Crowe Horwath.

Smart decisions. Lasting value.™

# Project Management

## For Microsoft Dynamics CRM

CERTIFIED FOR Microsoft Dynamics

# Table of Contents

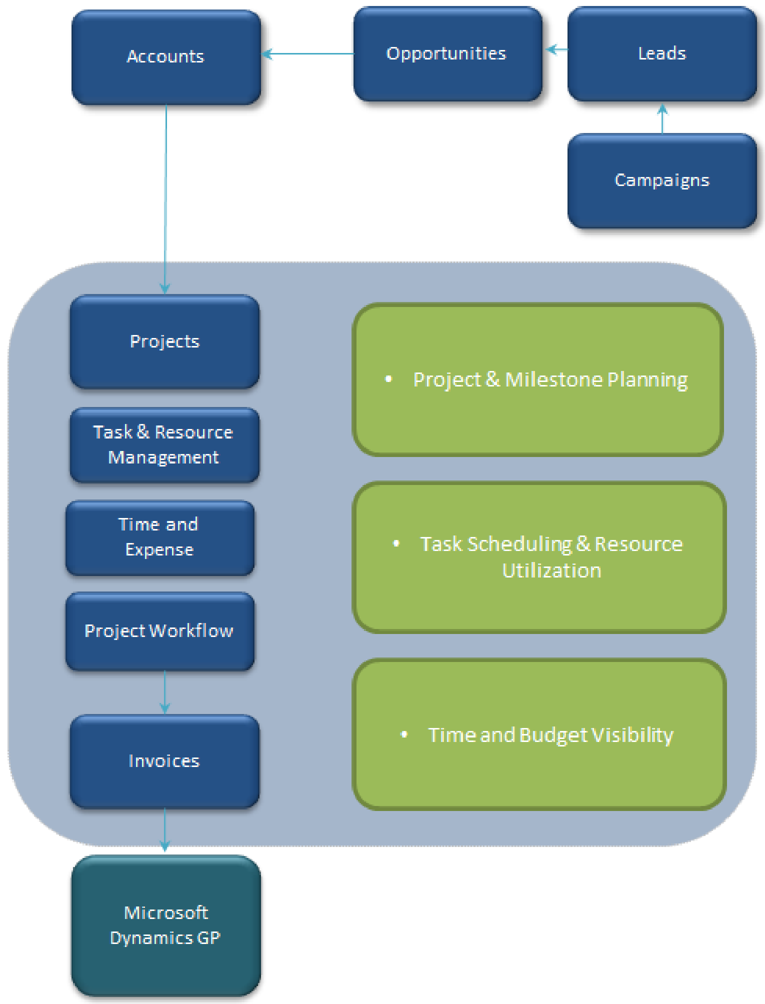


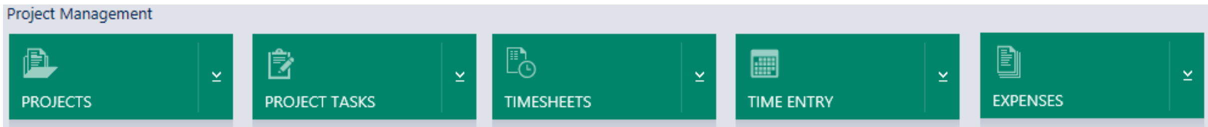
# Solution Relationships

**Project Management for**
Microsoft Dynamics CRM™

**Power of Choice:**
On Premises or CRM Online



# Main Menu – End User Navigation

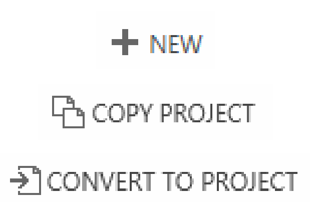



| | |
|---|---|
| **Projects** | Provides a list of Projects across Customer Accounts |
| **Project Tasks** | Provides a list of Project Tasks across Projects and Resources |
| **Timesheets** | Provides a list of Timesheets by Calendar Week and Resource |
| **Time Entry** | Provides a list of individual Time Entries by Project Tasks, Cases and Resources |
| **Expenses** | Provides a list of Expenses by Projects and Resources |

# Projects

## Creating a New Project

There are three ways to create a new Project.




Creates a new Project record.

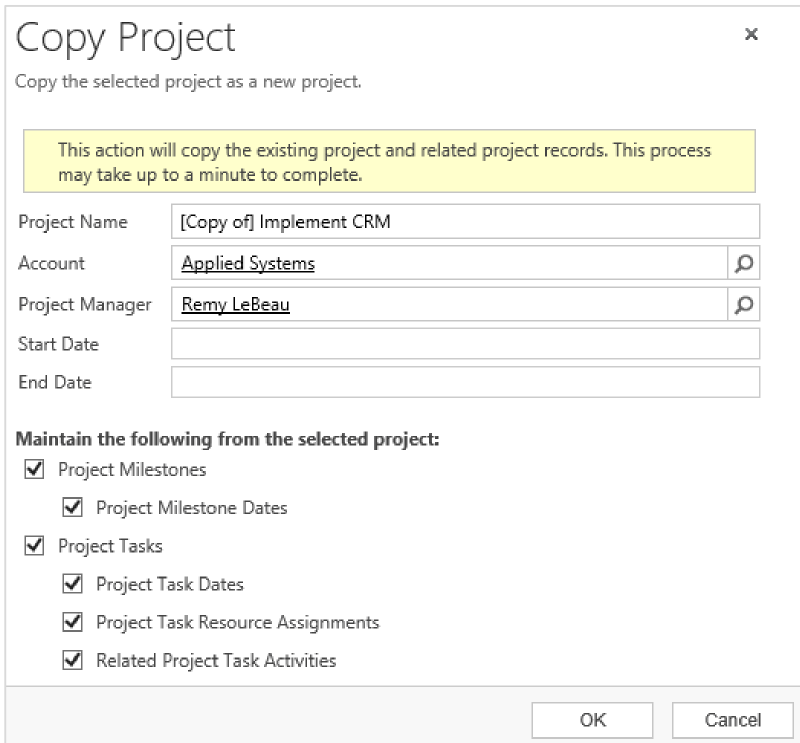
Creates a new Project record by copying an existing Project record.

Creates a new Project record by converting an existing sales Opportunity record. When converting a sales Opportunity to a Project the user also has the option of copying an existing Project record.

Tip: **Copy Projects**
*Reduce the administrative effort needed to create new project records and maintain consistency across similarly structured Projects by creating standard project "templates" which new projects can be copied from. The structure of all project information is maintained.*

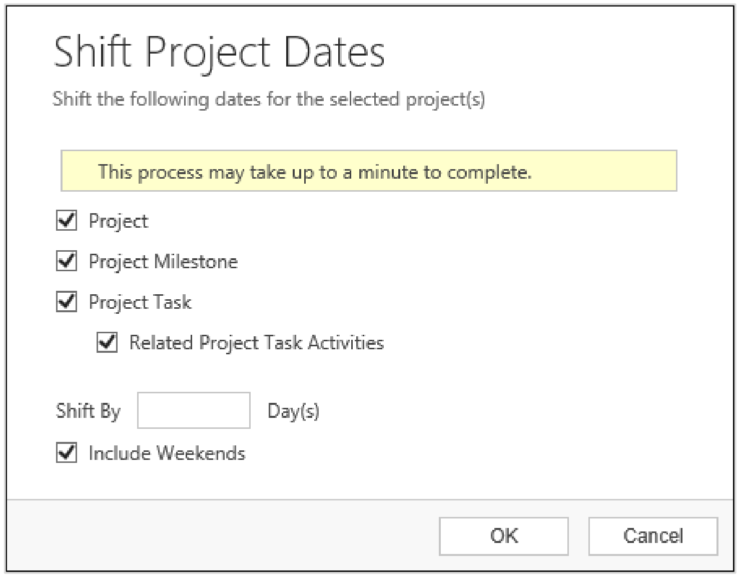
## Copy Project


Creates a duplicate of a Project and allows you to change the PM and associated account. You also have the option to keep Project Milestones, Project Tasks and their related items.



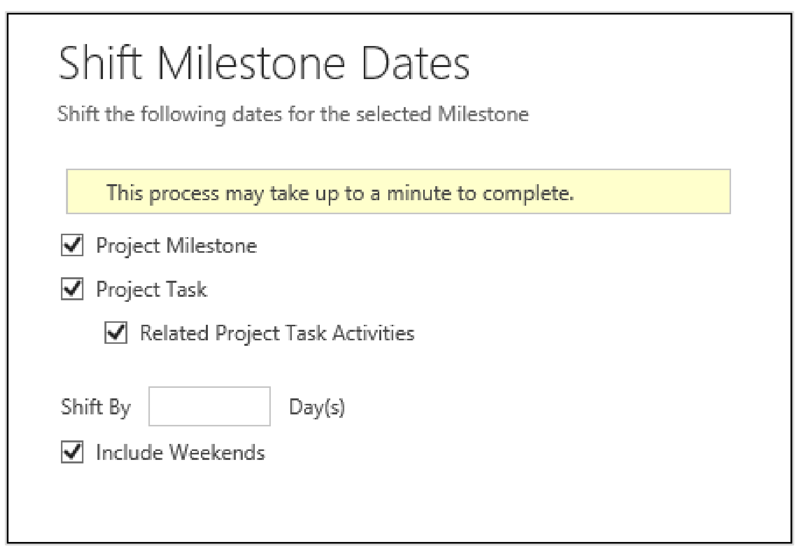
## Shift Project


Allows you to move a Project, Project Milestones, Project Tasks or Related Project Task Activities by a specified number of days



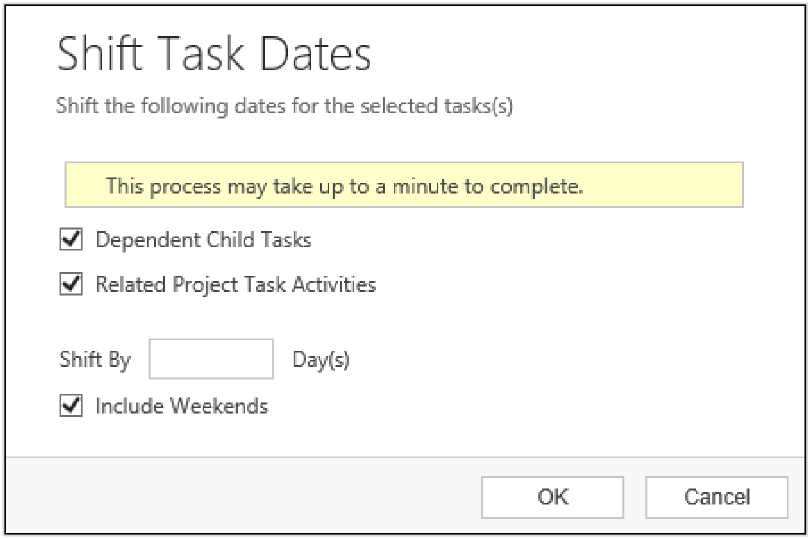

## Shift Milestone


Allows you to move a Project Milestone, Related Project Tasks and/or its related Project Task Activities by a specified number of days

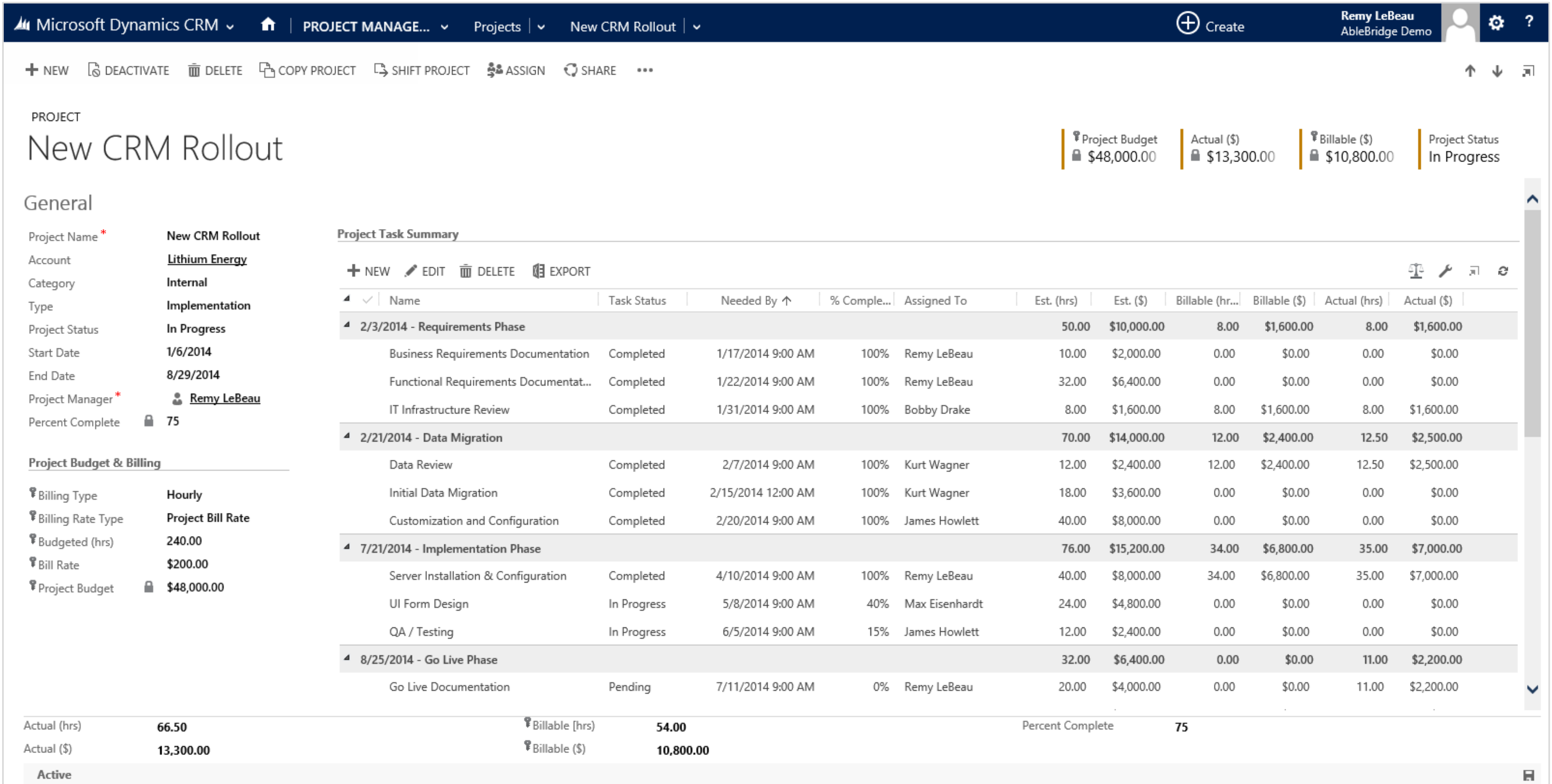


## Shift Project Task


Allows you to move a Project Task, its Dependent Child Project Tasks and/or its related Project Task Activities by a specified number of days



# Project Form Layout




| Name | Task Status | Needed By | % Comple... | Assigned To | Est. (hrs) | Est. ($) | Billable (hr... | Billable ($) | Actual (hrs) | Actual ($) |
|---|---|---|---|---|---|---|---|---|---|---|
| 2/3/2014 - Requirements Phase | | | | | 50.00 | $10,000.00 | 8.00 | $1,600.00 | 8.00 | $1,600.00 |
| Business Requirements Documentation | Completed | 1/17/2014 9:00 AM | 100% | Remy LeBeau | 10.00 | $2,000.00 | 0.00 | $0.00 | 0.00 | $0.00 |
| Functional Requirements Documentat... | Completed | 1/22/2014 9:00 AM | 100% | Remy LeBeau | 32.00 | $6,400.00 | 0.00 | $0.00 | 0.00 | $0.00 |
| IT Infrastructure Review | Completed | 1/31/2014 9:00 AM | 100% | Bobby Drake | 8.00 | $1,600.00 | 8.00 | $1,600.00 | 8.00 | $1,600.00 |
| 2/21/2014 - Data Migration | | | | | 70.00 | $14,000.00 | 12.00 | $2,400.00 | 12.50 | $2,500.00 |
| Data Review | Completed | 2/7/2014 9:00 AM | 100% | Kurt Wagner | 12.00 | $2,400.00 | 12.00 | $2,400.00 | 12.50 | $2,500.00 |
| Initial Data Migration | Completed | 2/15/2014 12:00 AM | 100% | Kurt Wagner | 18.00 | $3,600.00 | 0.00 | $0.00 | 0.00 | $0.00 |
| Customization and Configuration | Completed | 2/20/2014 9:00 AM | 100% | James Howlett | 40.00 | $8,000.00 | 0.00 | $0.00 | 0.00 | $0.00 |
| 7/21/2014 - Implementation Phase | | | | | 76.00 | $15,200.00 | 34.00 | $6,800.00 | 35.00 | $7,000.00 |
| Server Installation & Configuration | Completed | 4/10/2014 9:00 AM | 100% | Remy LeBeau | 40.00 | $8,000.00 | 34.00 | $6,800.00 | 35.00 | $7,000.00 |
| UI Form Design | In Progress | 5/8/2014 9:00 AM | 40% | Max Eisenhardt | 24.00 | $4,800.00 | 0.00 | $0.00 | 0.00 | $0.00 |
| QA / Testing | In Progress | 6/5/2014 9:00 AM | 15% | James Howlett | 12.00 | $2,400.00 | 0.00 | $0.00 | 0.00 | $0.00 |
| 8/25/2014 - Go Live Phase | | | | | 32.00 | $6,400.00 | 0.00 | $0.00 | 11.00 | $2,200.00 |
| Go Live Documentation | Pending | 7/11/2014 9:00 AM | 0% | Remy LeBeau | 20.00 | $4,000.00 | 0.00 | $0.00 | 11.00 | $2,200.00 |

**Form Header**

The header area provides quick visibility into the overall Project Budget, Project Status, Actual and Billable Hours to date. Actual and Billable Hours for the Project are automatically calculated from the Time Entry related to the Project Tasks associated to the Project.

**General Tab**

The General tab is where you define and view basic Project information.

The Project Budget and Billing section defines the Project budget and the method in which billing is accounted for. The Project Billing Rate Type field provides the option of using the bill rate defined for the Project or using bill rates defined for each resource based on the role they play on the Project. Default resource role bill rates are defined in Administrative Settings but can also be changed from the Project Team menu for each individual Project.

**Project Task Summary**

The Project Task Summary section provides an organized view of the Project's related Project Tasks.

Inline editing makes it easy for users to quickly edit a Project Task without leaving the Project Task Summary tab. A hyperlink on the Project Task Name allows the users to click through the Project Task form for more detailed reviews and updates.

Dynamic grouping options can be enabled from the Project Task Summary toolbar. Project Tasks can be grouped by Milestone, Milestone and Target Date, Task Category, Resource or Status. Primary and secondary grouping can provide multiple ways of summarizing a Project for better visibility across the entire Project.

**Details Tab**

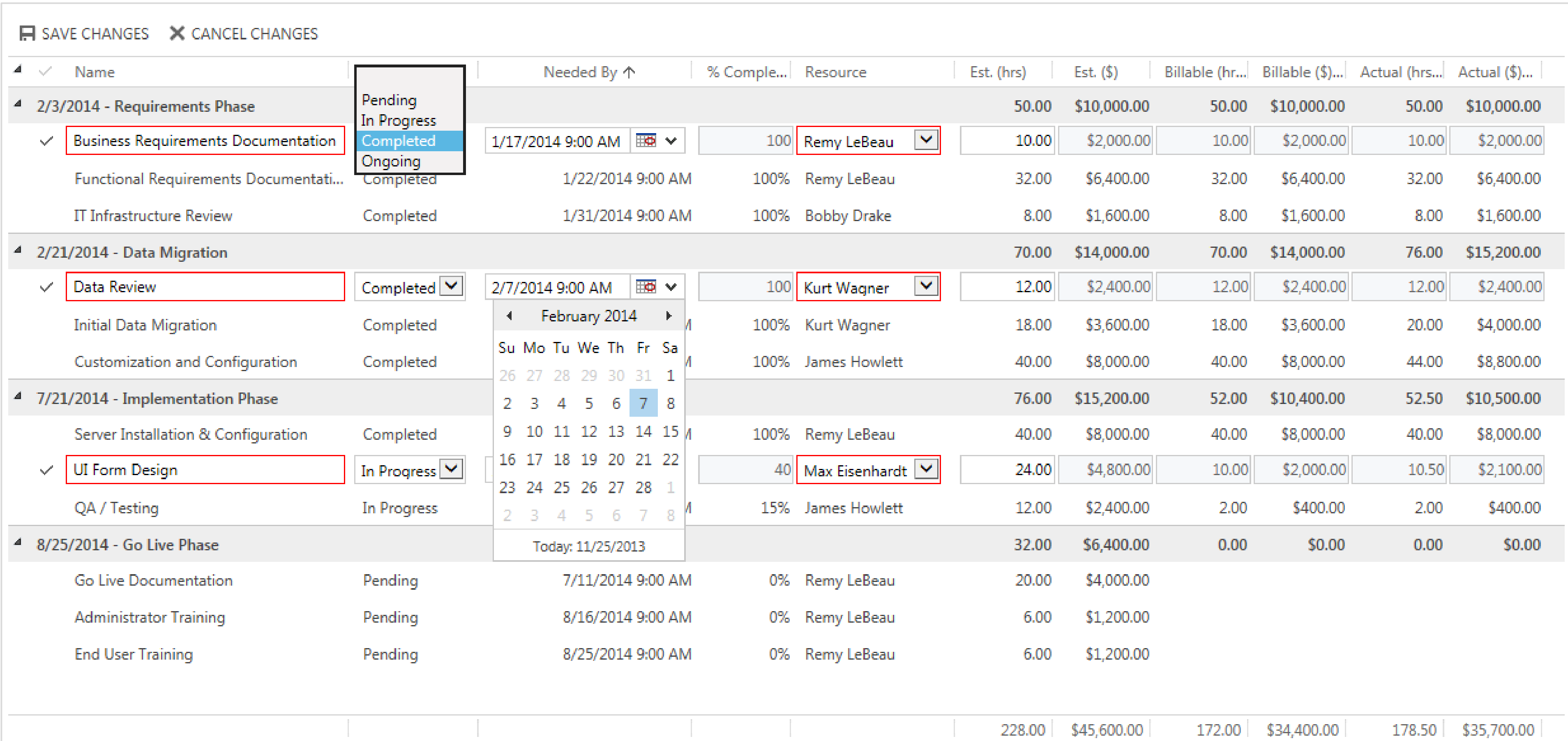
The Details tab is where you can include a brief summary of the Project and define Project Milestones.

The Milestones section signifies the project timeline against key target dates. Milestones can also be used to group Project Tasks related to a specific Milestone. The % Complete column represents the summary of completeness for each Project Task assigned to a specific Milestone.

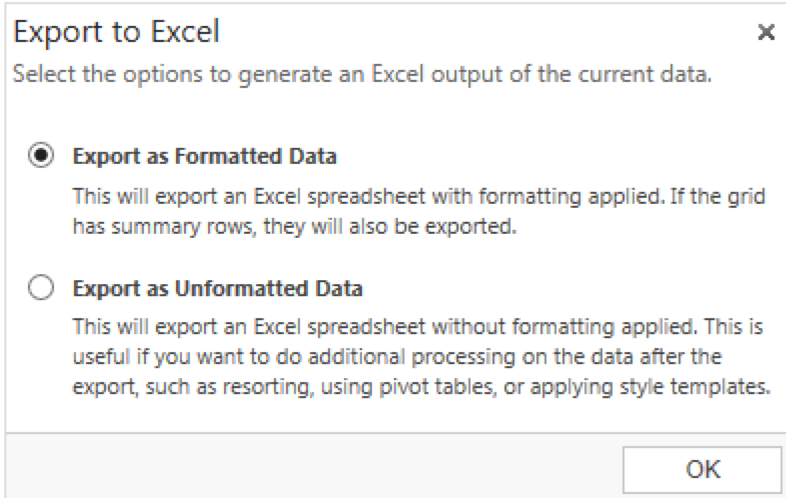
Tip: **Export to Excel**
Data can be exported with or without formatting. The formatted option is useful for internal or external project status updates. The unformatted version can be used to create pivot tables, additional reports or utilized for data imports.

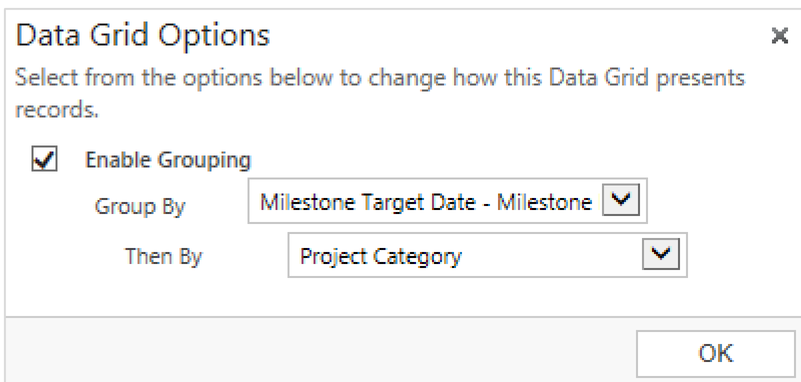
# Project Task Summary – Inline Edit Mode

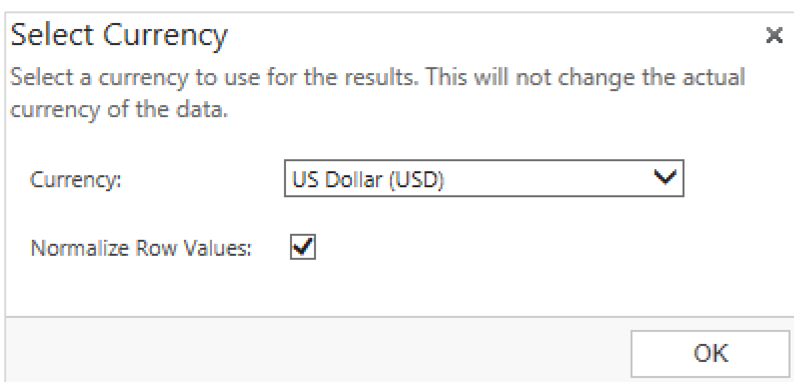
Required fields can be configured to be outlined in red



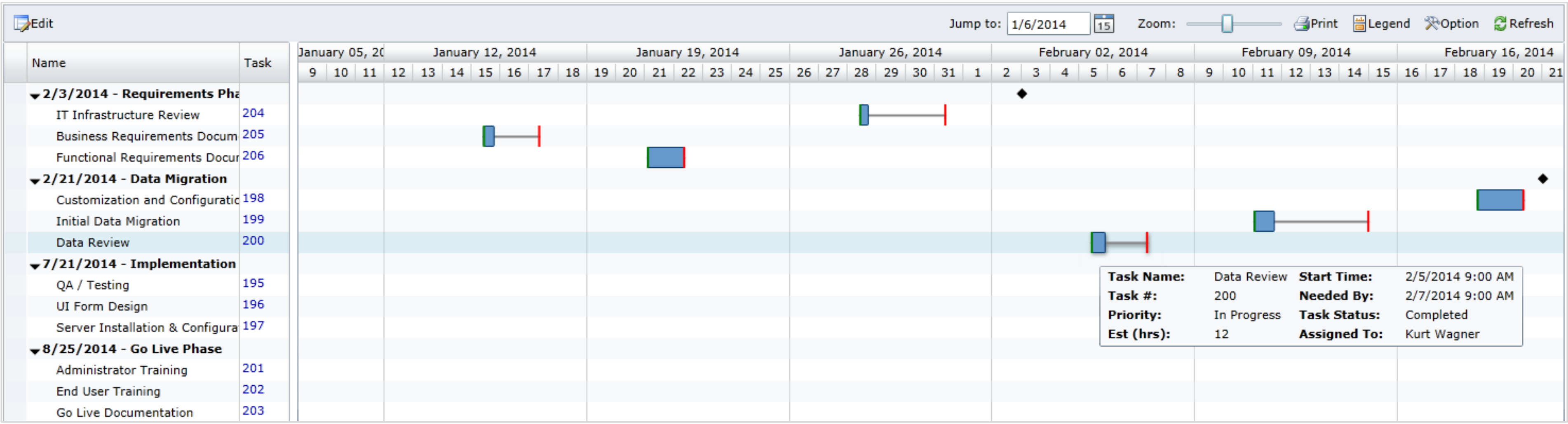
# Project Task Summary Options



# Gantt Chart



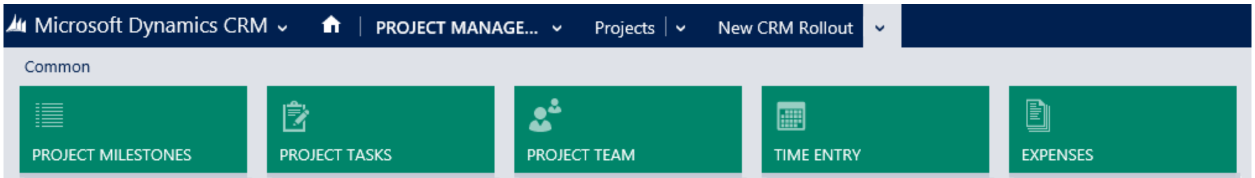

**Gantt Chart**

The Gantt Chart provides a timeline view of Project Task Start and Needed By dates. Project Milestones are also displayed.

Similar to the Project Task Summary, grouping options can be applied to provide multiple ways of viewing the project timeline. For example, grouping by Resource provides a timeline view of Resources and their assigned Project Tasks.

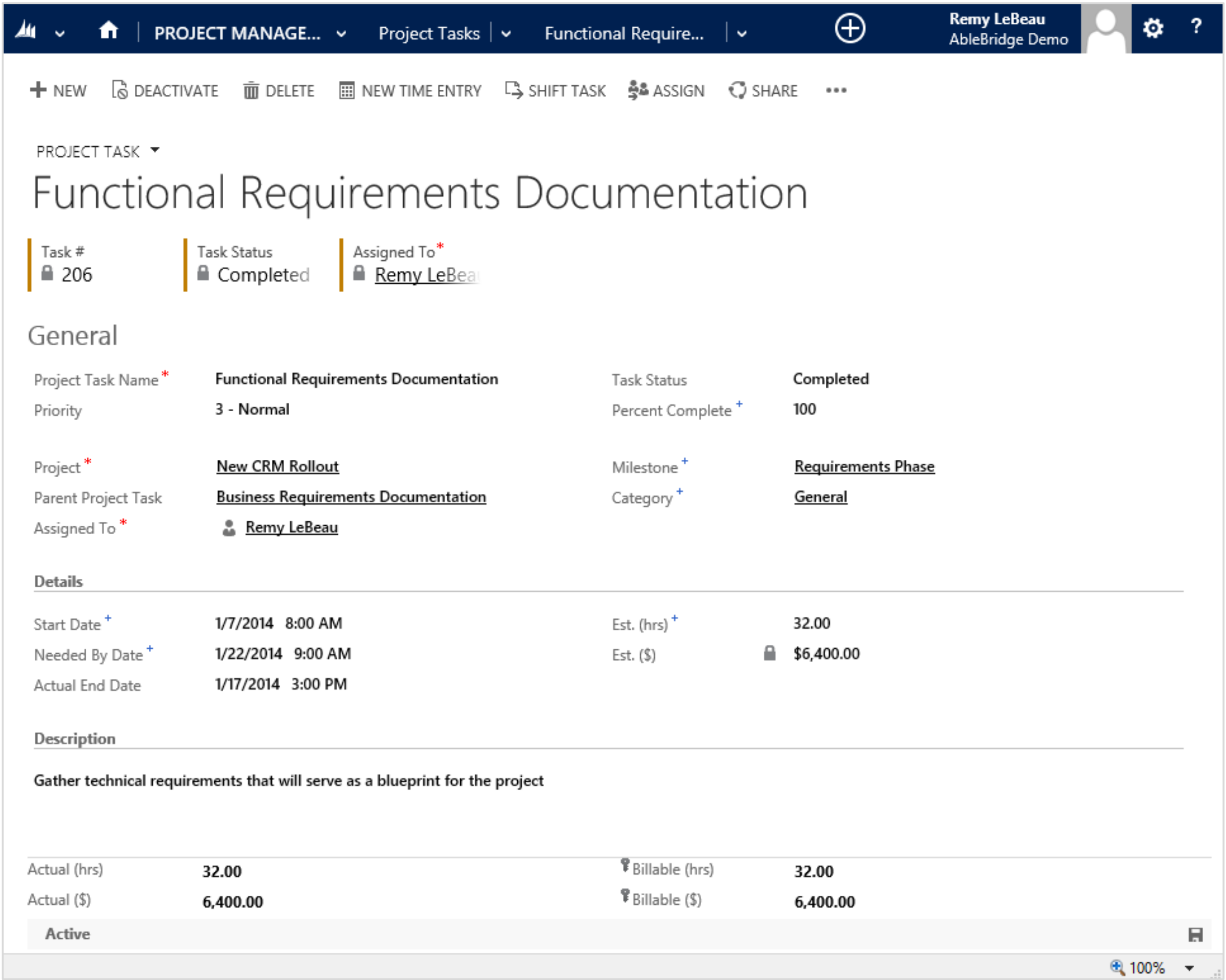
Edit the Start and Needed By dates for a Project Task by simply dragging or expanding the Project Task marker within the Gantt Chart.

# Project Form – Associated Relationships




| | |
|---|---|
| **Project Milestones** | View or create Project Milestones for the current Project. |
| **Project Tasks** | View or create Project Tasks for the current Project. |
| **Project Team** | View or create Project Team resources and the roles they will play on the Project. |
| **Time Entry** | View or create time entry for the current Project. Time entered from this menu will create a new Timesheet record if one doesn't exist for the specified time period. Alternatively, it will update an existing Timesheet record if one already exists. |
| **Expenses** | View or create Project Expenses for the current Project. |

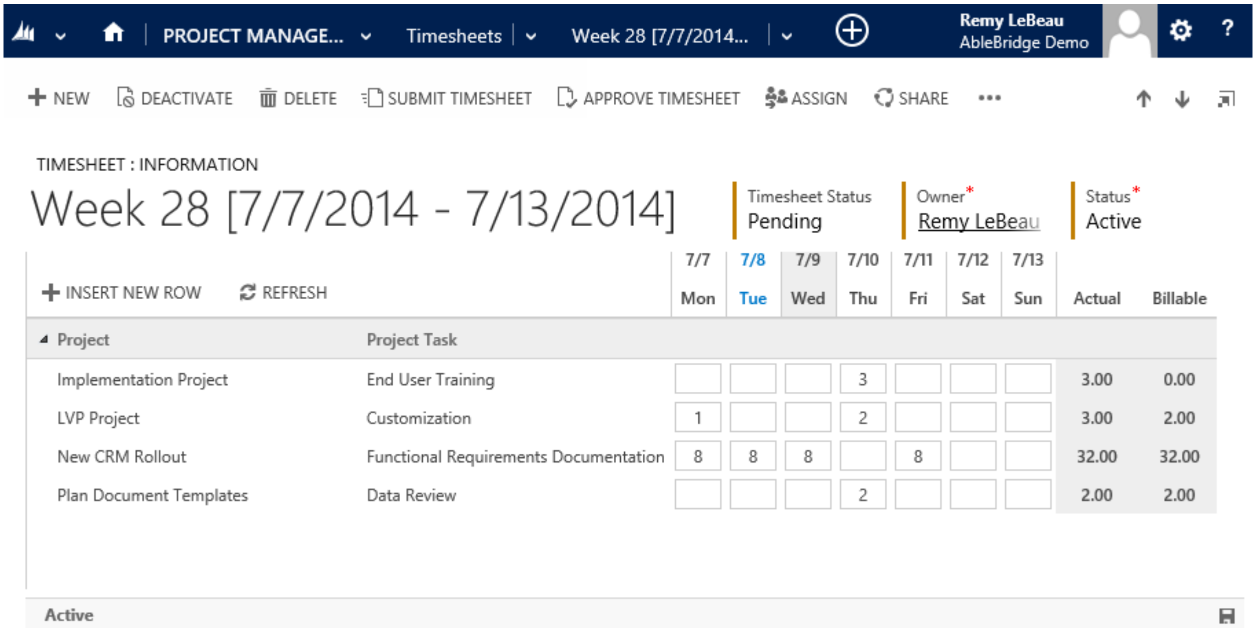
# Project Task Form Layout



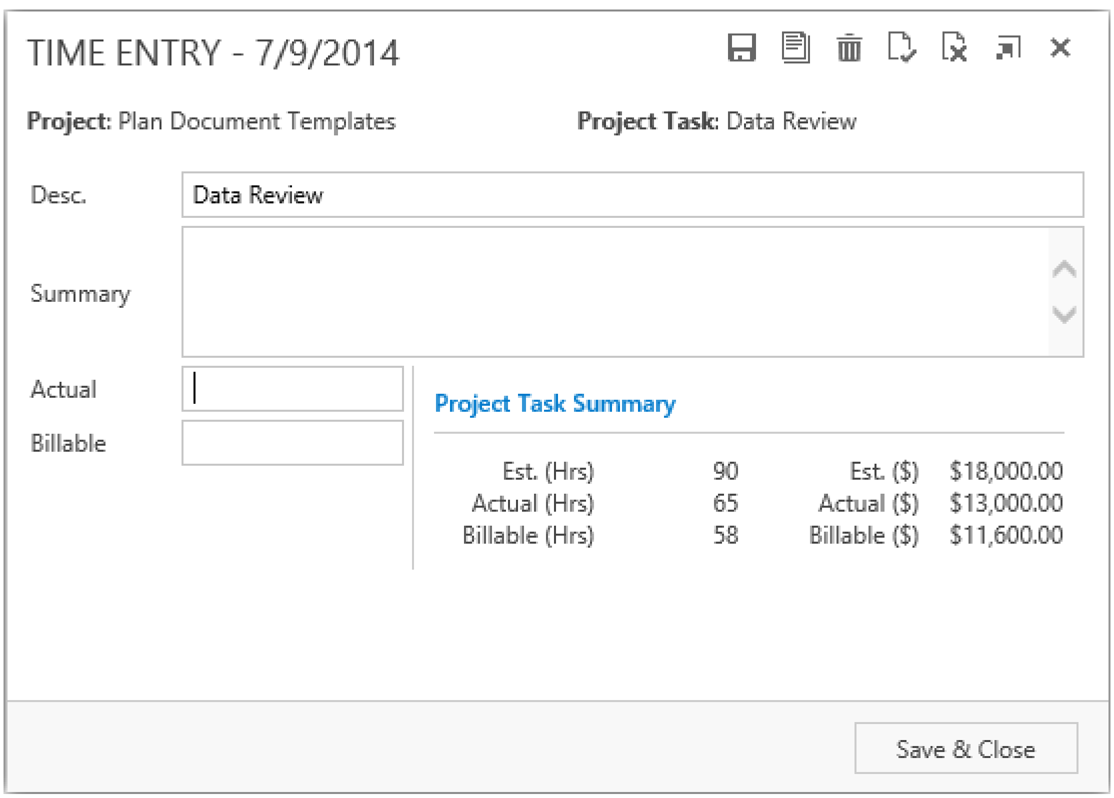

Tip: **Project Task Dependencies**
On the Project Task form, there is a field that allows you to designate a Parent Project Task. This comes in handy when you have tasks that need to be completed before others begin.

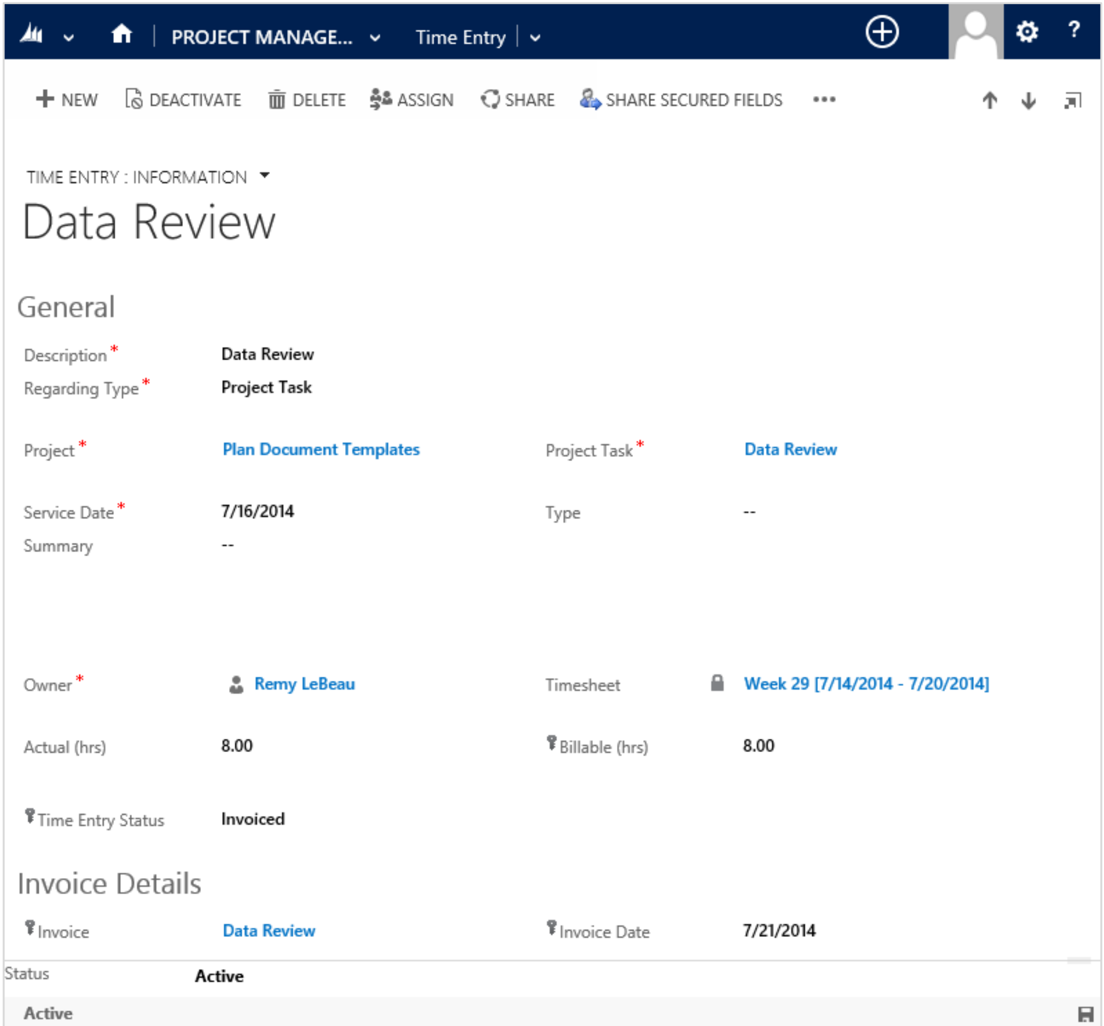
# Timesheet Form Layout




To enter time, just click inside any box to launch the time entry window:



# Time Entry Form Layout




**Timesheet Form**

The Timesheet form allows a user to quickly enter time in bulk on a weekly basis. Time can be entered against multiple Project Tasks or Cases.

Timesheet submissions can follow an approval process based on a company's time review and billing procedures.

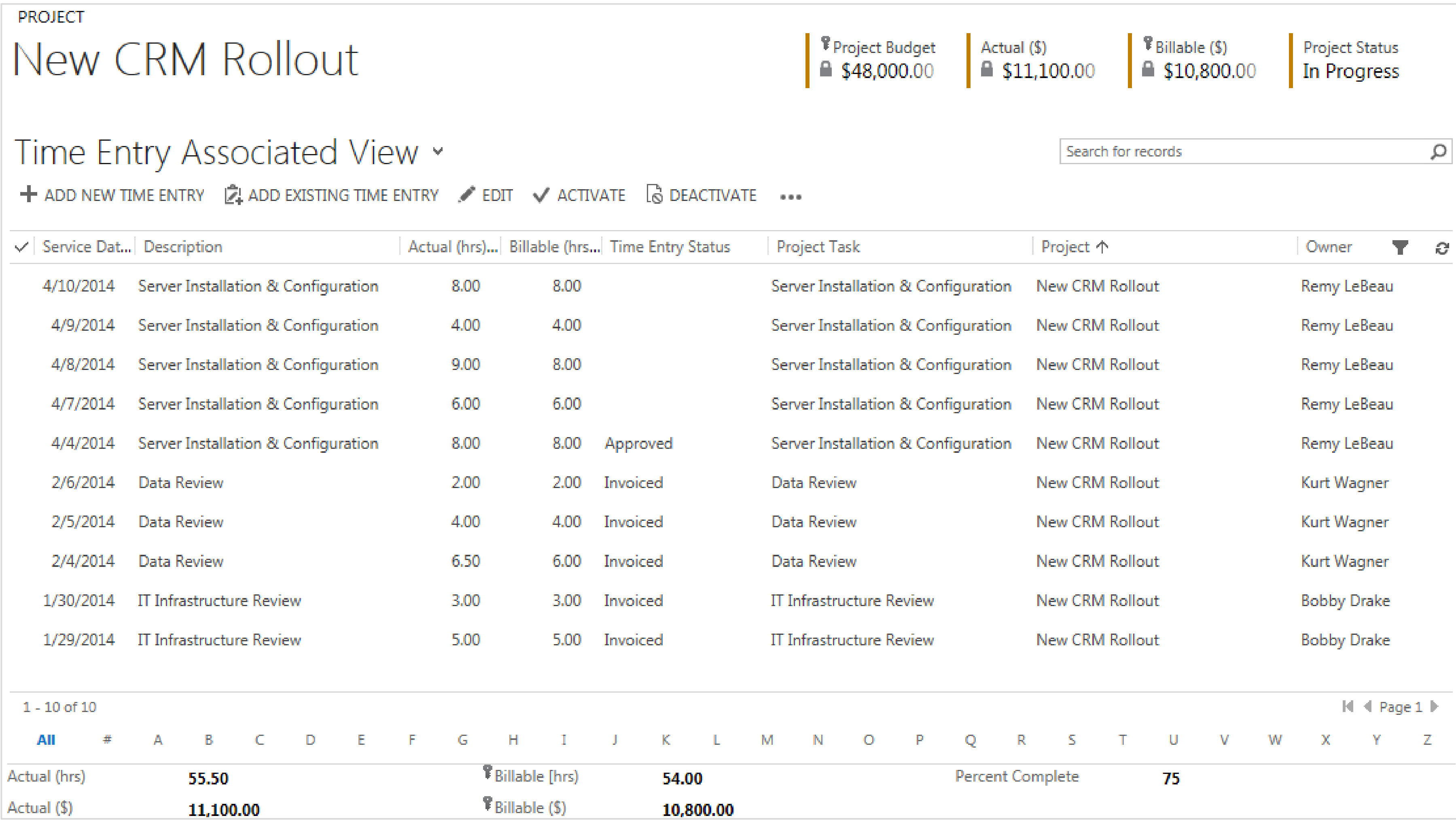
Time Entry can be associated with an Invoice for direct billing within Microsoft Dynamics CRM. Or it can be integrated with Microsoft Dynamics GP or another ERP / Accounting package.

**Time Entry Form**

Time can also be entered by launching a new Time Entry Form from either the Time Entry List View or from a Project Task.

# Time Entry Associated Views

From the Project form, you can view all Time Entries related to a Project



PROJECT

New CRM Rollout

Project Budget $48,000.00 | Actual ($) $11,100.00 | Billable ($) $10,800.00 | Project Status In Progress

Time Entry Associated View

Search for records

ADD NEW TIME ENTRY | ADD EXISTING TIME ENTRY | EDIT | ACTIVATE | DEACTIVATE

| Service Dat... | Description | Actual (hrs)... | Billable (hrs... | Time Entry Status | Project Task | Project | Owner |
|---|---|---|---|---|---|---|---|
| 4/10/2014 | Server Installation & Configuration | 8.00 | 8.00 | | Server Installation & Configuration | New CRM Rollout | Remy LeBeau |
| 4/9/2014 | Server Installation & Configuration | 4.00 | 4.00 | | Server Installation & Configuration | New CRM Rollout | Remy LeBeau |
| 4/8/2014 | Server Installation & Configuration | 9.00 | 8.00 | | Server Installation & Configuration | New CRM Rollout | Remy LeBeau |
| 4/7/2014 | Server Installation & Configuration | 6.00 | 6.00 | | Server Installation & Configuration | New CRM Rollout | Remy LeBeau |
| 4/4/2014 | Server Installation & Configuration | 8.00 | 8.00 | Approved | Server Installation & Configuration | New CRM Rollout | Remy LeBeau |
| 2/6/2014 | Data Review | 2.00 | 2.00 | Invoiced | Data Review | New CRM Rollout | Kurt Wagner |
| 2/5/2014 | Data Review | 4.00 | 4.00 | Invoiced | Data Review | New CRM Rollout | Kurt Wagner |
| 2/4/2014 | Data Review | 6.50 | 6.00 | Invoiced | Data Review | New CRM Rollout | Kurt Wagner |
| 1/30/2014 | IT Infrastructure Review | 3.00 | 3.00 | Invoiced | IT Infrastructure Review | New CRM Rollout | Bobby Drake |
| 1/29/2014 | IT Infrastructure Review | 5.00 | 5.00 | Invoiced | IT Infrastructure Review | New CRM Rollout | Bobby Drake |

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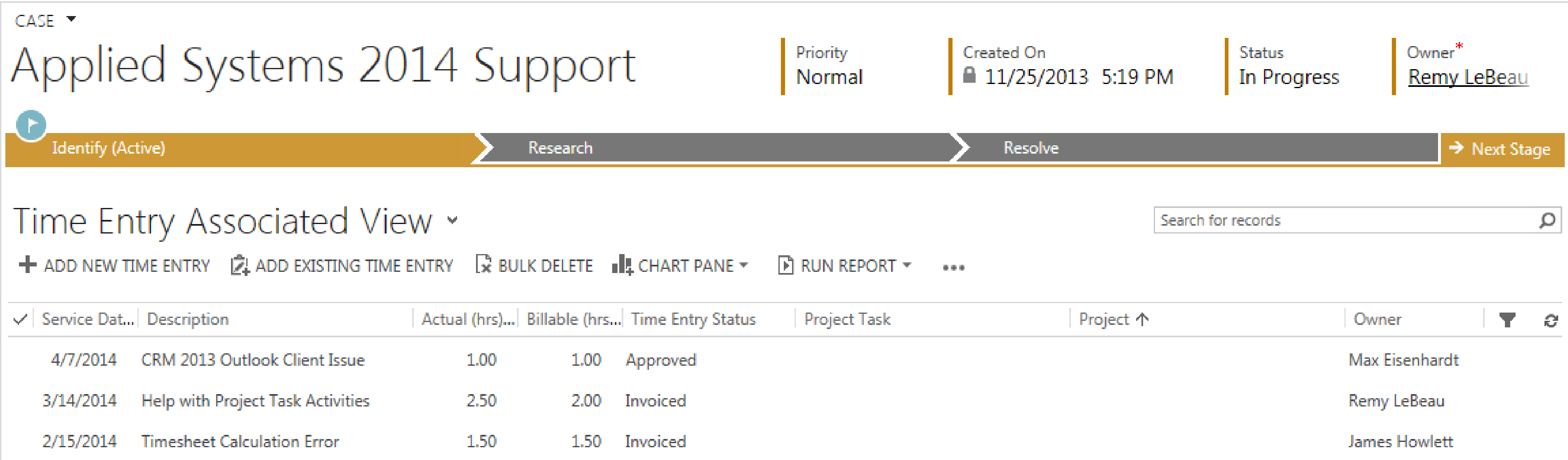
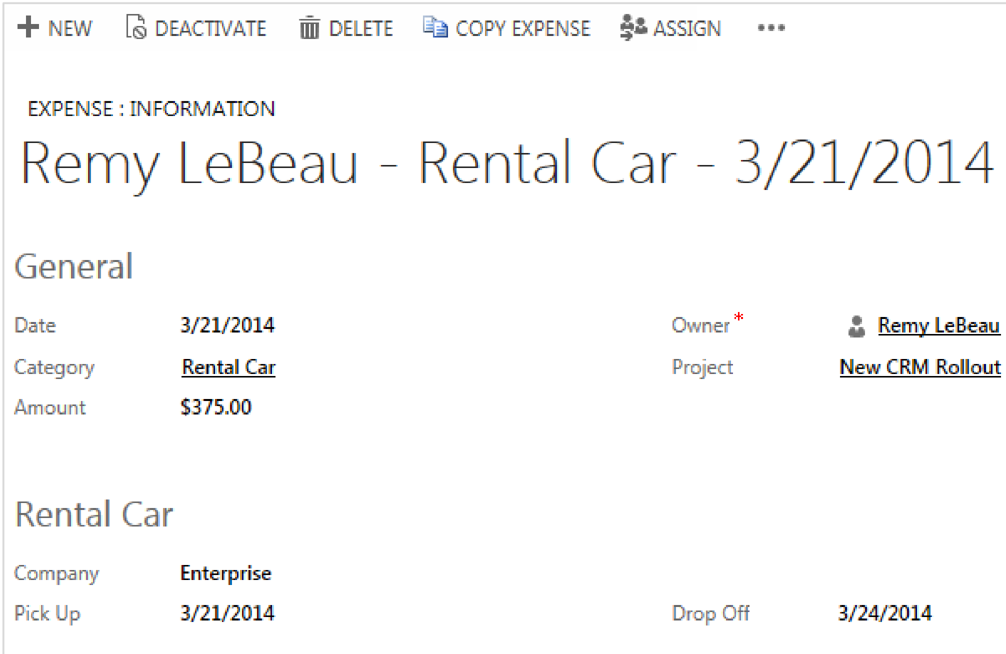
All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

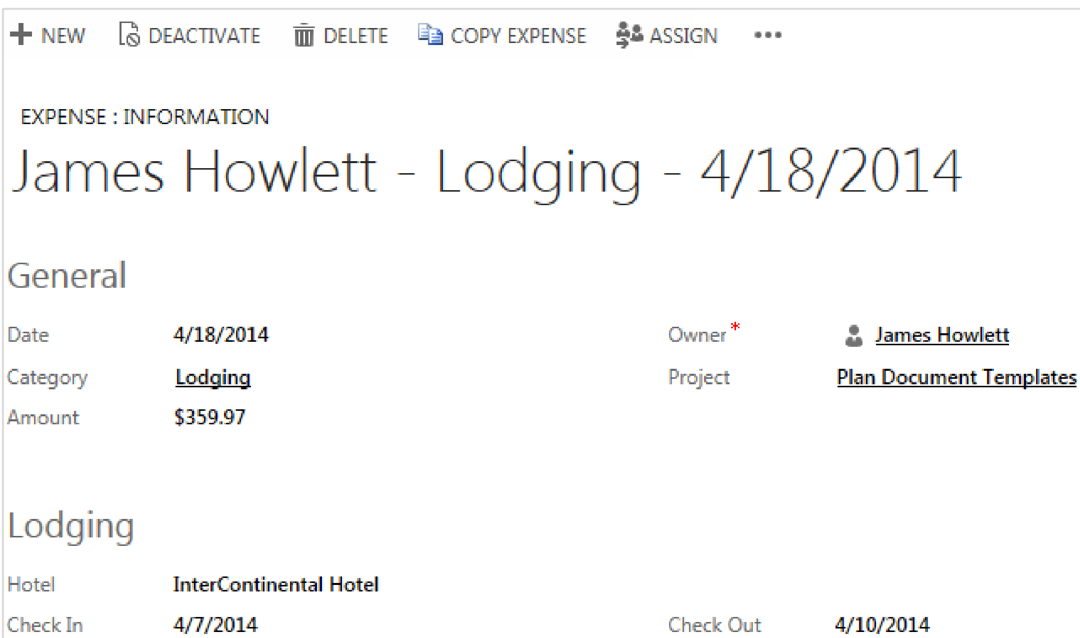
| | | | | | |
|---|---|---|---|---|---|
| Actual (hrs) | 55.50 | Billable (hrs) | 54.00 | Percent Complete | 75 |
| Actual ($) | 11,100.00 | Billable ($) | 10,800.00 | | |

From the Case form, you can view all Time Entries related to a Case



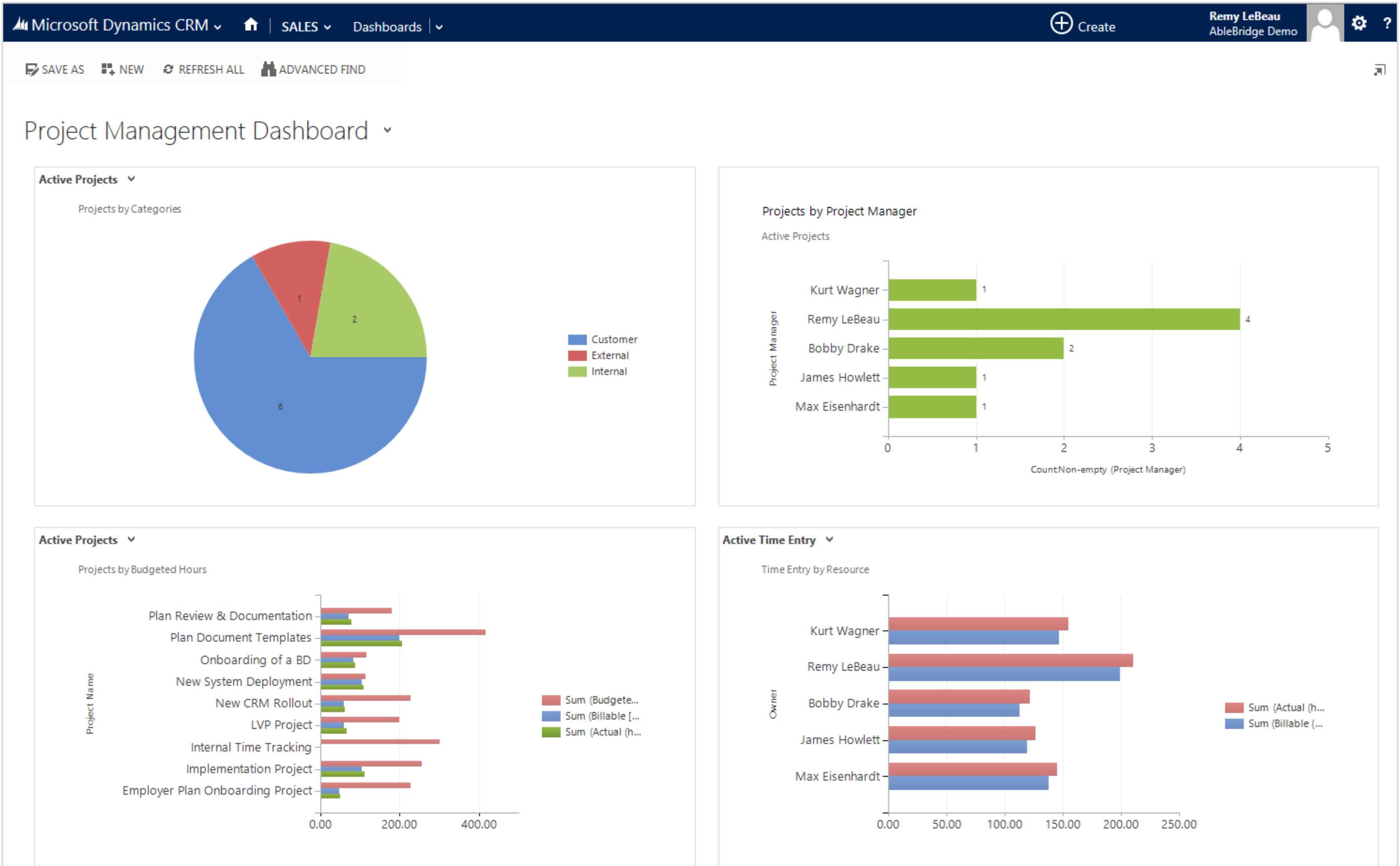
# Expense Form Layout




**General Tab** The General tab is where you enter and track project expenses. Pre-defined Expense Categories dynamically display the relevant fields for each type of Expense. Expense Category and Mileage Rates are managed within the Project Management Administration menus.

# Dashboard Charts



# Reports

Pre-built Project Management reports provide quick insight into your Projects and can be found by selecting the Reports Menu.

- PM - Project Hours By Resource
- PM - Project Summary Report
- PM - Utilization By Month
- PM - Utilization By Week - Any Year
- PM - Utilization By Week - Current Year
- PM - Utilization By Week - Last Year

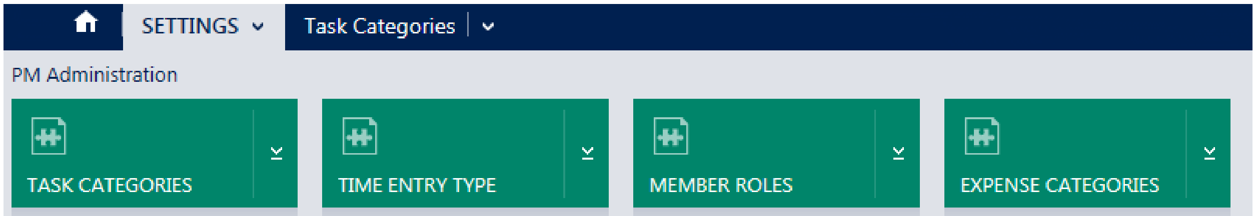
## Project Hours By Resource

| Project | Status | Start Date | End Date | Actual (hrs) | Billable (hrs) |
|---|---|---|---|---|---|
| **Bobby Drake** | | | | | |
| Employer Plan Onboarding Project | In Progress | 11/19/2013 | 8/31/2014 | 5.00 | 4.00 |
| | | | **Bobby Drake Total** | **5.00** | **4.00** |
| **James Howlett** | | | | | |
| New CRM Rollout | In Progress | 7/1/2013 | 4/1/2014 | 2.00 | 2.00 |
| | | | **James Howlett Total** | **2.00** | **2.00** |
| **Max Eisenhardt** | | | | | |
| New System Deployment | In Progress | 11/15/2013 | 9/15/2014 | 8.50 | 8.50 |
| New CRM Rollout | In Progress | 7/1/2013 | 4/1/2014 | 5.50 | 5.00 |
| Employer Plan Onboarding Project | In Progress | 11/19/2013 | 8/31/2014 | 4.50 | 4.00 |
| | | | **Max Eisenhardt Total** | **18.50** | **17.50** |
| **Remy LeBeau** | | | | | |
| New CRM Rollout | In Progress | 7/1/2013 | 4/1/2014 | 45.00 | 45.00 |
| | | | **Remy LeBeau Total** | **45.00** | **45.00** |
| | | | **Total** | **70.50** | **68.50** |

# Project Summary by Project Category

| Account | Project Name | Project Manager | Project Status | Start Date | End Date | Budgeted (hrs) | Billable (hrs) | Actual (hrs) |
|---|---|---|---|---|---|---|---|---|
| **Customer** | | | | | | | | |
| Applied Systems | New System Deployment | Remy LeBeau | In Progress | 11/15/2013 | 9/15/2014 | 114.00 | 8.50 | 8.50 |
| Every International Partners | Employer Plan Onboarding Project | Remy LeBeau | In Progress | 11/19/2013 | 8/31/2014 | 228.00 | 8.00 | 9.50 |
| Advanced Systems Inc. | Sample LVP Project | Bobby Drake | Pending | 3/1/2014 | 9/21/2014 | 200.00 | 0.00 | 0.00 |
| Grandview Distribution | Onboarding of a BD (Demo) | Bobby Drake | Pending | 4/30/2014 | 8/28/2014 | 115.00 | 0.00 | 0.00 |
| Applied Systems | Implementation Project (Demo) | Remy LeBeau | Pending | 5/1/2014 | 11/16/2014 | 255.00 | 0.00 | 0.00 |
| Zappos Company | Plan Review & Documentation | James Howlett | Pending | 6/18/2014 | 10/30/2014 | 180.00 | 0.00 | 0.00 |
| | | | | | **Subtotal** | **1,092.00** | **16.50** | **18.00** |
| **External** | | | | | | | | |
| Blackwater LLC | Plan Document Templates | Max Eisenhardt | Pending | 2/15/2014 | 6/24/2014 | 416.00 | 0.00 | 0.00 |
| | | | | | **Subtotal** | **416.00** | **0.00** | **0.00** |
| **Internal** | | | | | | | | |
| Bridge Consulting LLC | Internal Time Tracking | Kurt Wagner | Pending | 1/1/2014 | 12/31/2014 | 124.00 | 0.00 | 0.00 |
| Lithium Energy | New CRM Rollout | Remy LeBeau | In Progress | 7/1/2013 | 4/1/2014 | 228.00 | 172.00 | 178.50 |
| | | | | | **Subtotal** | **352.00** | **172.00** | **178.50** |
| | | | | | **Total** | **1,860.00** | **188.50** | **196.50** |

# Main Menu - Administration Navigation




Administrative settings allow each customer to define the most appropriate settings for their organization. These settings are typically reserved for a CRM Administrator.

| | |
|---|---|
| **Task Categories** | Provides a list of the Categories that can be assigned to a Project Task within a Project record. Task Category templates can be defined so a standard set of Task Categories is applied to every Project by default. Task Categories can help an organization segment and group Project Tasks according to their scope or purpose. |
| **Time Entry Type** | Provides a list of Types that can be assigned to a Time Entry record. Time Entry Types can help an organization segment and group Time Entry according to their scope or purpose. |
| **Member Roles** | Provides a list of the Roles that can be assigned to a Project Team member within a Project record. Member Roles help an organization define the roles and responsibilities each Project Team Member will serve on a particular Project. |
| **Expense Categories** | Provides a list of Categories that can be assigned to an Expense record. |

# About Crowe Horwath

## Our experience is delivering CRM project success.

We have been implementing CRM technology from the inception of contact management applications through the evolution to sales force automation and ultimately customer relationship management (CRM) systems. Our logical CRM project implementation methodology is proven and is focused on project success.

## We know Microsoft Dynamics CRM.

At Crowe we are focused on Microsoft Dynamics CRM and the Microsoft technology platform. Our involvement with Microsoft CRM dates back to the first release in 2003 and continues through its evolution into the market-leading CRM platform it is today. The flexibility of the platform, familiar user interface, interoperability with the Microsoft Office platform, including Outlook, and its top-flight functionality make it a smart investment choice for any organization looking to implement a CRM technology strategy.

## Focused on success.

Crowe strengths are our people and their personal commitment to each customer engagement. Our logical approach, the quality of our effort, and the seriousness and professionalism we bring to the table have been the keys to our accomplishments. We measure our success by our customers' success.