Project Management Add-ons for Dynamics 365

for Project Service Automation

User Guide

Project Management Add-ons
for Dynamics 365
Project Service Automation

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Time Tracking for Dynamics 365 for Project Service Automation

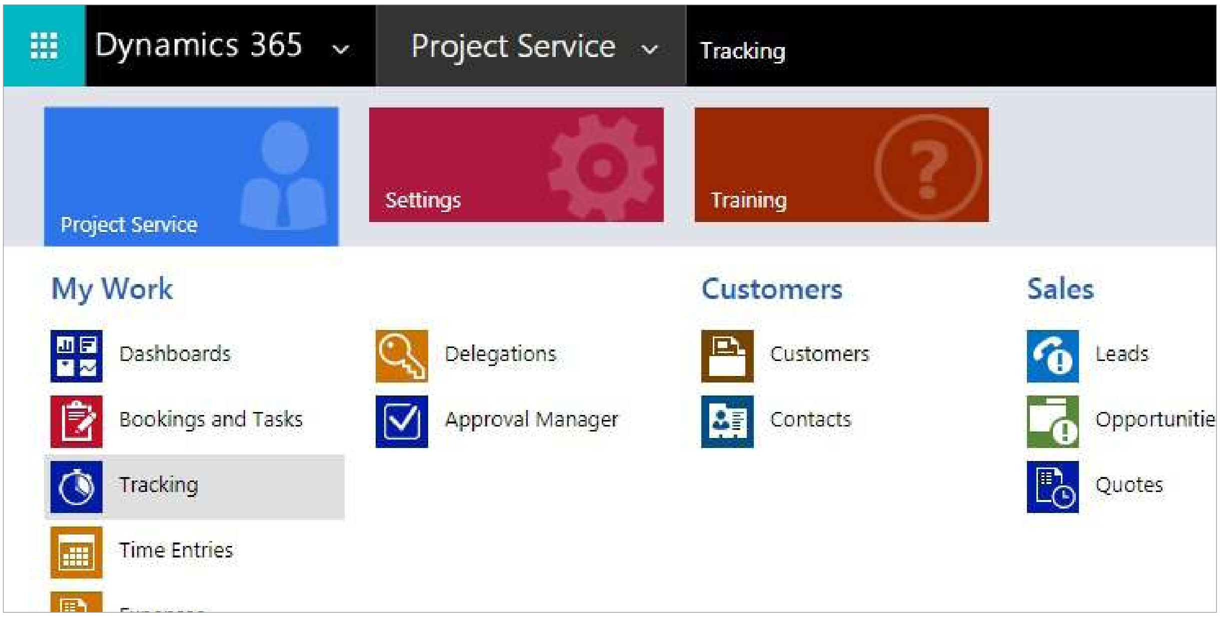
Time Tracking for Dynamics 365 for Project Service Automation extends the time and expense tracking functionality of Dynamics 365 for Project Service Automation. It allows employees to track their work efforts and expenses for project tasks to which they have been assigned.

Manage Time Entries

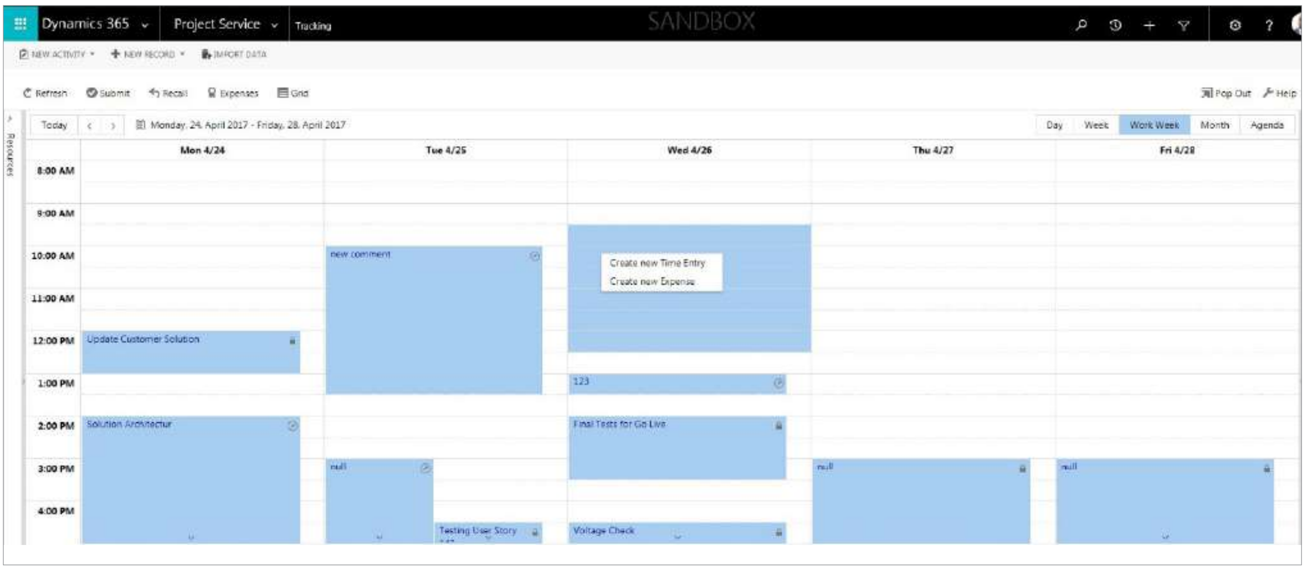
Each time entry requires a specific start and end time, its duration is calculated automatically and cannot be edited.

Create a Time Entry

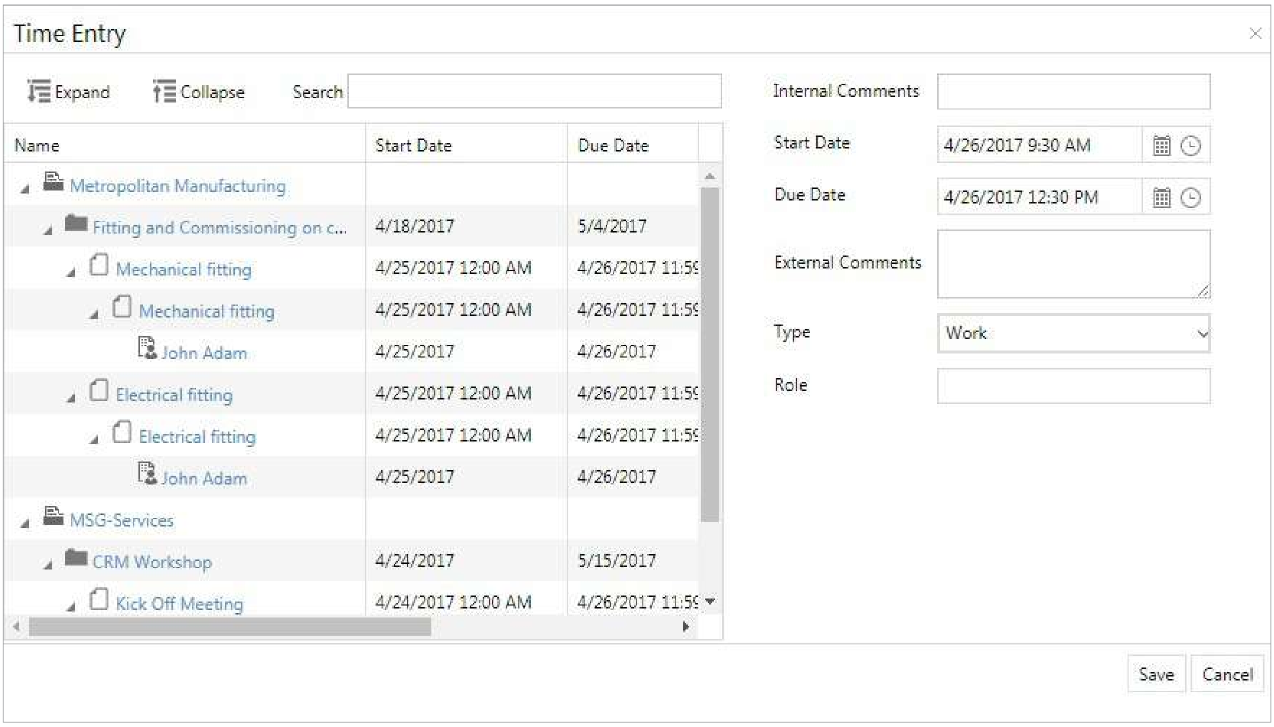
1. Go to **Project Service > Tracking**.



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**.

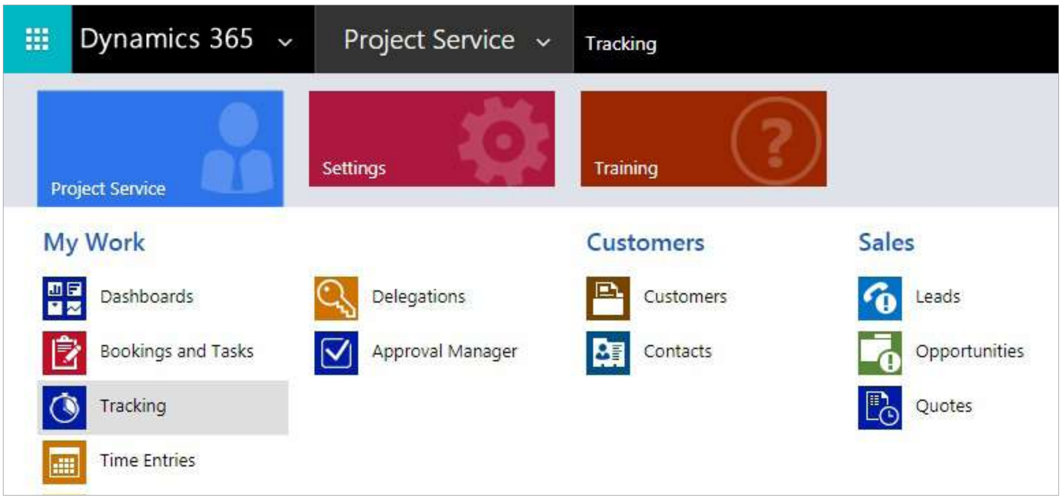


3. In the Time Entry creation form, select the relevant project task assignment in the project tree on the left-hand side. Then, type the required details in the form on the right. Create the time entry by clicking **Save**.

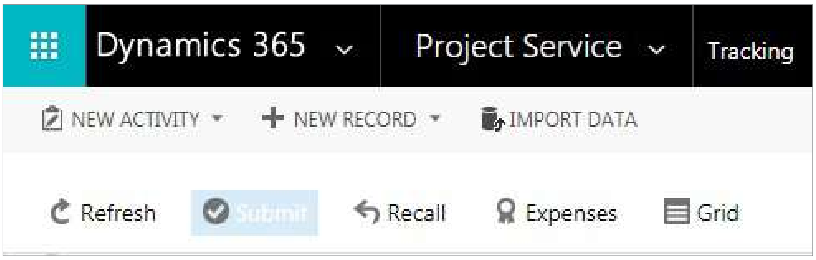


Submit a Time Entry

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



2. Click **Submit**.

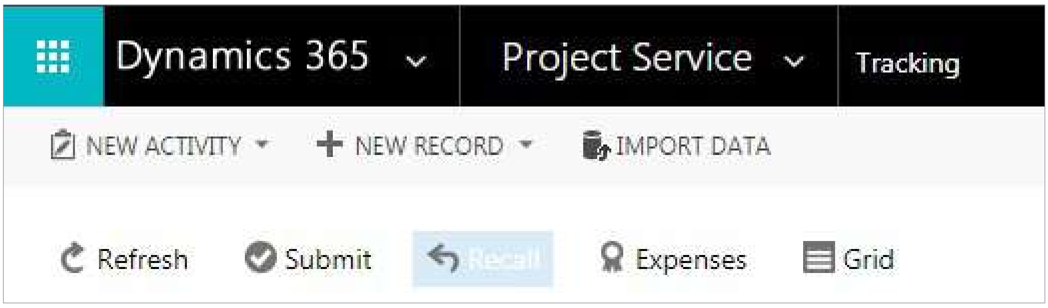


3. Select the entry you wish to submit via click. You may select multiple entries at once by holding the CTRL key. Click **Submit** at the bottom right corner of the screen.

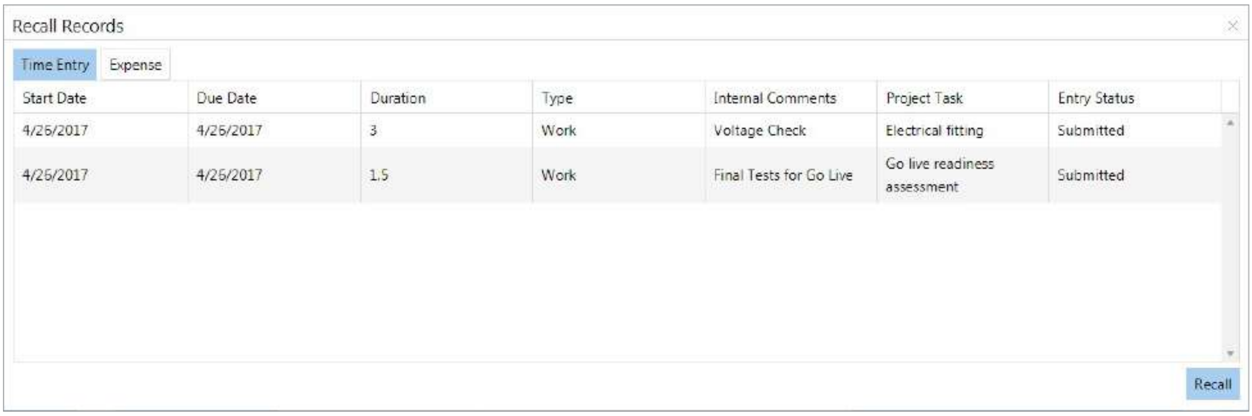
The status of the selected time entries will change from 'draft' to 'submitted'. These entries can no longer be edited (the status icon will change from a pen to a lock).

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.



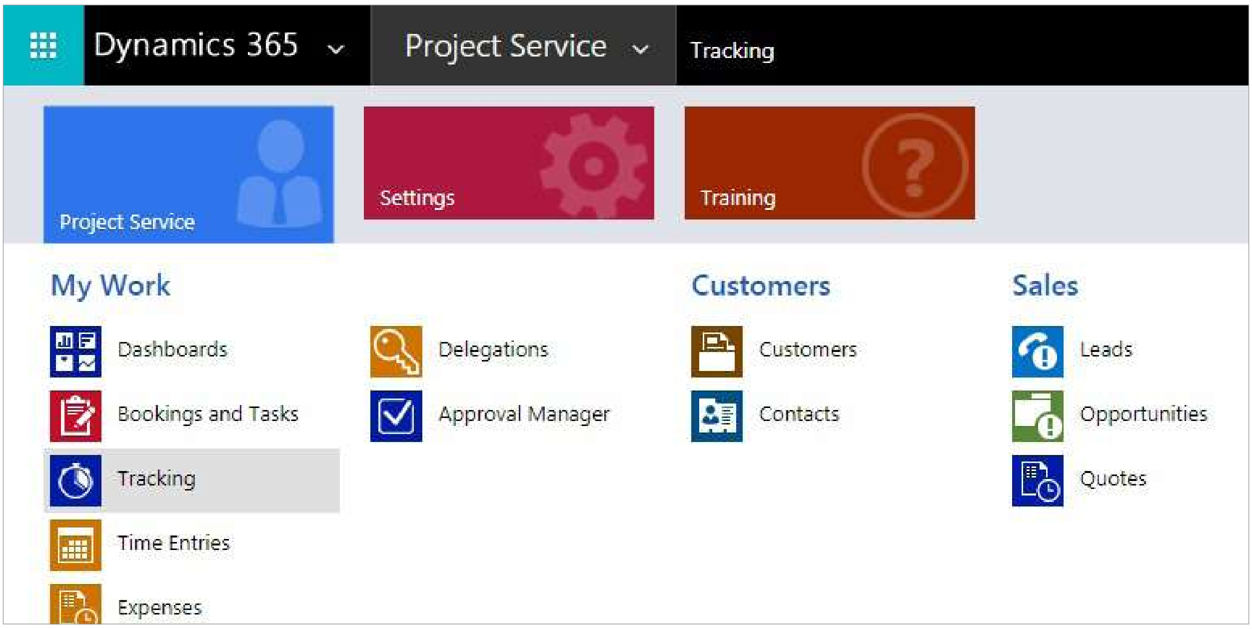
Start Date	Due Date	Duration	Type	Internal Comments	Project Task	Entry Status
4/26/2017	4/26/2017	3	Work	Voltage Check	Electrical fitting	Submitted
4/26/2017	4/26/2017	1.5	Work	Final Tests for Go Live	Go live readiness assessment	Submitted

Expenses

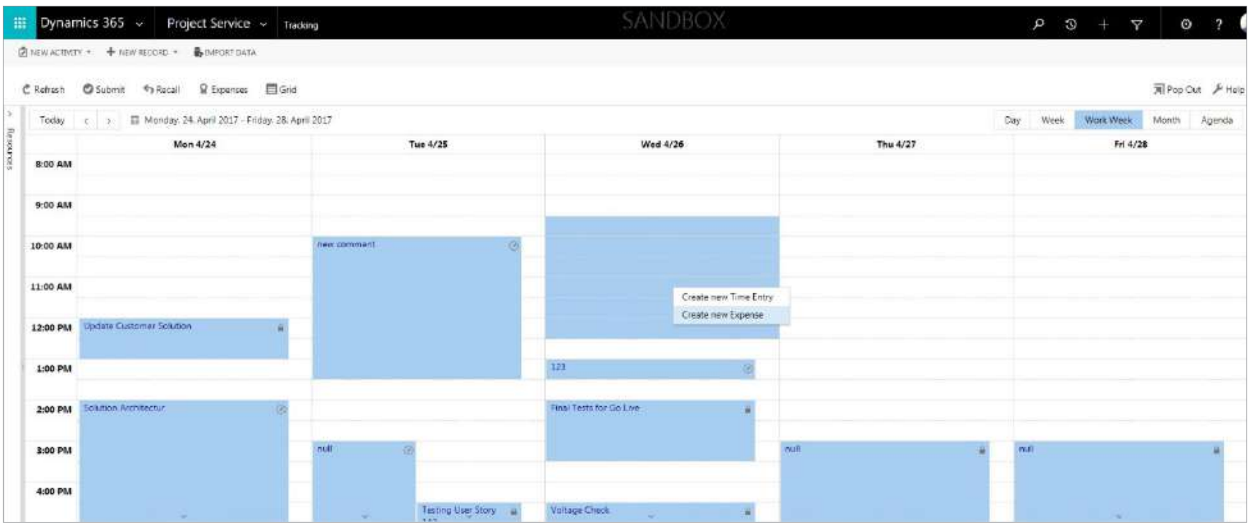
In addition to working time, you may also track project-related expenses. The following expense categories are available: Airfare, Car Rental, Hotel, Meal, Miscellaneous, Public Transportation and Taxi.

Create an Expense

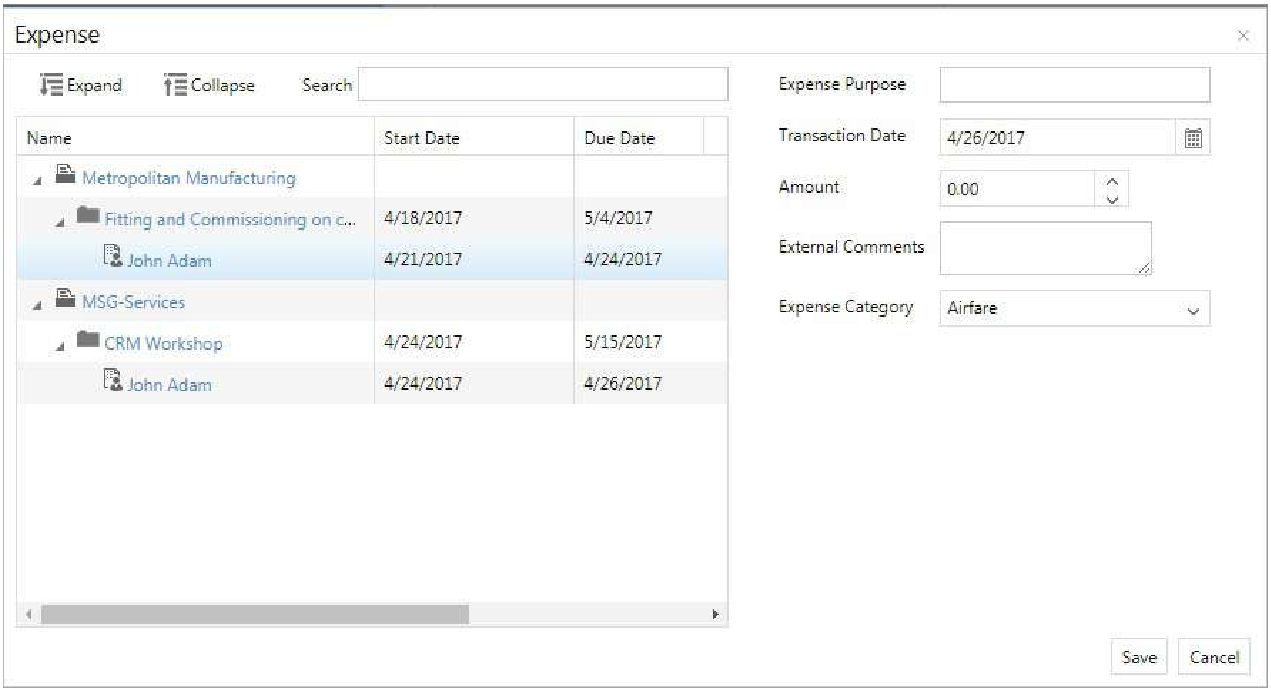
1. Go to **Project Service > Tracking**.



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**.

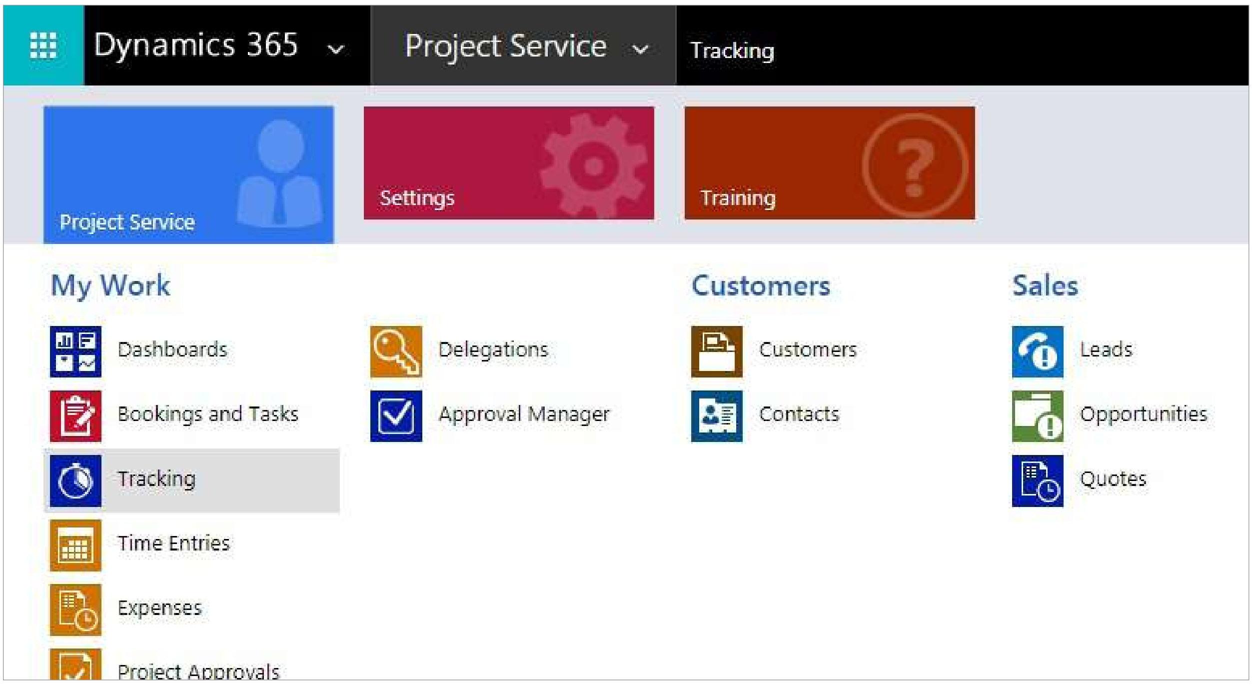


3. In the Expense creation form, select the relevant project task assignment in the project tree on the left-hand side. Then, type the required details into the form on the right. Create the expense by clicking **Save**.

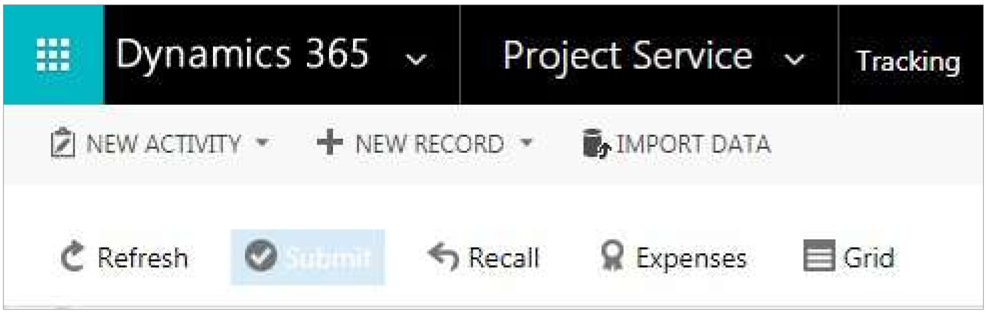


Submit an Expense

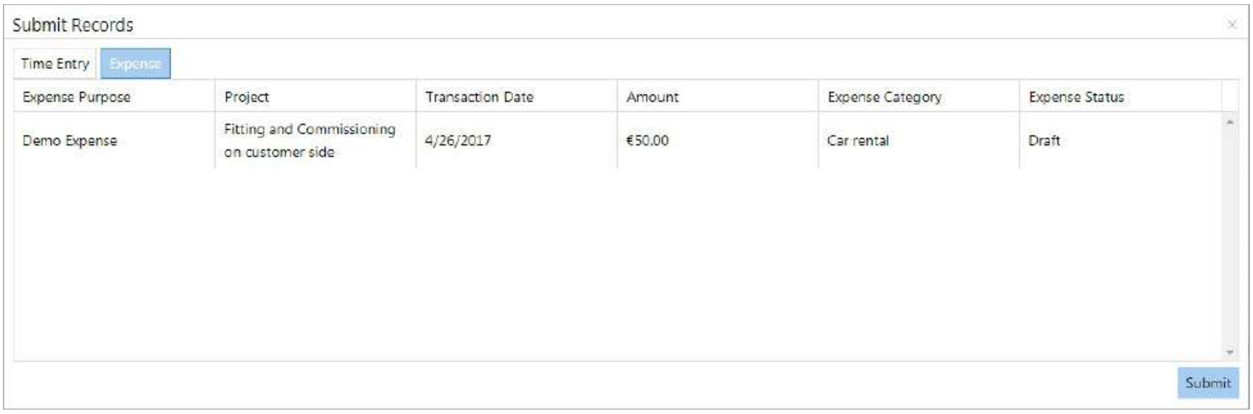
1. Go to **Project Service > Tracking**.



2. Click **Submit**.



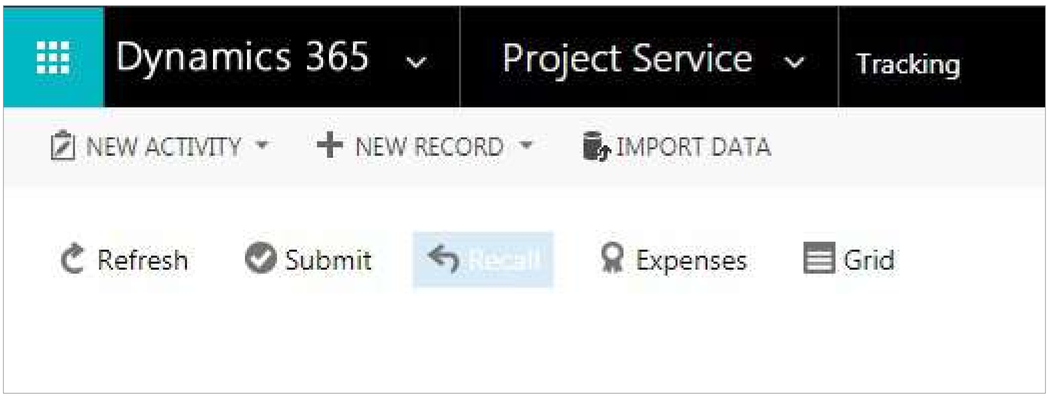
3. Switch to the **Expense** tab. In the list of draft expenses, select those you wish to submit via click. You may select multiple expenses at once by holding the CTRL key. Click **Submit** at the bottom right corner.



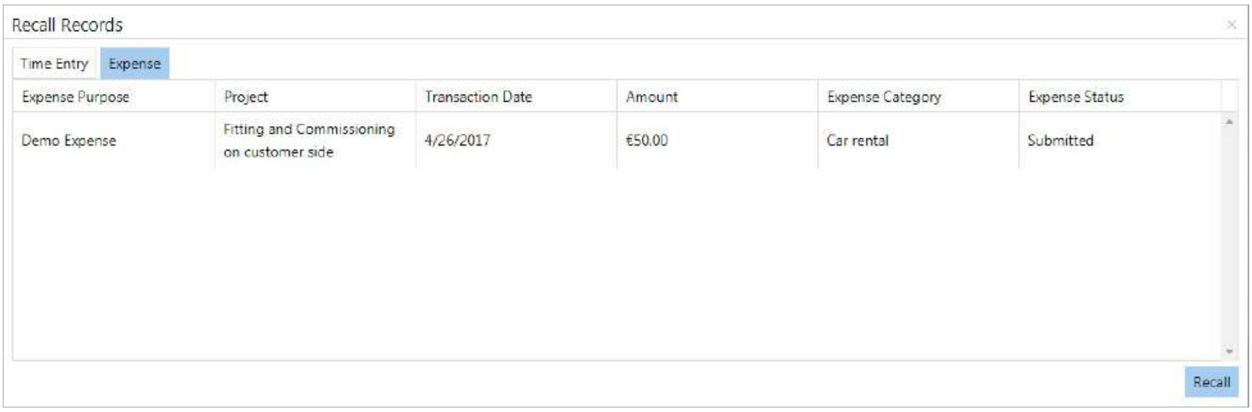
The status of the selected expenses will change from 'draft' to 'submitted'. These entries can no longer be edited (the status icon will change from a pen to a lock).

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.

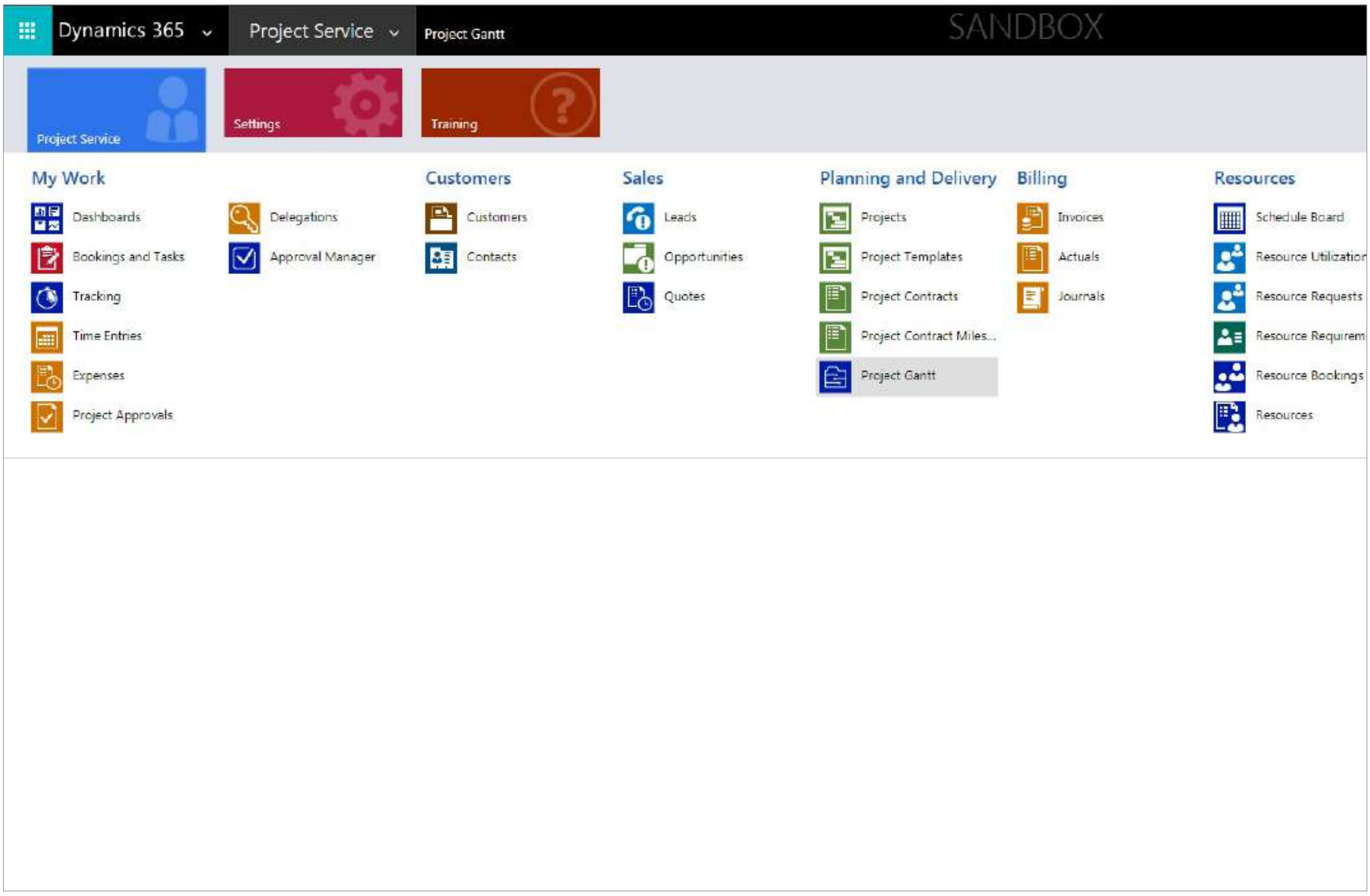


Project Gantt for Dynamics 365 for Project Service Automation

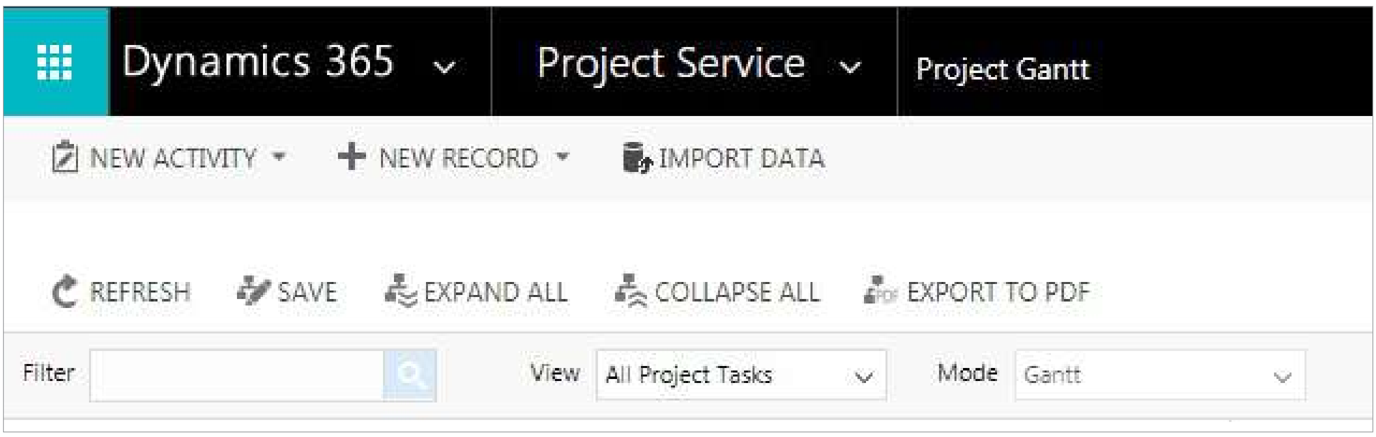
Project Gantt for Dynamics 365 for Project Service Automation is an add-on which extends the Dynamics 365 for Project Service Automation app. It allows project managers to plan and control project structures and progress. Project Gantt supports all Dynamics 365 for Project Service Automation entities.

Display projects

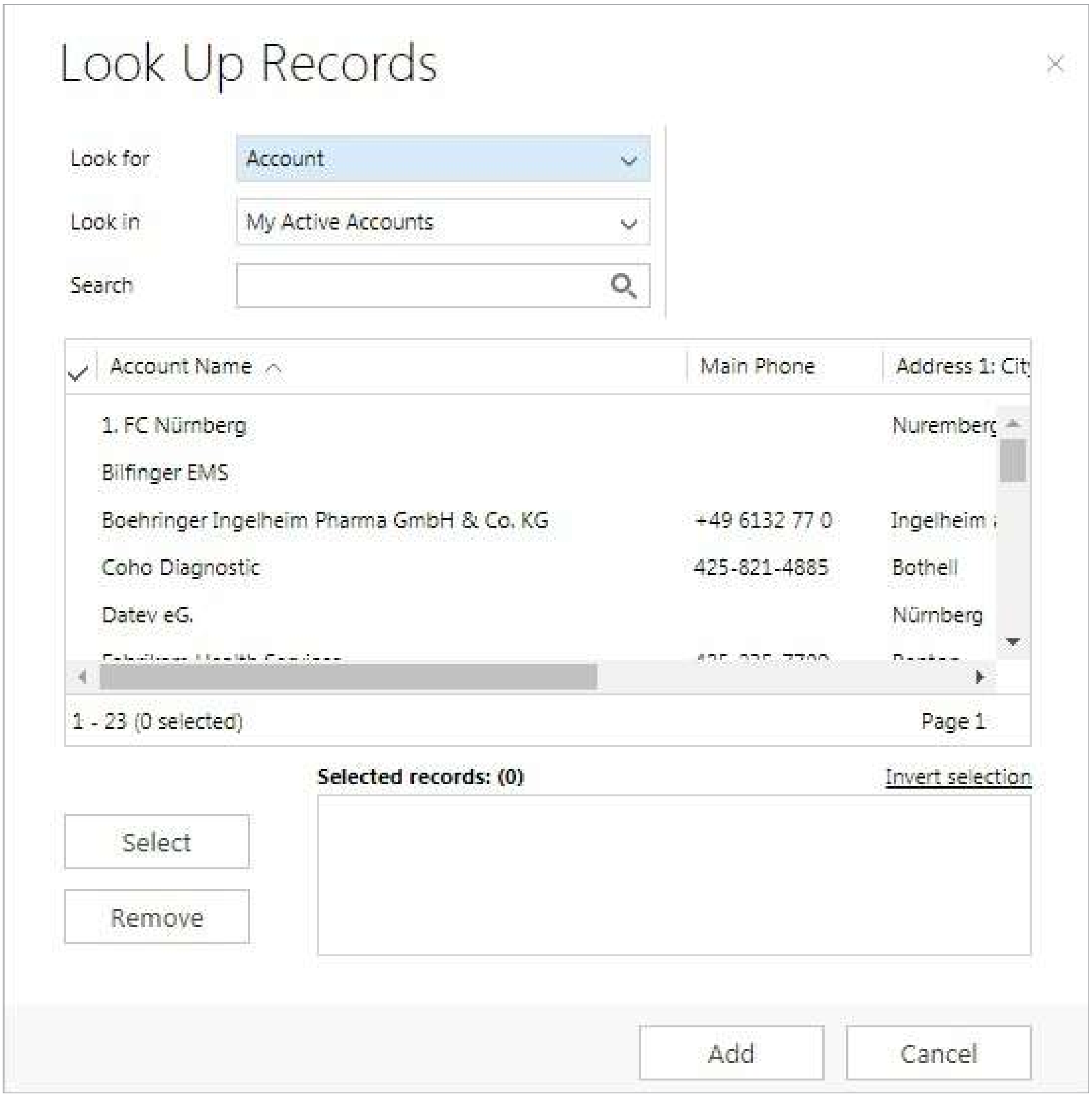
1. Go to **Project Service > Project Gantt.**



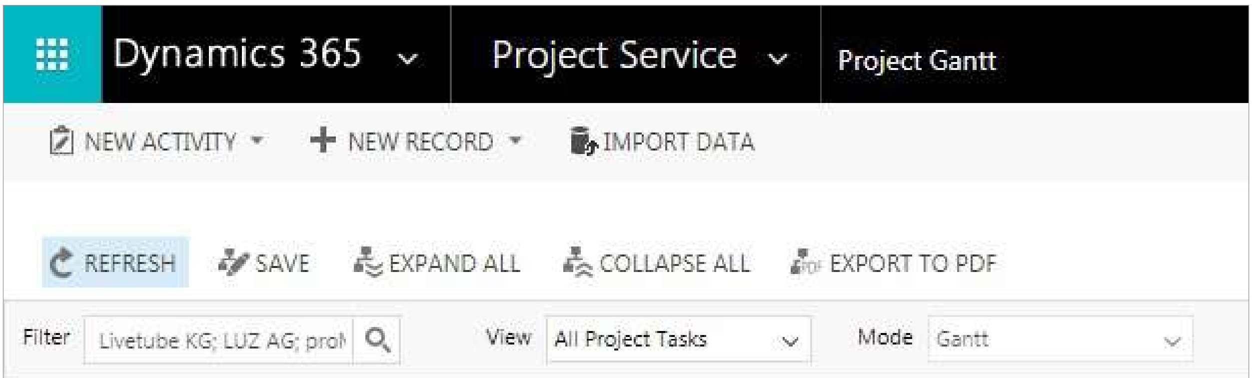
2. To display all projects, click **Refresh**. To select particular projects to display, click the magnifying glass icon in the field **Filter.**



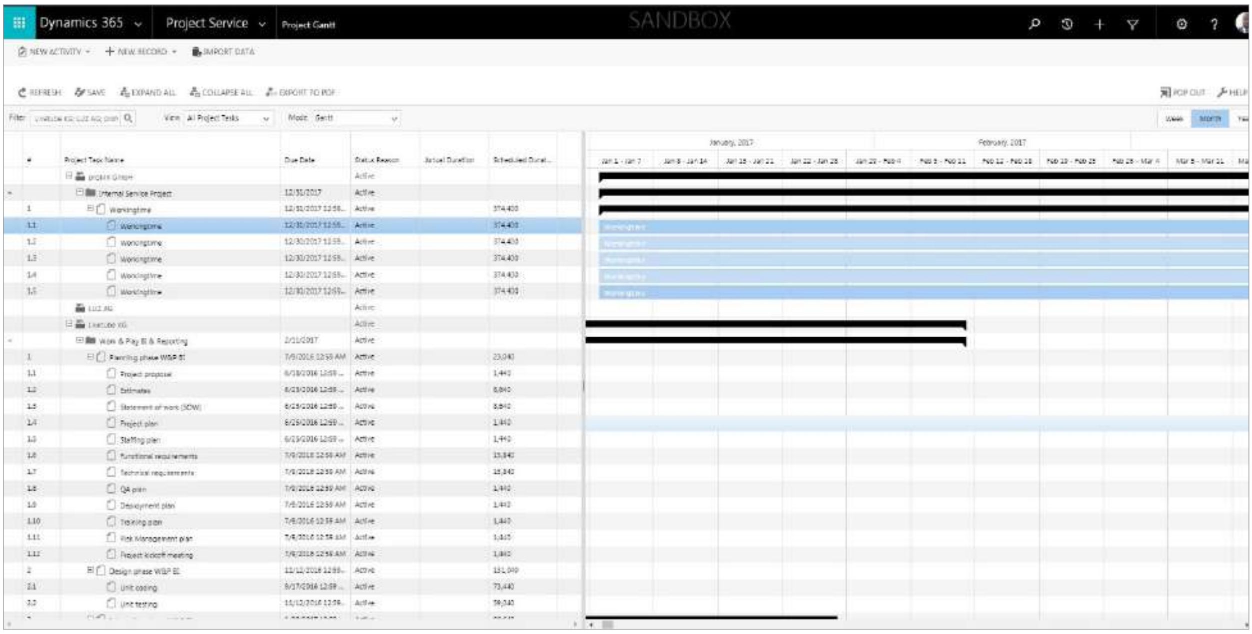
3. Browse Projects, Accounts, Contacts, and Project Tasks and **Select** the records you would like to display. Then, click **Add.**



4. Click **Refresh**.

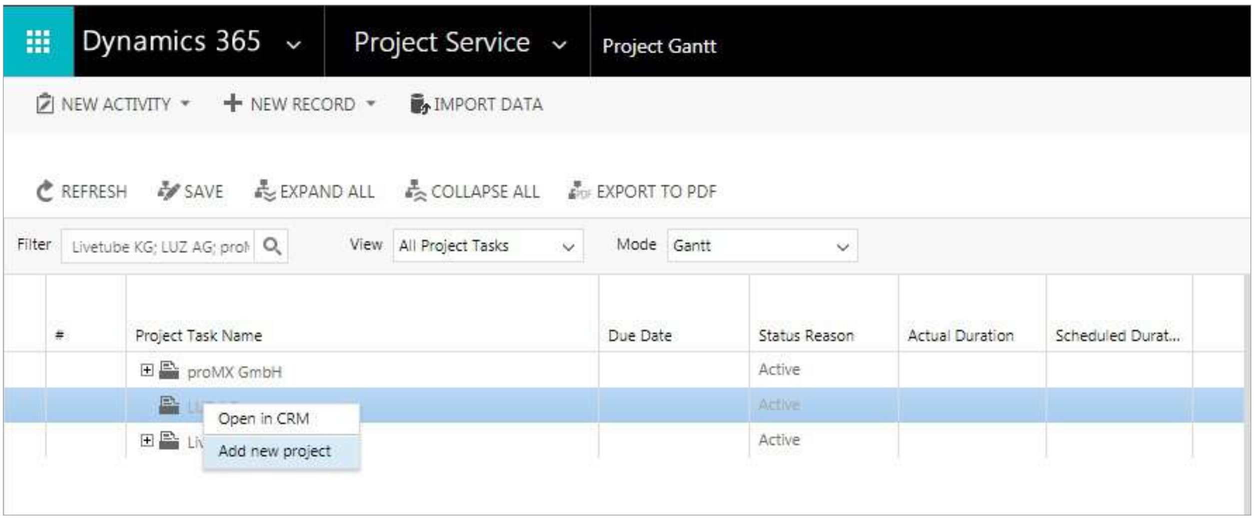


The selected records will appear in the project tree hierarchy on the left and as Gantt charts on the right.

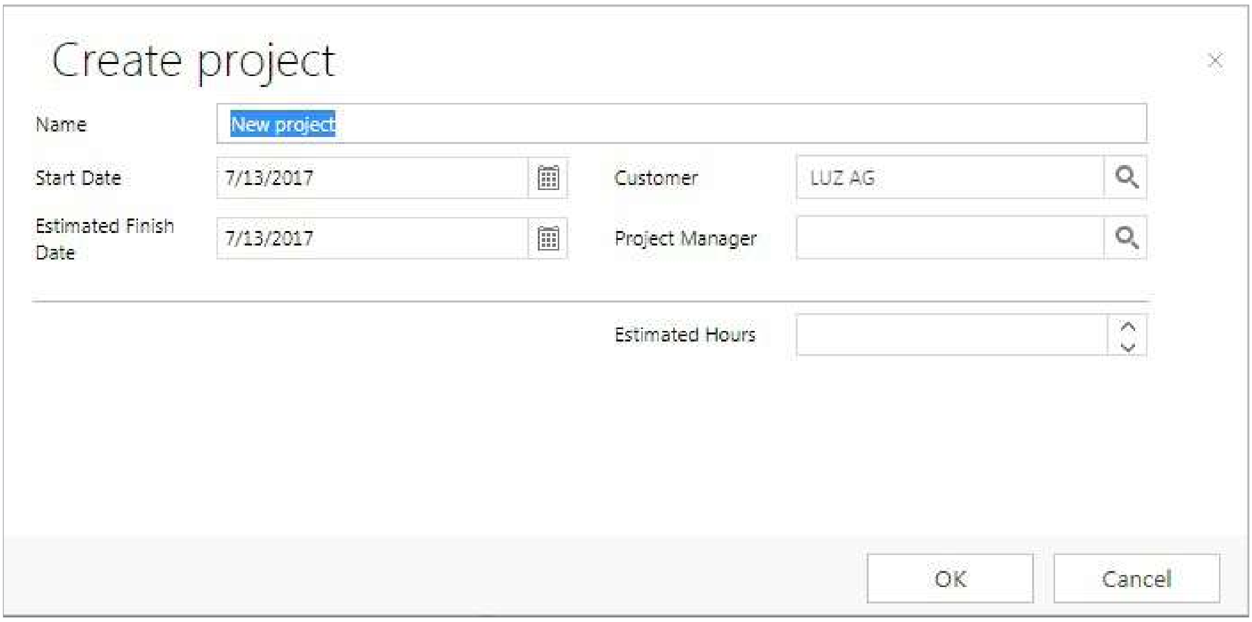


Add a new project

1. Select the account for which you wish to create a new project.
Right-click and select **Add new project.**

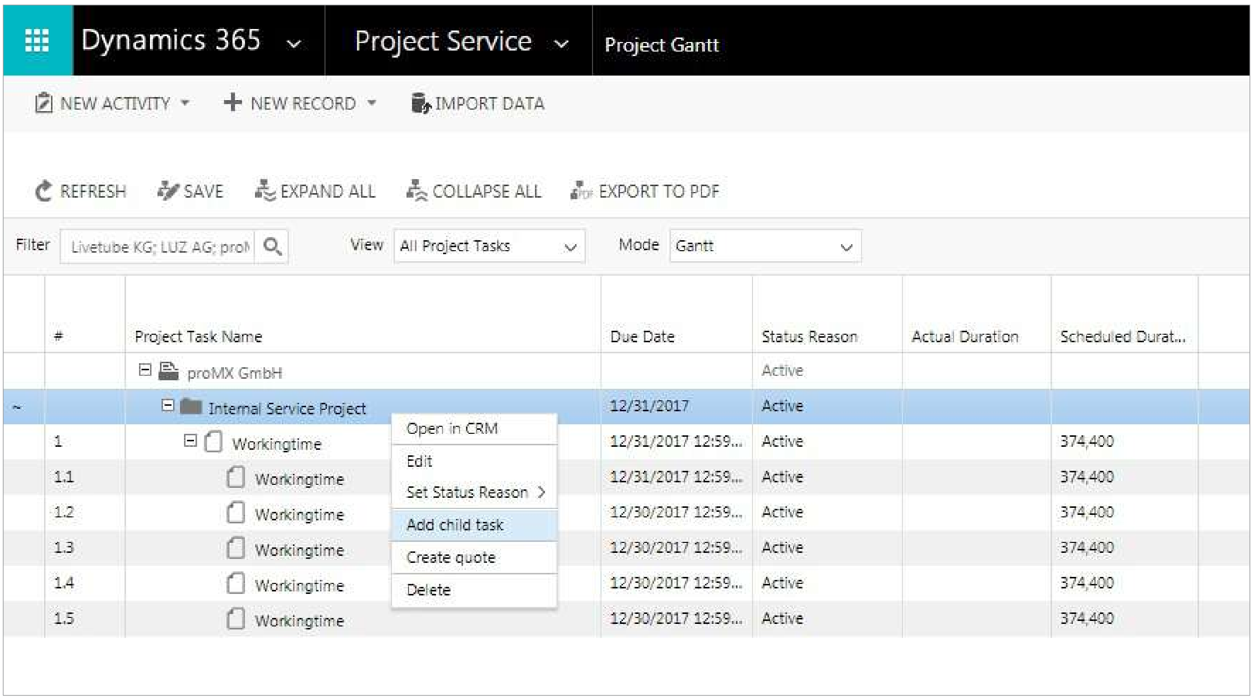


2. Fill in the form. Choose **OK** to schedule your project for creation. To create the project, subsequently click **Save** in the command bar.

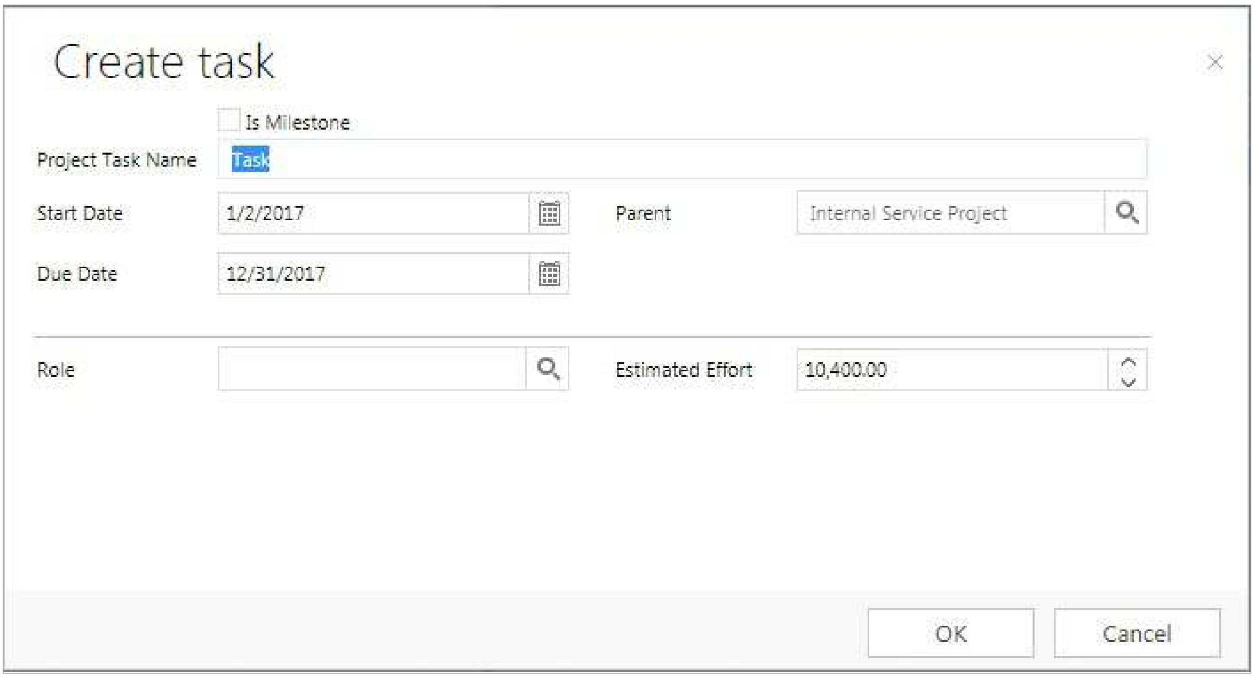


Manage project tasks

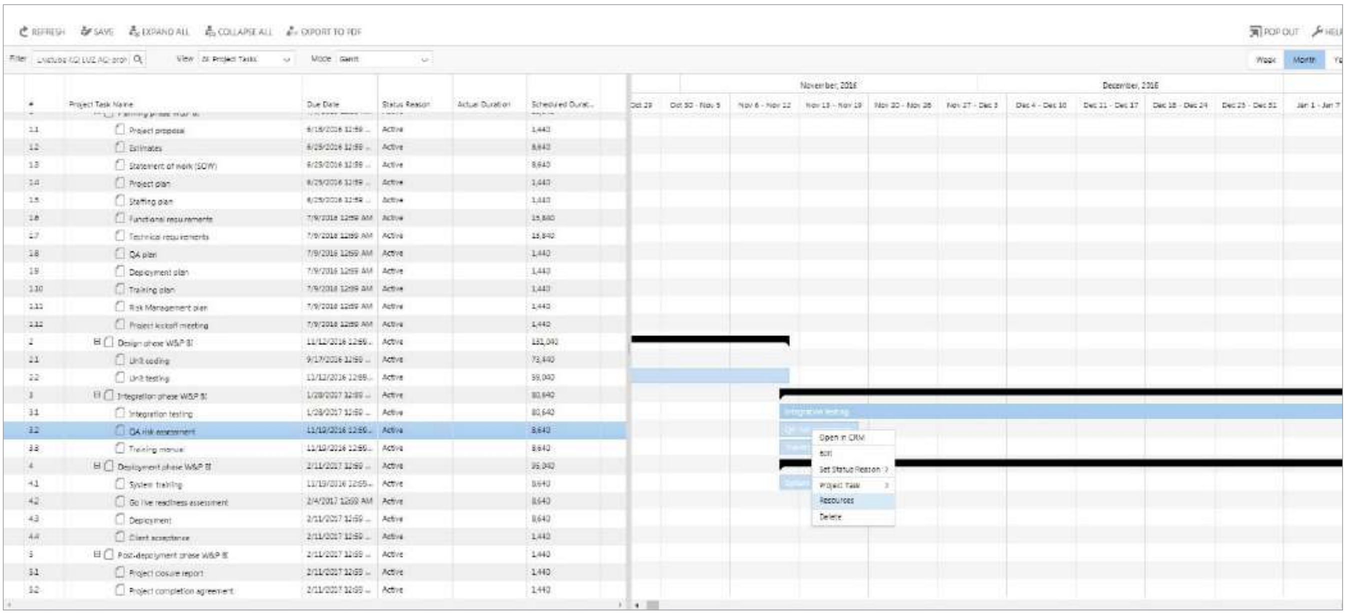
1. To create a new project task, select a project and right click to open the context menu. Select **Add child task**.



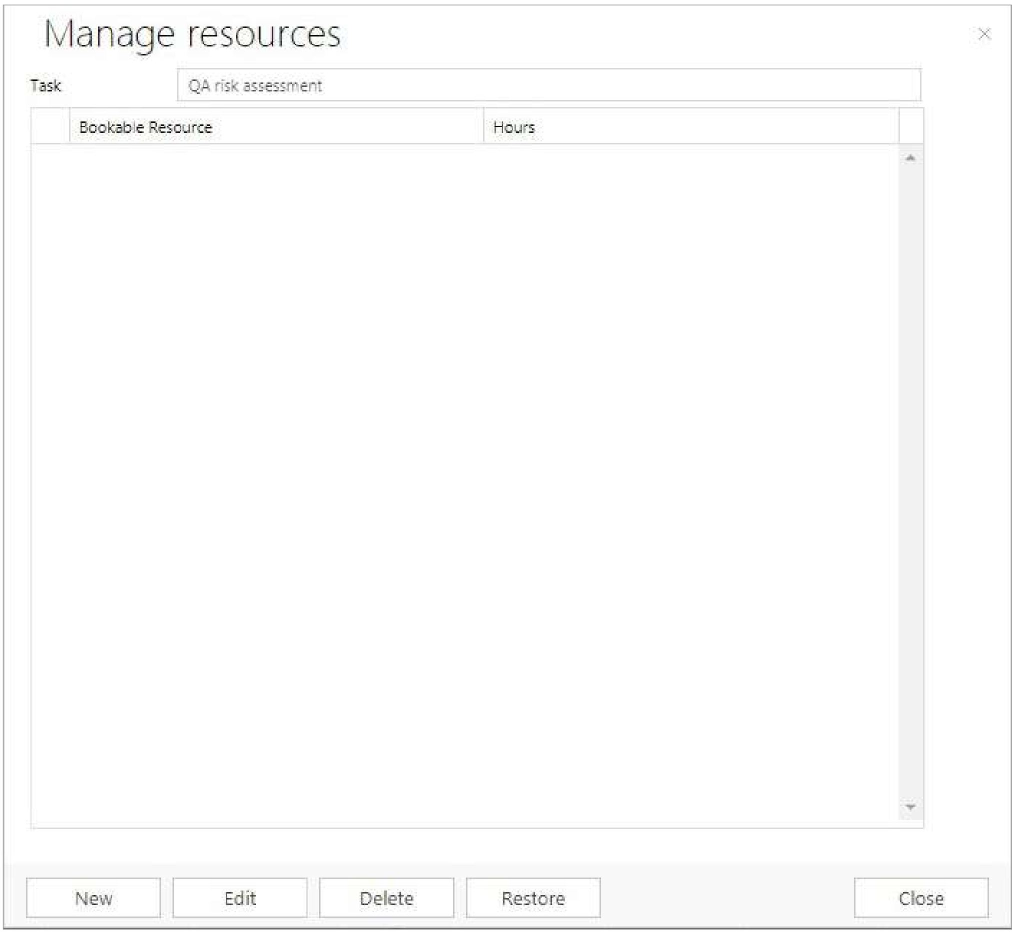
2. In the dialog window, fill in all fields and click **OK**.



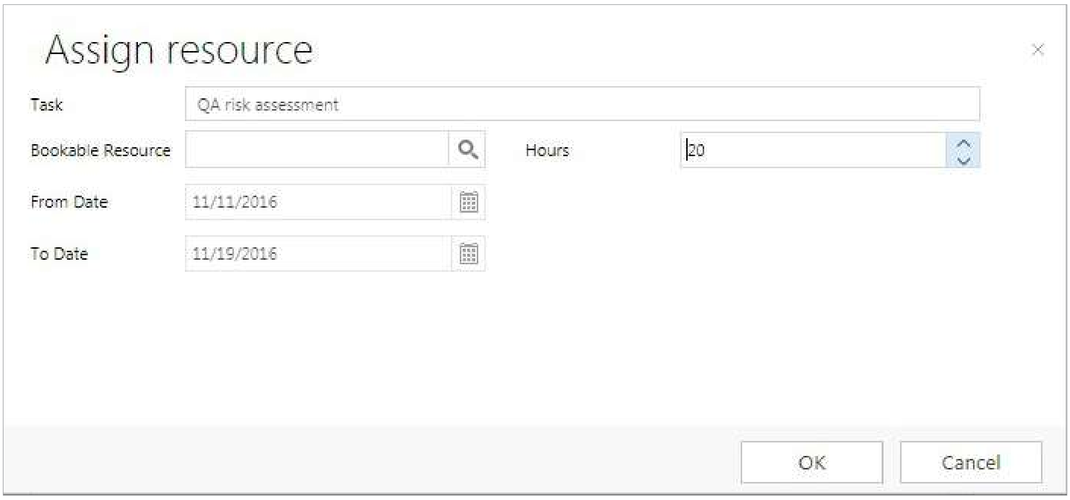
3. To assign a resource to a task, select the project task and right click to open the context menu. Select **Resources**.



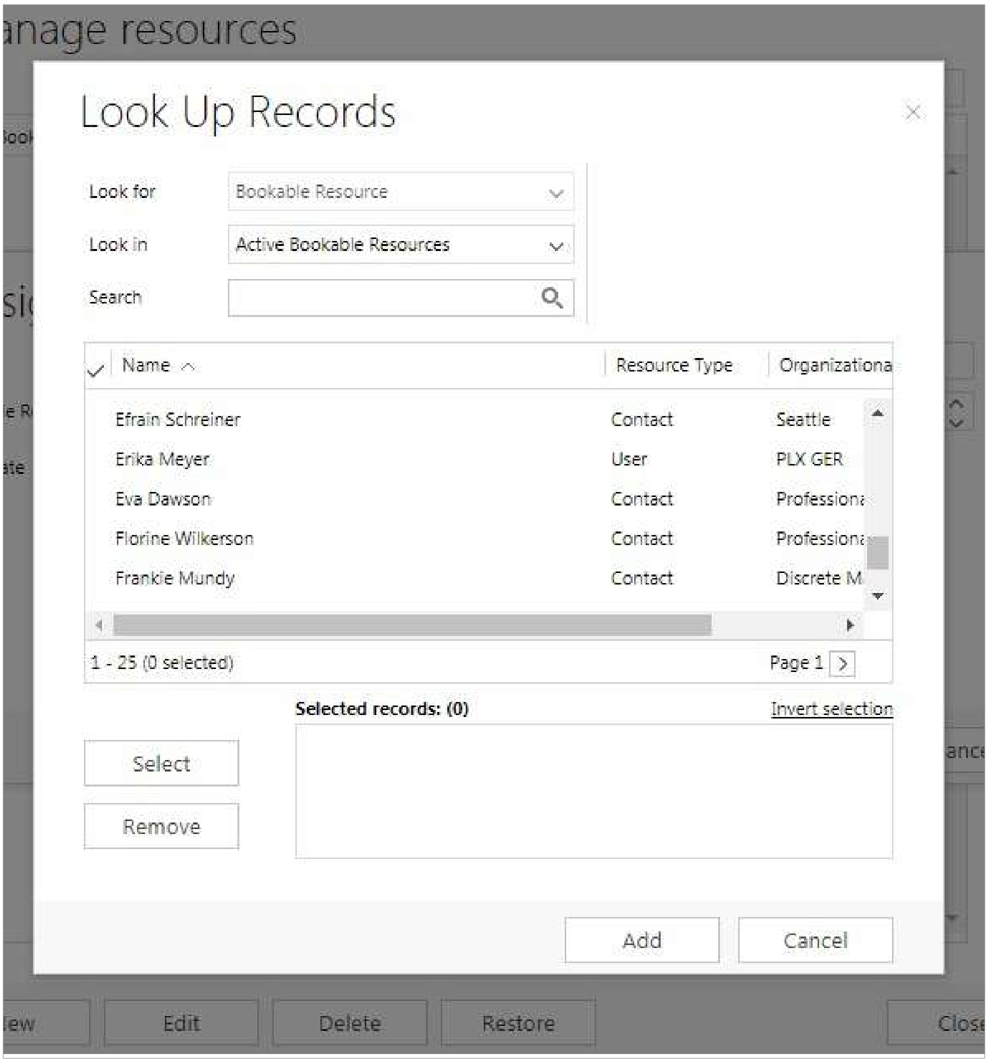
4. Choose **New**.



5. To find the desired resource, click the magnifying glass icon in the **Bookable Resource** field.



6. Select one or more resoures and click **Select** and then **Add**.



7. In the Assign resource window, click **OK**.

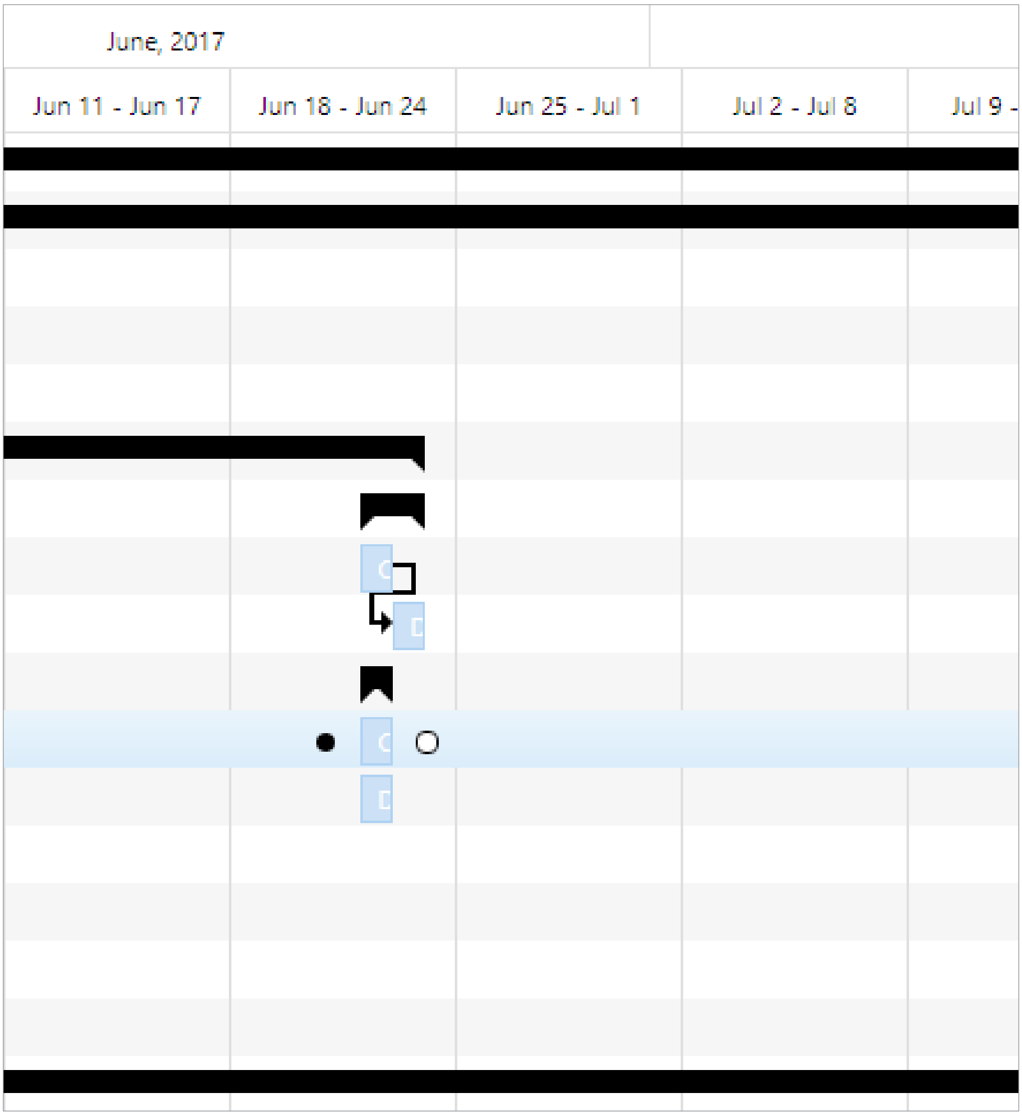
Click **Close**.Then, click **Save** in the top menu ribbon to finalize the assignment(s).

Create a project task dependency

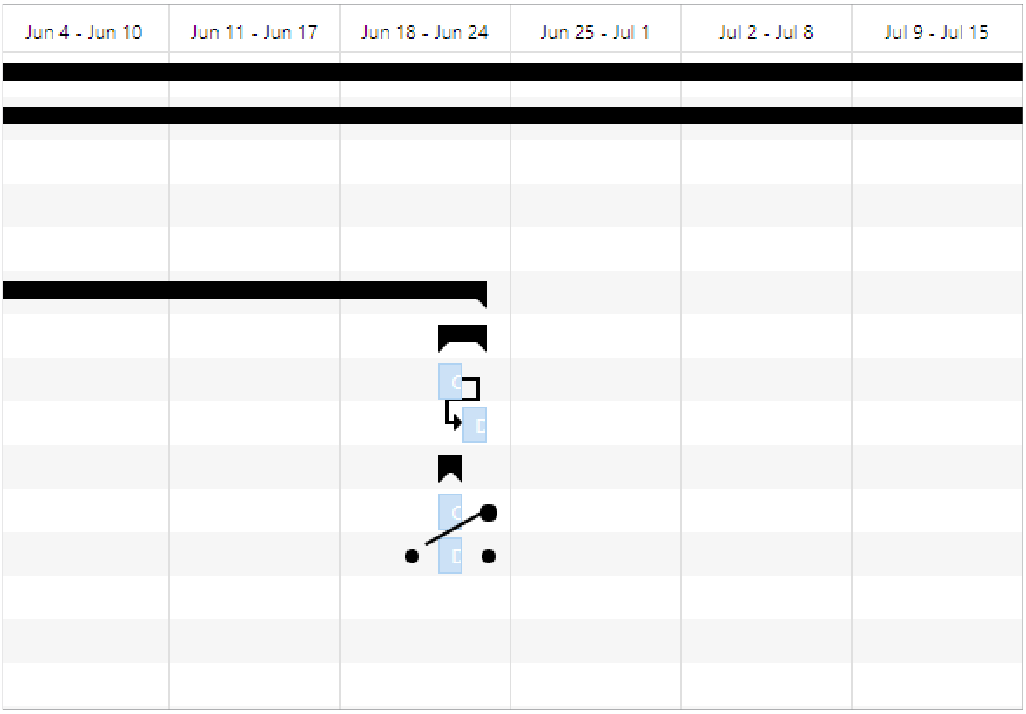
There are four possible dependencies between project tasks: Finish-to-Start (FS), Finish-to-Finish (FF), Start-to-Start (SS), and Start-to-Finish (SF).

1. To create a dependency between two project tasks, navigate to the Gantt chart on the right-hand side of the screen.

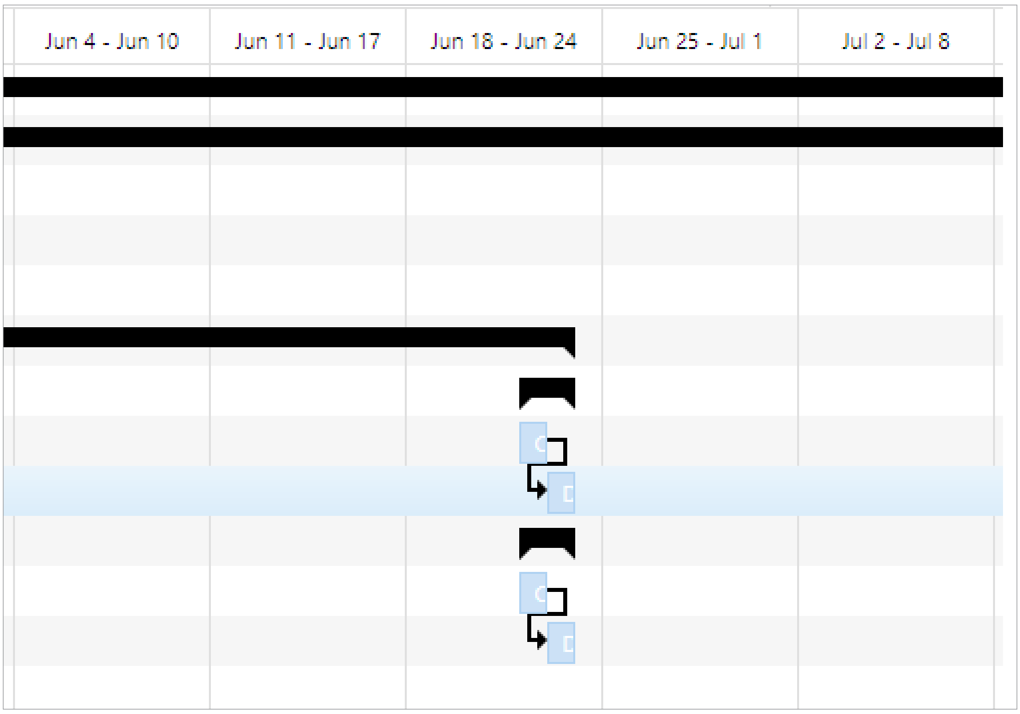
Place your cursor on one of the project tasks. Two circles appear, the circle to the left of the chart represents the start of the project task, the circle on the right the end.



Click one of the circles, hold the mouse button and drag towards one of the circles of the second project task.



The resulting dependency will be depicted as an arrow.



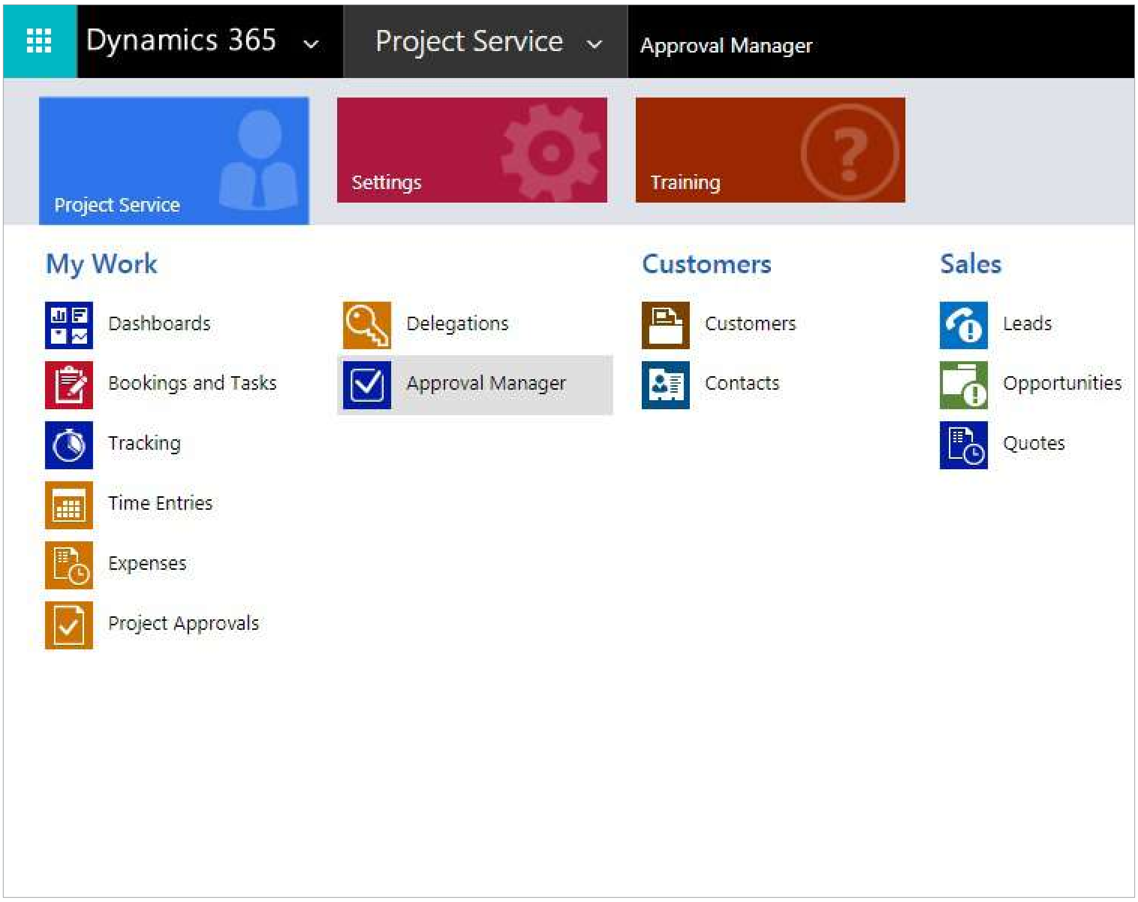
2. Finalize the dependency by clicking **Save** in the command bar.

Approval Manager for Dynamics 365 for Project Service Automation

Approval Manager for Dynamics 365 for Project Service Automation extends the approval management functionality of Dynamics 365 for Project Service Automation. It allows project managers to check submitted time entries and expenses for accuracy, edit them if necessary, reject, or approve them. Approved time entries and expenses can then be used for invoicing.

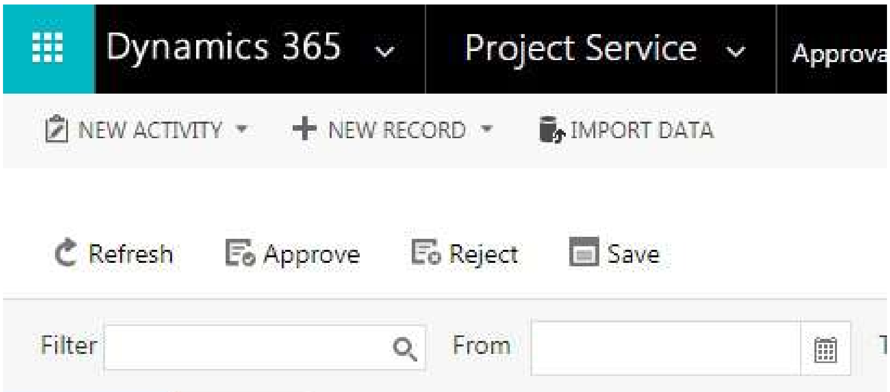
Approve or Reject Time Entries

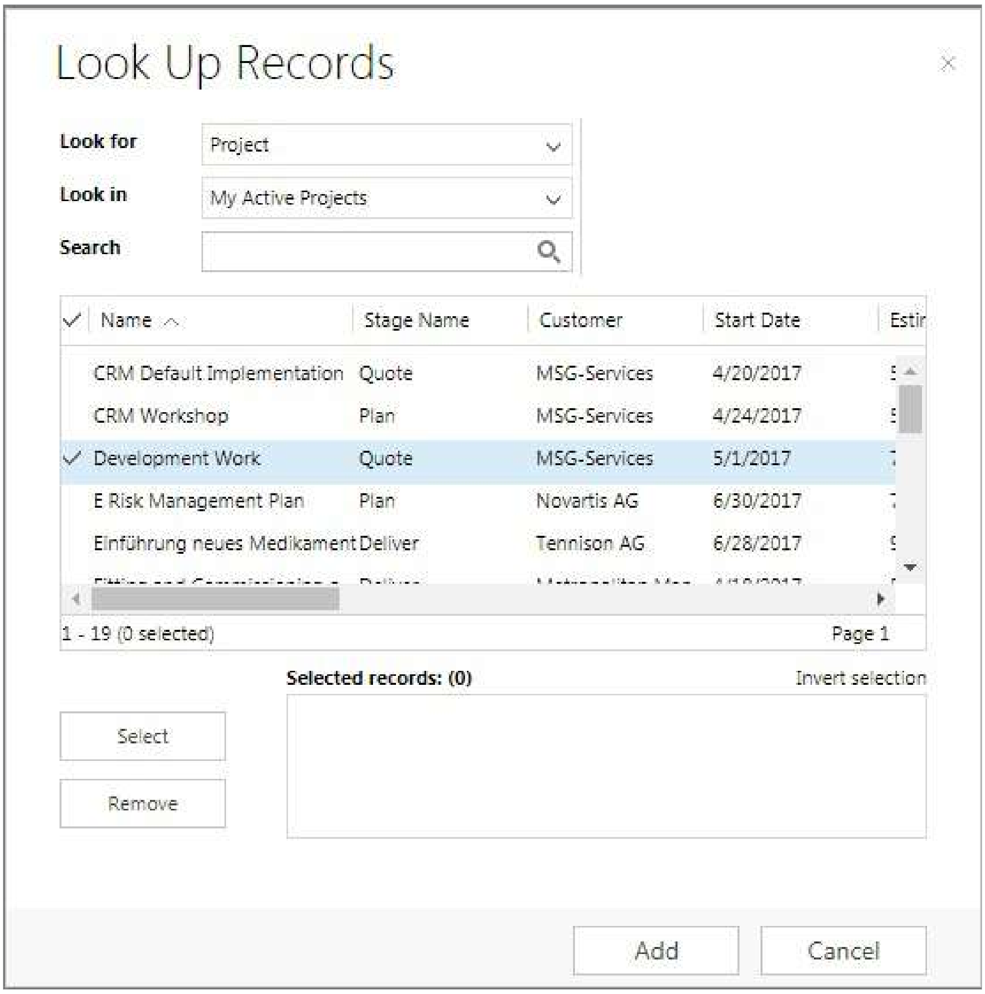
1. Go to **Project Service > Approval Manager**.



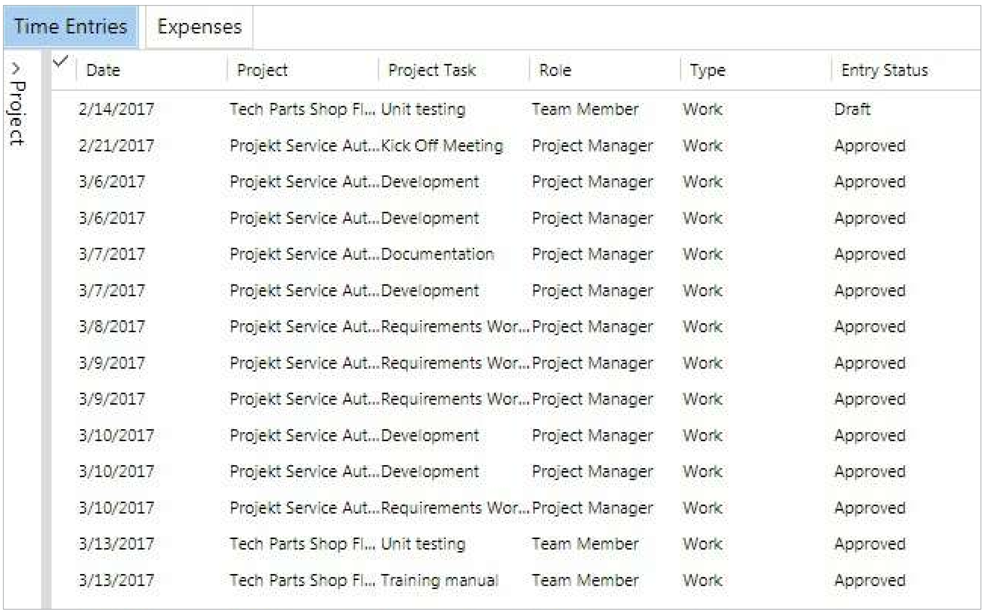
2. To display all time entries in the system, click **Refresh**.

To load only selected time entries, open the **Filter** look-up field by clicking the magnifying glass icon in that field. Then, add one or more projects, accounts, contacts, project tasks, bookable resources, or project task assignments, click **Select**, and finally **Add**.

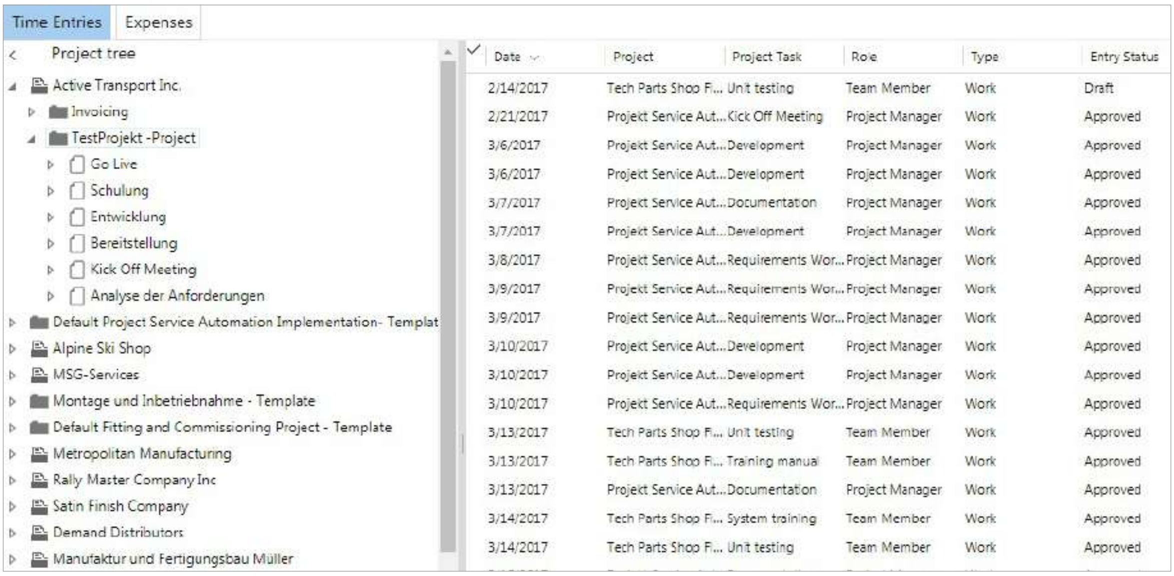




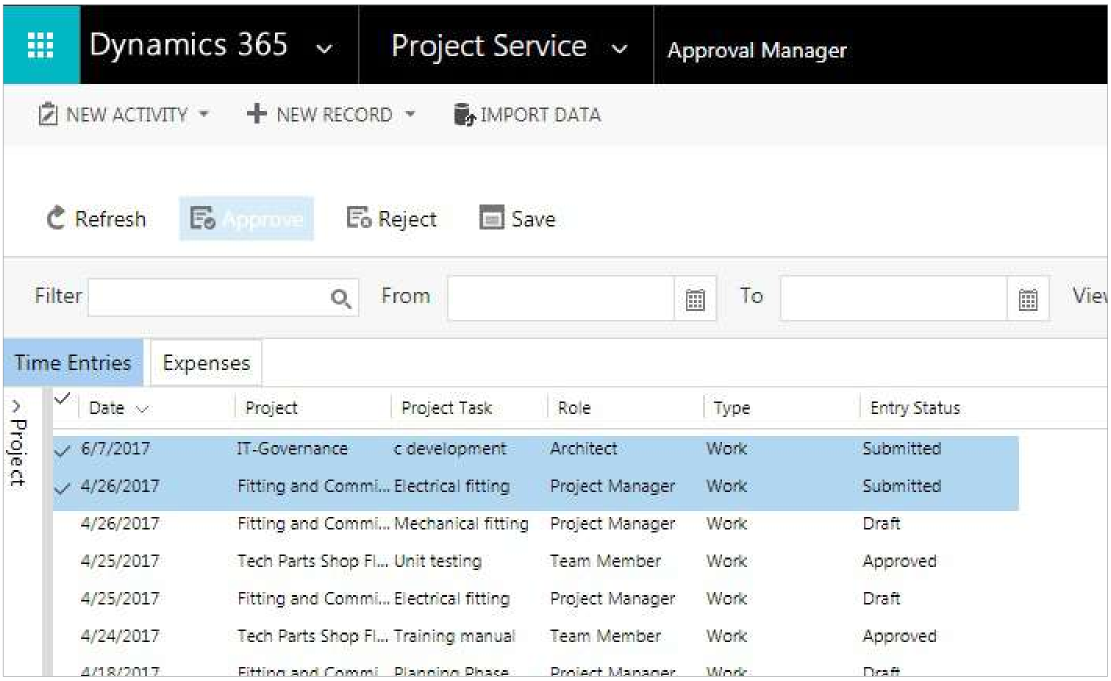
3. Click **Refresh**. Based on the selected view, date range and filter, records will be displayed in the main panel.



4. Use the project tree on the left-hand side to filter time entries by project, project task or project task assignment. To do so, expand the project tree and select the desired item in the structure.



5. To approve a time entry, select it by clicking the check column. You may select multiple records at once. Once you have selected all desired records, click **Approve**.



6. In case a time entry was approved by mistake or should be edited by the respective employee, you may unapprove these records by selecting them and clicking **Reject.**

Contact

For questions, wishes or feedback, please contact us via support@proMX.net or the below details.

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