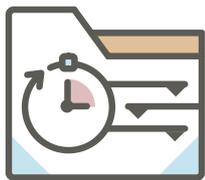


Project Management Add-ons for Dynamics 365 for Project Service Automation

User Guide



Project Management Add-ons

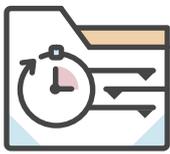
for Dynamics 365
Project Service Automation

proMX AG
Nordring 100
90409 Nuremberg
Germany

E-Mail: sales@proMX.net

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.

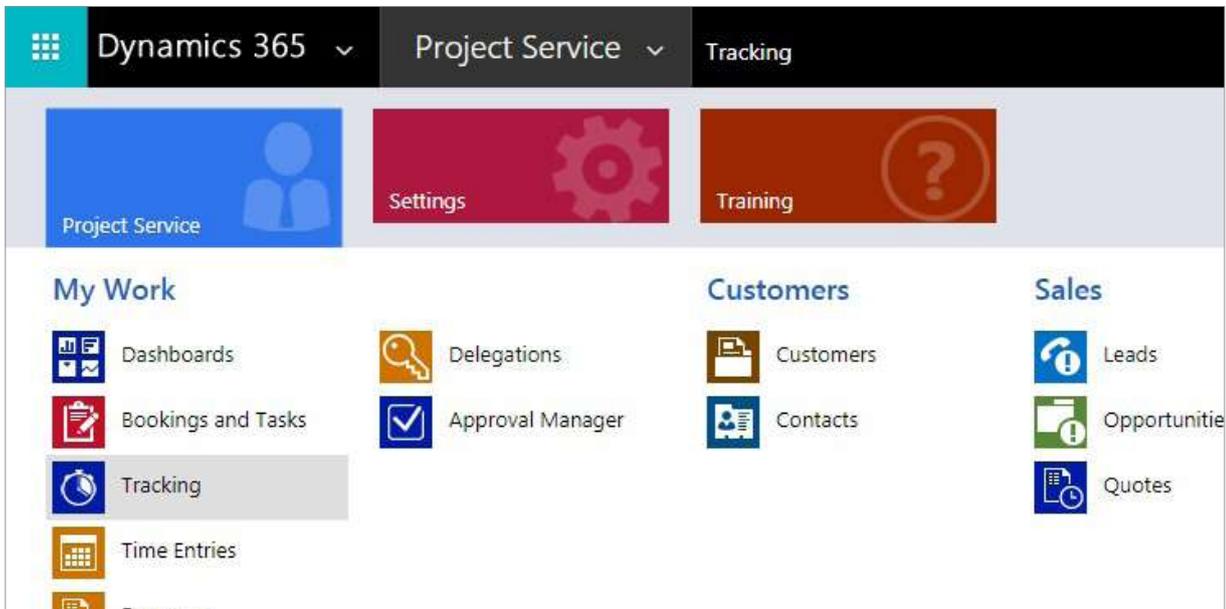


Manage Time Entries

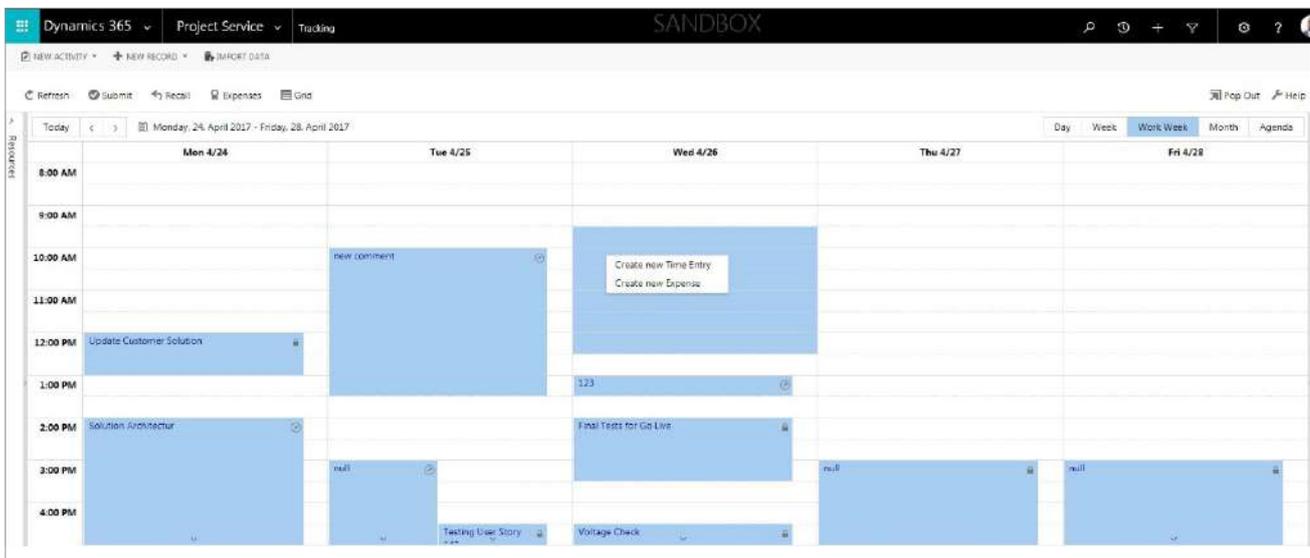
Each time entry requires a specific start and end time, its duration is calculated automatically and cannot be edited.

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**.

Time Entry

Expand Collapse Search

Name	Start Date	Due Date
Metropolitan Manufacturing		
Fitting and Commissioning on c...	4/18/2017	5/4/2017
Mechanical fitting	4/25/2017 12:00 AM	4/26/2017 11:59 AM
Mechanical fitting	4/25/2017 12:00 AM	4/26/2017 11:59 AM
John Adam	4/25/2017	4/26/2017
Electrical fitting	4/25/2017 12:00 AM	4/26/2017 11:59 AM
Electrical fitting	4/25/2017 12:00 AM	4/26/2017 11:59 AM
John Adam	4/25/2017	4/26/2017
MSG-Services		
CRM Workshop	4/24/2017	5/15/2017
Kick Off Meeting	4/24/2017 12:00 AM	4/26/2017 11:59 AM

Internal Comments

Start Date: 4/26/2017 9:30 AM

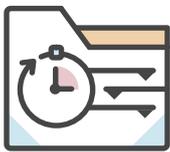
Due Date: 4/26/2017 12:30 PM

External Comments

Type: Work

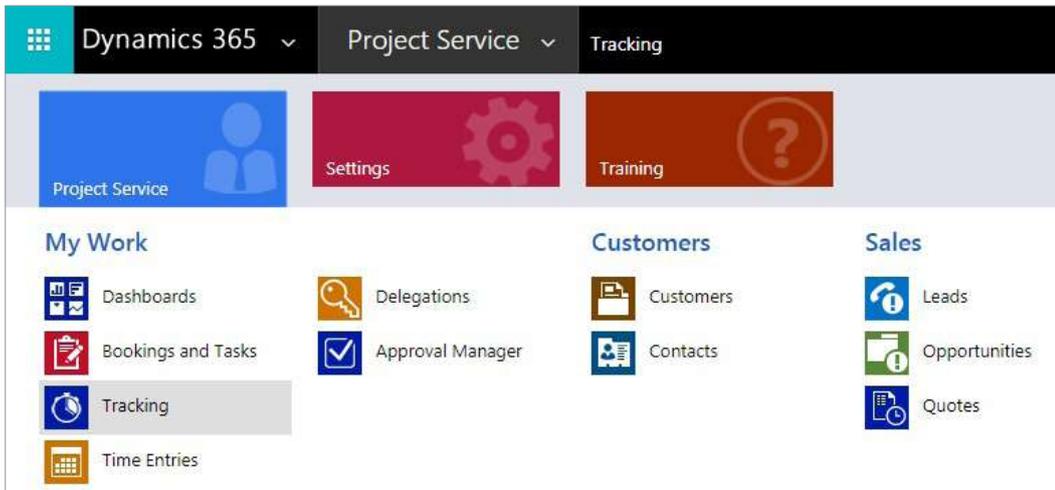
Role

Save Cancel

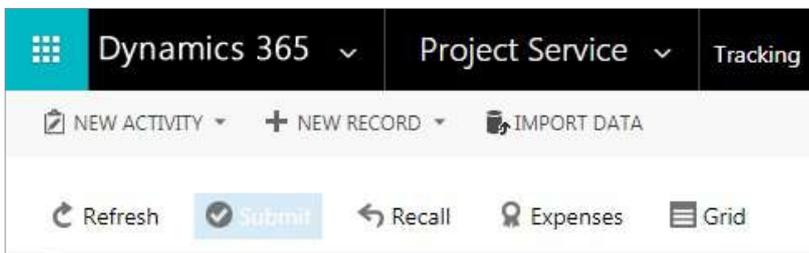


Submit a Time Entry

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.

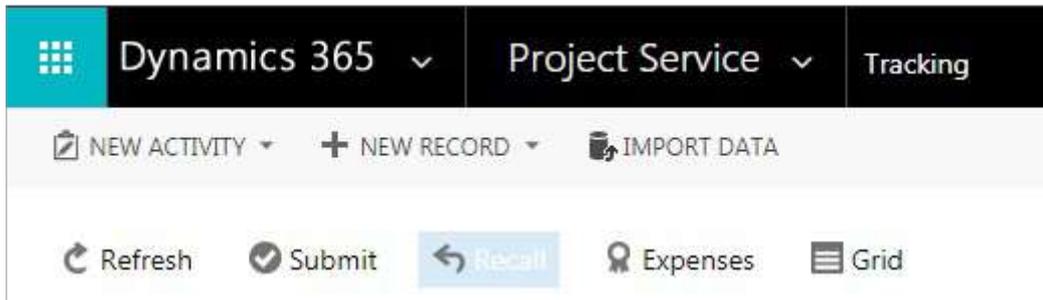
Submit Records						
Time Entry	Expense					
Start Date	Due Date	Duration	Type	Internal Comments	Project Task	Entry Status
4/25/2017	4/25/2017	4.5	Work		Kick Off Meeting	Returned
4/25/2017	4/25/2017	3.5	Work	new comment	Electrical fitting	Draft
4/24/2017	4/24/2017	6	Work	Solution Architectur	Architect	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

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**.

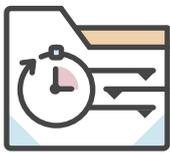


2. Select one or multiple time entries you wish to recall and choose **Recall** at the bottom right corner of the dialog windows. The selected entries will return to the draft stage and may then be edited again.

The screenshot shows the 'Recall Records' dialog window. It has a close button (X) in the top right corner. There are two tabs: 'Time Entry' (selected) and 'Expense'. The table below contains the following data:

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

A 'Recall' button is located at the bottom right corner of the dialog window.

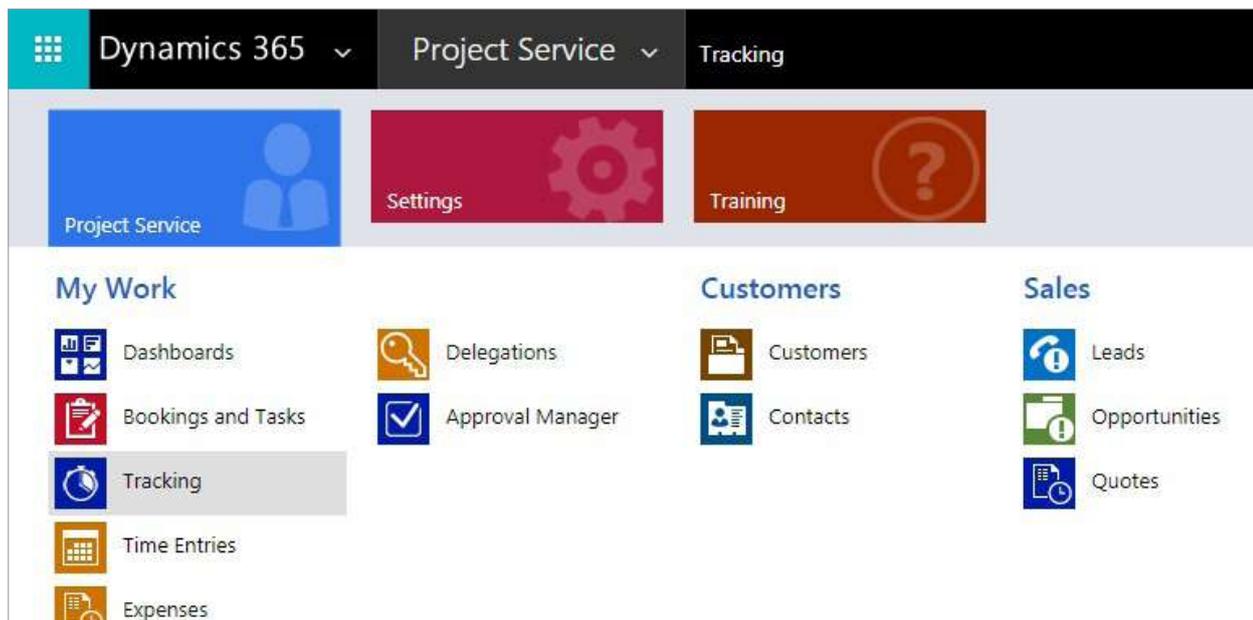


Expenses

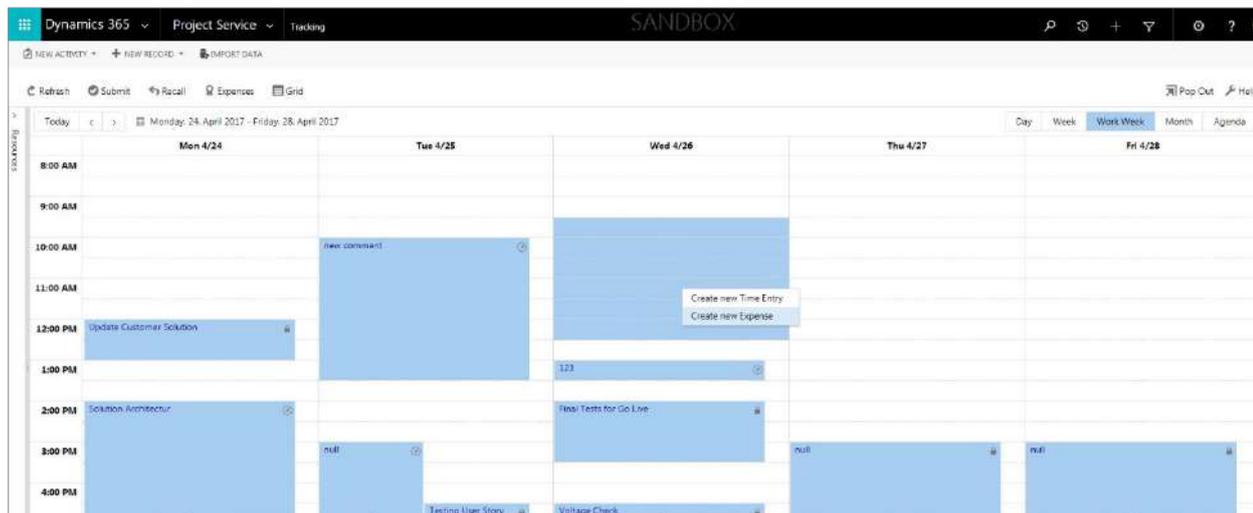
In addition to working time, you may also track project-related expenses. The following expense categories are available: Airfare, Car Rental, Hotel, Meal, Miscellaneous, Public Transportation and Taxi.

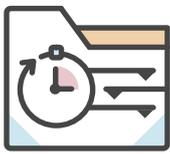
Create an Expense

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**.

The screenshot shows the 'Expense' form in Dynamics 365. On the left, there is a project tree with a table of tasks. The selected task is 'John Adam' under 'MSG-Services'. On the right, the form fields are filled with the following values:

Name	Start Date	Due Date
Metropolitan Manufacturing		
Fitting and Commissioning on c...	4/18/2017	5/4/2017
John Adam	4/21/2017	4/24/2017
MSG-Services		
CRM Workshop	4/24/2017	5/15/2017
John Adam	4/24/2017	4/26/2017

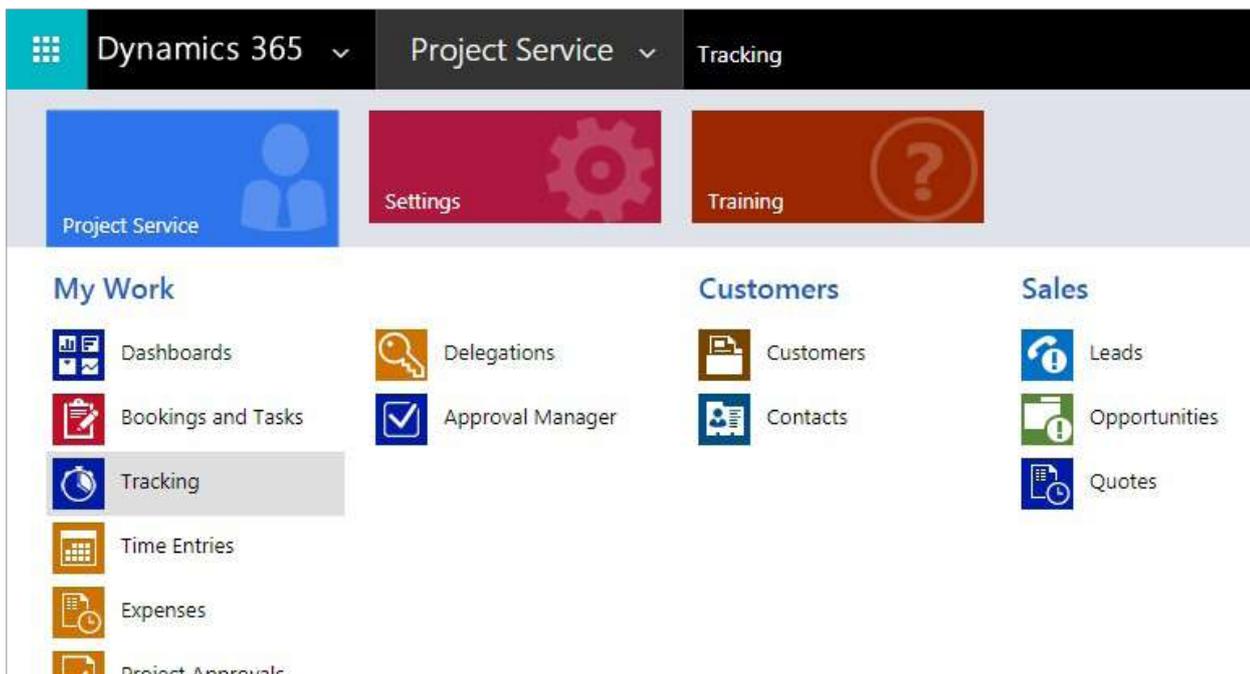
Form fields on the right:

- Expense Purpose: [Empty]
- Transaction Date: 4/26/2017
- Amount: 0.00
- External Comments: [Empty]
- Expense Category: Airfare

Buttons: Save, Cancel

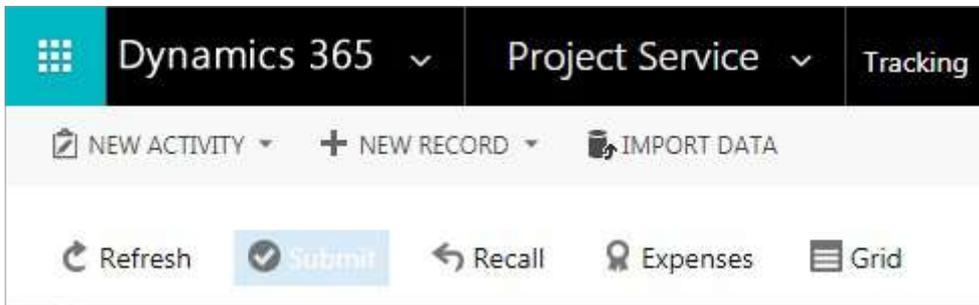
Submit an Expense

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

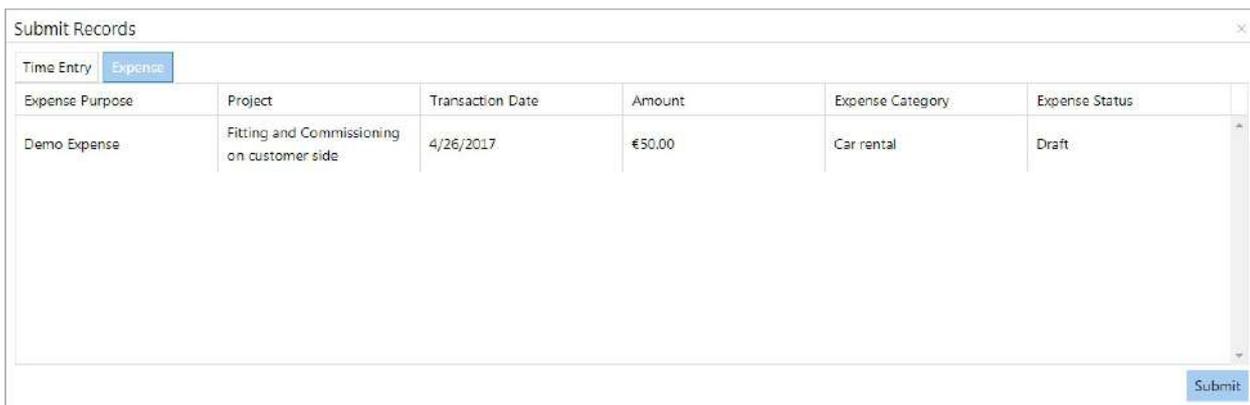




2. Click **Submit**.



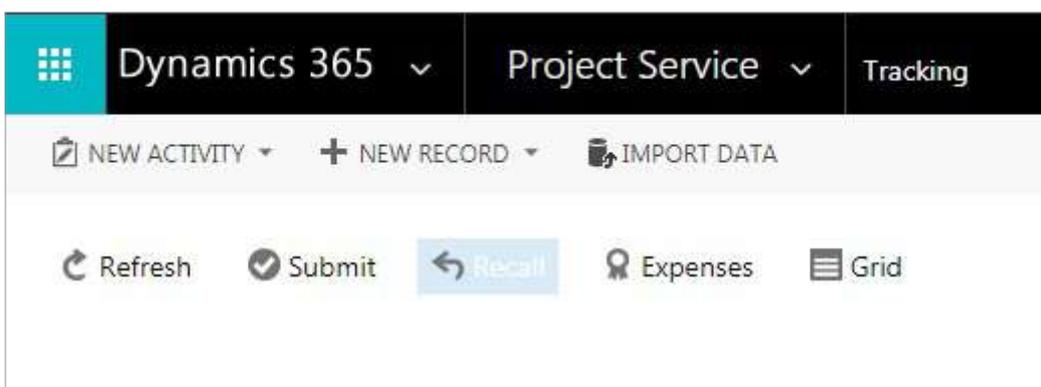
3. Switch to the **Expense** tab. In the list of draft expenses, select those you wish to submit via click. You may select multiple expenses at once by holding the CTRL key. Click **Submit** at the bottom right corner.

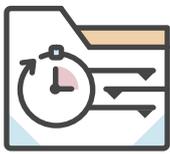


The status of the selected expenses will change from 'draft' to 'submitted'. These entries can no longer be edited (the status icon will change from a pen to a lock).

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**.





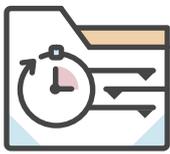
2. Select one or multiple time entries you wish to recall and choose **Recall** at the bottom right corner of the dialog windows. The selected entries will return to the draft stage and may then be edited again.

Recall Records					
Time Entry		Expense			
Expense Purpose	Project	Transaction Date	Amount	Expense Category	Expense Status
Demo Expense	Fitting and Commissioning on customer side	4/26/2017	€50.00	Car rental	Submitted

[Recall](#)

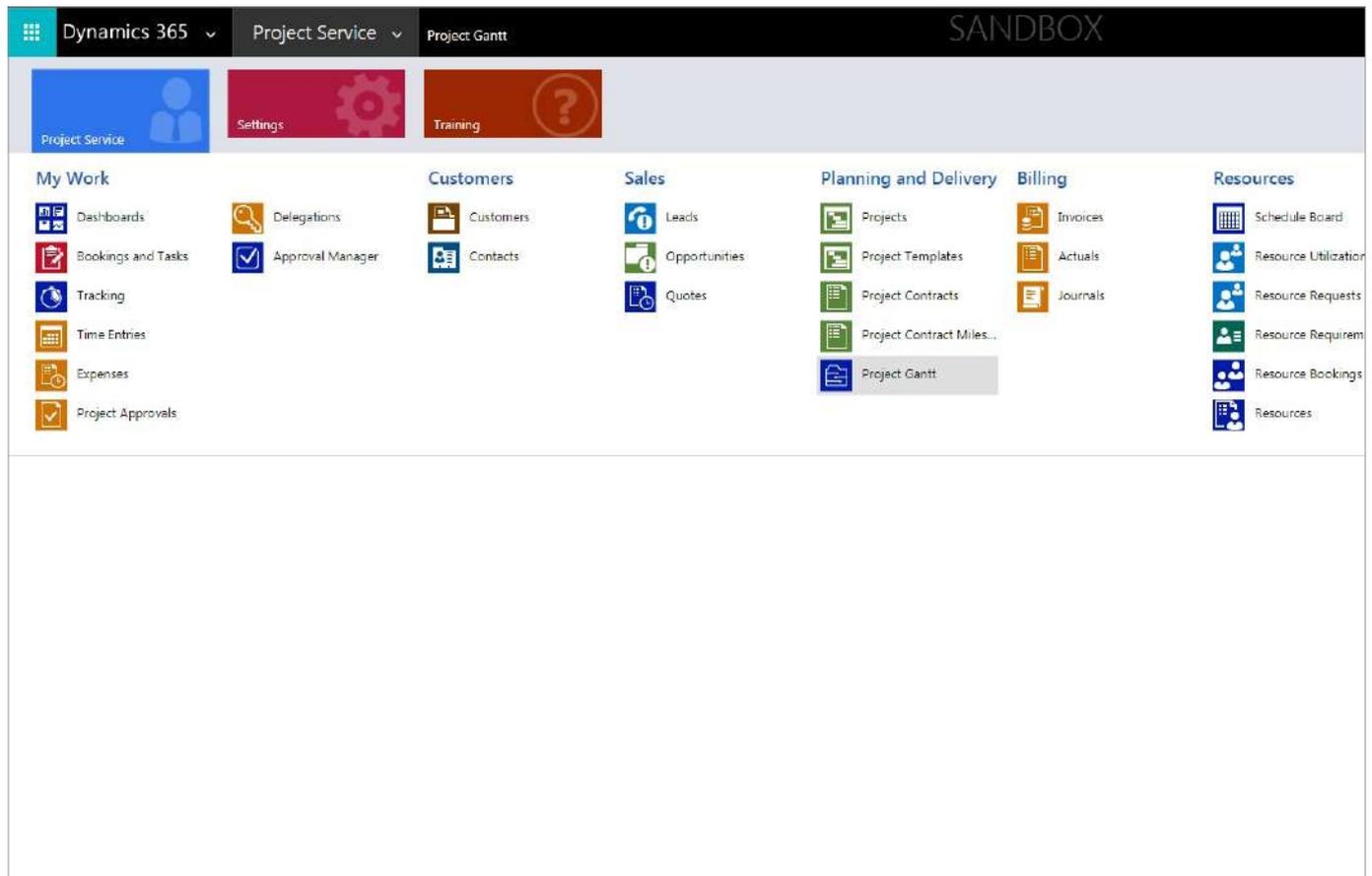
Project Gantt for Dynamics 365 for Project Service Automation

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.

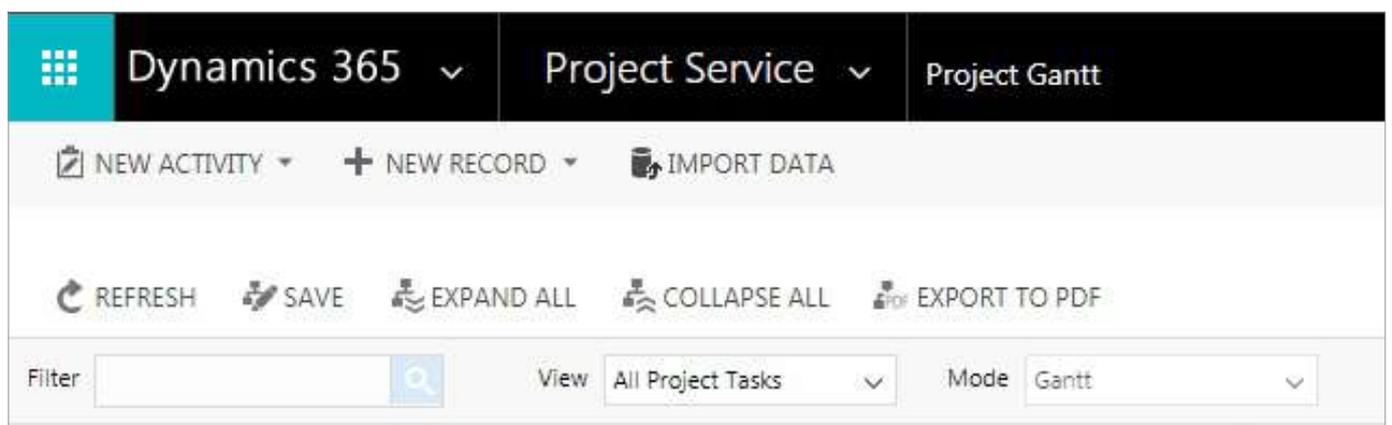


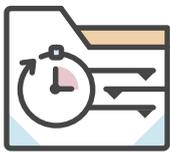
Display projects

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**.

Look Up Records

Look for:

Look in:

Search:

Account Name	Main Phone	Address 1: City
1. FC Nürnberg		Nuremberg
Bilfinger EMS		
Boehringer Ingelheim Pharma GmbH & Co. KG	+49 6132 77 0	Ingelheim
Coho Diagnostic	425-821-4885	Bothell
Datev eG.		Nürnberg
Febalium Health Services	425 225 7700	Bothell

1 - 23 (0 selected) Page 1

Selected records: (0) [Invert selection](#)

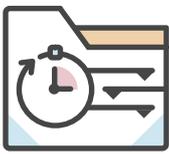
4. Click **Refresh**.

Dynamics 365 Project Service Project Gantt

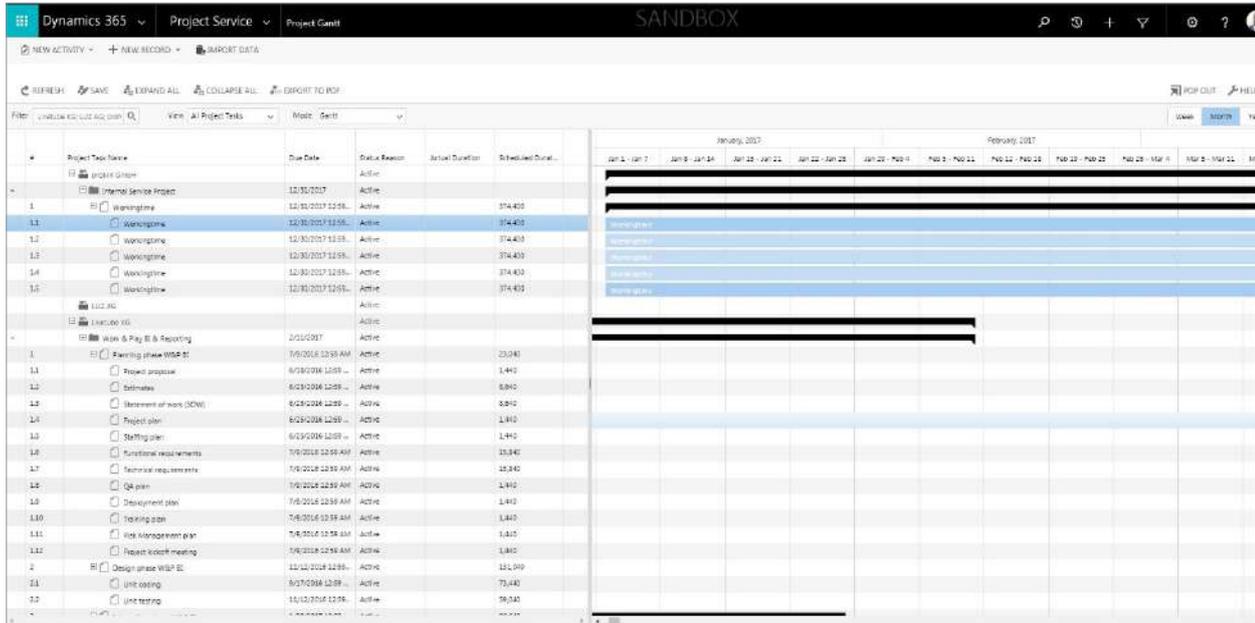
NEW ACTIVITY + NEW RECORD IMPORT DATA

REFRESH SAVE EXPAND ALL COLLAPSE ALL EXPORT TO PDF

Filter: Livetube KG; LUZ AG; prof View: All Project Tasks Mode: Gantt



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**.

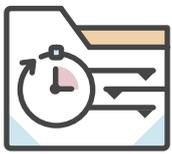
The screenshot shows the Dynamics 365 Project Service interface. The top navigation bar includes 'Dynamics 365', 'Project Service', and 'Project Gantt'. Below the navigation bar are buttons for 'NEW ACTIVITY', 'NEW RECORD', and 'IMPORT DATA'. A secondary bar contains 'REFRESH', 'SAVE', 'EXPAND ALL', 'COLLAPSE ALL', and 'EXPORT TO PDF'. The main area has a filter 'Livetube KG; LUZ AG; prof' and a view 'All Project Tasks' in 'Gantt' mode. A table with columns '#', 'Project Task Name', 'Due Date', 'Status Reason', 'Actual Duration', and 'Scheduled Durat...' is displayed. The second row is selected, and a context menu is open with options 'Open in CRM' and '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.

The 'Create project' dialog box is shown. It has a title bar with a close button. The form contains the following fields:

- Name:
- Start Date: with a calendar icon
- Estimated Finish Date: with a calendar icon
- Customer: with a search icon
- Project Manager: with a search icon
- Estimated Hours:

At the bottom right, there are 'OK' and 'Cancel' buttons.



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**.

The screenshot shows the Dynamics 365 Project Gantt interface. The top navigation bar includes 'Dynamics 365', 'Project Service', and 'Project Gantt'. Below the navigation bar are buttons for 'NEW ACTIVITY', 'NEW RECORD', and 'IMPORT DATA'. A secondary bar contains 'REFRESH', 'SAVE', 'EXPAND ALL', 'COLLAPSE ALL', and 'EXPORT TO PDF'. The main area has a filter 'Livetube KG; LUZ AG; proh' and a view mode set to 'All Project Tasks'. The Gantt chart displays a hierarchy of tasks. A context menu is open over the 'Internal Service Project' task, with 'Add child task' highlighted. The table below shows the task details.

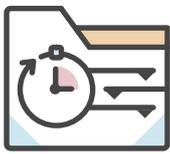
#	Project Task Name	Due Date	Status Reason	Actual Duration	Scheduled Durat...
	proMX GmbH		Active		
	Internal Service Project	12/31/2017	Active		
1	Workingtime	12/31/2017 12:59...	Active		374,400
1.1	Workingtime	12/31/2017 12:59...	Active		374,400
1.2	Workingtime	12/30/2017 12:59...	Active		374,400
1.3	Workingtime	12/30/2017 12:59...	Active		374,400
1.4	Workingtime	12/30/2017 12:59...	Active		374,400
1.5	Workingtime	12/30/2017 12:59...	Active		374,400

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

The 'Create task' dialog window is shown with the following fields:

- Is Milestone
- Project Task Name: Task
- Start Date: 1/2/2017
- Due Date: 12/31/2017
- Parent: Internal Service Project
- Role: (empty)
- Estimated Effort: 10,400.00

Buttons for 'OK' and 'Cancel' are located at the bottom right.



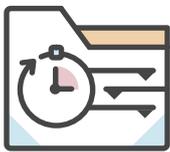
3. To assign a resource to a task, select the project task and right click to open the context menu. Select **Resources**.

The screenshot shows a Gantt chart interface for project management. The chart displays various tasks with their durations and scheduled dates. A context menu is open over the 'QA risk assessment' task, showing options like 'Open in CRM', 'Edit', 'Set Status Reason', 'Project Task', 'Resources', and 'Delete'. The 'Resources' option is highlighted.

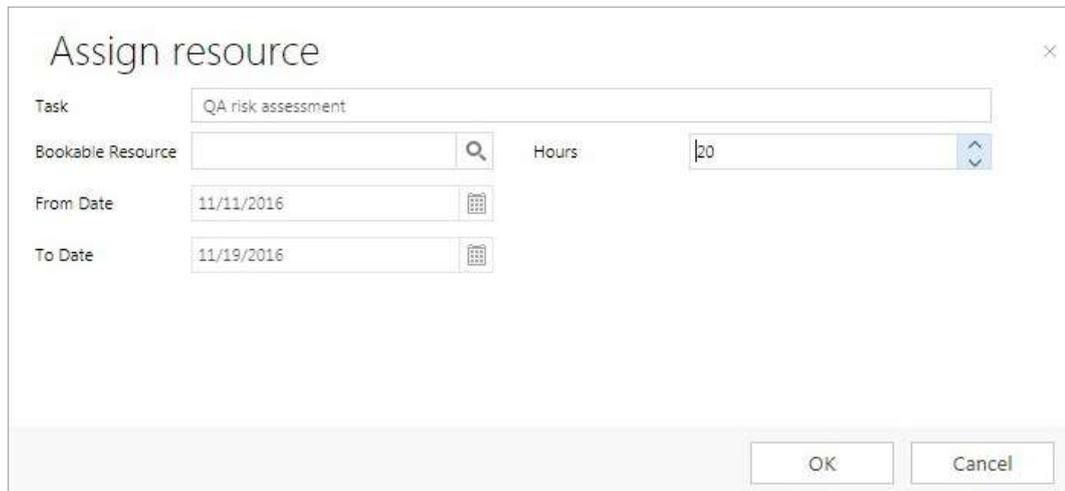
#	Project Task Name	Due Date	Status Reason	Actual Duration	Scheduled Dur...	Oct 28	Oct 30	Nov 5	Nov 6	Nov 22	Nov 18	Nov 19	Nov 20	Nov 26	Nov 27	Dec 3	Dec 4	Dec 10	Dec 11	Dec 17	Dec 18	Dec 24	Dec 25	Dec 31	Jan 1	Jan 7
11	Project proposal	8/25/2018 11:59 ...	Active	1,440	1,440																					
12	Estimates	8/29/2018 11:59 ...	Active	8,840	8,840																					
13	Statement of work (SOW)	8/29/2018 11:59 ...	Active	8,840	8,840																					
14	Project plan	8/29/2018 11:59 ...	Active	1,440	1,440																					
15	Starting plan	8/29/2018 11:59 ...	Active	1,440	1,440																					
16	Functional requirements	7/9/2018 12:59 AM	Active	15,840	15,840																					
17	Technical requirements	7/9/2018 12:59 AM	Active	15,840	15,840																					
18	QA plan	7/9/2018 12:59 AM	Active	1,440	1,440																					
19	Deployment plan	7/9/2018 12:59 AM	Active	1,440	1,440																					
10	Training plan	7/9/2018 12:59 AM	Active	1,440	1,440																					
111	Risk Management plan	7/9/2018 12:59 AM	Active	1,440	1,440																					
144	Project kickoff meeting	7/9/2018 12:59 AM	Active	1,440	1,440																					
2	Design phase W&P B	11/14/2018 12:59 ...	Active	121,040	121,040																					
21	Unit testing	9/17/2018 11:59 ...	Active	73,840	73,840																					
22	Unit testing	11/12/2018 12:59 ...	Active	99,040	99,040																					
3	Integration phase W&P B	1/28/2017 12:59 ...	Active	80,640	80,640																					
31	Integration testing	1/28/2017 12:59 ...	Active	80,640	80,640																					
32	QA risk assessment	11/12/2018 12:59 ...	Active	8,840	8,840																					
38	Training manual	11/12/2018 12:59 ...	Active	8,840	8,840																					
4	Deployment phase W&P B	2/11/2017 12:59 ...	Active	99,040	99,040																					
41	System training	11/12/2018 12:59 ...	Active	99,040	99,040																					
42	Go live readiness assessment	2/11/2017 12:59 AM	Active	8,840	8,840																					
43	Deployment	2/11/2017 12:59 ...	Active	8,840	8,840																					
44	Client acceptance	2/11/2017 12:59 ...	Active	1,440	1,440																					
5	Post-deployment phase W&P B	2/11/2017 12:59 ...	Active	1,440	1,440																					
31	Project closure report	2/11/2017 12:59 ...	Active	1,440	1,440																					
12	Project completion agreement	2/11/2017 12:59 ...	Active	1,440	1,440																					

4. Choose **New**.

The screenshot shows the 'Manage resources' dialog box. The task is 'QA risk assessment'. Below the task name is a table with columns for 'Bookable Resource' and 'Hours'. The table is currently empty. At the bottom of the dialog, there are buttons for 'New', 'Edit', 'Delete', 'Restore', and 'Close'.



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

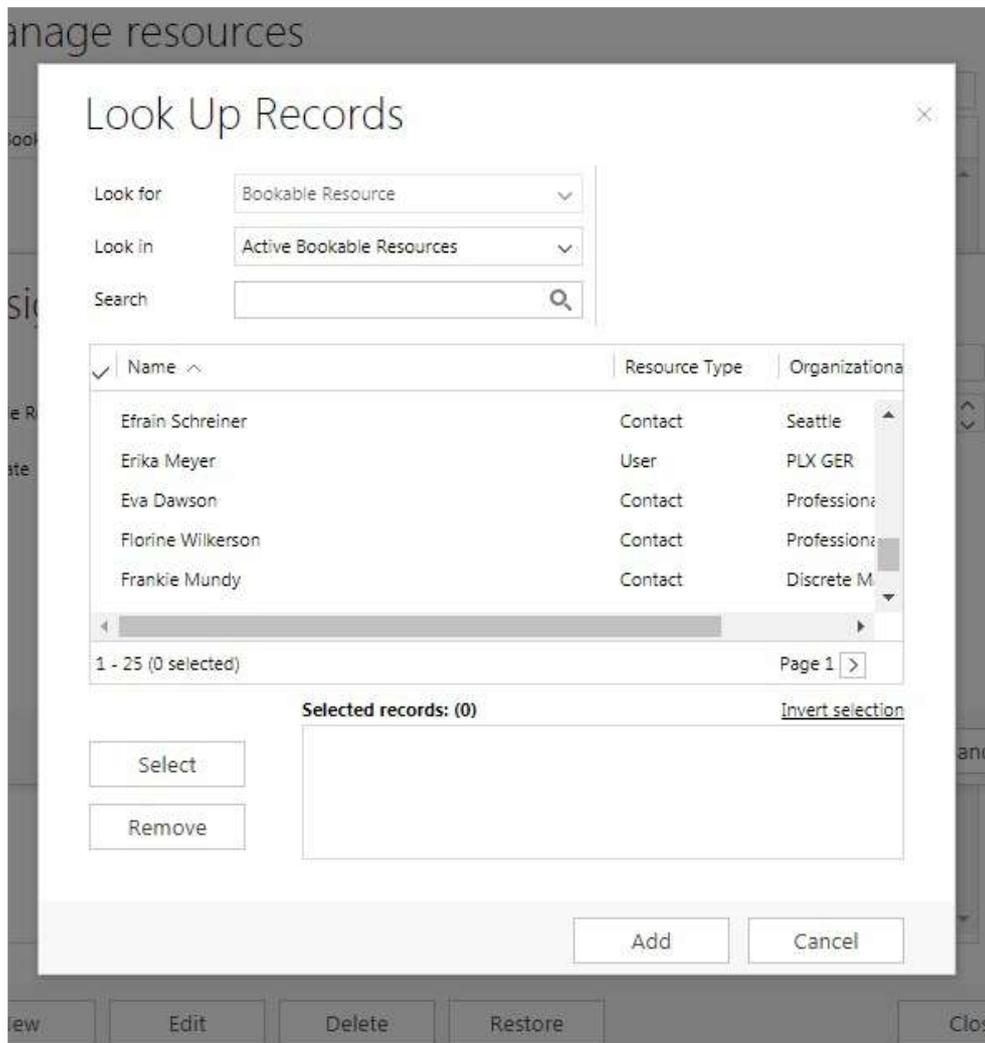


The 'Assign resource' dialog box contains the following fields:

- Task: QA risk assessment
- Bookable Resource: [Empty field with magnifying glass icon]
- Hours: 20
- From Date: 11/11/2016
- To Date: 11/19/2016

Buttons: OK, Cancel

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



The 'Look Up Records' dialog box contains the following fields:

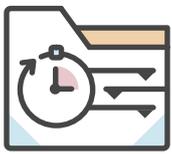
- Look for: Bookable Resource
- Look in: Active Bookable Resources
- Search: [Empty field with magnifying glass icon]

Name	Resource Type	Organization
Efrain Schreiner	Contact	Seattle
Erika Meyer	User	PLX GER
Eva Dawson	Contact	Professiona
Florine Wilkerson	Contact	Professiona
Frankie Mundy	Contact	Discrete M

1 - 25 (0 selected) Page 1

Selected records: (0) [Invert selection](#)

Buttons: Select, Remove, Add, Cancel

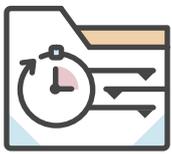


7. In the Assign resource window, click **OK**.

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

The screenshot shows a table with three rows and two columns. The first row is a header with a blue background. The second row has a blue background for the first cell and a white background for the second cell. The third row has a blue background for the first cell and a white background for the second cell.

Integration testing	
QA risk assessment	Erika Meyer
Training manual	

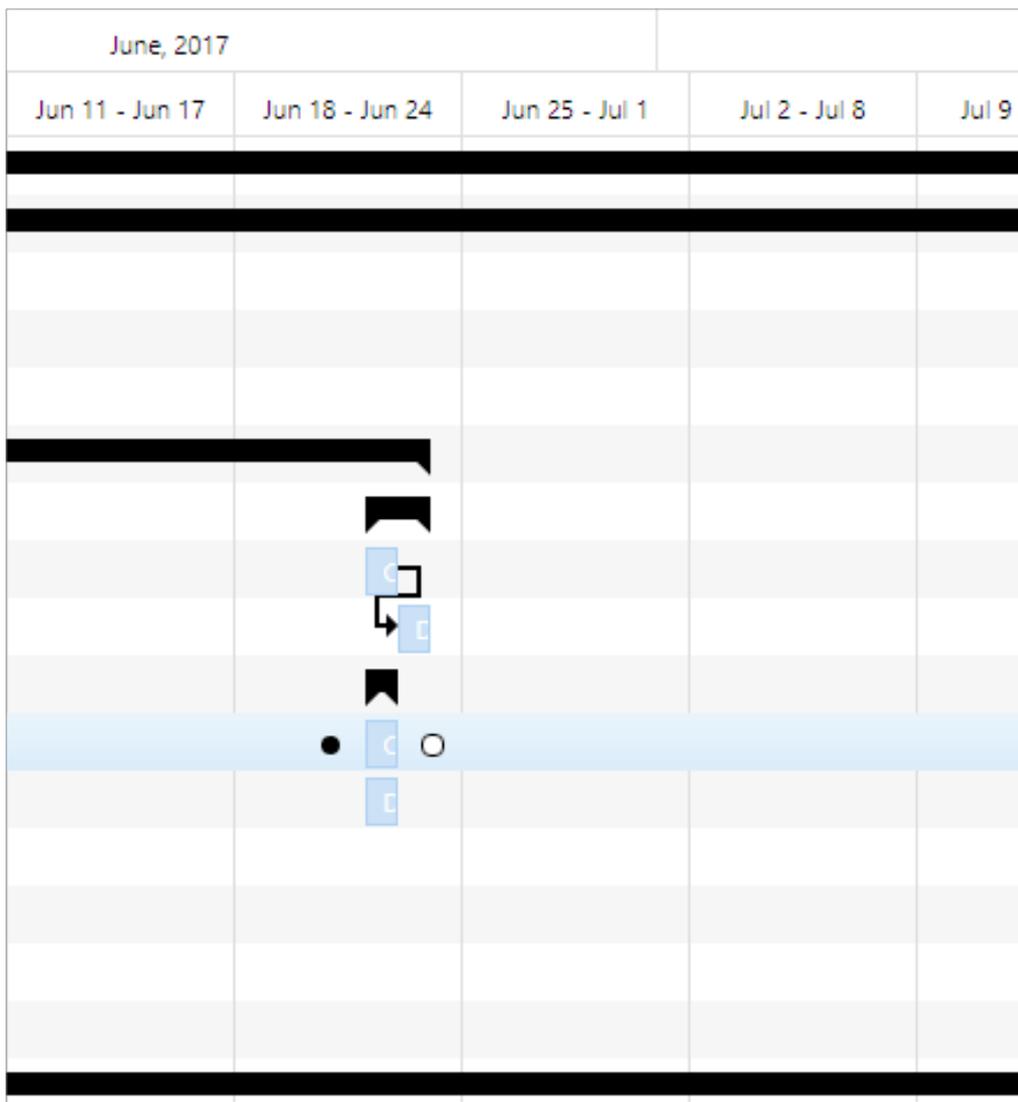


Create a project task dependency

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).

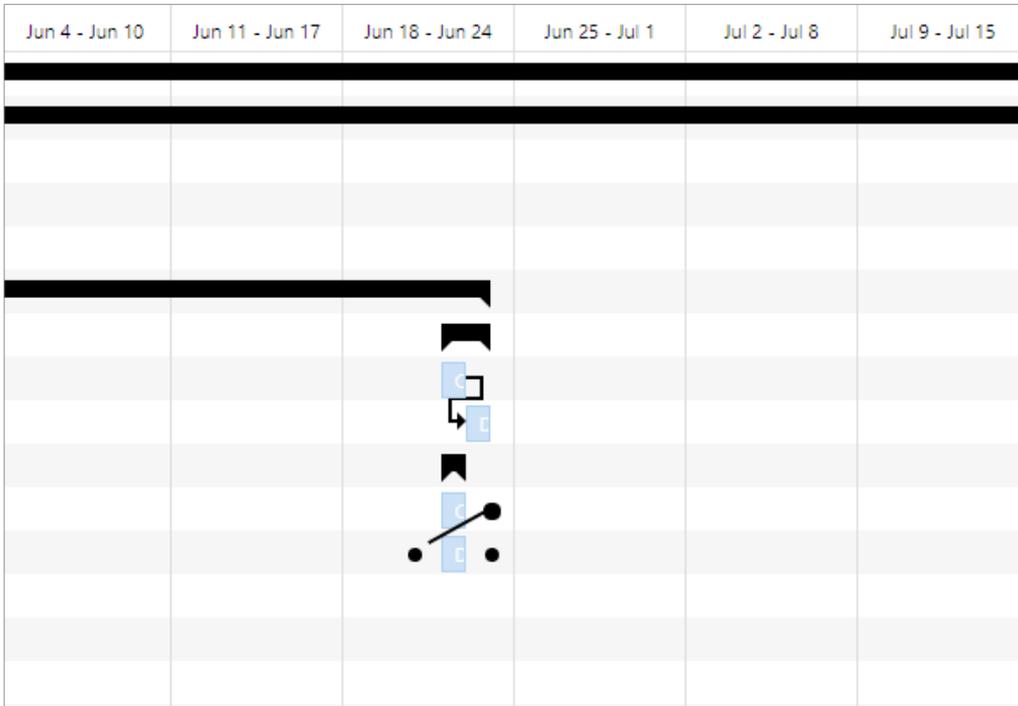
1. To create a dependency between two project tasks, navigate to the Gantt chart on the right-hand side of the screen.

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.

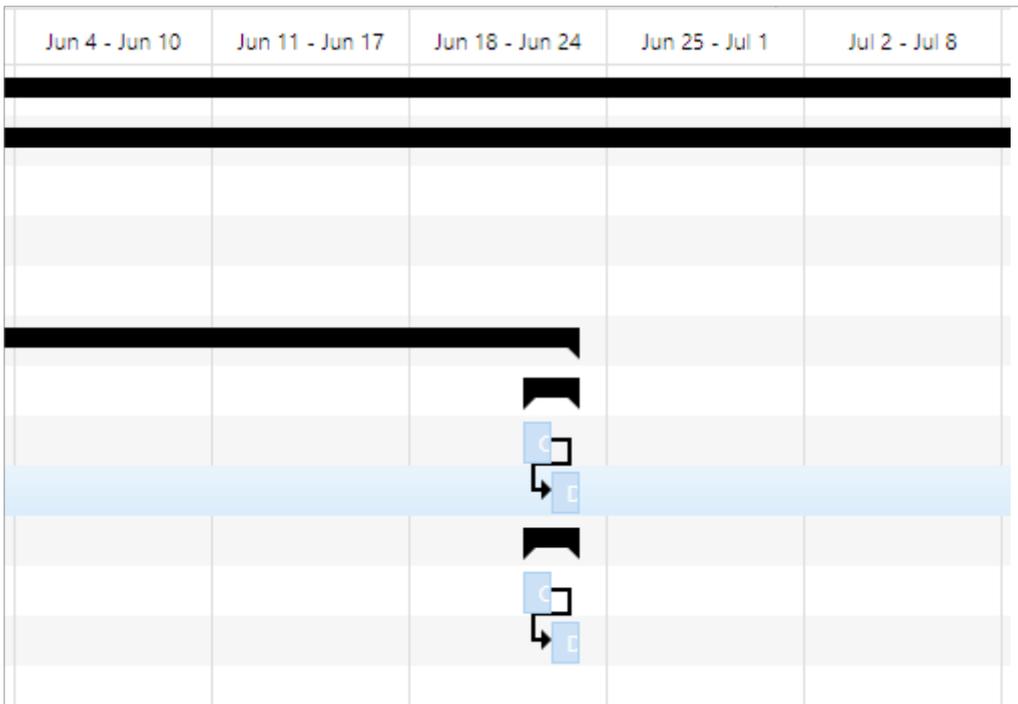




Click one of the circles, hold the mouse button and drag towards one of the circles of the second project task.



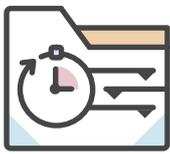
The resulting dependency will be depicted as an arrow.



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

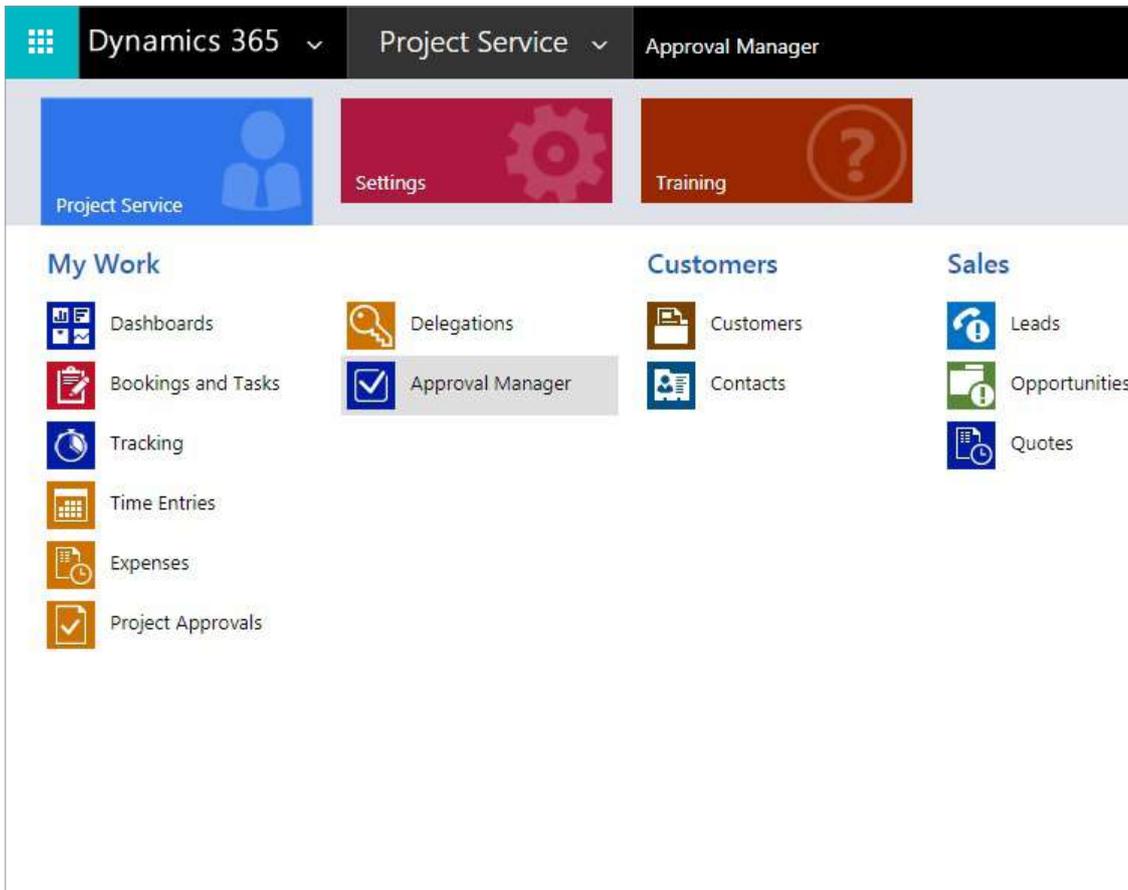
Approval Manager for Dynamics 365 for Project Service Automation

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.



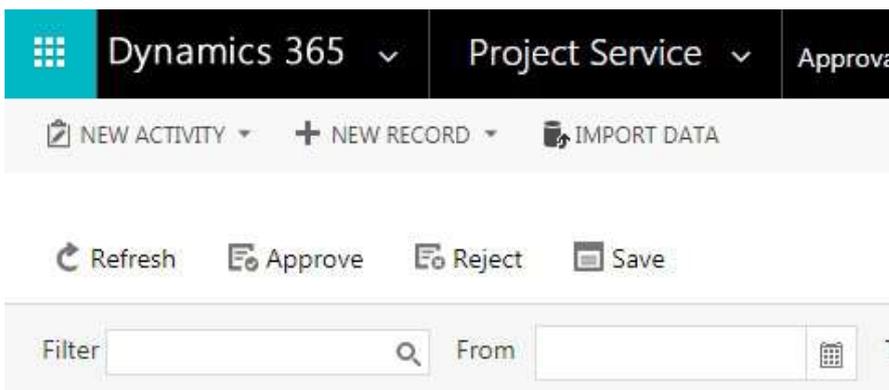
Approve or Reject Time Entries

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**.





Look Up Records

Look for:

Look in:

Search:

Name	Stage Name	Customer	Start Date	Estimate
CRM Default Implementation	Quote	MSG-Services	4/20/2017	
CRM Workshop	Plan	MSG-Services	4/24/2017	
Development Work	Quote	MSG-Services	5/1/2017	
E Risk Management Plan	Plan	Novartis AG	6/30/2017	
Einführung neues Medikament Deliver		Tennison AG	6/28/2017	
Fitnes und Gesundheits...	Deliver	McAfee Inc	4/18/2017	

1 - 19 (0 selected) Page 1

Selected records: (0) Invert selection

Select

Remove

Add Cancel

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

Time Entries		Expenses			
Date	Project	Project Task	Role	Type	Entry Status
2/14/2017	Tech Parts Shop Fl...	Unit testing	Team Member	Work	Draft
2/21/2017	Projekt Service Aut...	Kick Off Meeting	Project Manager	Work	Approved
3/6/2017	Projekt Service Aut...	Development	Project Manager	Work	Approved
3/6/2017	Projekt Service Aut...	Development	Project Manager	Work	Approved
3/7/2017	Projekt Service Aut...	Documentation	Project Manager	Work	Approved
3/7/2017	Projekt Service Aut...	Development	Project Manager	Work	Approved
3/8/2017	Projekt Service Aut...	Requirements Wor...	Project Manager	Work	Approved
3/9/2017	Projekt Service Aut...	Requirements Wor...	Project Manager	Work	Approved
3/9/2017	Projekt Service Aut...	Requirements Wor...	Project Manager	Work	Approved
3/10/2017	Projekt Service Aut...	Development	Project Manager	Work	Approved
3/10/2017	Projekt Service Aut...	Development	Project Manager	Work	Approved
3/10/2017	Projekt Service Aut...	Requirements Wor...	Project Manager	Work	Approved
3/13/2017	Tech Parts Shop Fl...	Unit testing	Team Member	Work	Approved
3/13/2017	Tech Parts Shop Fl...	Training manual	Team Member	Work	Approved



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.

Date	Project	Project Task	Role	Type	Entry Status
2/14/2017	Tech Parts Shop F...	Unit testing	Team Member	Work	Draft
2/21/2017	Projekt Service Aut...	Kick Off Meeting	Project Manager	Work	Approved
3/6/2017	Projekt Service Aut...	Development	Project Manager	Work	Approved
3/6/2017	Projekt Service Aut...	Development	Project Manager	Work	Approved
3/7/2017	Projekt Service Aut...	Documentation	Project Manager	Work	Approved
3/7/2017	Projekt Service Aut...	Development	Project Manager	Work	Approved
3/8/2017	Projekt Service Aut...	Requirements Wor...	Project Manager	Work	Approved
3/9/2017	Projekt Service Aut...	Requirements Wor...	Project Manager	Work	Approved
3/9/2017	Projekt Service Aut...	Requirements Wor...	Project Manager	Work	Approved
3/10/2017	Projekt Service Aut...	Development	Project Manager	Work	Approved
3/10/2017	Projekt Service Aut...	Development	Project Manager	Work	Approved
3/10/2017	Projekt Service Aut...	Requirements Wor...	Project Manager	Work	Approved
3/13/2017	Tech Parts Shop F...	Unit testing	Team Member	Work	Approved
3/13/2017	Tech Parts Shop F...	Training manual	Team Member	Work	Approved
3/13/2017	Projekt Service Aut...	Documentation	Project Manager	Work	Approved
3/14/2017	Tech Parts Shop F...	System training	Team Member	Work	Approved
3/14/2017	Tech Parts Shop F...	Unit testing	Team Member	Work	Approved

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**.

Date	Project	Project Task	Role	Type	Entry Status	
<input checked="" type="checkbox"/>	6/7/2017	IT-Governance	c development	Architect	Work	Submitted
<input checked="" type="checkbox"/>	4/26/2017	Fitting and Commi...	Electrical fitting	Project Manager	Work	Submitted
<input type="checkbox"/>	4/26/2017	Fitting and Commi...	Mechanical fitting	Project Manager	Work	Draft
<input type="checkbox"/>	4/25/2017	Tech Parts Shop F...	Unit testing	Team Member	Work	Approved
<input type="checkbox"/>	4/25/2017	Fitting and Commi...	Electrical fitting	Project Manager	Work	Draft
<input type="checkbox"/>	4/24/2017	Tech Parts Shop F...	Training manual	Team Member	Work	Approved
<input type="checkbox"/>	4/18/2017	Fitting and Commi...	Planning Phase	Project Manager	Work	Draft

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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