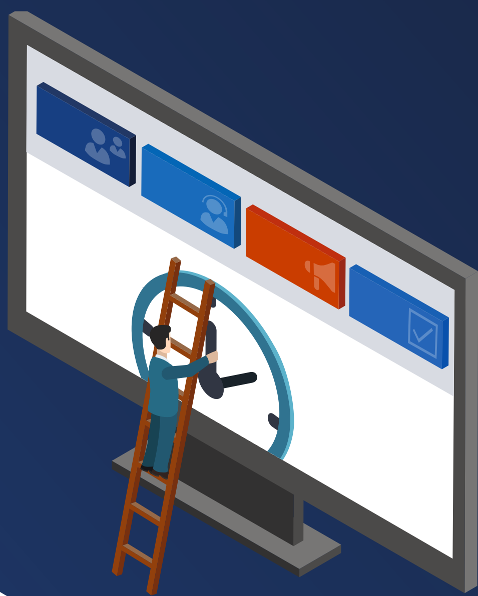
Time Tracking for Dynamics 365 for Project Service Automation

User Guide



Time Tracking
for Dynamics 365
Project Service Automation

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Time Tracking for Dynamics 365 for Project Service Automation

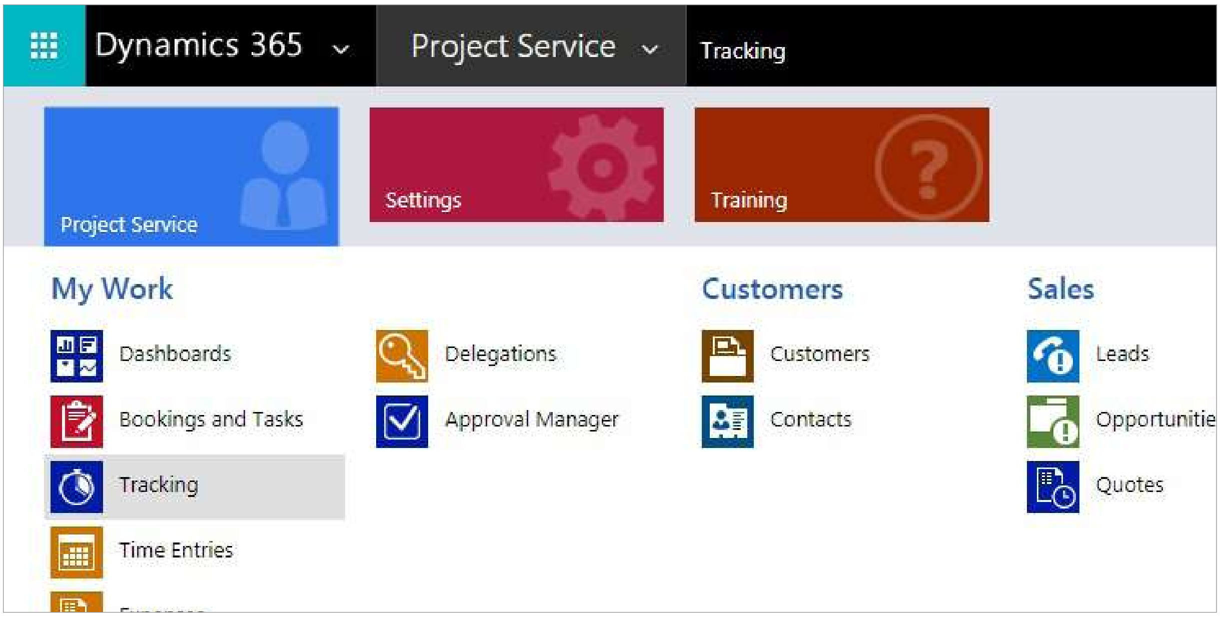
Time Tracking for Dynamics 365 for Project Service Automation extends the time and expense tracking functionality of Dynamics 365 for Project Service Automation. It allows employees to track their work efforts and expenses for project tasks to which they have been assigned.

Manage Time Entries

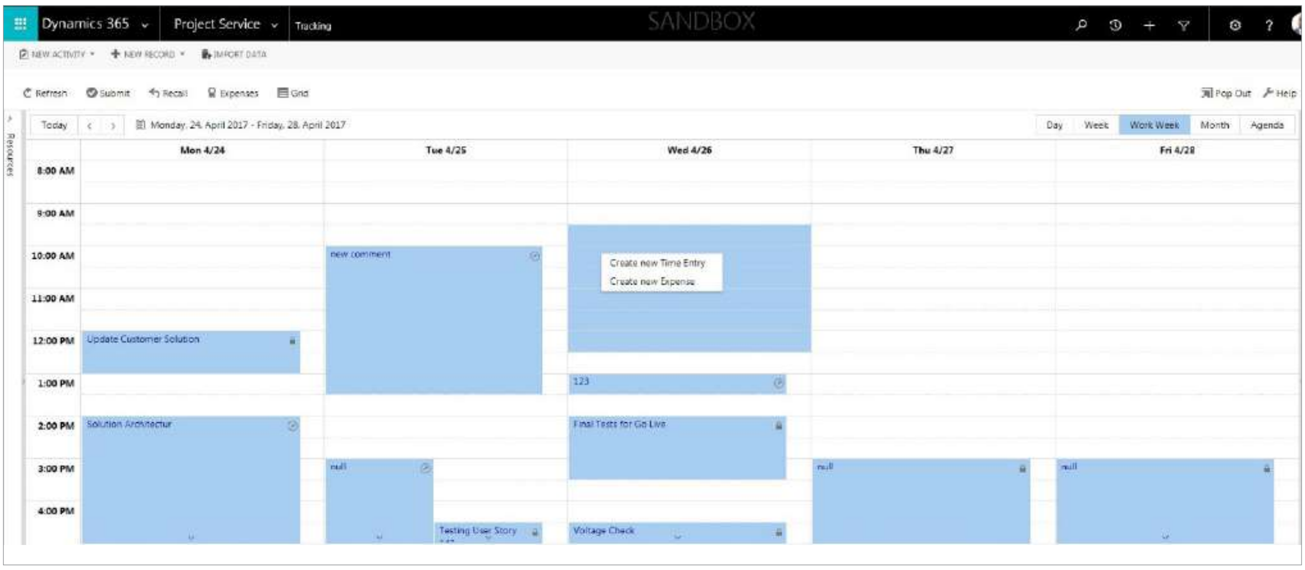
Each time entry requires a specific start and end time, its duration is calculated automatically and cannot be edited.

Create a Time Entry

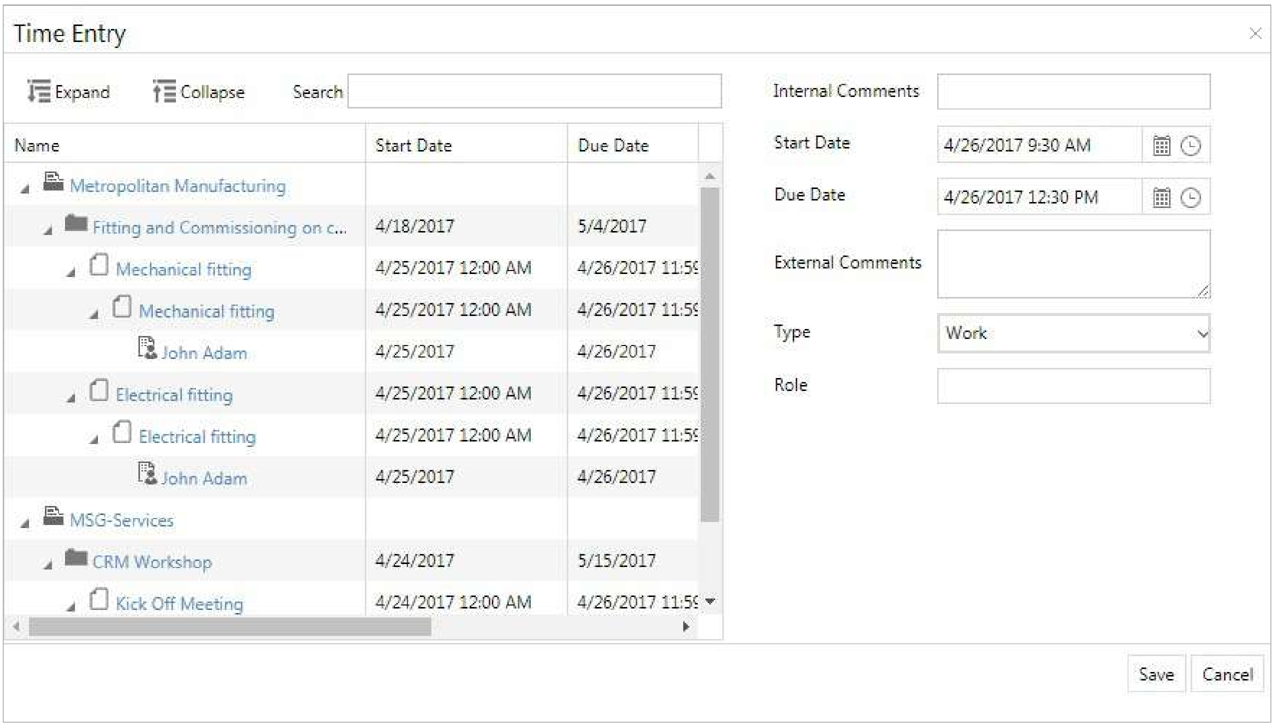
1. Go to **Project Service > Tracking**.



2. Select the desired time frame in the calendar by clicking and holding the left mouse button. Then, right click to open the context menu and choose **Create new Time Entry**.

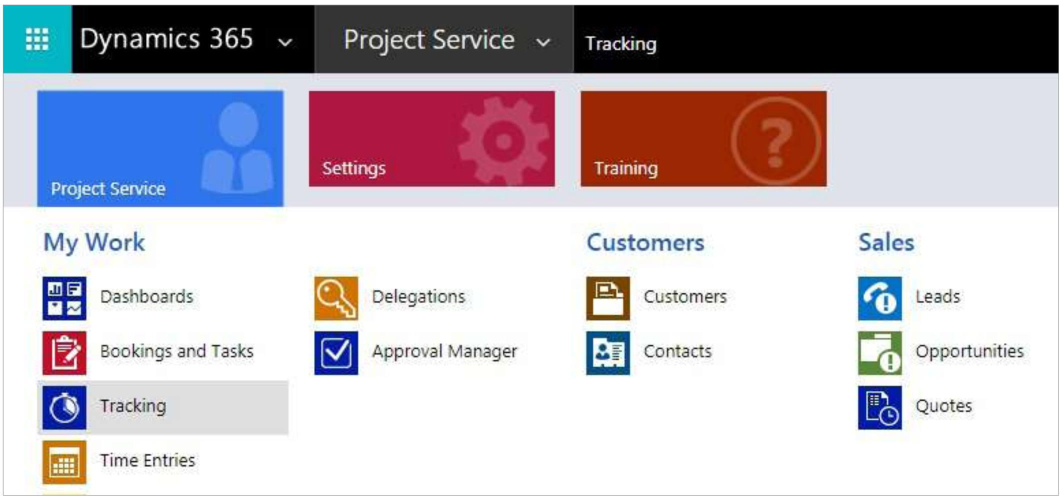


3. In the Time Entry creation form, select the relevant project task assignment in the project tree on the left-hand side. Then, type the required details in the form on the right. Create the time entry by clicking **Save**.

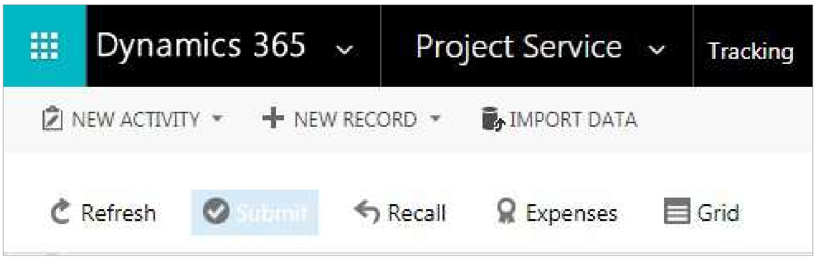


Submit a Time Entry

1. Go to **Project Service > Tracking**.



2. Click **Submit**.



3. Select the entry you wish to submit via click. You may select multiple entries at once by holding the CTRL key. Click **Submit** at the bottom right corner of the screen.


Submit Records

Time Entry | Expense

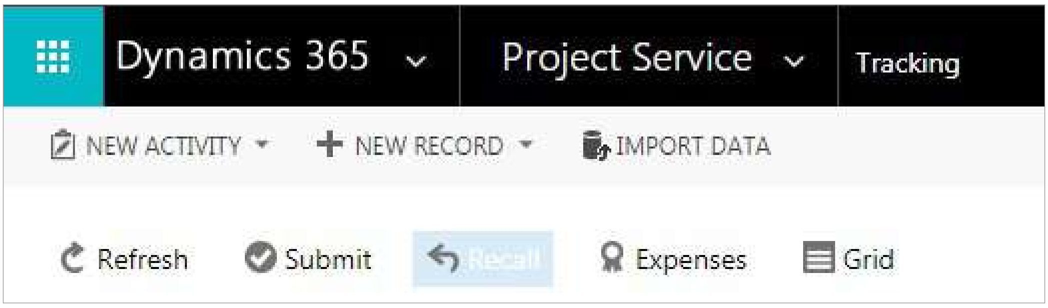
Start Date	Due Date	Duration	Type	Internal Comments	Project Task	Entry Status
4/25/2017	4/25/2017	4.5	Work		Kick Off Meeting	Returned
4/25/2017	4/25/2017	3.5	Work	new comment	Electrical fitting	Draft
4/24/2017	4/24/2017	6	Work	Solution Architectur	Architect	Returned
4/26/2017	4/26/2017	0.5	Work	123	Mechanical fitting	Draft
4/26/2017	4/26/2017	1.5	Work	Demo Tracking	Mechanical fitting	Draft

Submit

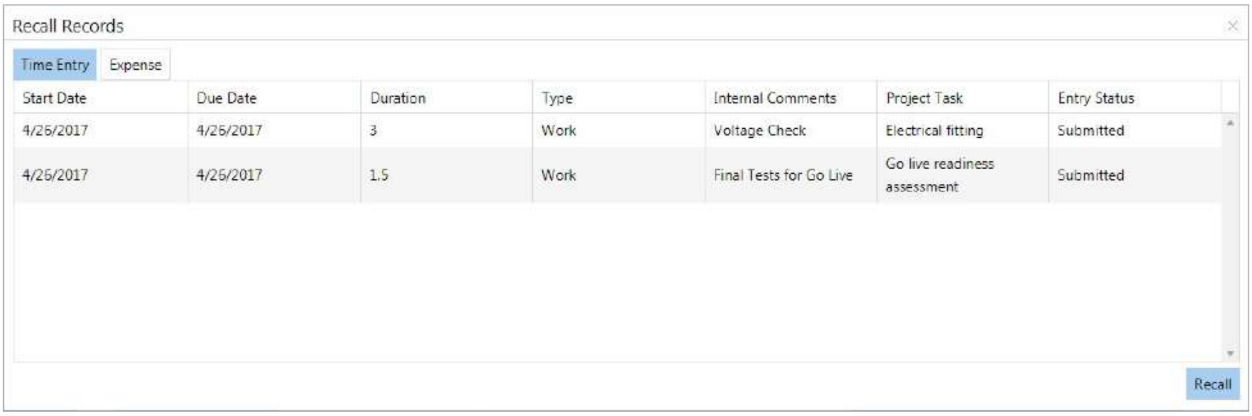
The status of the selected time entries will change from 'draft' to 'submitted'. These entries can no longer be edited (the status icon will change from a pen to a lock).

Recall a Time Entry

1. In case a time entry was submitted mistakenly or you want to edit a submitted time entry, you may recall it. To do so, click **Recall**.



2. Select one or multiple time entries you wish to recall and choose **Recall** at the bottom right corner of the dialog windows. The selected entries will return to the draft stage and may then be edited again.



Recall Records

Time Entry | Expense

Start Date	Due Date	Duration	Type	Internal Comments	Project Task	Entry Status
4/26/2017	4/26/2017	3	Work	Voltage Check	Electrical fitting	Submitted
4/26/2017	4/26/2017	1.5	Work	Final Tests for Go Live	Go live readiness assessment	Submitted

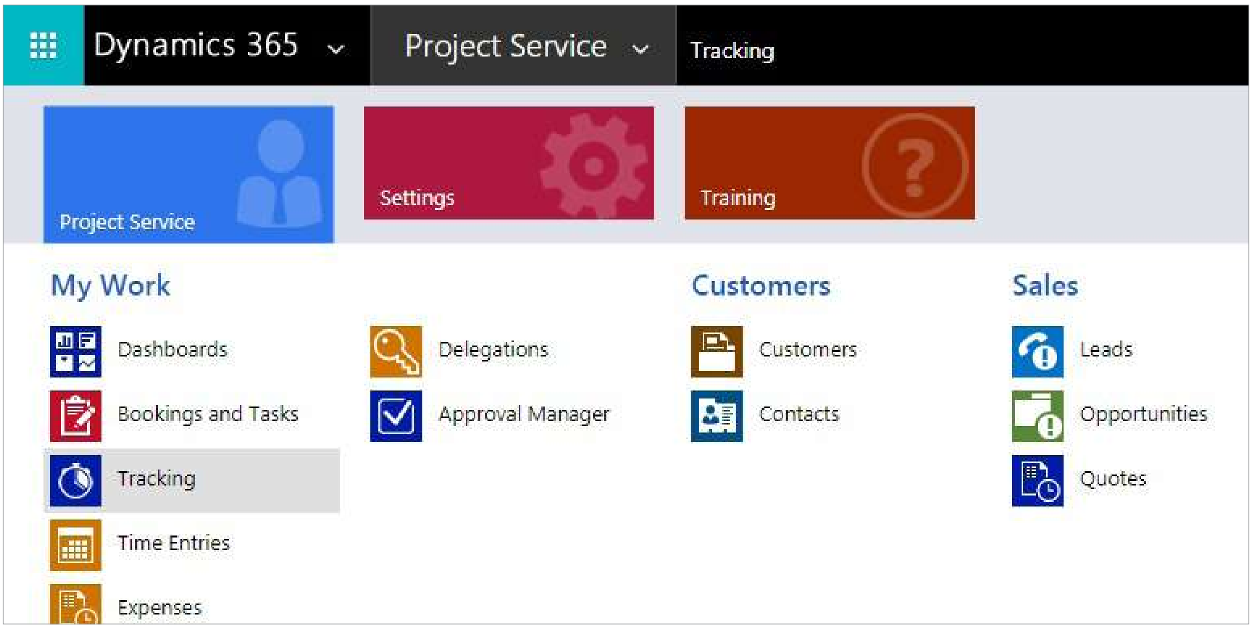
Recall

Expenses

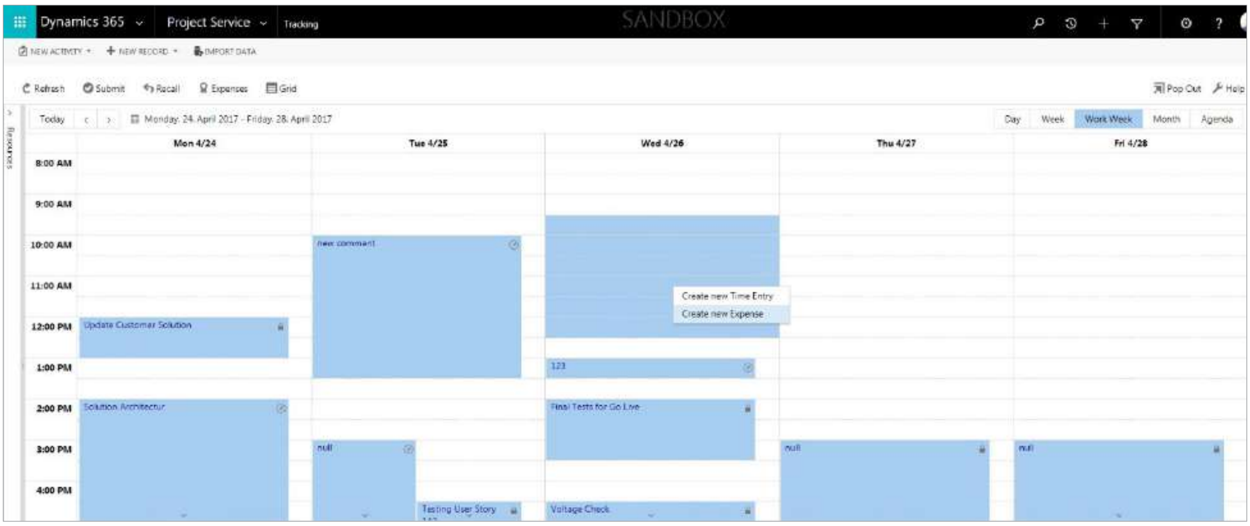
In addition to working time, you may also track project-related expenses. The following expense categories are available: Airfare, Car Rental, Hotel, Meal, Miscellaneous, Public Transportation and Taxi.

Create an Expense

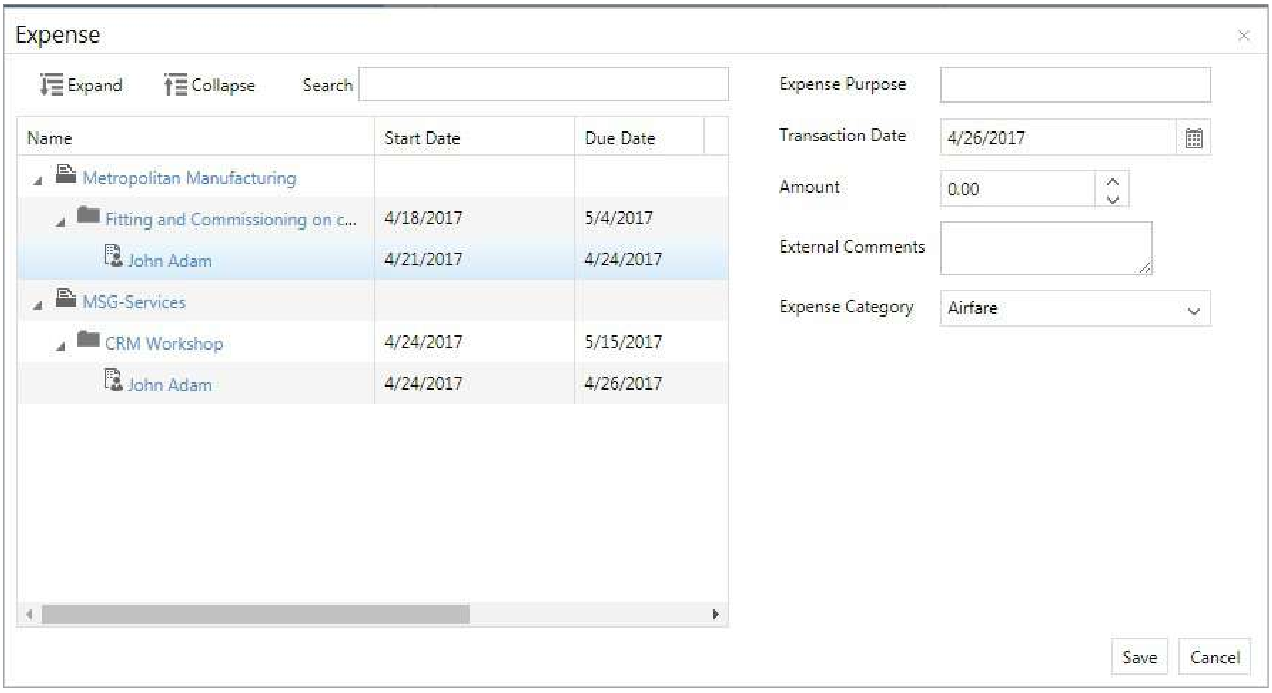
1. Go to **Project Service > Tracking**.



2. Select the desired time frame in the calendar by clicking and holding the left mouse button. Then, right click to open the context menu and choose **Create new Expense**.

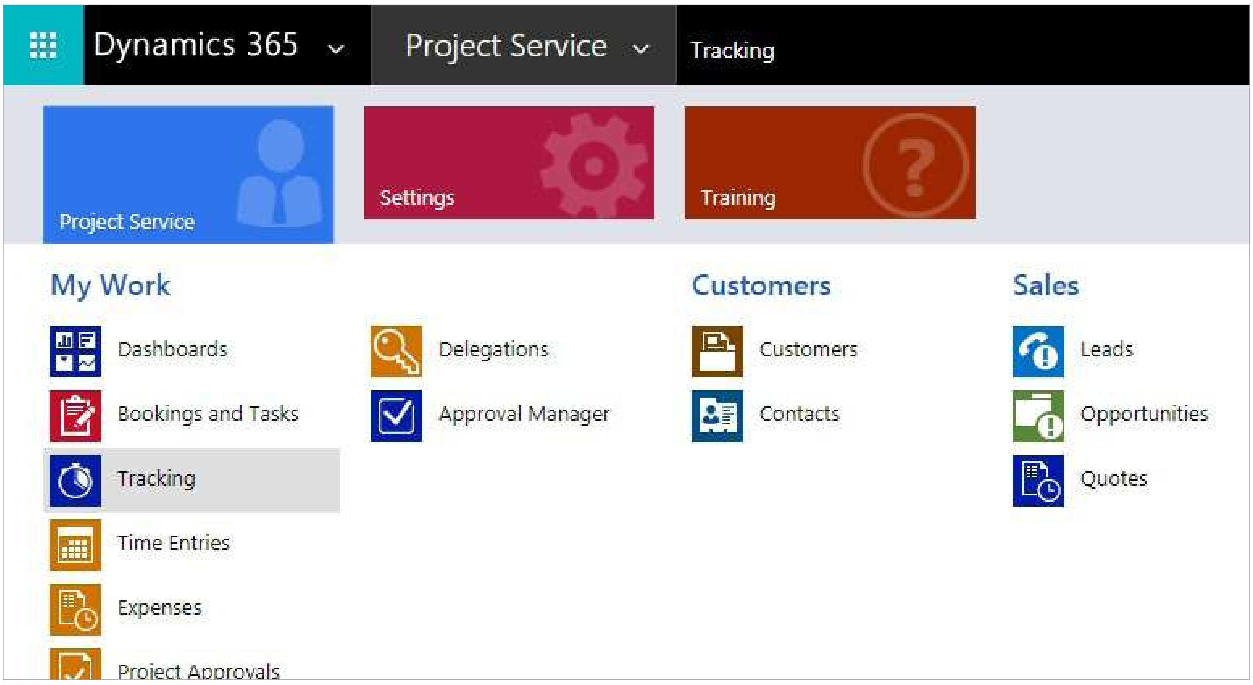


3. In the Expense creation form, select the relevant project task assignment in the project tree on the left-hand side. Then, type the required details into the form on the right. Create the expense by clicking **Save**.

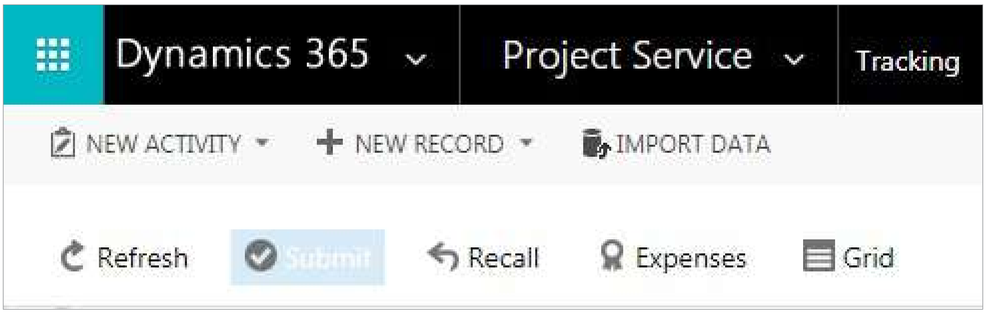


Submit an Expense

1. Go to **Project Service > Tracking**.



2. Click **Submit**.

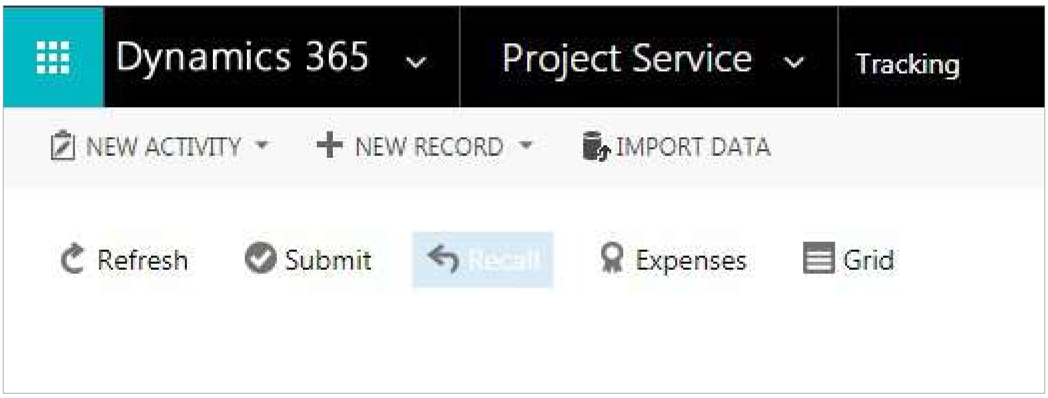


3. Switch to the **Expense** tab. In the list of draft expenses, select those you wish to submit via click. You may select multiple expenses at once by holding the CTRL key. Click **Submit** at the bottom right corner.

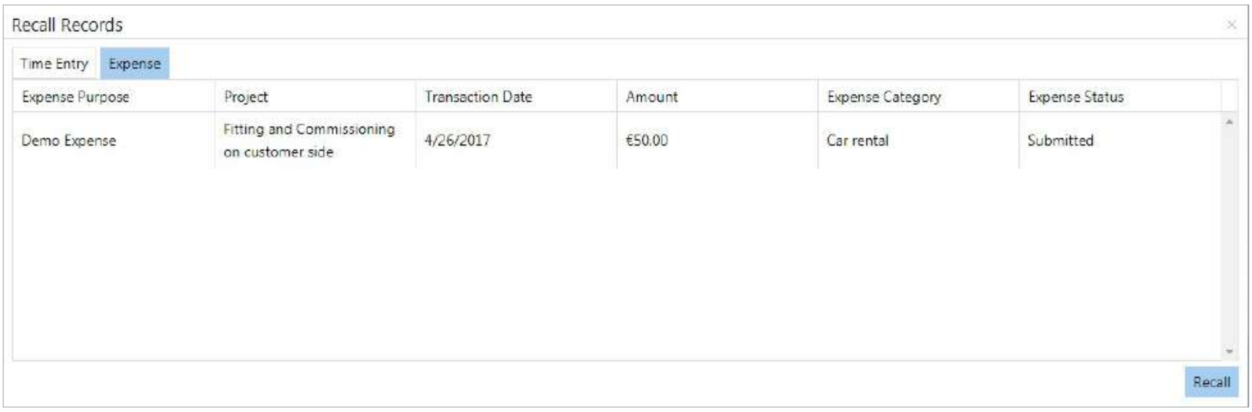
The status of the selected expenses will change from 'draft' to 'submitted'. These entries can no longer be edited (the status icon will change from a pen to a lock).

Recall an Expense

1. In case an expense was submitted mistakenly or a submitted expense needs to be edited, you may recall it. To do so, click **Recall**.



2. Select one or multiple time entries you wish to recall and choose **Recall** at the bottom right corner of the dialog windows. The selected entries will return to the draft stage and may then be edited again.



Contact

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