

Project Gantt for Dynamics 365 Project Service Automation

User Guide



Project Gantt
for Dynamics 365
Project Service Automation

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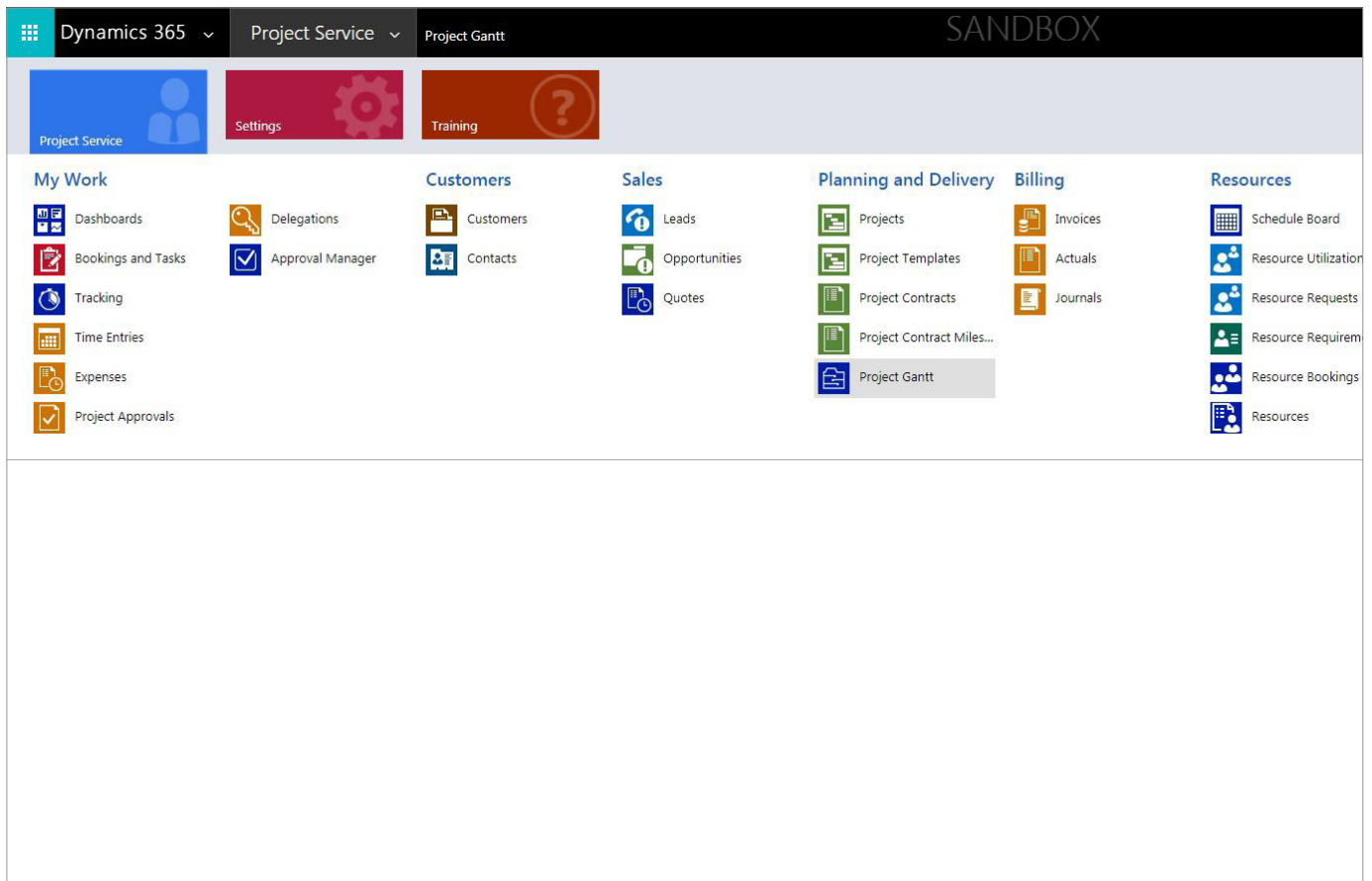
Project Gantt for Dynamics 365 Project Service Automation

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

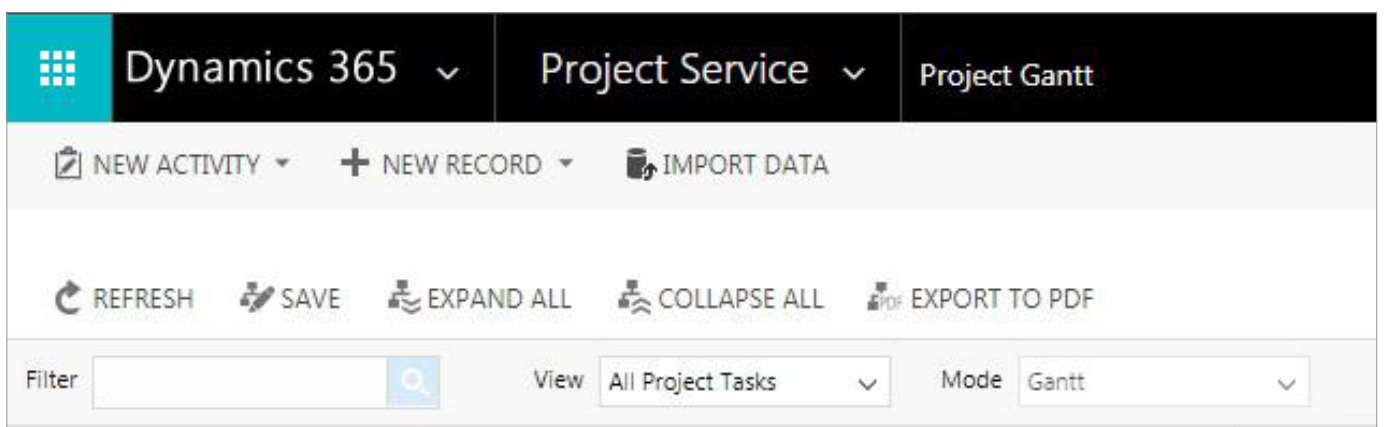


Display projects

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

Account

Look in

My Active Accounts

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
Excellence Health Services	425-821-4885	Bothell

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Select

Remove

Selected records: (0)

Invert selection

Add

Cancel

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; pro

View

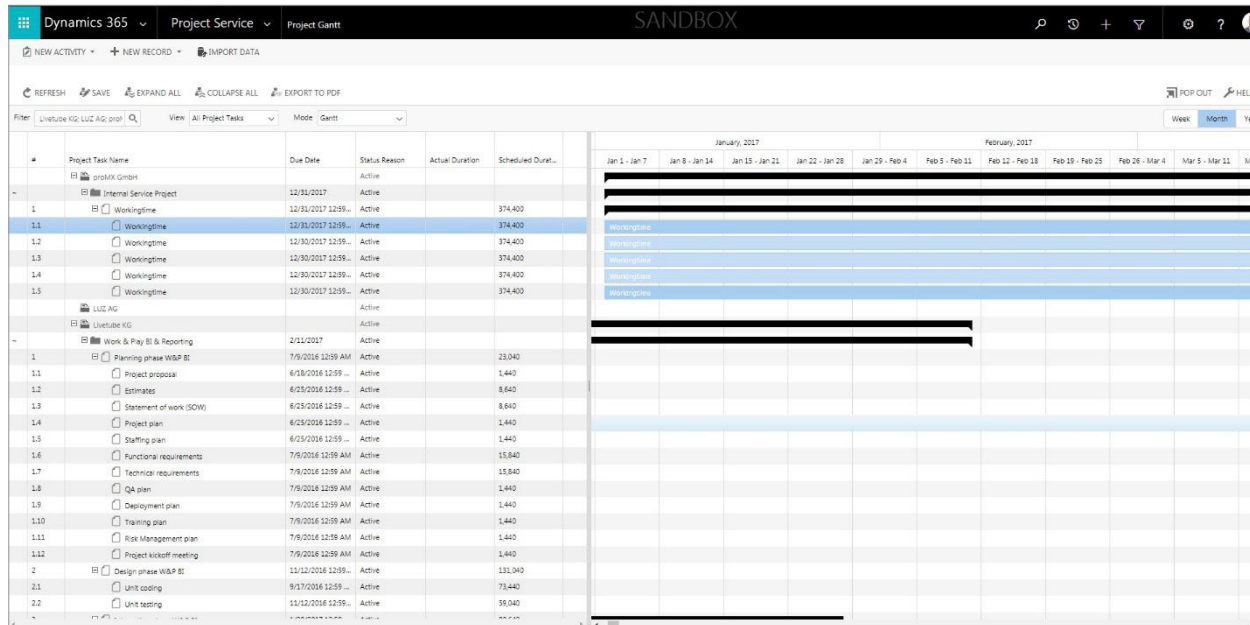
All Project Tasks

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 Project Gantt interface for Dynamics 365. 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 toolbar contains 'REFRESH', 'SAVE', 'EXPAND ALL', 'COLLAPSE ALL', and 'EXPORT TO PDF'. The main area has a filter bar with 'Livetube KG; LUZ AG; pro...' and a 'View' dropdown set to 'All Project Tasks'. The 'Mode' dropdown is set to 'Gantt'. A table of project tasks is displayed with columns: '#', 'Project Task Name', 'Due Date', 'Status Reason', 'Actual Duration', and 'Scheduled Durat...'. The table contains three rows, with the second row selected. A right-click context menu is open over the selected row, showing 'Open in CRM' and 'Add new project' options.

#	Project Task Name	Due Date	Status Reason	Actual Duration	Scheduled Durat...
	proMX GmbH		Active		
	LUZ AG		Active		
	LUZ AG		Active		

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 screenshot shows the 'Create project' dialog box. The form includes the following fields:

- Name: New project
- Start Date: 7/13/2017
- Estimated Finish Date: 7/13/2017
- Customer: LUZ AG
- Project Manager: (empty)
- Estimated Hours: (empty)

The 'OK' and 'Cancel' buttons are located at the bottom right of the dialog box.



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**.

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; proh View All Project Tasks Mode Gantt						
#	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**.

Create task

☐ Is Milestone

Project Task NameTask

Start Date1/2/2017

Due Date12/31/2017

Role

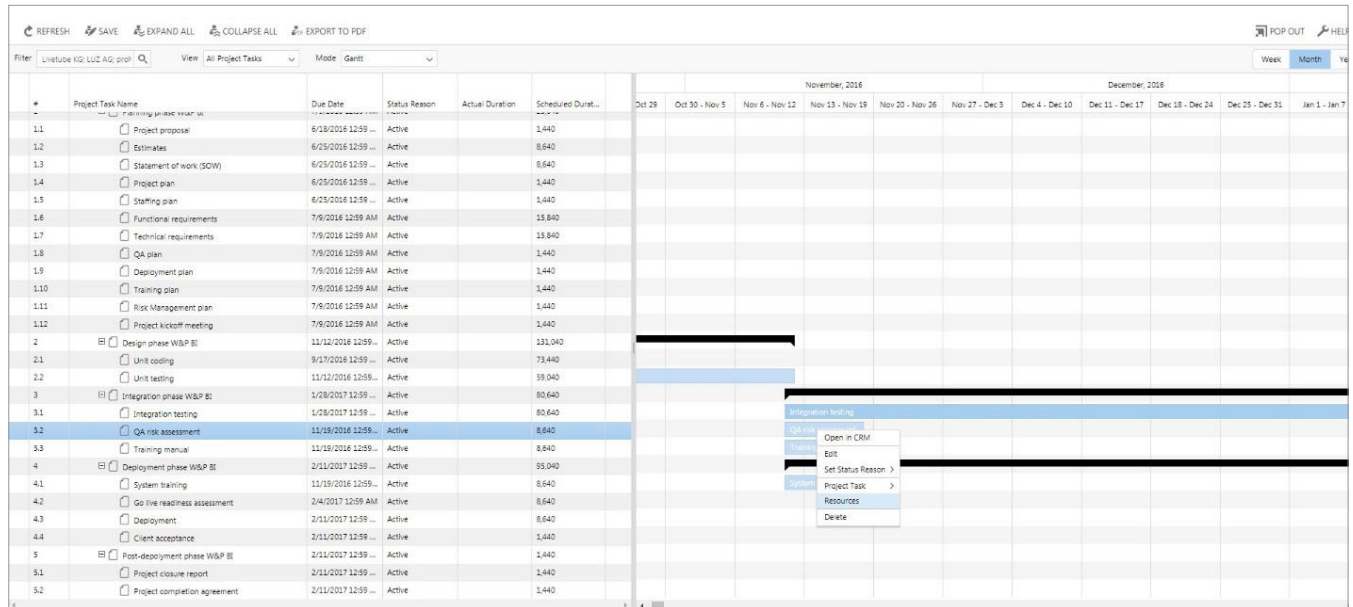
ParentInternal Service Project

Estimated Effort10,400.00

OKCancel



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**.

The screenshot shows the 'Manage resources' dialog box. The 'Task' field is set to 'QA risk assessment'. Below the task field, there is a table with two columns: 'Bookable Resource' and 'Hours'. The 'New' button is highlighted in the bottom left corner.



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 a 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 shows a search for 'Bookable Resource' in 'Active Bookable Resources'. The search results table is as follows:

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

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).

Integration testing	
QA risk assessment	Erika Meyer
Training manual	

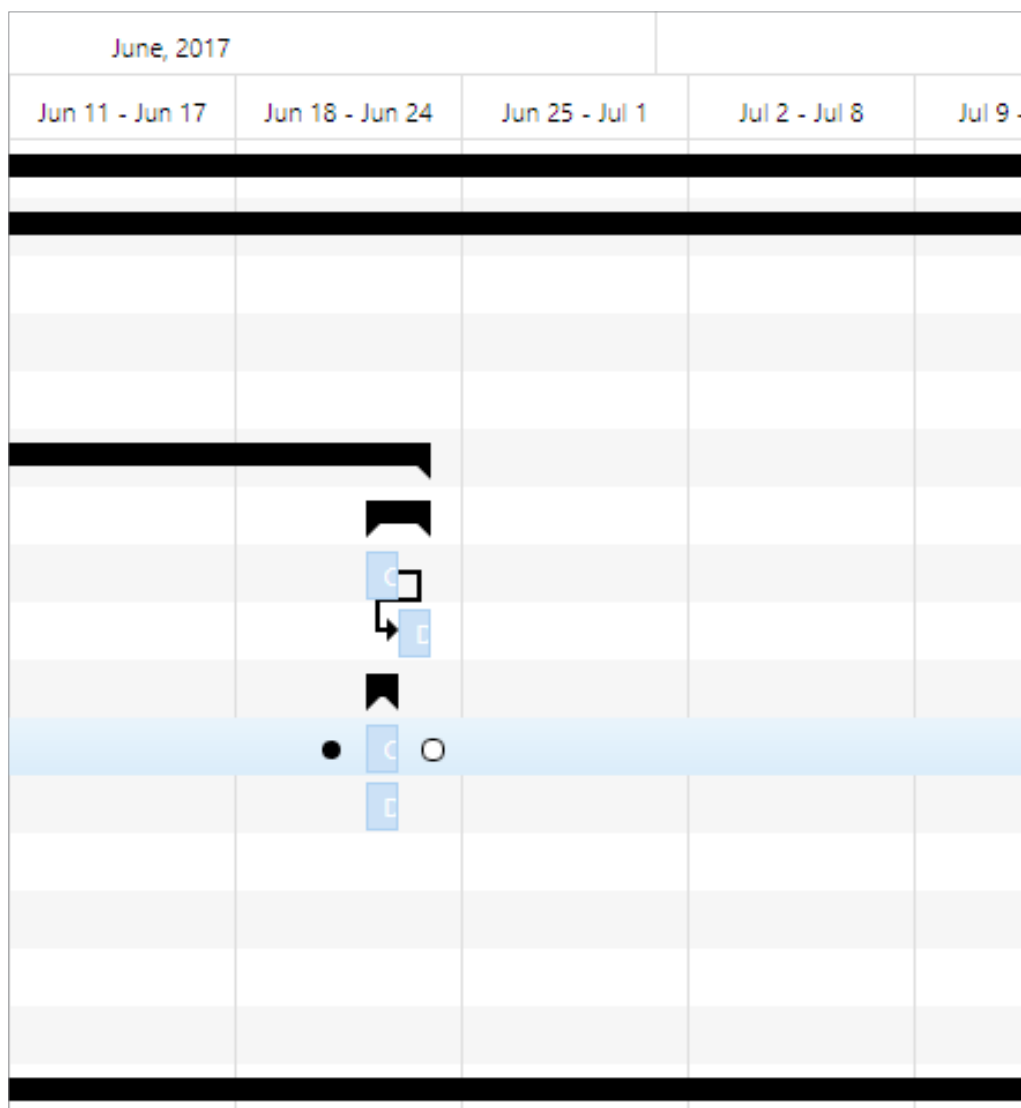


Create a project task dependency

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).

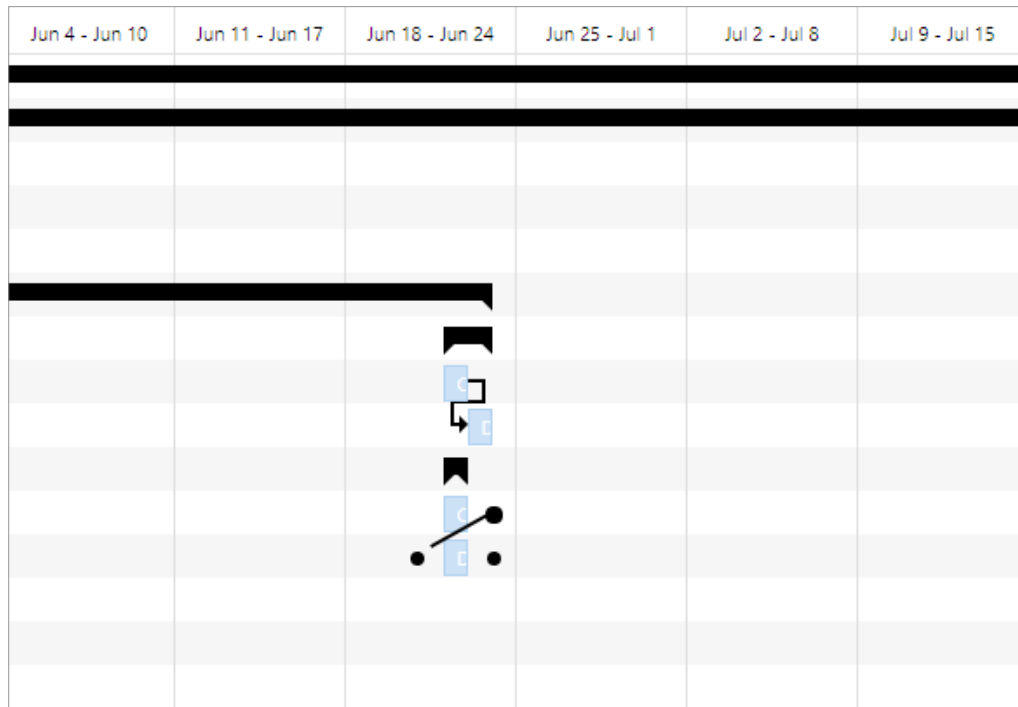
1. To create a dependency between two project tasks, navigate to the Gantt chart on the right-hand side of the screen.

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.

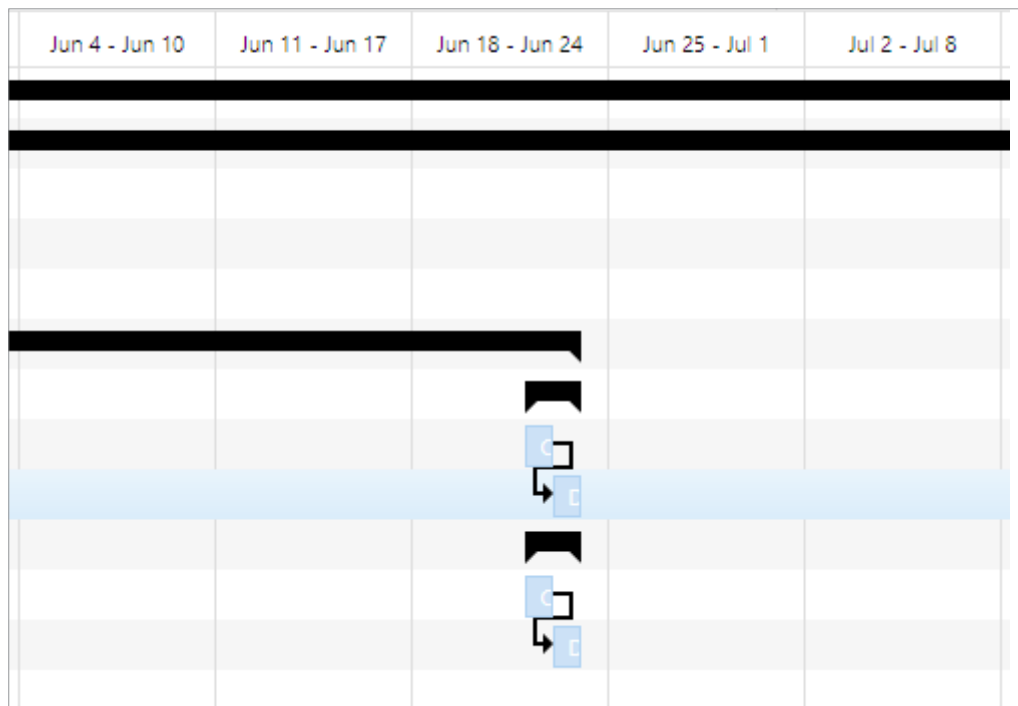




Click one of the circles, hold the mouse button and drag towards one of the circles of the second project task.



The resulting dependency will be depicted as an arrow.



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

Contact

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

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