



# proRM Fast Start

Client User Guide

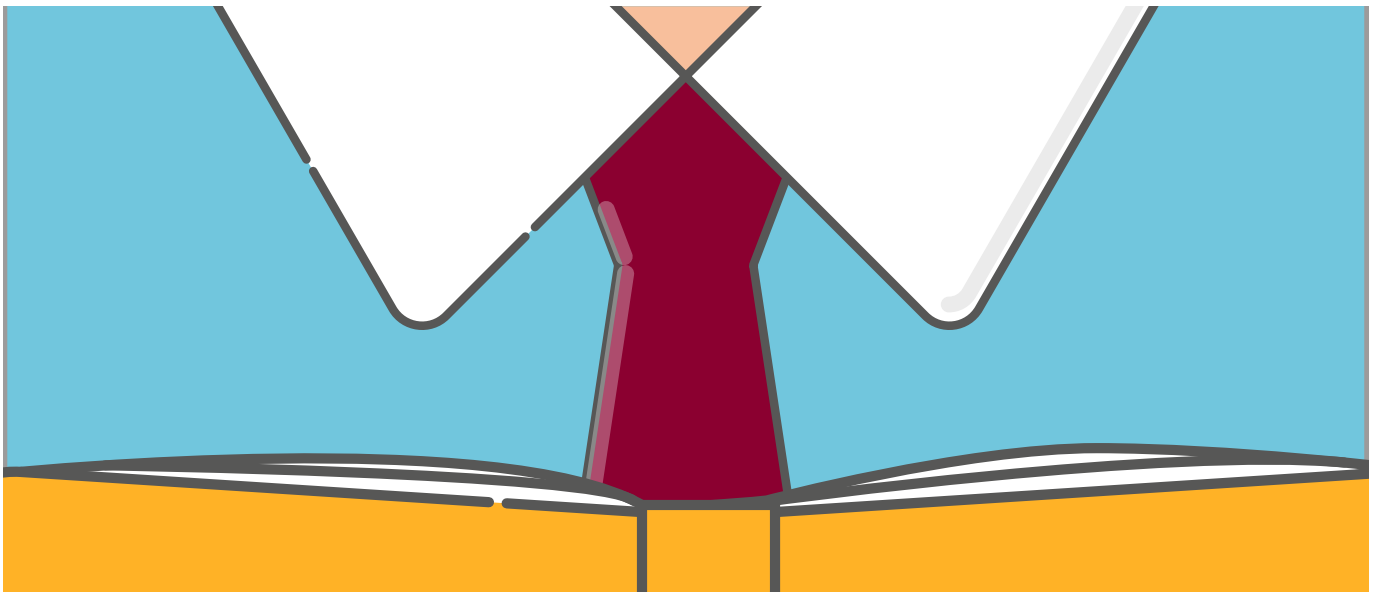
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# 1. Introduction

This guide gives detailed functionality description offered by proRM Fast Start for CRM in Microsoft Dynamics 365.

The Product is initiated and developed by proMX GmbH, Germany - in order to reach us, please visit our [contact page](#).

## 1.1 What is proRM Fast Start?

proRM Fast Start provides an essential add-on to CRM in Microsoft Dynamics 365 Online in project management area. Create new Projects based on Quotes, Orders, and Opportunities, assign Employees based on Skills to individual Tasks.

proRM Fast Start includes HTML applications offering Time Entry and Expense Tracking functionality for every Employee in the company, and a Project Gantt application to plan and structure the Project processes.

Based on above mentioned entries project managers, team leaders, and CEO's are able to use reporting from [Microsoft Power BI](#).

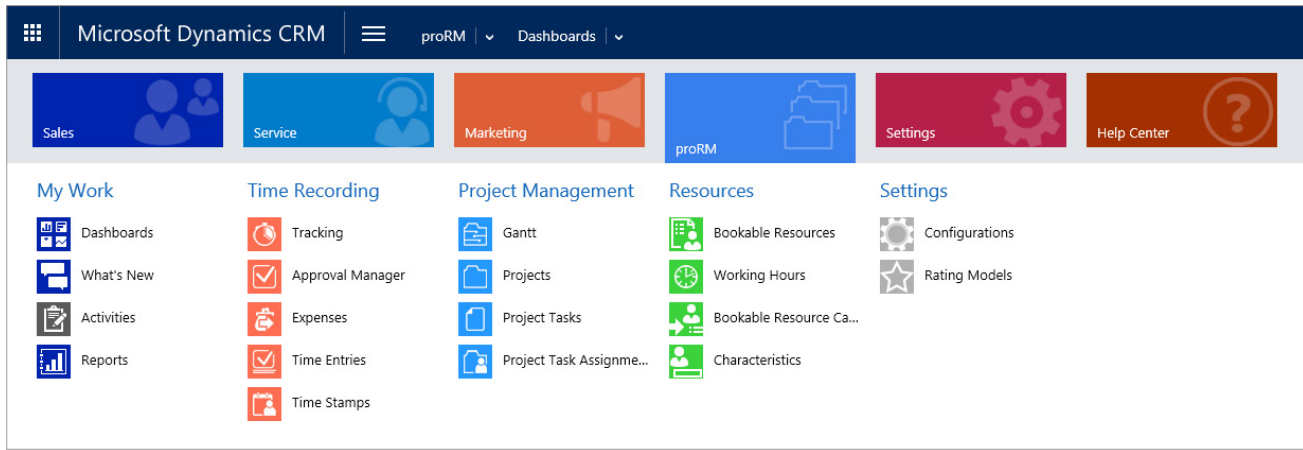
## 1.2 proRM Fast Start Installation

The proRM Fast Start extension will be available via Microsoft [AppSource](#) or on [proRM Business Solutions website](#).

For further information, please visit our [contact page](#).

### 1.3 proRM Fast Start Navigation

Once proRM Fast Start is installed to CRM in Microsoft Dynamics 365 Environment an additional area called 'proRM' will be added to the existing Sitemap:



The proRM Fast Start navigation area is divided into five Groups:

#### My Work

- Dashboards
- What's New
- Activities
- Reports

The My Work group displays related CRM entities, similar to all My Work Groups in default CRM.

#### Time Recording

- Tracking
- Approval Manager
- Expenses
- Time Entries
- Time Stamps

The Time Recording group grants access to two different HTML applications: Tracking and Approval Manager.

Additionally, it is possible to get an overview of Time Entries, Expenses and Time Stamps in the system.

#### Project Management

- Gantt
- Projects
- Project Tasks
- Project Task Assignme...

The Project Management group allows access to Project Gantt.

Additionally, Projects, Project Tasks and Project Task Assignment Entities are available in the system..

### Resources



Bookable Resources



Working Hours



Bookable Resource Ca...



Characteristics

The Resources group is the last main group in proRM Area.

You can find features overview of Bookable Resources in the CRM system and related Working Hours.

The group also provides an overview of Bookable Resource Categories and Characteristics.

### Settings



Configurations



Rating Models

The Settings Group is used to list user-defined Configurations for the HTML applications and gives access to the Rating Models in the Dynamics CRM Environment.

## 1.4 Key Features

The use of the ISV solution proRM Fast Start for CRM in Microsoft Dynamics 365 CRM will extend the default CRM functionality by Project Management based entities and additional functionality.

All related Entities (Project, Project Task, Project Task Assignment, Time Entry, Expense, Time Stamp, Project Template and Working Hour) are stored in the new navigation area called 'proRM'.

Those Entities are used and required for following use in the HTML Applications: Tracking, Approval Manager and Project Gantt.

Besides to this, proRM Fast Start also uses default Microsoft Dynamics 365 CRM entities like Bookable Resource, Bookable Resource Category, Characteristic, Rating Model, Account, as well as the main sales entities: Lead, Contact, Opportunity, Quote and Order.

### Tracking Application

proRM Fast Start will provide three different applications in order to extend the possibilities of the CRM functionality. All applications are developed in HTML and supported by Microsoft Dynamics CRM.

The Tracking Application allows employees to track their efforts on assigned Project Tasks by using form of Time Entries and Expenses. For these purposes we provide a calendar view for a simple tracking. The employee also receives direct feedback

regarding own working time in the current time period with the help of a Working Time overview and support of charts directly in the application.

Besides Expenses and Time Entries, the employee is also able to create own Time Stamps to prove his/her presence in the office.

## Project Gantt Application

proRM Fast Start will provide three different applications in order to extend the possibilities of the CRM functionality. All applications are developed in HTML and supported by Microsoft Dynamics CRM.

The key idea behind the Project Gantt application is to provide a tool for every project manager where it is possible to enable project managers to create, plan, and also control the project structures he/she is responsible for.

With the help of the graphical Gantt Chart the project manager is able to plan and monitor the ongoing and upcoming project and dependencies between related project tasks.

## Approval Manager Application

proRM Fast Start will provide three different applications in order to extend the possibilities of the CRM functionality. All applications are developed in HTML and supported by Microsoft Dynamics CRM.

The Approval Manager application finalizes the project management process in proRM Fast Start with approving the created Expenses and Time Entries for the invoicing process. By default the project manager of each project checks and approves the records at the end of the reporting period month. Nevertheless, it surely can vary for each business process.

If values in the records are not correct, it is possible to deny the approval and assign it back to the employee or directly edit the related record in the application.

With the help of different filters and charts, the project manager will also receive an additional control of the project module besides the Project Gantt application.

## Sales Process

proRM Fast Start will also assist the sales team with a new business process flow, which guides the employee through

the sales process into the project management.

It will also be possible to create new projects based on sales orders and their assigned products.

With the help of these processes, every employee receives a guide line on how to set up the best conditions for the project manager in their daily work.

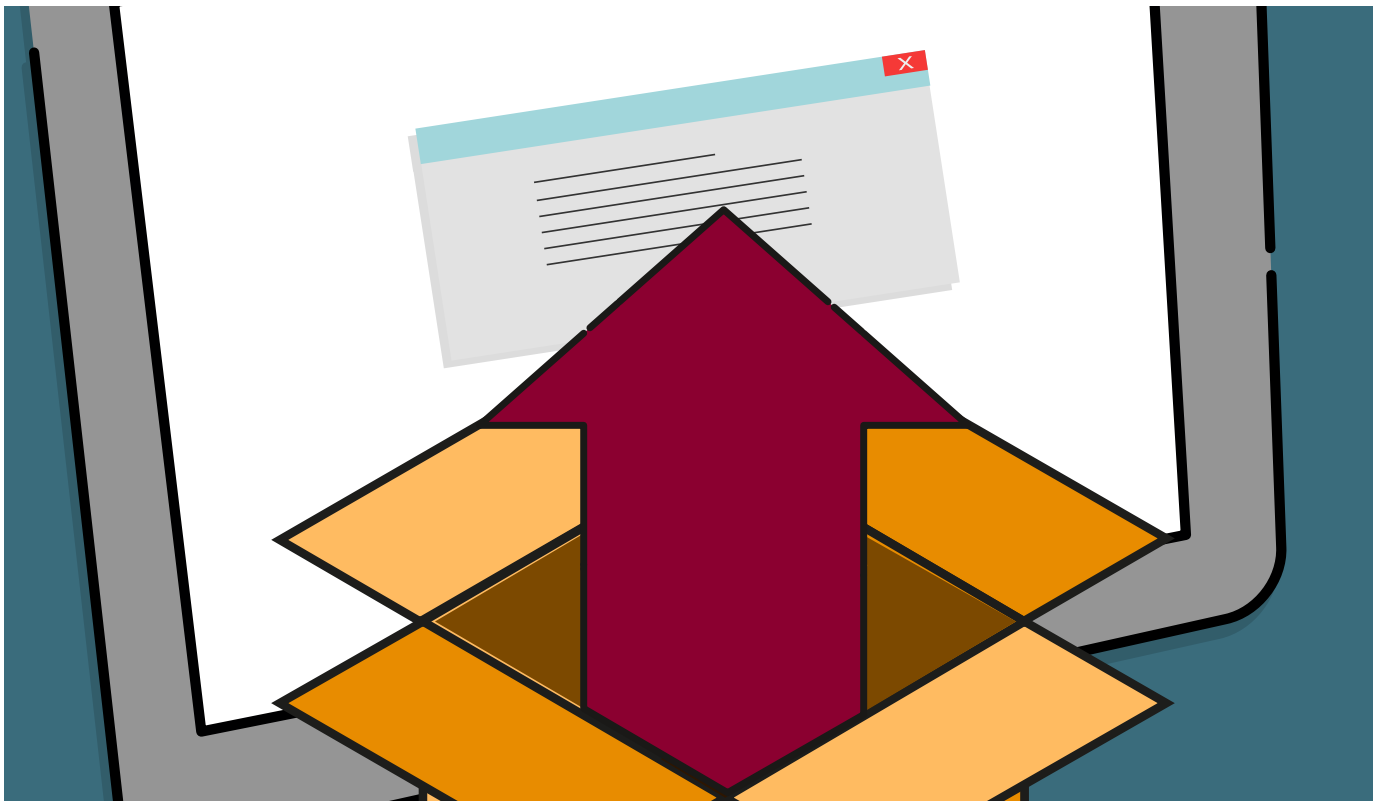
## Background processes for calculation and validation

Background process for calculation and validation ensures full integrity of data in the system and up to date values for every proRM Fast Start related record.

With the implemented background process for calculation and validation, we provide a full integrity of data in the system as well as up-to-date values for every proRM Fast Start related record.

The calculations are done in real time without affecting any end users work behavior.





## 2. proRM Fast Start Set Up

To use full functionality of proRM Fast Start basic configuration is required.

### 2.1 Security Concept and Security Roles Explained

proRM Fast Start provides security concept for preventing unauthorised employees from accessing certain data. The implication of the concept, is the difference of access rights between project manager and an employee.

3 Security Roles have been implemented that can be assigned to the related System User:


#### Employee

The Security Role called Employee is essential for accessing any functionality of proRM Fast Start. It provides permissions to create own Time Entries, Expenses and Time Stamps.

Furthermore, the User with Employee permission is able to read Project, Project Task and Assignments in the system.

## Project Manager

A Project Manager has more rights in the proRM Area than an Employee and is able to create new Projects, Project Tasks and Assignments.

 Please Note: The Project Manager Role is based on the Employee Role and so the Employee Security Role has to be assigned to every Project Manager, too.

## Administration

The Administration role grants full access to all related proRM data – it is similar to the System Administrator Role in CRM.

Every System User who has to work with proRM Fast Start needs to have the Employee Security Role at least.

Security Roles also affect the permissions in CRM directly.

 For questions regarding assigning a Security Role in Microsoft Dynamics CRM, please visit the [Microsoft Dynamics CRM Help & Training](#)

# 2.2 proRM Fast Start Entities Configuration

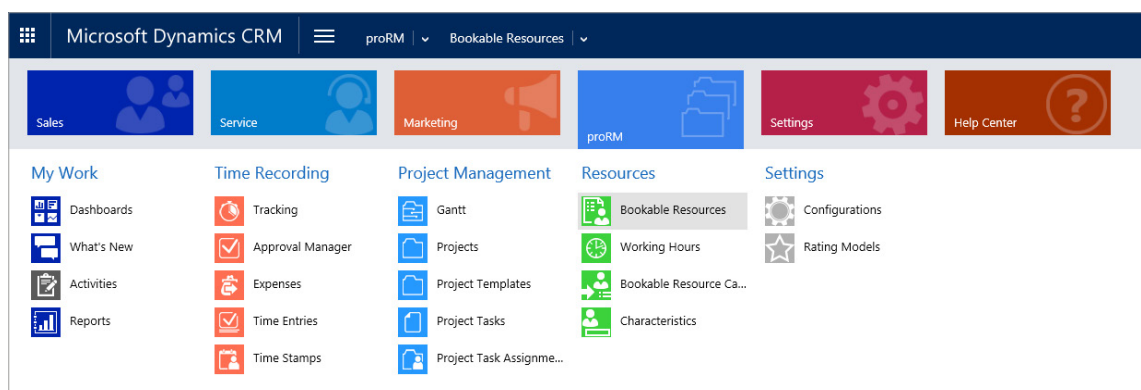
To start using proRM Fast start it is required to set up basic entities.

## 2.2.1 Creating Bookable Resources

Bookable Resources display resources and employees of the company. Without a Bookable Resource it is impossible to work on a Project Task or create Time Entries in the system.

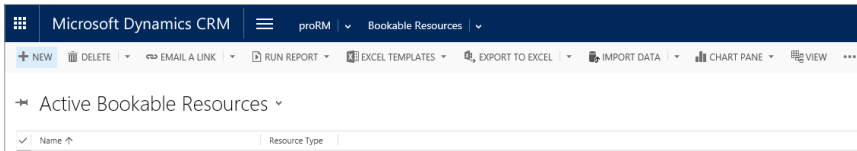
### Step 1: Open Bookable Resource Overview

Navigate to the proRM Area and select Bookable Resource in the Resource Management Group:



## Step 2: Create a New Bookable Resource

To create a new Bookable Resource click on the NEW button in the CRM task bar:



## Step 3: Enter the Required Data

Now fill in all the required data directly in the form:

BOOKABLE RESOURCE : INFORMATION  
New Bookable Resource

General

Resource Type *	User
User	--
Contact	--
Account	--
Name *	--
Time Zone *	(GMT+01:00) Belgrade, Bratislava, Budapest, Ljubljana, Prague

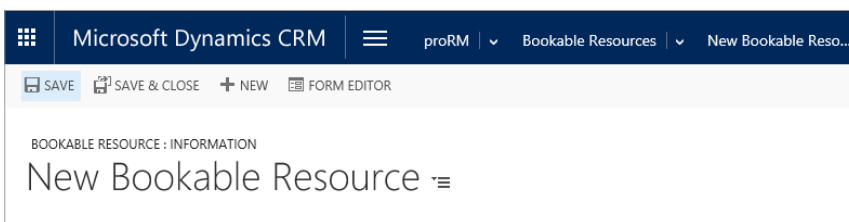


Please Note: For employees who work with proRM Fast Start a system user is needed and a Bookable Resource with Resource Type: User.

Select the related System User in the Lookup "User".

## Step 4: Save the Record

After filling in all required data (marked with a red \*) save the record with the SAVE button in the CRM Task bar:

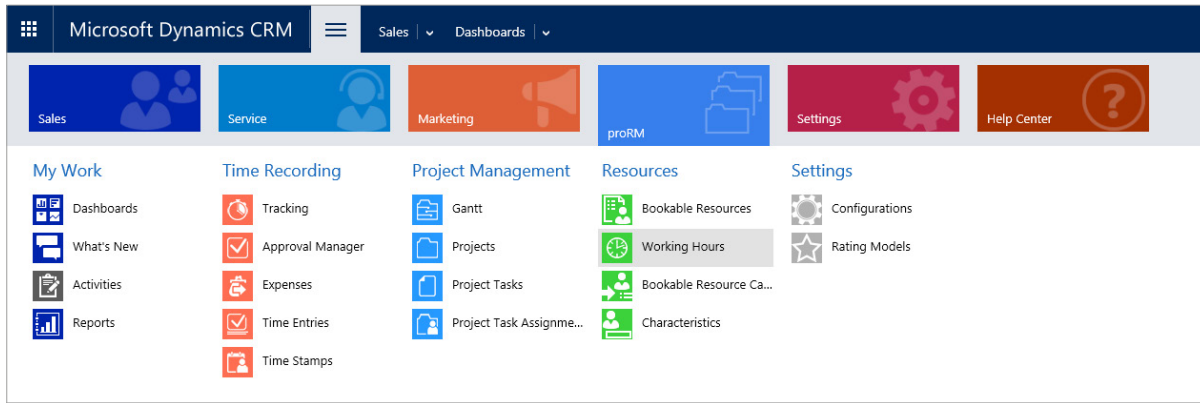


## 2.2.2 Creating and Configuring Working Hours

Working Hours define the default value of hours an employee has to work per week. It is possible to create different working models and assign the related model to the Bookable Resources.

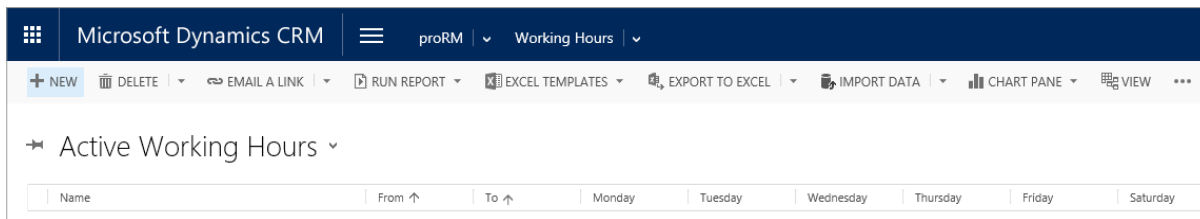
## Step 1: Open Working Hours Overview

Navigate to the proRM Area and select Working Hours in the Resource Management Group:



## Step 2: Create a New Working Hour

To create a new Working Hour click on the NEW button in the CRM task bar:



## Step 3: Enter the Required Data

Now fill in all the required data direct on the form:

WORKING HOUR ▾

### New Working Hour

General

Name \* --

From --

To --

Monday --

Tuesday --

Wednesday --

Thursday --

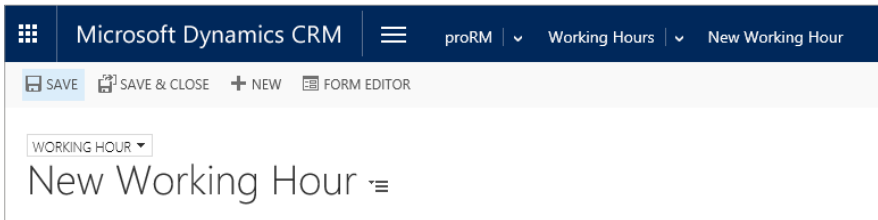
Friday --

Saturday --

Sunday --

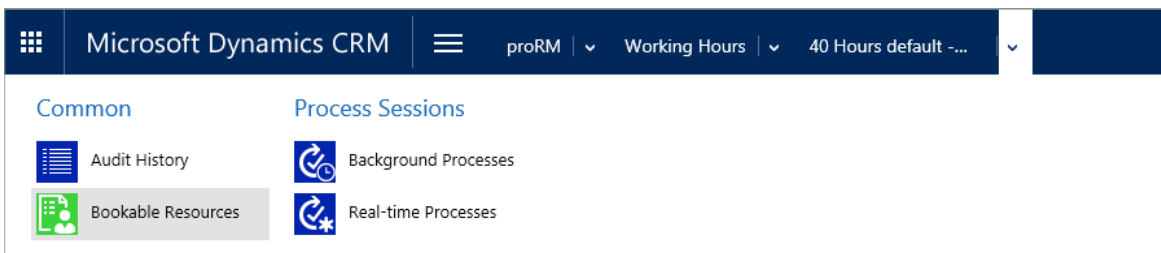
## Step 4: Save the Record

After filling in all required data (marked with a red \*) save the record with the SAVE button in the CRM Task bar:

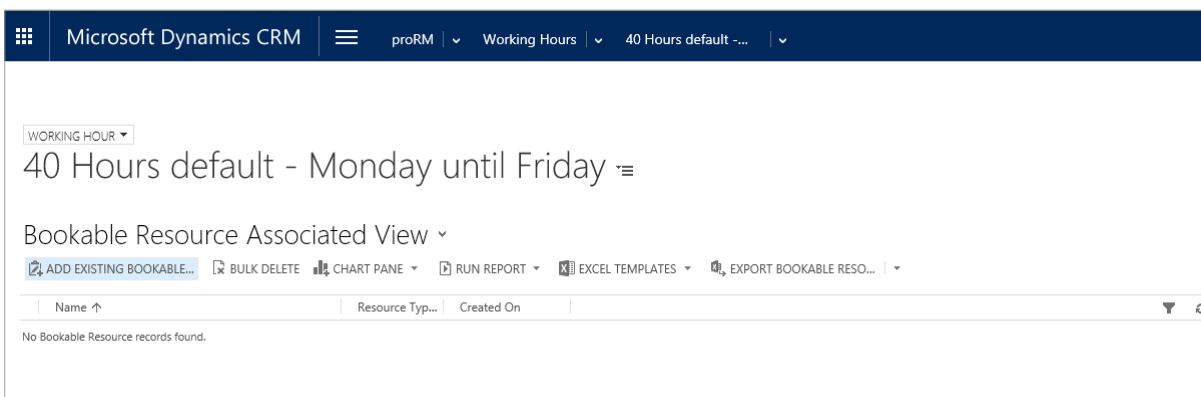


## Step 5: Assign Working Hours to a Bookable Resource

To assign Working Hours to Bookable Resources open the desired Working Hours record. Open navigation menu of the entry and select Bookable Resources:



Use ADD EXISTING BOOKABLE RESOURCE button to add Bookable Resources to the Working Hours:

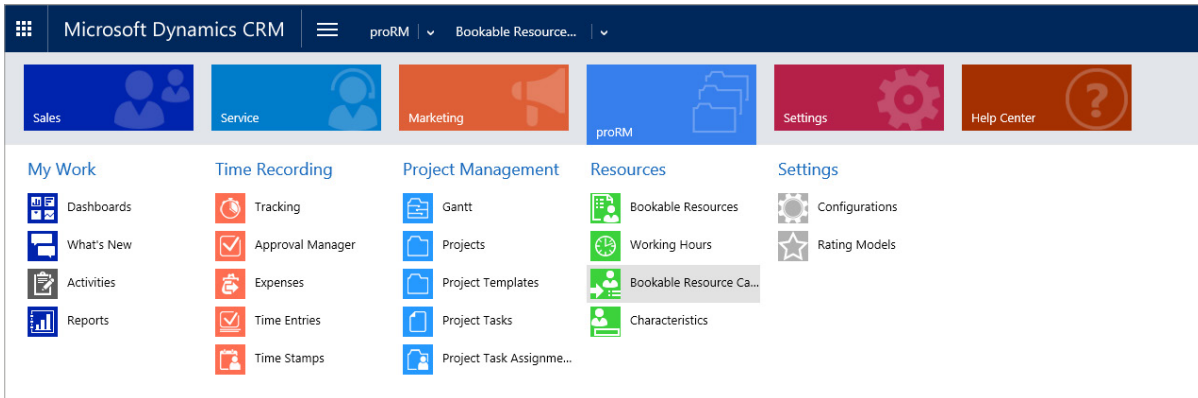


### 2.2.3 Bookable Resource Categories

Categories describe the job of each Bookable Resource in the company. It is possible to assign multiple categories to a Bookable Resource.

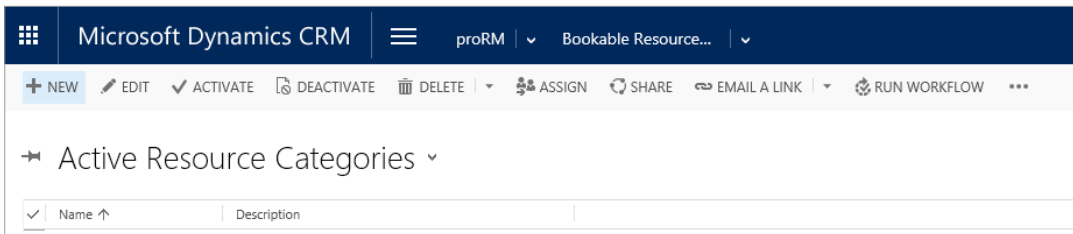
## Step 1: Open Bookable Resource Categories Overview

Navigate to the proRM Area and select Bookable Resource Category in the Resource Management Group:



## Step 2: Create a New Bookable Resource Category

To create a new Bookable Resource Category click on the NEW button in the CRM task bar:



## Step 3: Fill out form

Now fill in all the required data:

BOOKABLE RESOURCE CATEGORY : INFORMATION

### New Bookable Resource Category

General

Name\* --

Description --

## Step 4: Save the Record

After filling in all required data (marked with a red \*) save the record with the SAVE button in the CRM Task bar:

Microsoft Dynamics CRM | proRM | Bookable Resource... | New Bookable Reso...

SAVE SAVE & CLOSE + NEW FORM EDITOR

BOOKABLE RESOURCE CATEGORY : INFORMATION

### New Bookable Resource Category

General

Name \* --

Description --

## Step 5: Assign Bookable Resource Category to a Bookable Resource

To assign Bookable Resource Categories to a Bookable Resource open the desired Bookable Resource. Via the inline grid called "Resource Categories" add existing Bookable Resource Categories from the system:

Microsoft Dynamics CRM | proRM | Bookable Resources | Search CRM data

SAVE SAVE & CLOSE + NEW DEACTIVATE DELETE ASSIGN SHARE EMAIL A LINK RUN WORKFLOW

BOOKABLE RESOURCE : INFORMATION

### Bookable Resource

General

Resource Type \* User

User \* User

Name \* --

Time Zone \* (GMT+01:00) Amsterdam, Berlin, Bern, Rome, Stockholm, Vienna

**RESOURCE CHARACTERISTICS**

Characteristic ↑	Rating Value
.net	Proficient
BI Reporting	Good
CRM	Proficient

**RESOURCE CATEGORIES**

Resource Category ↑
Teamleader

Add Bookable Resource Category Assn record.

## 2.2.4 Creating and Configuring Characteristics

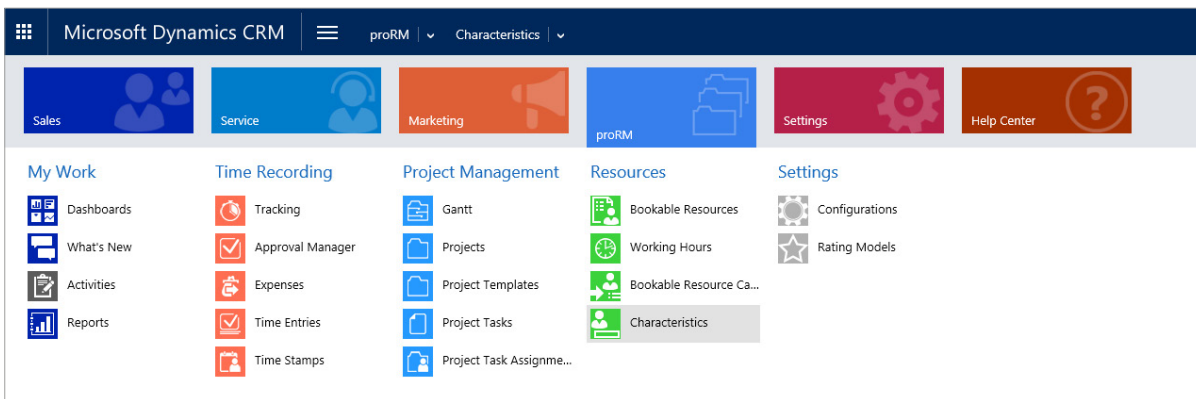
Characteristics are used to assign skills to each employee. Based on a rating value the experience characteristics can be defined individually for each skill per employee. It is possible to assign

an unlimited number of skills to a resource.

Every characteristic has a Characteristic Type, which is defined as Skill or Certification.

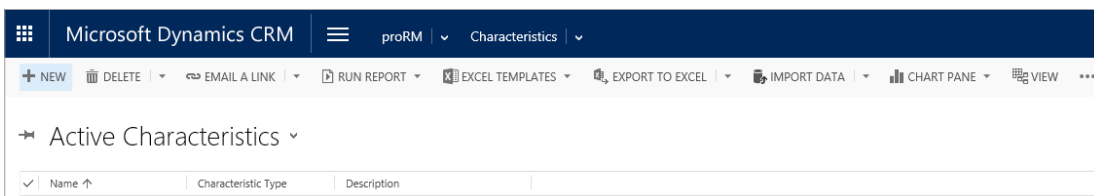
## Step 1: Open Characteristics Overview

Navigate to the proRM Area and select Characteristics in the Resource Management Group:



## Step 2: Create a New Characteristic

To create a new Characteristic click on the NEW button in the CRM task bar:



## Step 3: Enter the Required Data

Fill in all the required data:

CHARACTERISTIC : INFORMATION

### New Characteristic

**General**

Name \* --

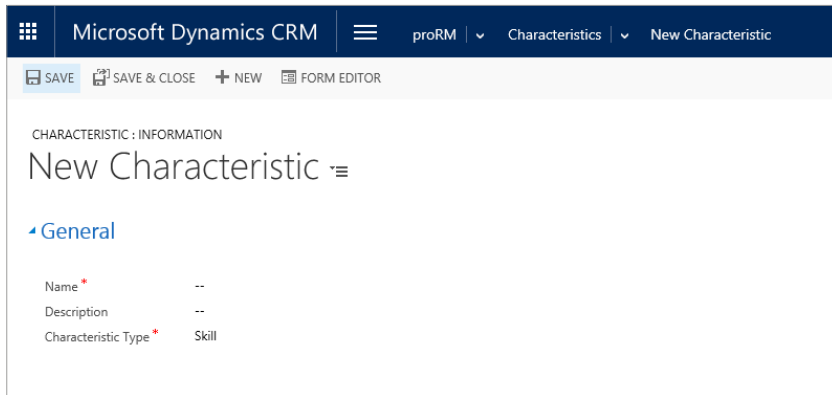
Description --

Characteristic Type \* Skill

## Step 4: Save the Record

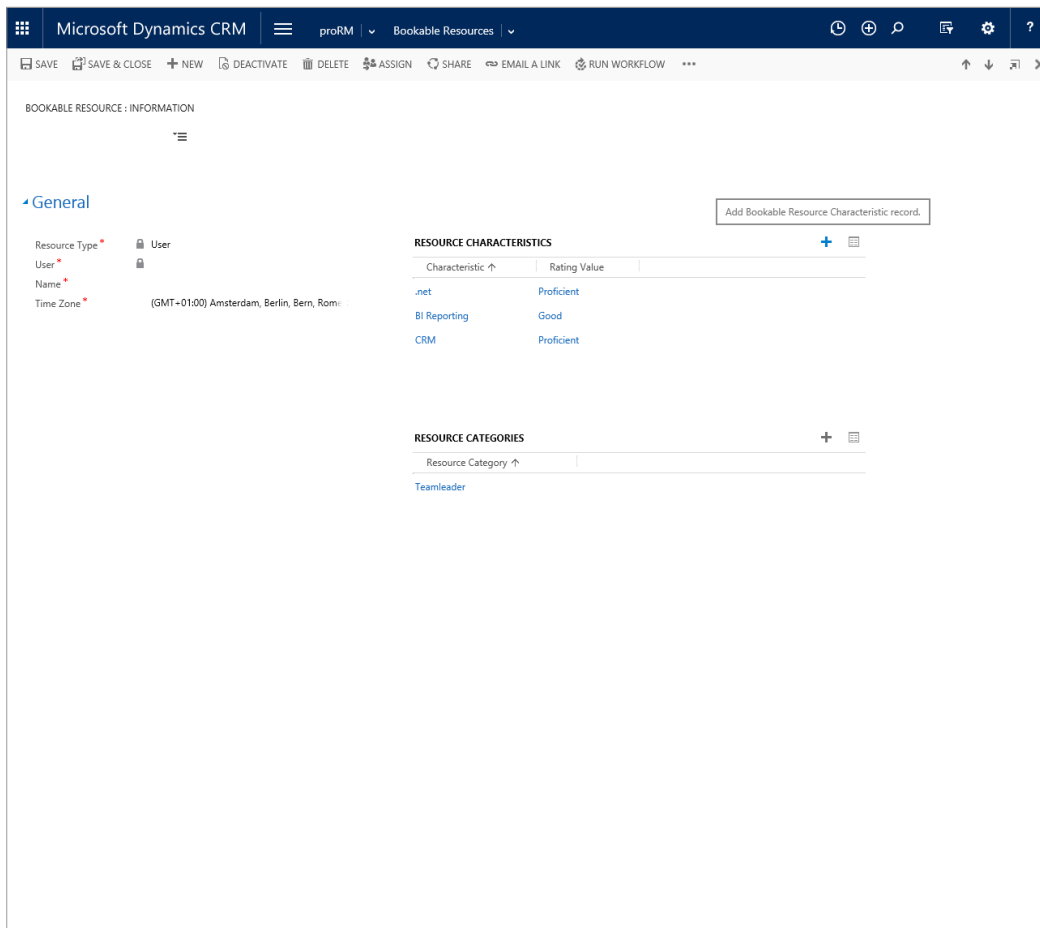


After filling in all required data (marked with a red \*) save the record with the SAVE button in the CRM Task bar:



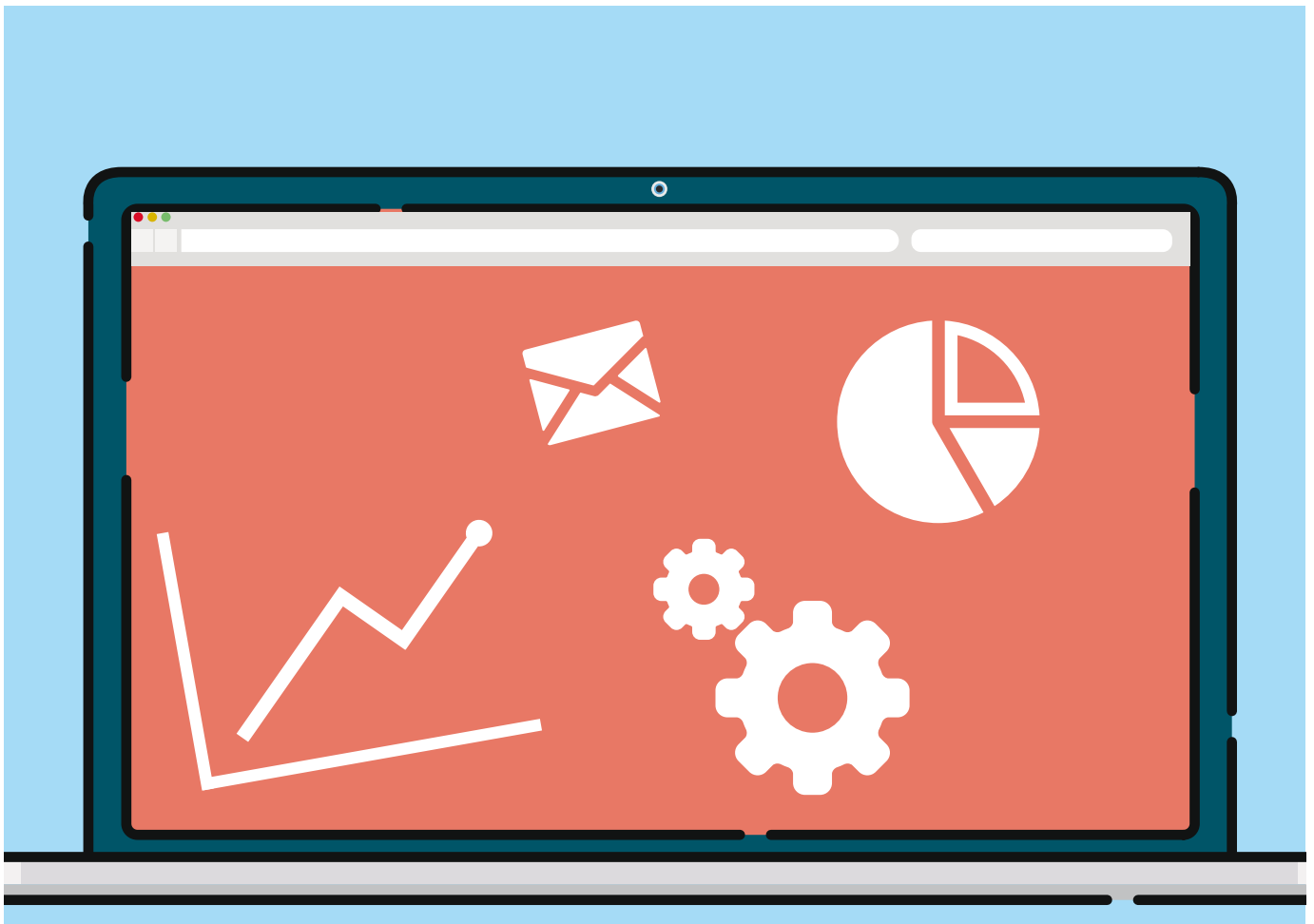
## Step 5: Assign Characteristics to a Bookable Resource

To assign Characteristics to a Bookable Resource open the desired Bookable Resource. Via the inline grid called "Resource Characteristics" add existing Characteristics from the system:



In the new tab set the Characteristic and the experience based on the Rating Model. Save data record to confirm the assignment:

The screenshot shows the Microsoft Dynamics CRM interface for creating a new bookable resource characteristic. The top navigation bar includes the Microsoft Dynamics CRM logo and the text 'New Bookable Reso...'. Below the navigation bar is a toolbar with buttons for 'SAVE', 'SAVE & CLOSE', '+ NEW', and 'FORM EDITOR'. The main content area is titled 'BOOKABLE RESOURCE CHARACTERISTIC : INFORMATION' and 'New Bookable Resource Characteristic'. A section titled 'General' is expanded, showing three fields: 'Characteristic\*' with the value 'C#', 'Rating Value' with the value 'Good', and 'Resource\*'. The asterisks indicate required fields.



### 3. proRM Fast Start Functionality

This chapter is an introduction of the best ways of operating proRM Fast Start and working with the given, supported options in the system.

Following functionality headlines are explained in this guide:

- Creating and editing of Projects
- Creating and editing of Project Tasks
- Adding of Assignments to a Project Task
- Creating and updating of Time Entries
- Creating and updating of Expenses
- Creating a new Time Stamp
- Approving Time Entries
- Approving Expenses
- Defining reporting tools

## 3.1 Project Structure Implementation

Projects are essential for using proRM Fast Start. The product is following a strict hierarchy, which is topped by a customer-Account or Contact from CRM.

Each Project has to be listed under a Customer. Every Project can have several Project Tasks under it but no Resource directly assigned to it.

The Resources will be only assigned at the Project Tasks; this is called Project Task Assignment.

This is the graphical overview of hierarchy:



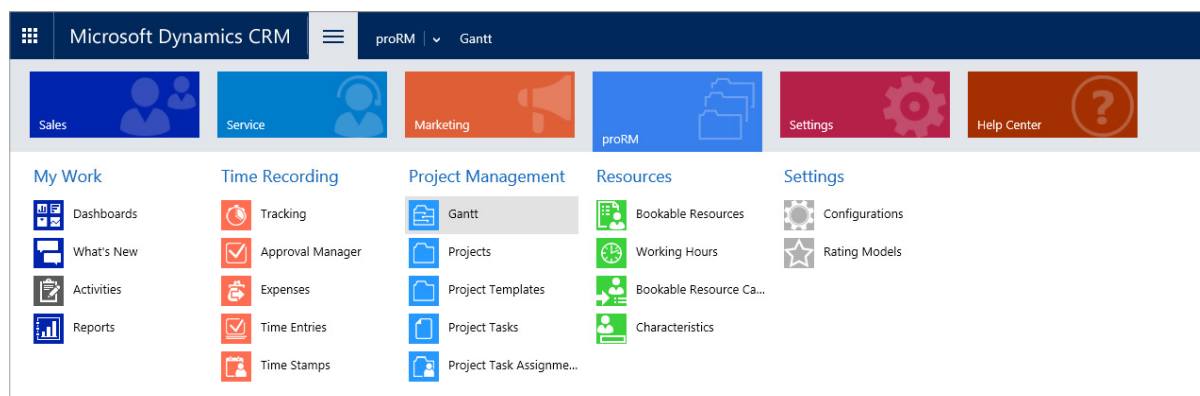
It is possible to have more Projects under one Customer or several Project Tasks under Projects.

New projects can be created using CRM form or with the help of Project Gantt application

### 3.1.1 Project Gantt Application Overview

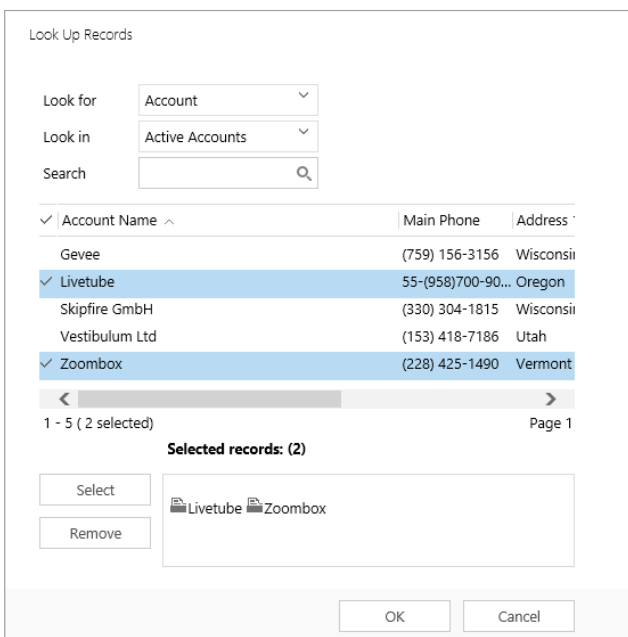
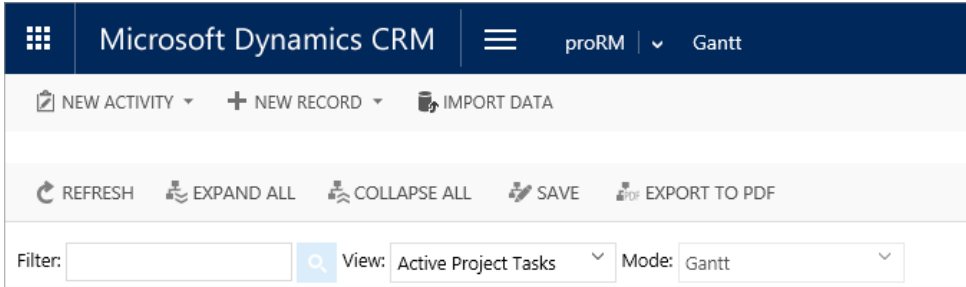
#### Step 1: Open the Application

Navigate to the proRM Area and select Project Gantt in the Project Management Group:



## Step 2: Select a Customer

Select a related Customer through the Lookup called "Filter":

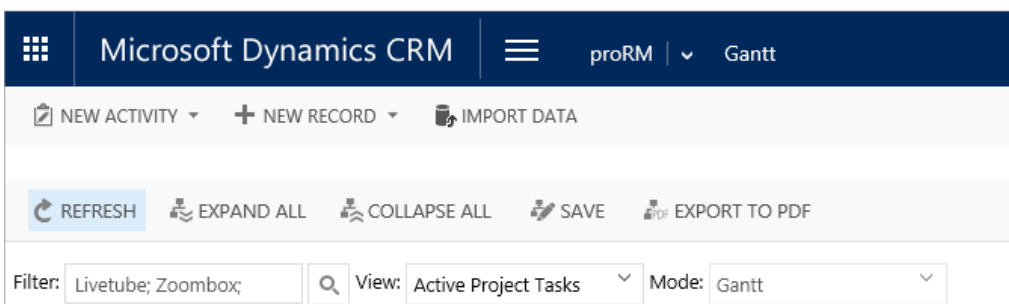


Please note: Loading all available data in the system decreases the performance of the application.

It is also possible to keep the filter empty to load all the data in the system.

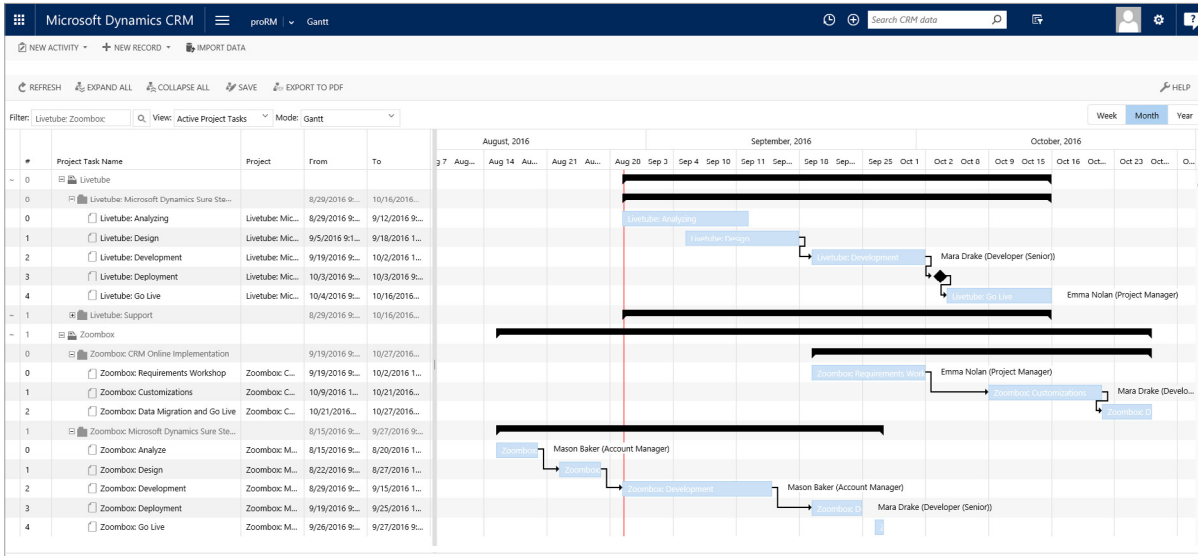
## Step 3: Click Refresh to Load Data

After choosing the desired filter, click on REFRESH to load data into the application.



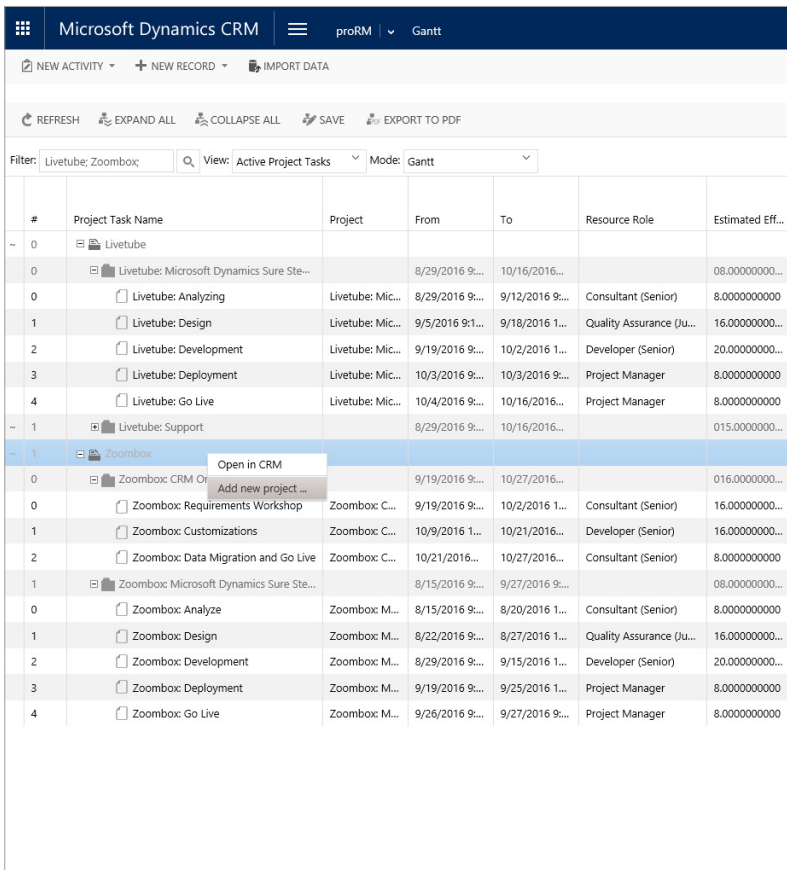
On the left, there is Project Tree with the hierarchy. Related to

the Project Tree there is a graphical overview on the right hand side of the application.



## Step 4: Create a New Project

To create a new Project, choose the desired Customer it should be created for. Select the Customer with left mouse button click and open the context menu by using the right mouse button. Select ADD NEW PROJECT in the context menu.



## Step 5: Enter all Required Data

After clicking on ADD NEW PROJECT a new dialog pops out where it is possible to fill in the required data for the new Project:

The 'Create new project' dialog box contains the following fields:

- Projectname: Enter your Project name here
- From: 8/29/2016
- To: 8/29/2016
- Customer: Zoombox
- Project Manager: Mason Baker
- Billing Type: Chargeable
- Internal price: €90.00
- External price: €126.00
- Estimated effort (h): 65.00

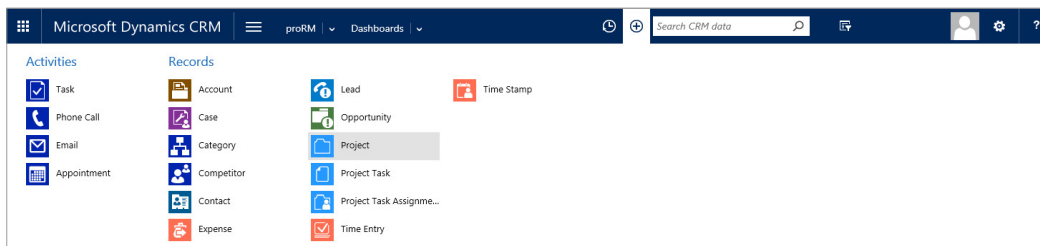
Buttons: OK, Cancel

If all fields are filled in, confirm with OK button and the Project will be created.

## 3.1.2 Creating New Project via Quick Create

### Step 1: Open Quick Create Form

Navigate to the + Icon in the CRM Navigation to select Project in the Records group:



### Step 2: Enter the Desired Data to Create the Record

After clicking on Project, the form to enter the required data is shown:

The 'Project' form displays the following sections:

- GENERAL**
  - Projectname \*
  - Customer
  - From \*
  - To \*
- PROJECT DETAILS**
  - Project Manager \*
  - Billing Type \*
  - Estimated Effort (h) \*
- SALES DETAILS**
  - Internal Price (h) \*
  - External Price (h) \*

Buttons: Save, Cancel



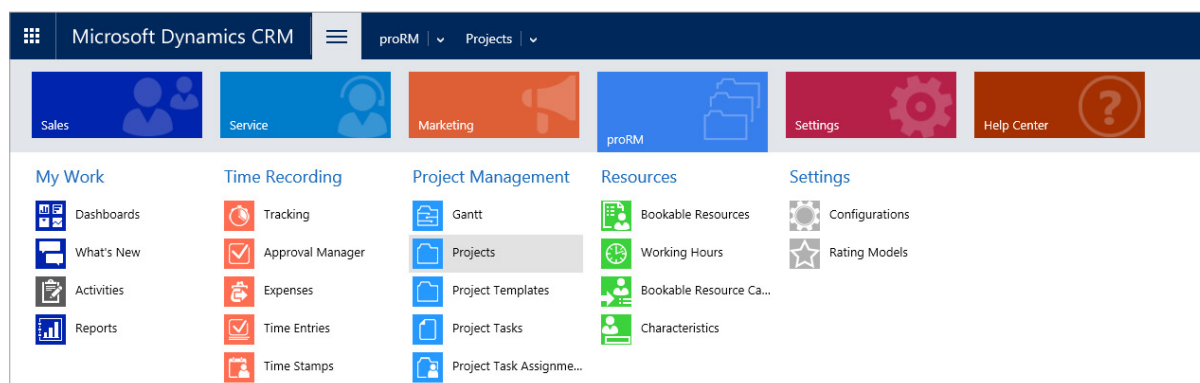
For a more general overview about the functionality and content of the Quick Create Feature, please visit the [Microsoft Dynamics CRM Help & Training](#).

Fill in required fields in order to create the new data record click on the button SAVE.

### 3.1.3 Creating New Project via CRM Form

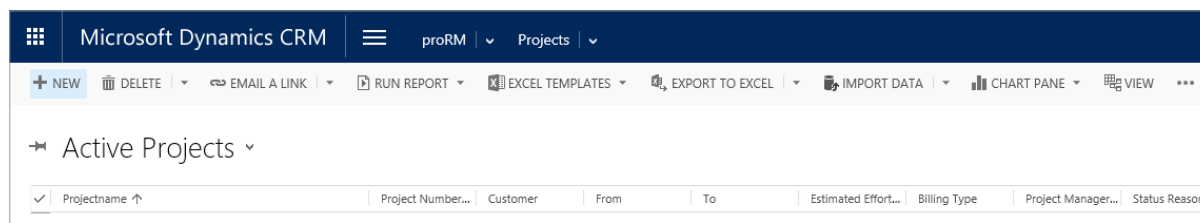
#### Step 1: Open Project Overview in CRM

Navigate to the proRM Area and select Projects in the Project Management Group:



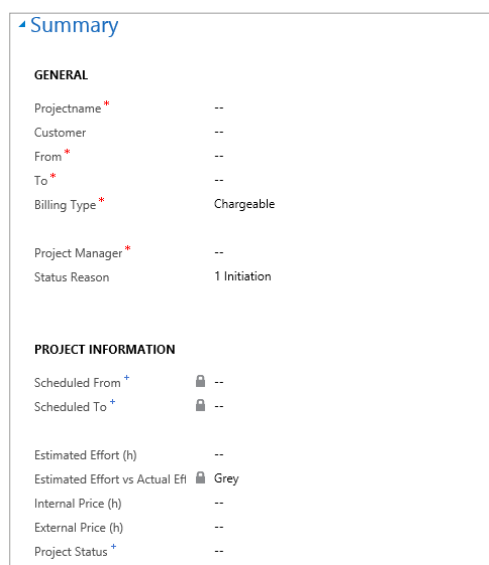
#### Step 2: Create a New Project

Click the NEW button of CRM Task bar to open a new blank form for the Project Entity:



#### Step 3: Enter the Required Data

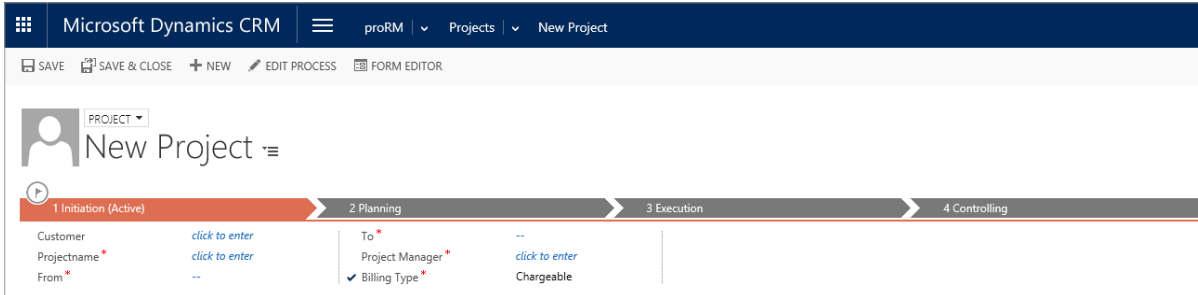
There are two options to fill in the data. One is to fill in the required data directly to the form:



For more information about the business process flow feature please visit the related [Microsoft TechNet website](https://technet.microsoft.com/).

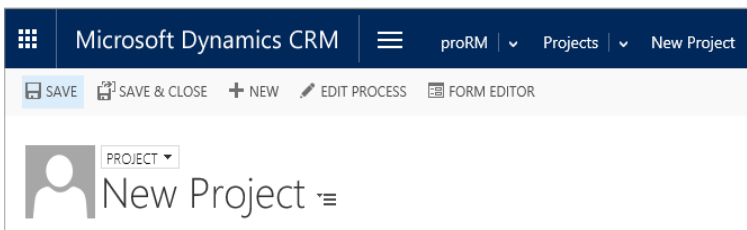


The second possibility is to use the proRM Business Process Flow on the top of the page, which guides the project manager through the different states of the Project:

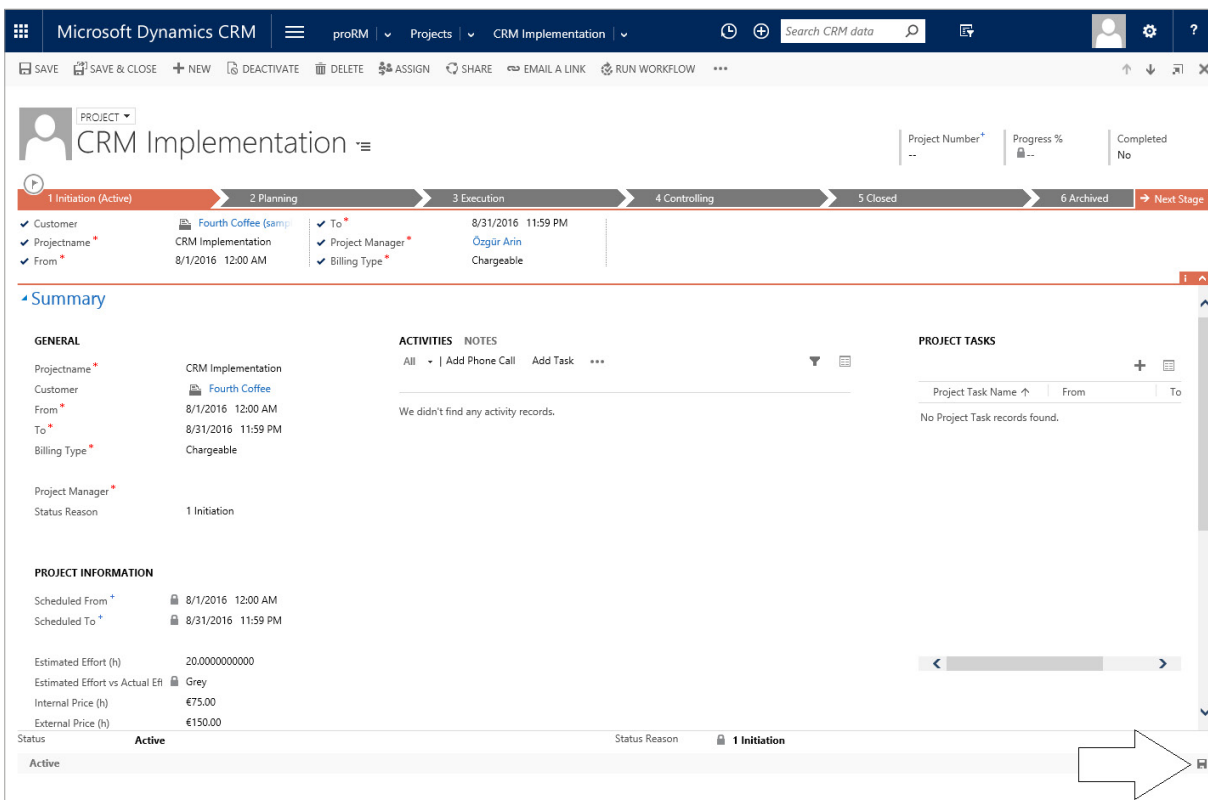


## Step 4: Save the Record

After filling in all required data (marked with a red \*), save the record with the SAVE button in the CRM Task bar:



Or choose the SAVE button in the bottom right corner of the screen:



### 3.1.4 Project Template Explained

Repetative Project Structures with high incidence can be saved as Project Templates.

In order to save time for creating Project Tasks, giving estimations for assignments or planning the project structure it is possible to import those templates for different customers or head projects via the Project Gantt application.

### 3.2 Project Task Creation

Projects are followed by Project Tasks. It is possible to add more Project Tasks to one Project or different Project Tasks under each other to create a deeper hierarchy.

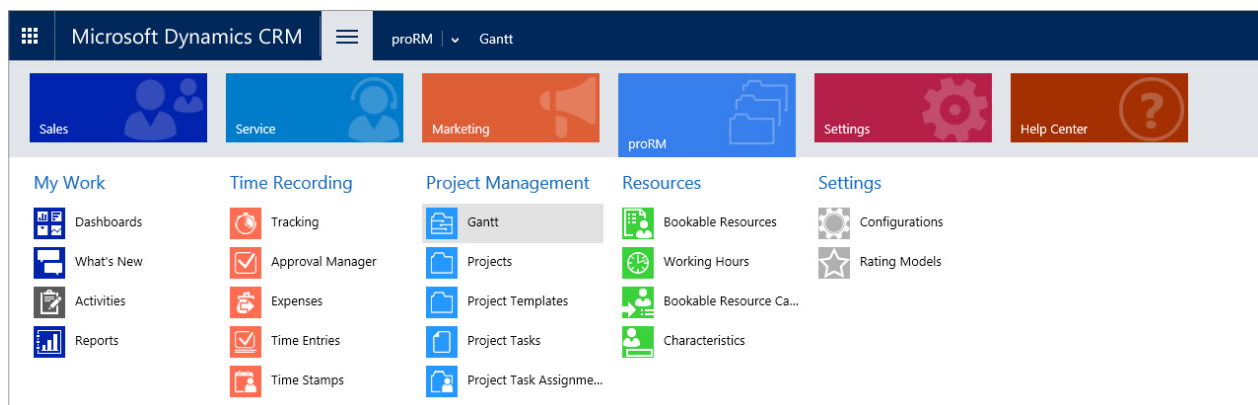
Project manager is able to add Assignments always to the lowest Project Task in the related project structure.

There are different options to create new tasks. Either out of CRM or with the help of the Project Gantt Application - both ways are supported.

### 3.2.1 Creating Project Task in Project Gantt

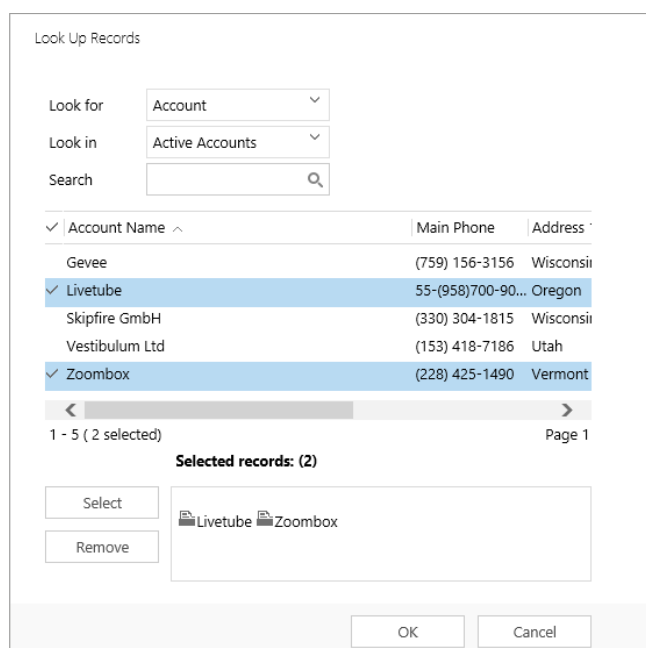
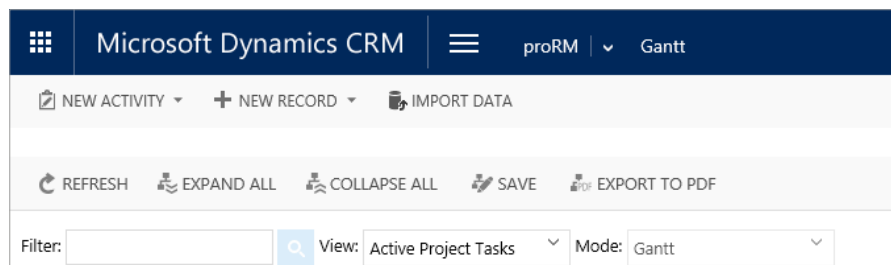
#### Step 1: Open the Application

Navigate to the proRM Area and select Project Gantt in the Project Management Group:



## Step 2: Select a Customer

Select a related Customer through the Lookup called "Filter":

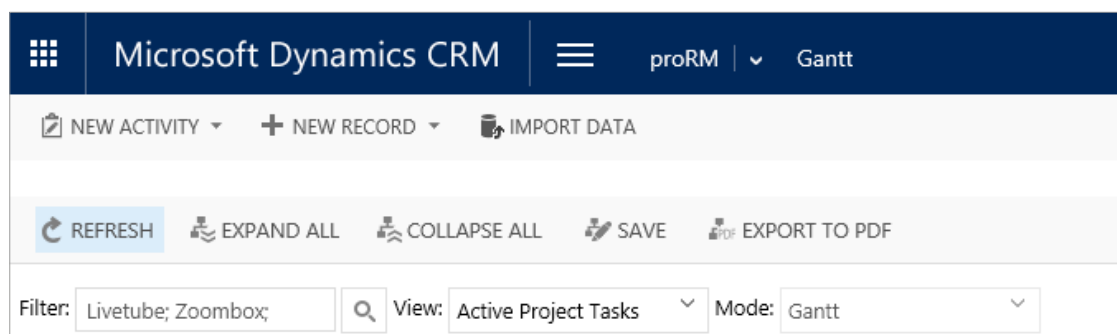


Please note: Loading all available data in the system decreases the performance of the application.

It is also possible to keep the filter empty to load all the data in the system.

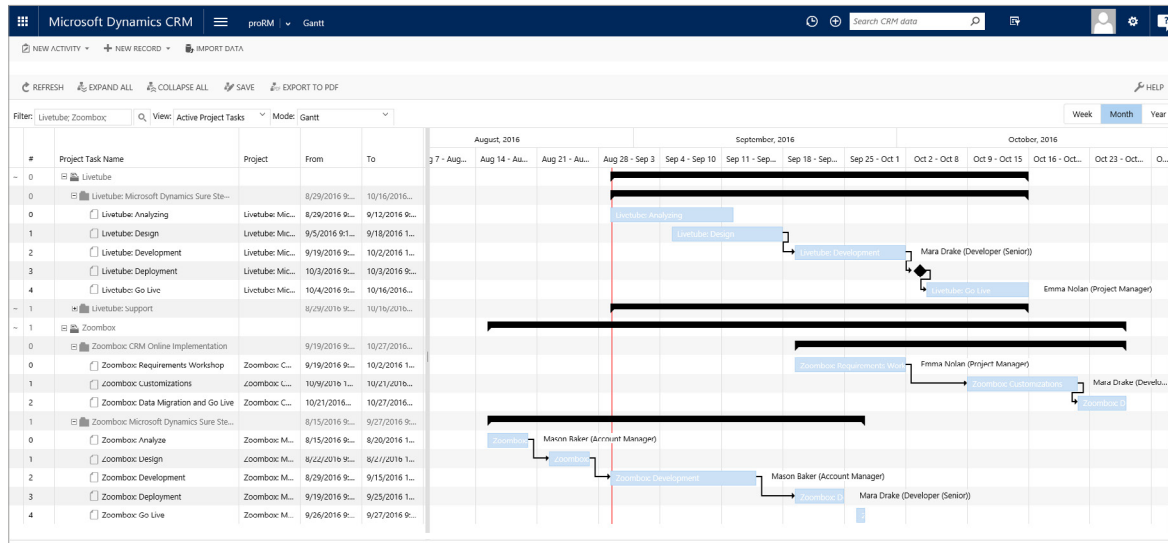
## Step 3: Click Refresh to Load the Data

After choosing the desired filter, click on REFRESH to load the data into the application.



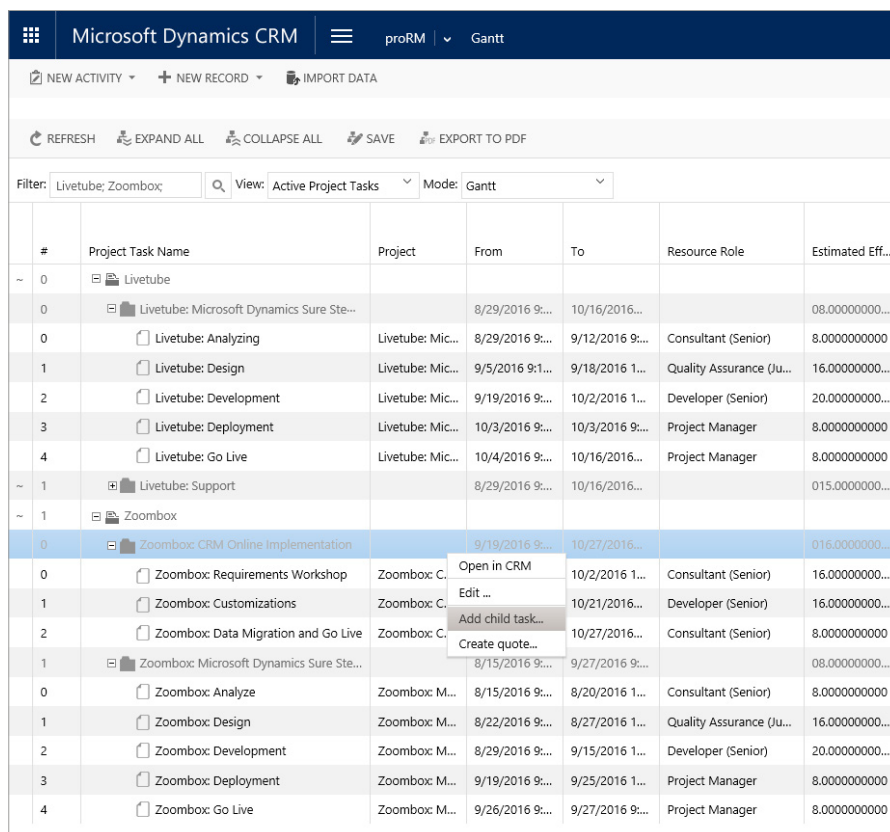
On the left hand side, there is the Project Tree with the hierarchy.

Related to the Project Tree there is a graphical overview on the right hand side of the application.



## Step 4: Create a New Project Task

To create a new Project Task, choose the desired Project or already existing Project Task it should be created for. Select the line with left mouse button click and open the context menu by using the right mouse button. Select ADD CHILD TASK in the context menu.



When creating a Project Task under an existing Project Task, the add child task functionality will be hidden in a submenu called "Task".

#	Project Task Name	Project	From	To	Resource Role	Estimated Eff...
~ 0	[-] Livetube					
0	[-] Livetube: Microsoft Dynamics Sure Ste...		8/29/2016 9:...	10/16/2016...		08.000000000...
0	[-] Livetube: Analyzing	Livetube: Mic...	8/29/2016 9:...	9/12/2016 9:...	Consultant (Senior)	8.0000000000
1	[-] Livetube: Design	Livetube: Mic...	9/5/2016 9:1...	9/18/2016 1...	Quality Assurance (Ju...	16.000000000...
2	[-] Livetube: Development	Livetube: Mic...	9/19/2016 9:...	10/2/2016 1...	Developer (Senior)	20.000000000...
3	[-] Livetube: Deployment	Livetube: Mic...	10/3/2016 9:...	10/3/2016 9:...	Project Manager	8.0000000000
4	[-] Livetube: Go Live	Livetube: Mic...	10/4/2016 9:...	10/16/2016...	Project Manager	8.0000000000
~ 1	[-] Livetube: Support		8/29/2016 9:...	10/16/2016...		015.00000000...
~ 1	[-] Zoombox					
0	[-] Zoombox: CRM Online Implementation		9/19/2016 9:...	10/27/2016...		016.00000000...
0	[-] Zoombox: Requirements Workshop	Zoombox: C...	9/19/2016 9:...	10/2/2016 1...	Consultant (Senior)	16.000000000...
1	[-] Zoombox: Customizations		10/9/2016 1...	10/21/2016...	Developer (Senior)	16.000000000...
2	[-] Zoombox: Data Migration and Go Liv...		10/21/2016...	10/27/2016...	Consultant (Senior)	8.0000000000
1	[-] Zoombox: Microsoft Dynamics Sure Ste...		8/15/2016 9:...	9/27/2016 9:...		08.000000000...
0	[-] Zoombox: Analyze		9/20/2016 1...	10/20/2016 1...	Consultant (Senior)	8.0000000000
1	[-] Zoombox: Design		9/27/2016 1...	10/27/2016 1...	Quality Assurance (Ju...	16.000000000...
2	[-] Zoombox: Development		9/27/2016 1...	10/15/2016 1...	Developer (Senior)	20.000000000...
3	[-] Zoombox: Deployment	Zoombox: M...	9/19/2016 9:...	9/25/2016 1...	Project Manager	8.0000000000
4	[-] Zoombox: Go Live	Zoombox: M...	9/26/2016 9:...	9/27/2016 9:...	Project Manager	8.0000000000

## Step 5: Enter all Required Data

After clicking on ADD CHILD [TASK] a new dialog pops out where it is possible to fill in required data for the new Project. If all fields are filled in confirm with OK button and the Project Task will be created.

Create project task ✕

Milestone

Name

From   Parent

To   Project Manager

---

Resource Role   Estimated effort (h)

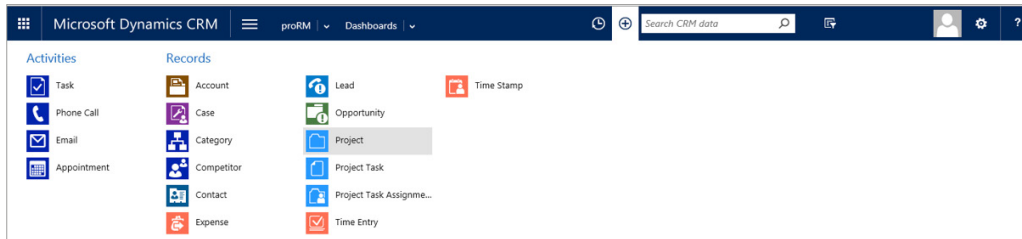
Billing Type   Internal price

Overbookable External price

### 3.2.2 Creating Project Task via Quick Create

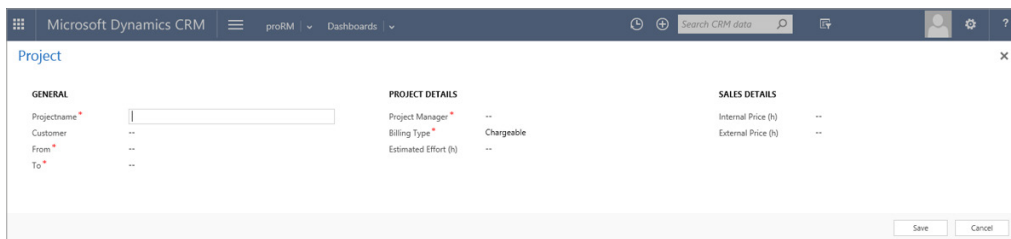
#### Step 1: Open Quick Create Form

Navigate to the + Icon in the CRM Navigation to select Project Task in the Records Group:



#### Step 2: Enter the Desired Data to Create the Record

After clicking on Project Task the form, where it is able to enter the required data, is shown:



Please fill in all required fields, in order to create the new data record click on the button SAVE.

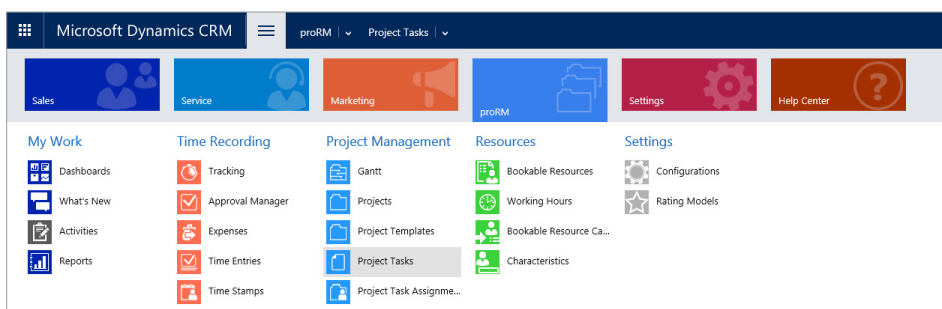


For a more general overview about the functionality and content of the Quick Create Feature, please visit the [Microsoft Dynamics CRM Help & Training](#).

### 3.2.3 Creating Projects Task via CRM Form

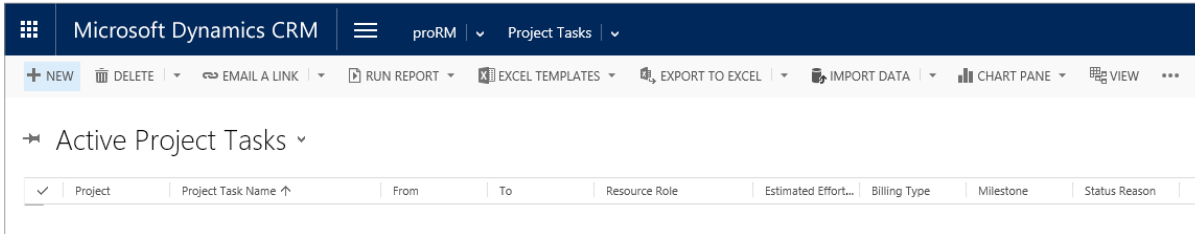
#### Step 1: Open the Project Task Overview in CRM

Navigate to the proRM Area and select Project Tasks in the Project Management Group:



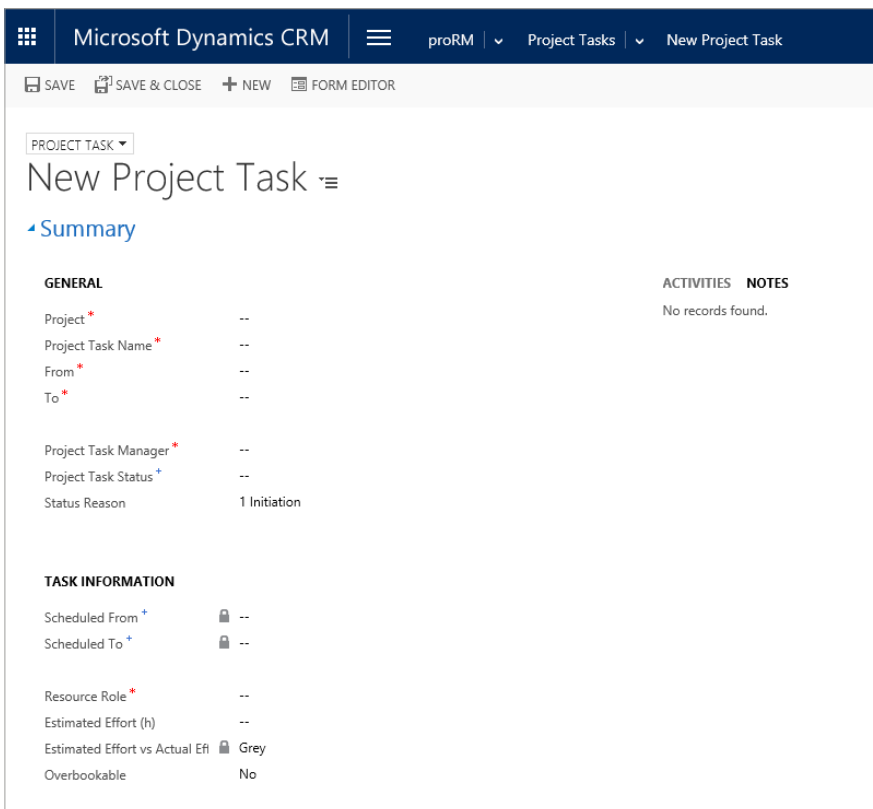
## Step 2: Create a New Project Task

Click the NEW button of CRM Task bar to open a new blank form for the Project Task entity:



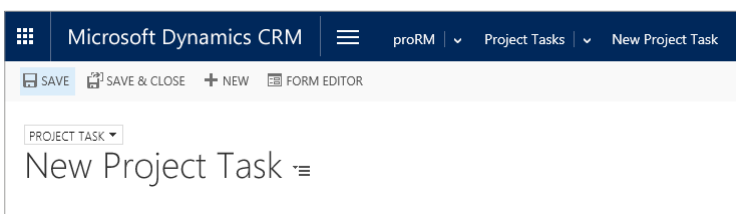
## Step 3: Enter the required data

Now fill in all required data directly to the form:

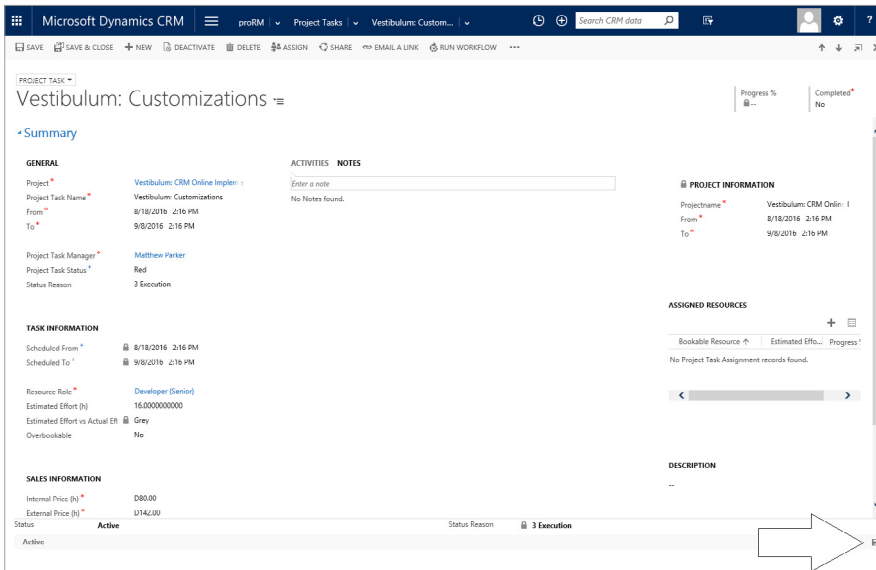


## Step 4: Save the Record

After filling in all required data (marked with a red \*) it is possible you to save the record with the SAVE button in the CRM Task bar:



Or choose the SAVE button on the bottom right corner of the screen:



## 3.3 Project Task Resource Assignment

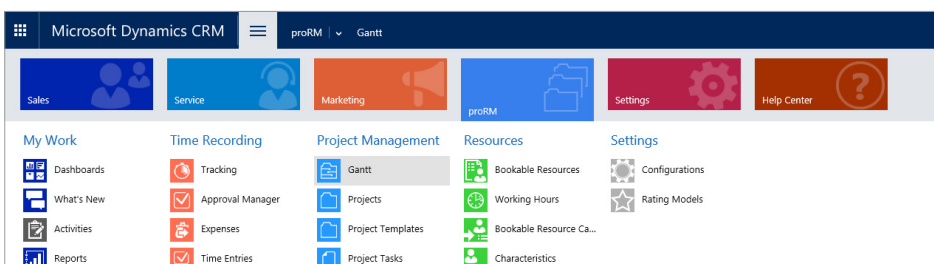
The Project Task Assignment connects the Project Task with the Bookable Resource entity and stores customer as also employee specific values. Only after this Assignment is made, it is possible for the employee to create Time Entries and Expenses for.

There are different options how to create new Project Task Assignments. Either out of CRM or with the help of the Project Gantt Application - both ways are supported.

### 3.3.1 Creating Assignment via Project Gantt Application Project

#### Step 1: Open the Application

Navigate to the proRM Area and select Project Gantt in the Project Management Group:





## Step 2: Select a Customer

Select a related Customer through the Lookup called Filter:



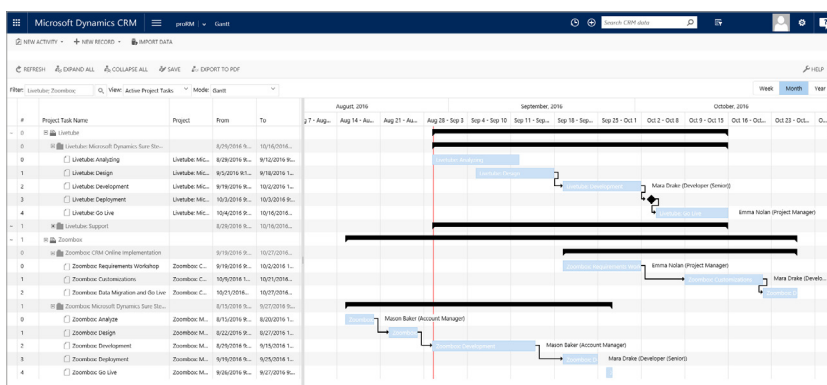
Please note: Loading all available data in the system will decrease the performance of the application.

It is also possible to keep the filter empty to load all the data in the system.

## Step 3: Click Refresh to Load the Ddata

After choosing the desired filter, click on REFRESH to load the data into the application.

On the left hand side, there will be the Project Tree with the hierarchy. Related to the project tree there is a graphical overview on the right hand side of the application.



## Step 4: Create a New Project Task Assignment

To create a new Project Task Assignment, choose the desired Project Task it should be created for. Select the line with left mouse button click and open the context menu by using the right mouse button. Select "ASSIGNMENTS ..." option in the context menu.

#	Project Task Name	Project	From	To	Resource Role	Estimated Eff...
- 0	[-] Livetube					
0	[-] Livetube: Microsoft Dynamics Sure Ste...		8/29/2016 9:...	10/16/2016...		08.000000000...
0	[-] Livetube: Analyzing	Livetube: Mic...	8/29/2016 9:...	9/12/2016 9:...	Consultant (Senior)	8.0000000000
1	[-] Livetube: Design	Livetube: Mic...	9/5/2016 9:1...	9/18/2016 1...	Quality Assurance (Ju...	16.000000000...
2	[-] Livetube: Development	Livetube: Mic...	9/19/2016 9:...	10/2/2016 1...	Developer (Senior)	20.000000000...
3	[-] Livetube: Deployment	Livetube: Mic...	10/3/2016 9:...	10/3/2016 9:...	Project Manager	8.0000000000
4	[-] Livetube: Go Live	Livetube: Mic...	10/4/2016 9:...	10/16/2016...	Project Manager	8.0000000000
- 1	[-] Livetube: Support		8/29/2016 9:...	10/16/2016...		015.000000000...
- 1	[-] Zoombox					
0	[-] Zoombox: CRM Online Implementation		9/19/2016 9:...	10/27/2016...		016.000000000...
0	[-] Zoombox: Requirements Workshop	Zoombox: C...	9/19/2016 9:...	10/2/2016 1...	Consultant (Senior)	16.000000000...
1	[-] Zoombox: Customizations	Zoombox: C...	10/9/2016 1...	10/21/2016...	Developer (Senior)	16.000000000...
2	[-] Zoombox: Data Migration and G...		10/21/2016...	10/27/2016...	Consultant (Senior)	8.0000000000
1	[-] Zoombox: Microsoft Dynamics Sur...		8/15/2016 9:...	9/27/2016 9:...		08.000000000...
0	[-] Zoombox: Analyze		8/15/2016 9:...	8/20/2016 1...	Consultant (Senior)	8.0000000000
1	[-] Zoombox: Design		8/22/2016 9:...	8/27/2016 1...	Quality Assurance (Ju...	16.000000000...
2	[-] Zoombox: Development		8/29/2016 9:...	9/15/2016 1...	Developer (Senior)	20.000000000...
3	[-] Zoombox: Deployment		9/19/2016 9:...	9/25/2016 1...	Project Manager	8.0000000000
4	[-] Zoombox: Go Live	Zoombox: M...	9/26/2016 9:...	9/27/2016 9:...	Project Manager	8.0000000000

## Step 5: Enter all required Data

After clicking on the menu option ASSIGNMENTS a new dialog will pop out where it is possible to edit, remove and delete existing and new Project Task Assignments. To create a new assignment please select the NEW button in the bottom left corner:

Manage assignments

Task: Zoombox: Customizations

Bookable Res...	Resource Role	Billing Type	Estimated eff...	Internal price	External price
Mara Drake	Developer (Senior)	Chargeable	16.00	€80.00	€110.00

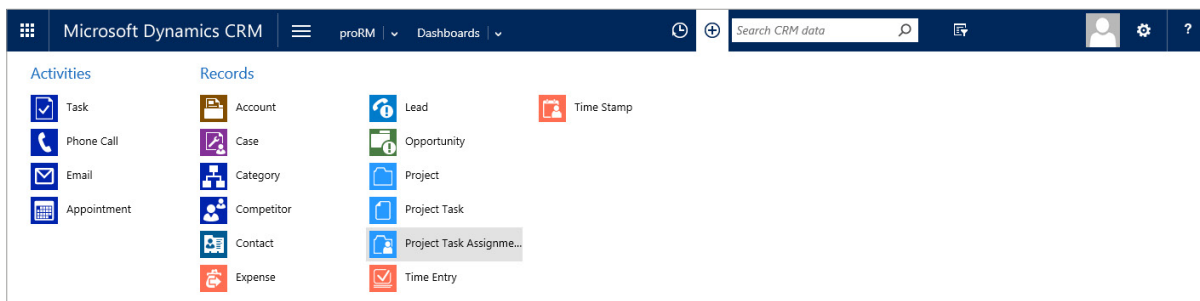
New Edit Delete Restore Close

If all fields are filled in, confirm with OK button and the Project Task Assignment will be created.

### 3.3.2 Creating Assignment via Quick Create Form

#### Step 1: Open Quick Create Form

Navigate to the + Icon in the CRM Navigation to select Project Task Assignment in the Records Group:



#### Step 2: Enter the desired data to create the record

After clicking on Project Task Assignment, the form, where it is possible to enter the required data, is shown:

Fill in all required fields, in order to create the new data record click on the button SAVE.

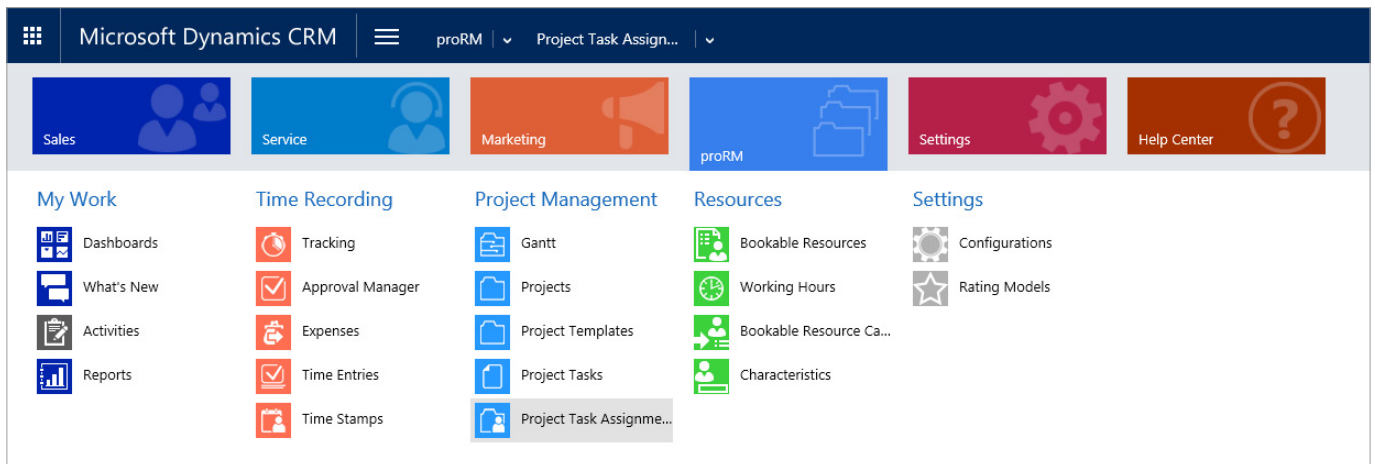


For a more general overview about the functionality and content of the Quick Create Feature, please visit the [Microsoft Dynamics CRM Help & Training](#).

### 3.3.3 Creating Assignment via CRM Form

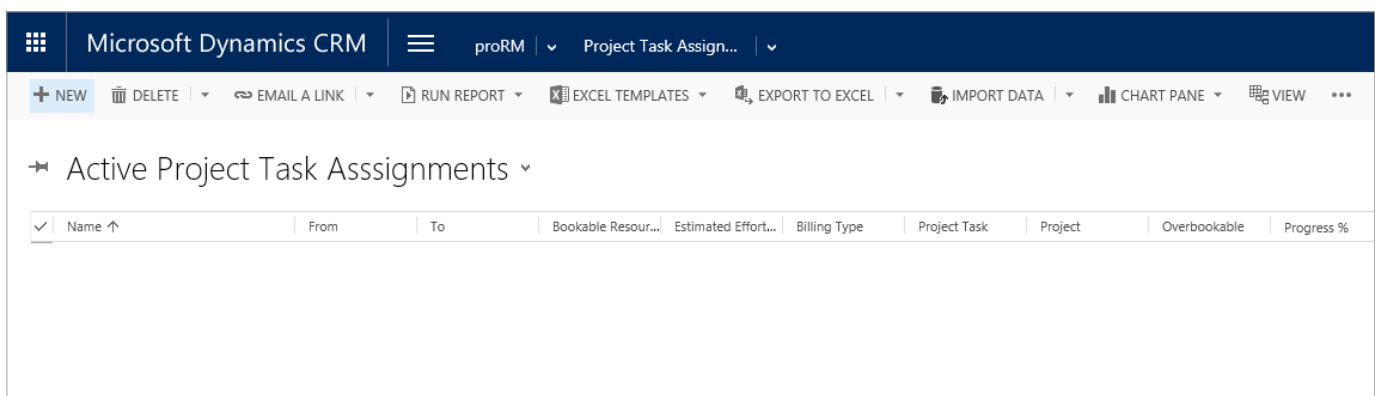
#### Step 1: Open the Project Task Assignment Overview in CRM

Navigate to the proRM Area and select Project Task Assignments in the Project Management Group:



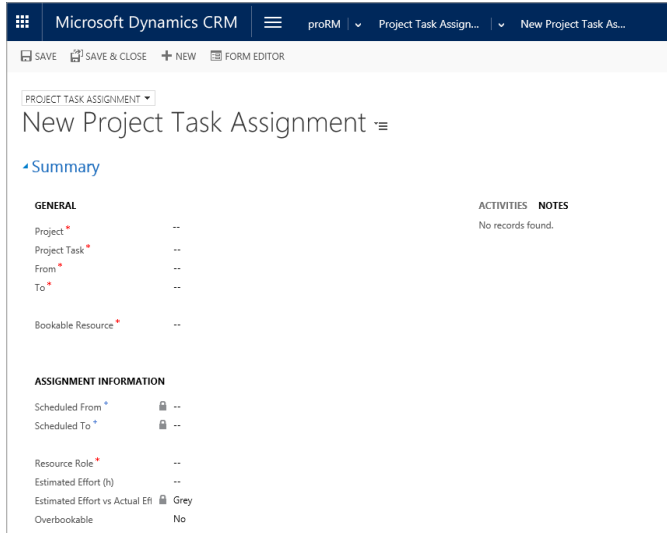
#### Step 2: Create a New Project Task Assignment

Click the NEW button of CRM Task bar to open a new blank form for the Project Task Assignment entity:



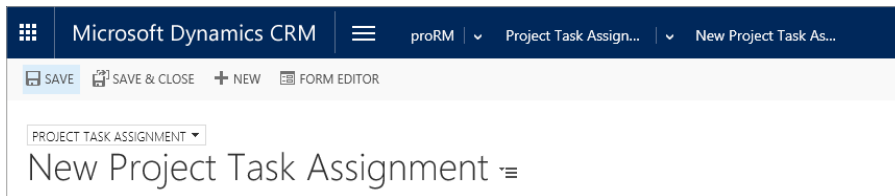
### Step 3: Enter the Required Data

Now fill in all required data directly to the form:

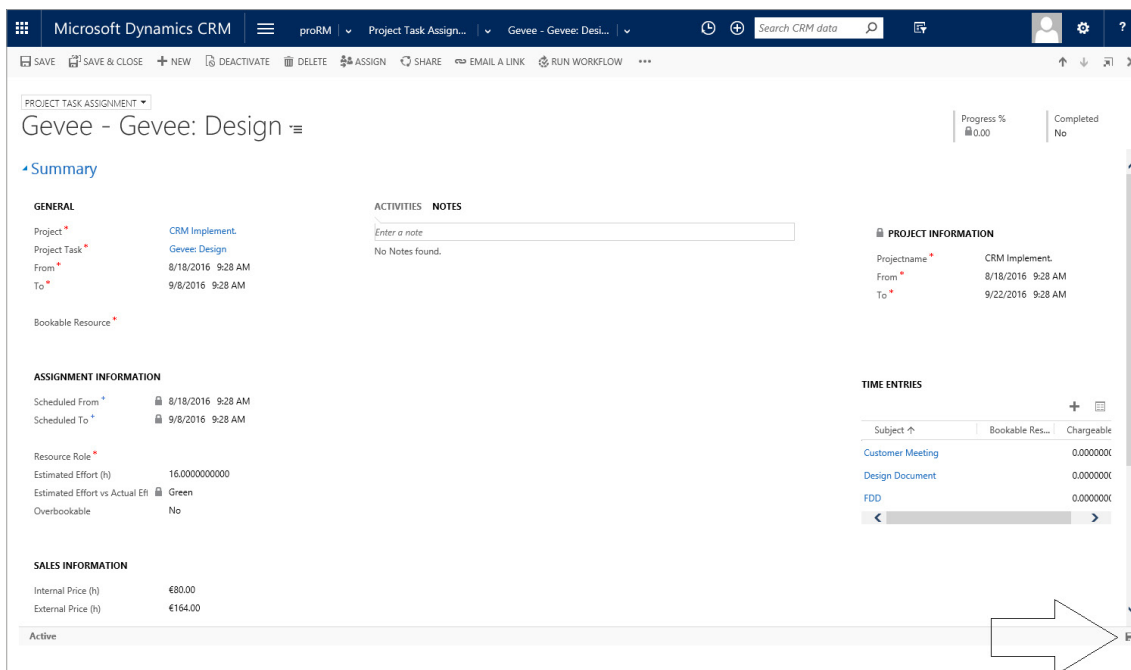


### Step 4: Save the Record

After filling in all required data (marked with a red \*), save the record with the SAVE button in the CRM Task bar:



Or choose the SAVE button on the bottom right corner of the screen:



## 3.4 Time Tracking

As soon as an employee is assigned to a specific Project Task it is possible for him/her to create new Time Entries for this Task. With those Time Entries the employee tracks the duration he/she was working on the assigned Task.

Based on the created time entries it is possible for the Project Manager to control the progress of his/her project.

There are different options to create the proof of the work done in Time Entry form. Either out of CRM or with the help of the Tracking application - both ways are supported.

In addition, there are different types of Time Entries:

Time Entry Type: Work

The Work type is general and default type for the Time Entry. It is used for the normal daily work on Projects.

Time Entry Type: Absence

The Absence type can be used for days or time entries where the employee is not in the office, for example illness.

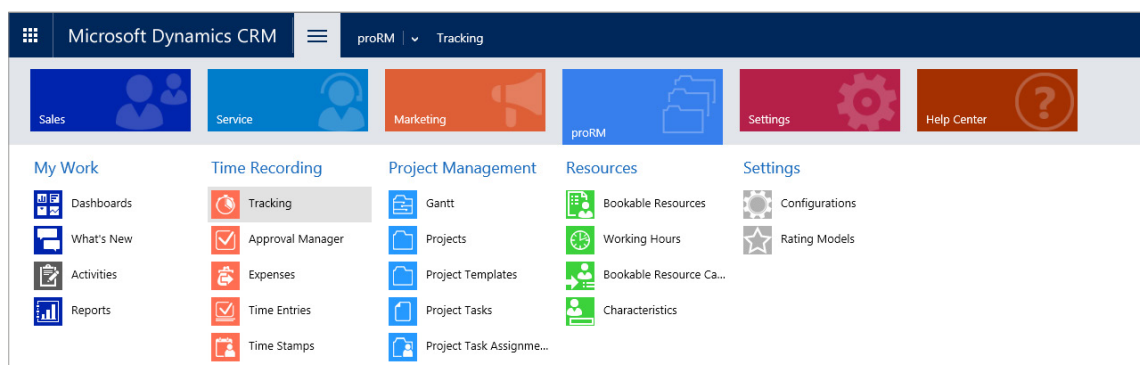
Time Entry Type: Holiday

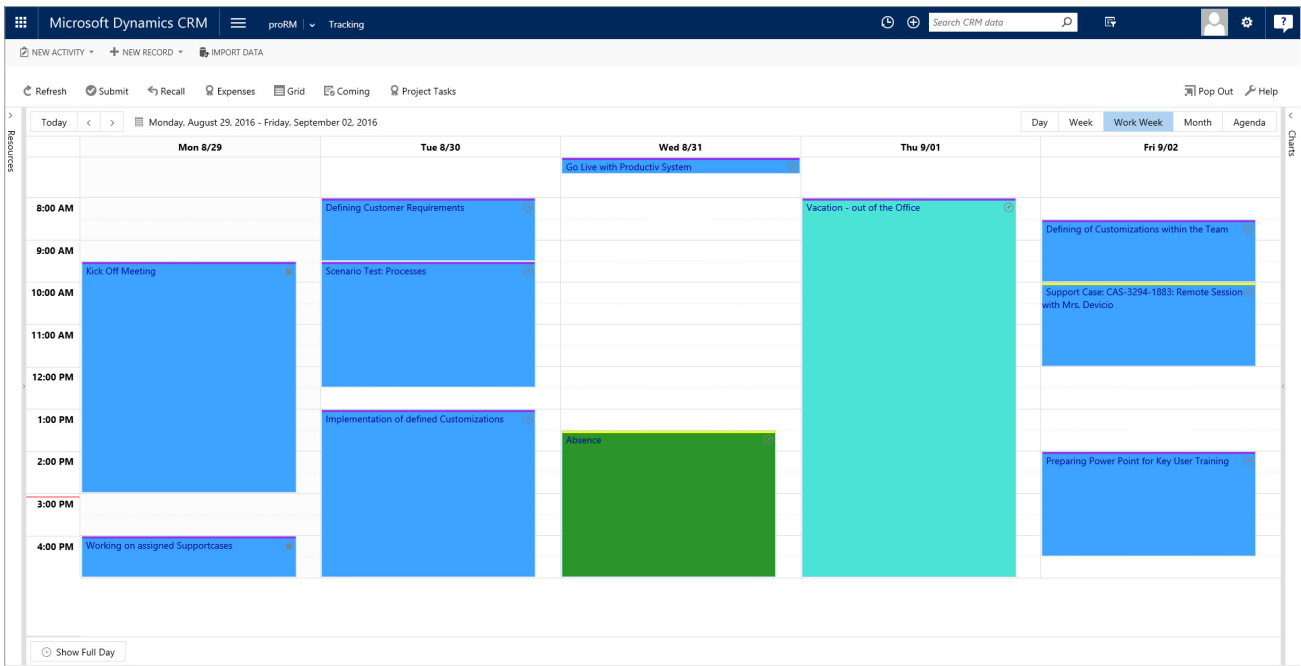
A Time Entry can have the Holiday type. As the name already defines it, it is used to track holidays or public holidays of the resources.

### 3.4.1 Creating and Managing Tracking Entries

#### Step 1: Open the Application

Navigate to the proRM Area and select Tracking in the Time Recording Group:





## Step 2: Decide which kind of Time Entry Should be Created

There are two kinds of Time Entries:

- Full Day Time Entries
- Start and End Time Entries

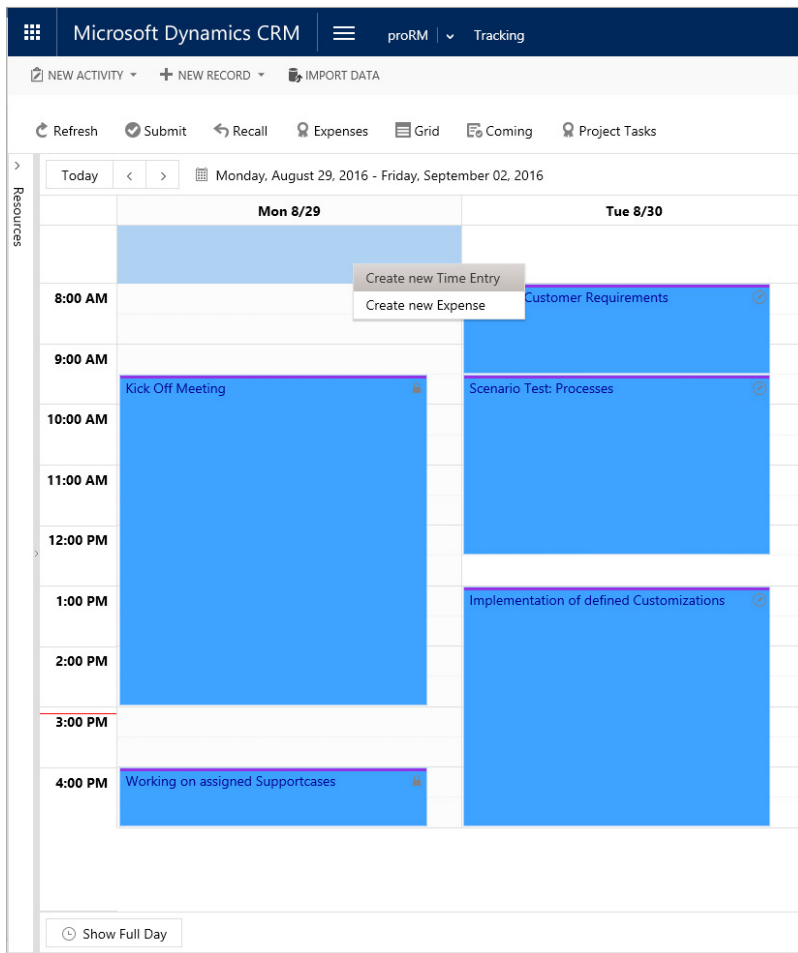
Full Day Time Entries do not have an exact Start Time or End Time – just a duration the user is manually able to enter. On the other side, Time Entries with specific Start and End Time are supported as well.

Which of those types are the correct or best one to create can be an individual choice, a decision by the management or based on the assigned project.

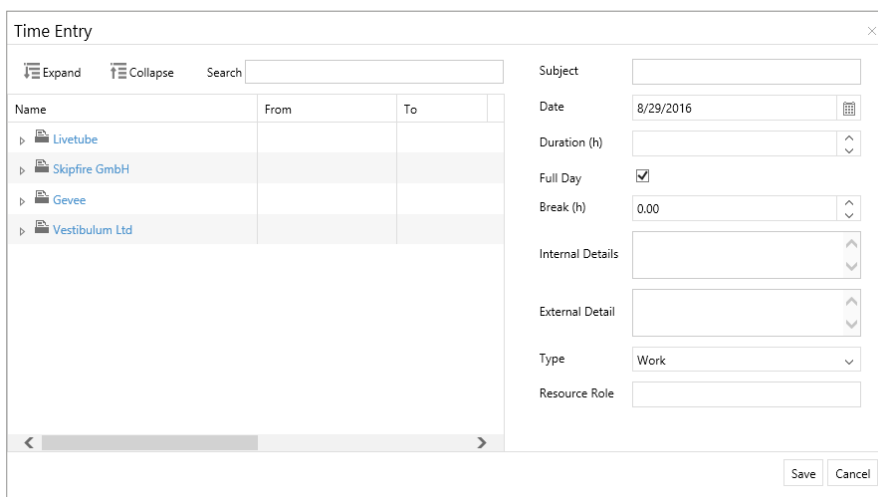
### Step 2.1: Create a Full Day Time Entry

Full Day Time Entries are only based on duration and the day the service was provided. So in order to create a new Time Entry without exact Start and End Time, select the column on the top of the desired day the Time Entry should be created.

Select the option CREATE NEW TIME ENTRY with the help of the right click context menu.



This action opens the creation form for the Time Entry. The pop-up is separated in two parts, a Project Tree for selecting the desired Project Task Assignment on the left hand side and on the right hand side an area to enter all the necessary data regarding the Time Entry.



Select the Project Task Assignment with a simple left click in the



Project Tree structure and fill in displayed fields:

Name	From	To
Livetube		
Livetube: Microsoft Dynamics Su...	8/29/2016 9:14 AM	10/16/2016 12:00 AM
Livetube: Analyzing	8/29/2016 9:14 AM	9/12/2016 9:14 AM
Livetube: Analyzing	8/29/2016 9:15 AM	9/12/2016 9:15 AM
Skipfire GmbH		
Gevee		
Vestibulum Ltd		

Confirm with a click on the SAVE button the entered data and create a new Time Entry.

## Step 2.2: Create a Time Entry with Start and End Times

Time Entries are also supported with specific Start and End Times, the duration here is locked and cannot be edited. The duration will be automatically calculated based on Start and End Time.

In order to create a new Time Entry, select the desired time frame in the calendar by holding the left mouse button. Select now the option "CREATE NEW TIME ENTRY" by clicking right mouse button to show the context menu.

This action opens the creation form for the Time Entry. The pop-up is separated in two parts, a Project Tree for selecting the desired Project Task Assignment on the left hand side and on the right hand side an area to enter all the necessary data regarding the Time Entry.

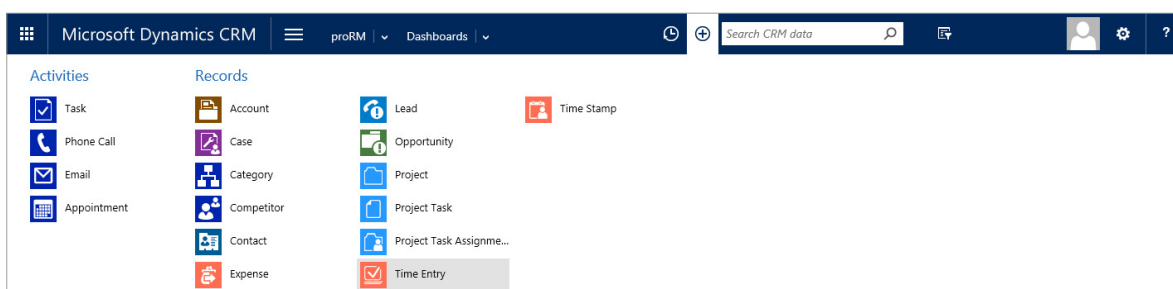
Select the Project Task Assignment with a simple left click in the Project Tree structure and fill in displayed fields.

Confirm with a click on the SAVE button the entered data and create a new Time Entry.

### 3.4.2 Creating Tracking Entries via Quick Create Form

#### Step 1: Open Quick Create Form

Navigate to the + Icon in the CRM Navigation to select Time Entry in the Records Group:



## Step 2: Enter the Desired Data to Create the Record

After clicking on Time Entry, the form to enter the required data is shown:

Fill in all required fields, in order to create the new data record click on the button SAVE.



For a more general overview about the functionality and content of the Quick Create Feature, please visit the [Microsoft Dynamics CRM Help & Training](#).

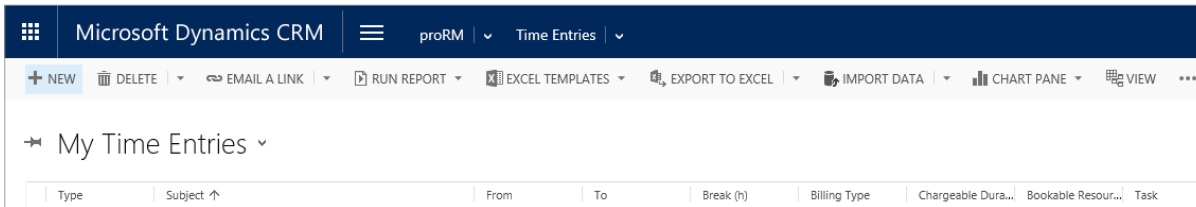
## 3.4.3 Creating Tracking Entries via CRM Form

### Step 1: Open the Time Entry Overview in CRM

Navigate to the proRM Area and select Time Entries in the Time Recording Group:

## Step 2: Create a New Time Entry

Click the NEW button of CRM Task bar to open a new blank form for the Time Entry entity:



## Step 3: Enter the Required Data

There are two options how to fill in the data. One is to fill in the required data directly to the form:

Summary

GENERAL		ACTIVITIES	NOTES
Project *	--	No records found.	
Task *	--		
Assignment *	--		
Subject *	--		
From *	--		
To *	--		
Break (h)	0.0000000000		
Duration (h)	--		
Status Reason	Draft		
RESOURCE INFORMATION			
Bookable Resource	--		
Resource Role	--		
Internal Details			
--			

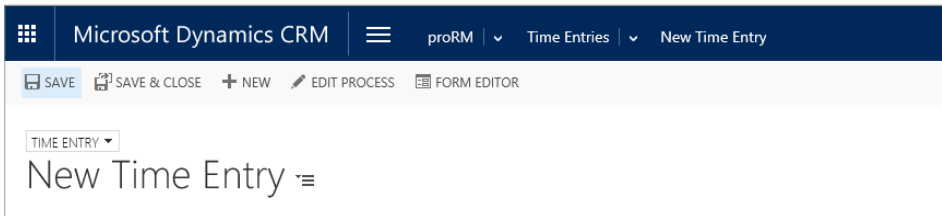
The second option is to use the proRM Business Process Flow at the top of the page, which will guide the employee through the different stages of the Time Entry creation:



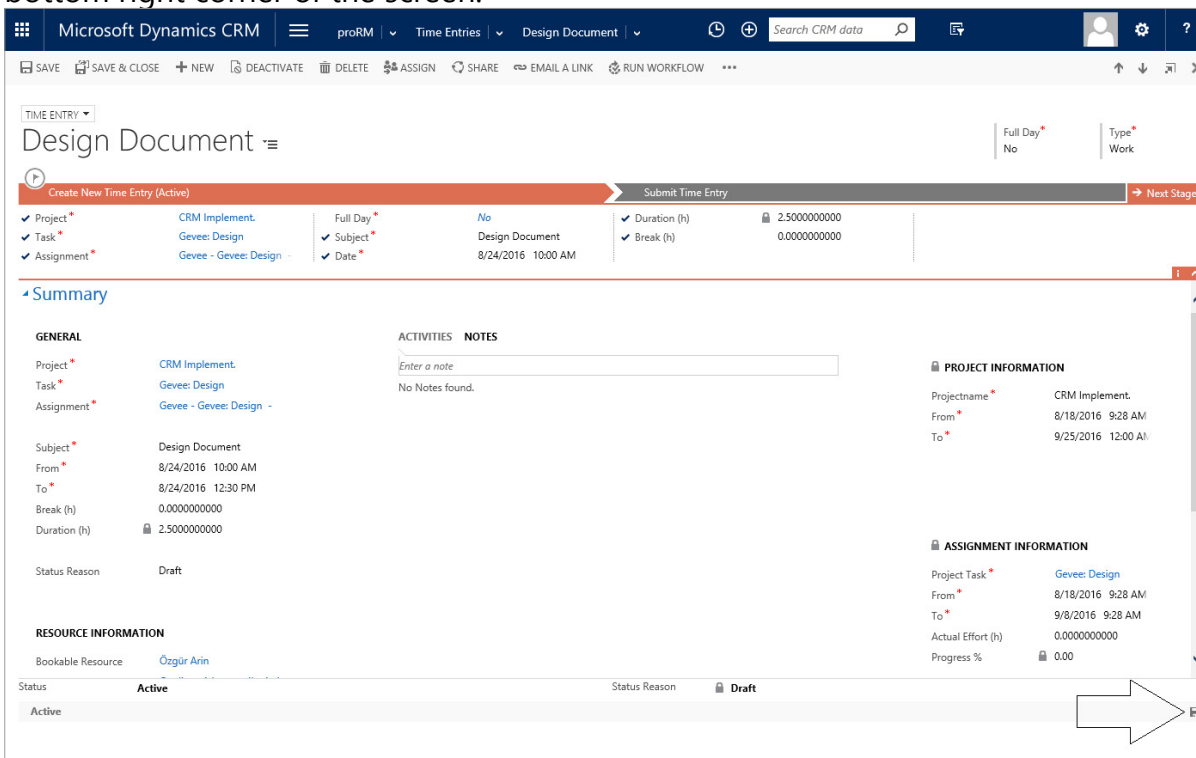
For more information about the Business Process Flow feature please visit the related [Microsoft TechNet website](#).

## Step 4: Save the Record

After filling in all required data (marked with a red \*), save the record with the SAVE button in the CRM Task bar:



Or choose the SAVE button in the bottom right corner of the screen:



### 3.4.4 Creating Tracking Entries via Microsoft Dynamics 365 Mobile Application 365



Please find all related to app for phones and tablets information [here](#).

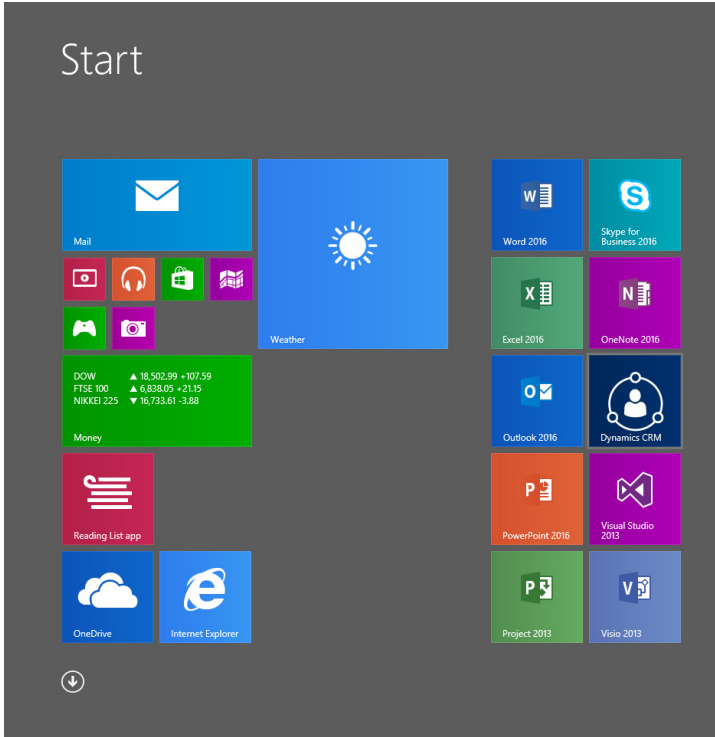
## Introduction

The Microsoft Dynamics 365 Application is available for phones, tablets and additional also for Windows 8.1 or higher via the related App stores. It features the access to activities, accounts, contacts, leads, dashboards and custom entities so it is possible to track the progress of the daily work.

For Windows PCs the application is available via the [Microsoft Store](#).

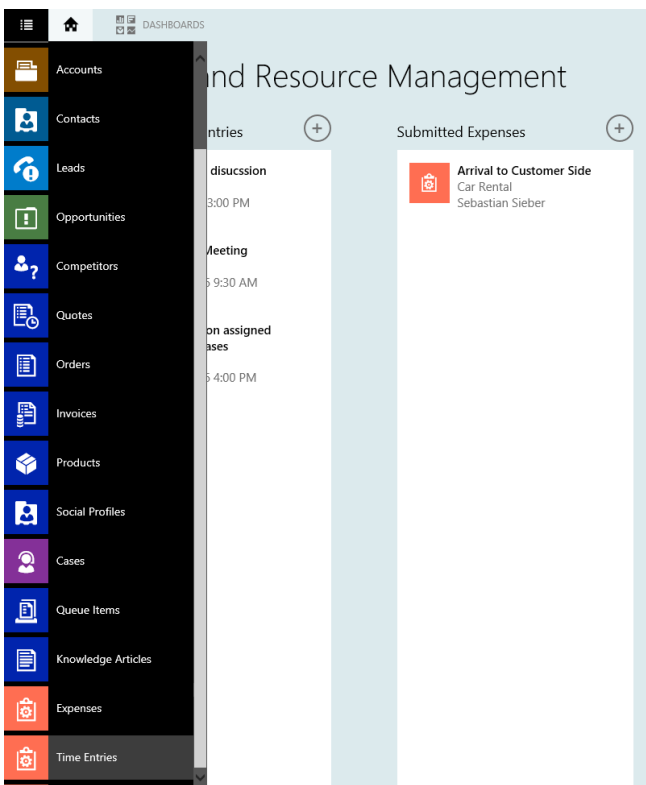
## Step 1: Open Application

Open the Mobile Application on phone, tablet or PC:

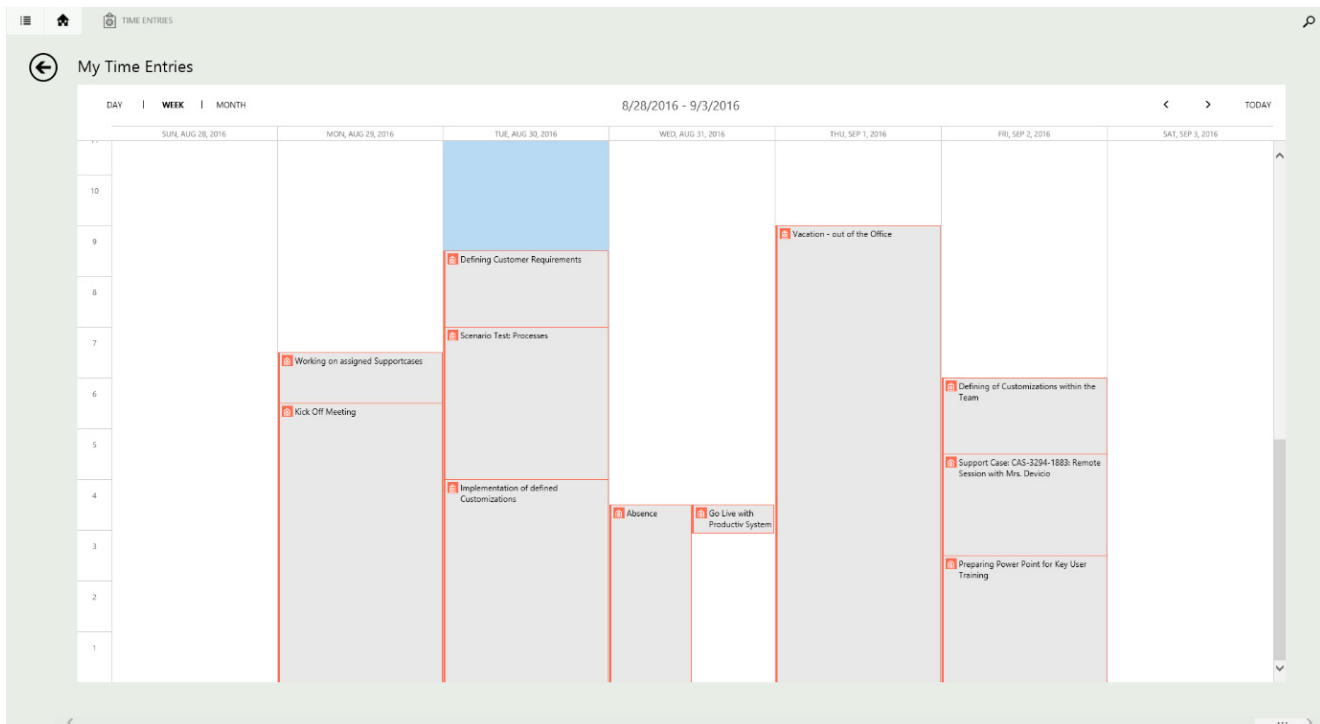


## Step 2: Select the Time Entry Entity

Navigate to the Menu Icon in the App Navigation to select Time Entry in the shown List:

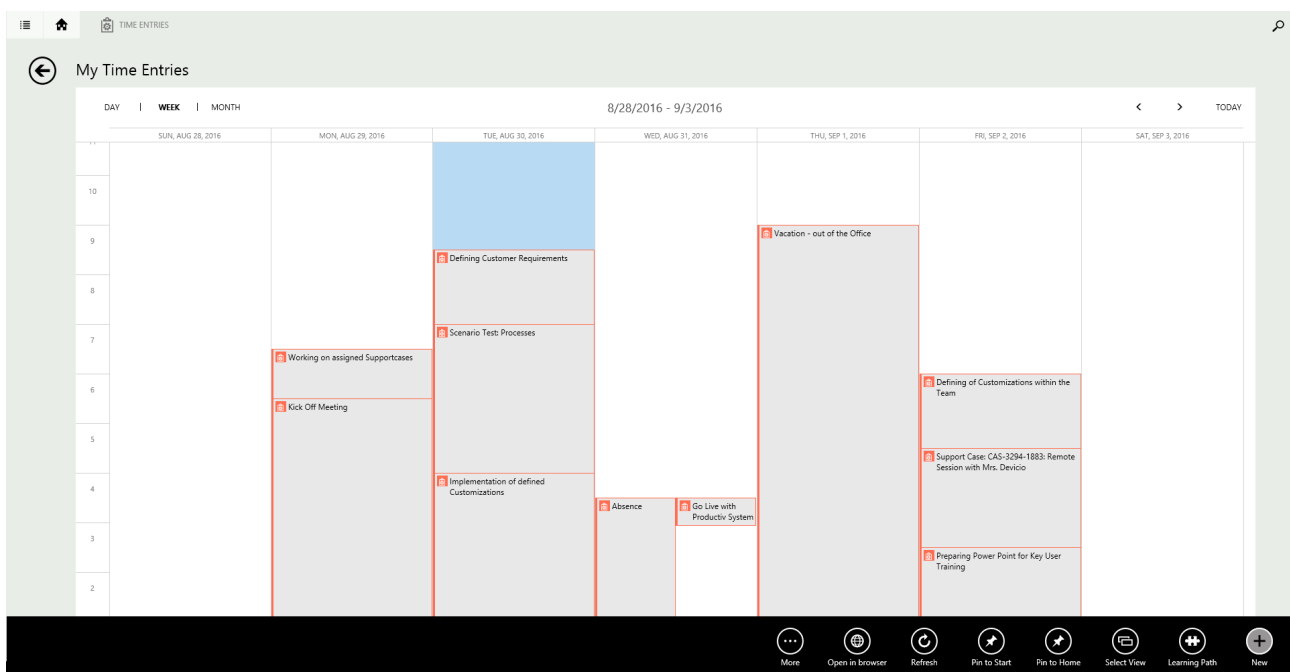


With opening the Entity there will be an overview about the current week including the already existing Time Entries:



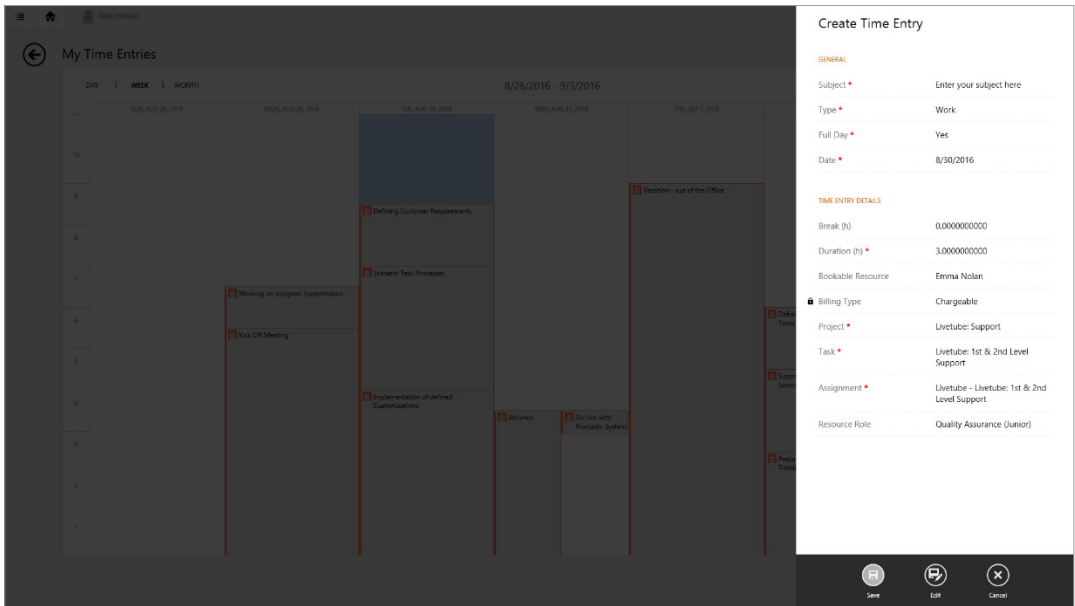
### Step 3: Open Creation Form

In order to create a new Time Entry right click or tap – if using a mobile - somewhere to open the context menu. Clicks the button NEW:



## Step 4: Enter the required data

After clicking the NEW button, the form, where it is possible to enter the required data, is shown. To create the new Time Entry enter all required data and click on SAVE button:





## 3.5 Expense Entry Creation for Tracking

In addition to Time Entries proRM Fast Start also provides the option to track Expenses in the Microsoft Dynamics 365. So it is also possible to include additional costs of each employee like travel expenses during a project.

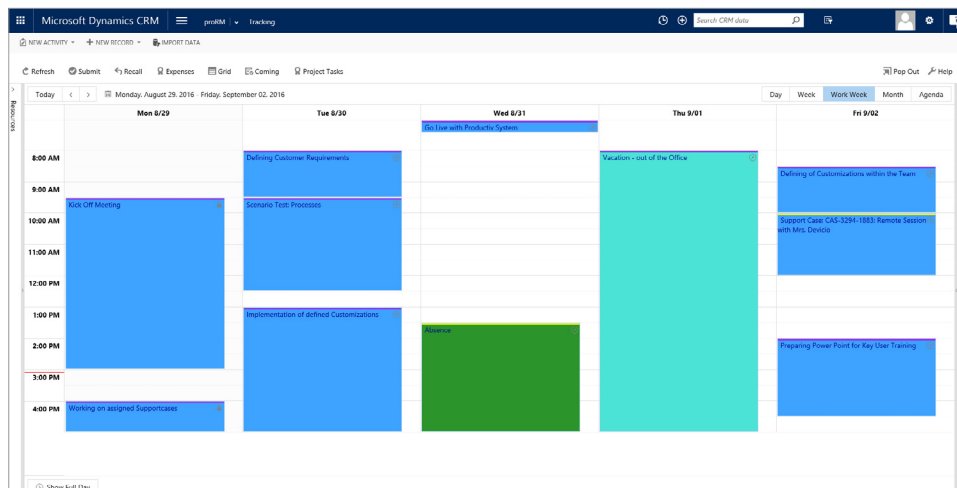
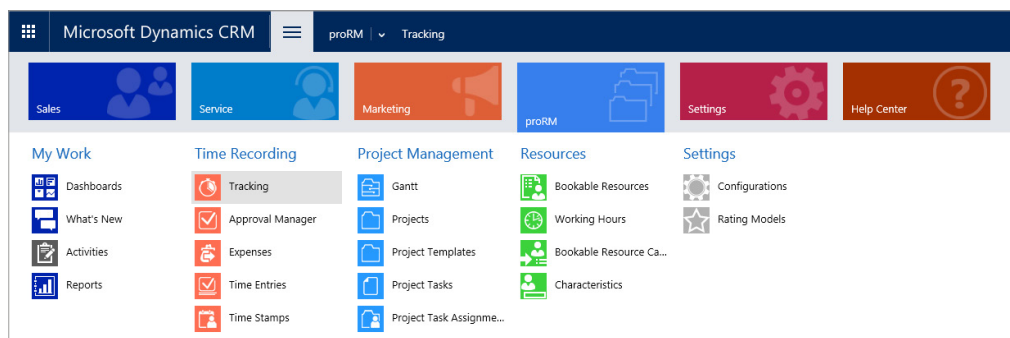
There are different options to track expenses. Either by CRM, with the help of the HTML Tracking Application or the Microsoft Dynamics 365 Application - all those ways are supported.

For each Expense, the user is able to deposit one of the following types to describe the usage of the entry in more detail: Hotel, Car Rental, Meal, Airline, Public Transportation, Taxi and Miscellaneous.

### 3.5.1 Adding Expenses via Tracking Application

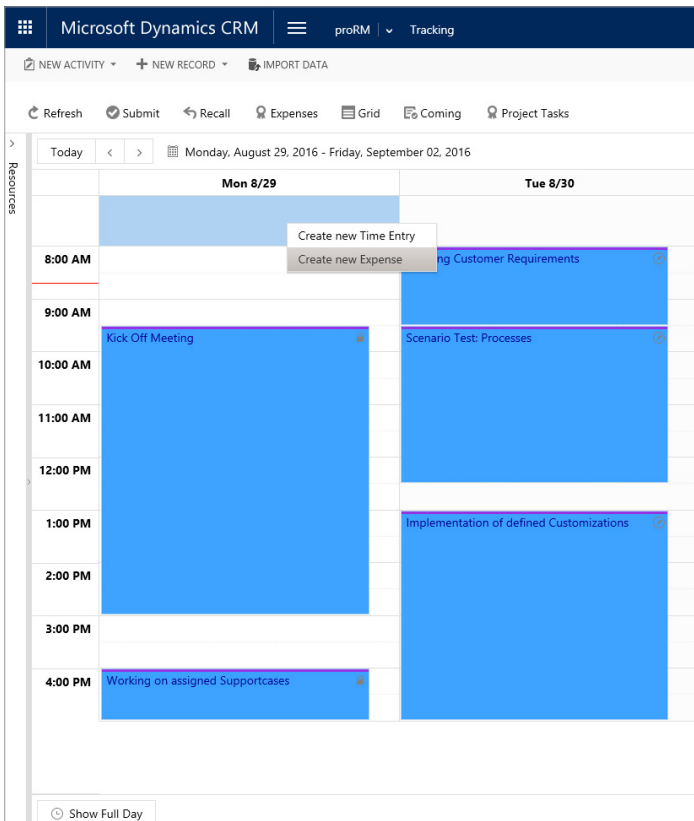
#### Step 1: Open the Application

Navigate to the proRM Area and select Tracking in the Time Recording Group:



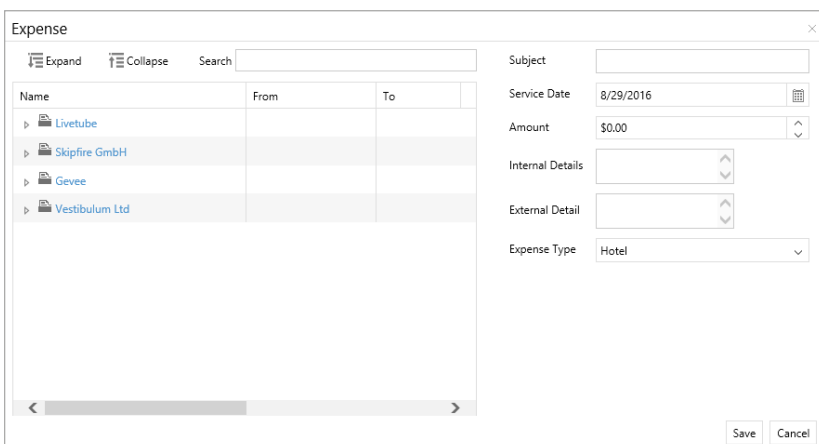
## Step 2: Open Creation Form

In order to create a new Expense, select a column with the left mouse button on the desired day the Expense should be created. Select the option CREATE NEW EXPENSE with the context menu by clicking right mouse button.



## Step 3: Enter Required Data and Creating the New Expense

This action opens the creation form for the Expense. The pop up is separated in two parts: a Project Tree for selecting the desired Project Task Assignment is on the left hand side and on the right hand side is an area to enter all the necessary data regarding the new Expense.



Select the Project Task Assignment with a simple left mouse button click in the Project Tree structure and fill in all fields. To create a new Expense confirm the entered data with a click on the SAVE button.

The screenshot shows the 'Expense' form in Microsoft Dynamics CRM. On the left, there is a tree view with the following structure:

Name	From	To
Livetube		
└ Livetube: Microsoft Dynamics Su...	8/29/2016 9:14 AM	10/16/2016 12:00 AM
└ Livetube: Analyzing	8/29/2016 9:14 AM	9/12/2016 9:14 AM
└ Livetube: Analyzing	8/29/2016 9:15 AM	9/12/2016 9:15 AM
└ Skipfire GmbH		
└ Gevee		
└ Vestibulum Ltd		

The right pane of the form contains the following fields:

- Subject: Enter you subject here
- Service Date: 8/29/2016
- Amount: \$160.00
- Internal Details: Internal Details for colleagues and PM
- External Detail: External Details for Customer
- Expense Type: Airline

Buttons for 'Save' and 'Cancel' are located at the bottom right of the form.

### 3.5.2 Creating Expenses with Quick Create Form

#### Step 1: Open Quick Create form

Navigate to the + Icon in the CRM Navigation to select Expense in the Records Group:

The screenshot shows the Microsoft Dynamics CRM navigation pane. The 'Records' group is expanded, and the 'Expense' record is highlighted. The records listed are:

- Account
- Case
- Category
- Competitor
- Contact
- Expense
- Lead
- Opportunity
- Project
- Project Task
- Project Task Assignme...
- Time Stamp
- Time Entry

#### Step 2: Enter the Desired Data to Create the Record

After clicking on Expense the form to enter the required data is shown:

The screenshot shows the 'Expense' form in Microsoft Dynamics CRM. The form is divided into three sections:

- GENERAL**
  - Expense Type: Miscellaneous
  - Subject: --
  - Service Date: --
  - Bookable Resource: --
  - Project: --
- BILLING**
  - Currency: Euro
  - Amount: --
  - Billing Type: Chargeable
- DETAILS**
  - Internal Details: --
  - External Detail: --

Buttons for 'Save' and 'Cancel' are located at the bottom right of the form.

Fill in all required fields, in order to create the new data record click on the SAVE button.

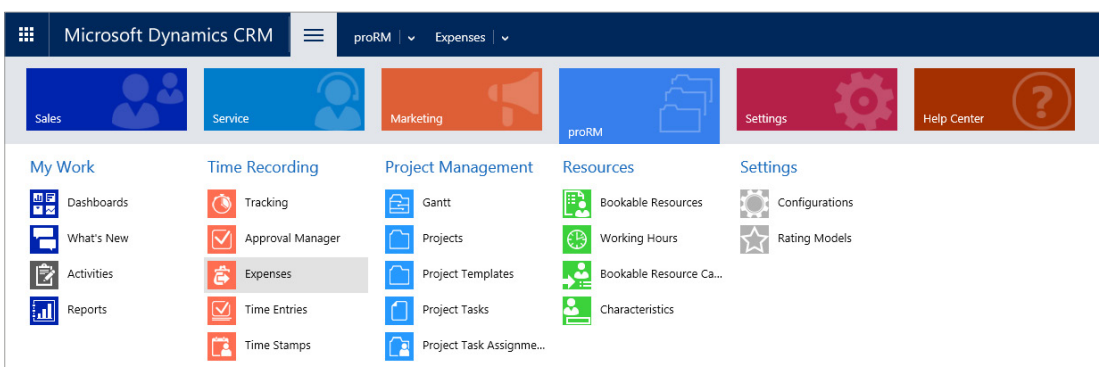


For a more general overview about the functionality and content of the Quick Create Feature, please visit the [Microsoft Dynamics CRM Help & Training](#).

### 3.5.3 Creating Expense via CRM Form

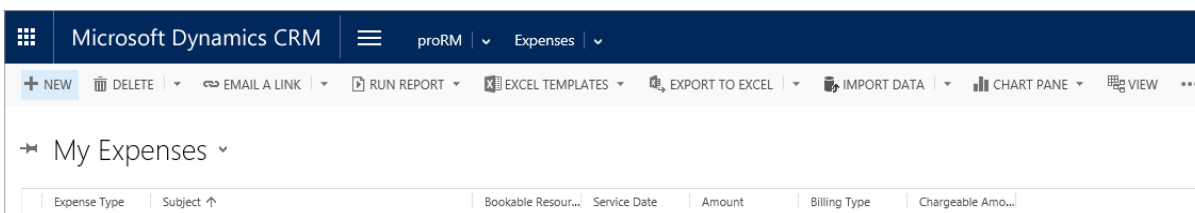
#### Step 1: Open the Expense Overview in CRM

Navigate to the proRM Area and select Expenses in the Time Recording Group:



#### Step 2: Create a New Expense

Click the NEW button of CRM Task bar to open a new blank form for the Expense entity:



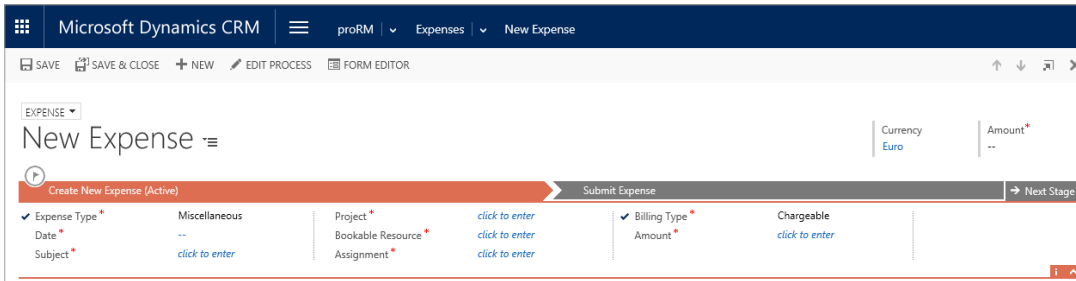
#### Step 3: Enter the Required Data

There are two options to fill in the data. One is to fill in the required data directly to the form:

**Summary**

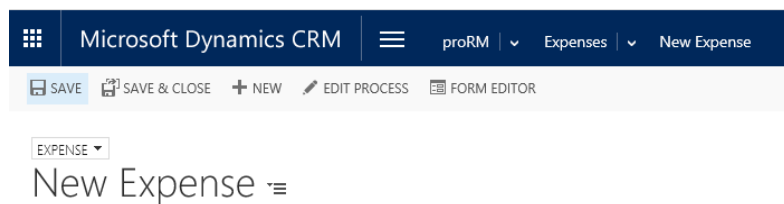
GENERAL		ACTIVITIES	NOTES
Expense Type *	Miscellaneous	No records found.	
Subject *	--		
Service Date *	--		
Bookable Resource *	--		
Internal Details +	--		
External Detail	--		

The Second option is to use the proRM Business Process Flow at the top of the page, which will guide the employee through the different stages of the Expense:



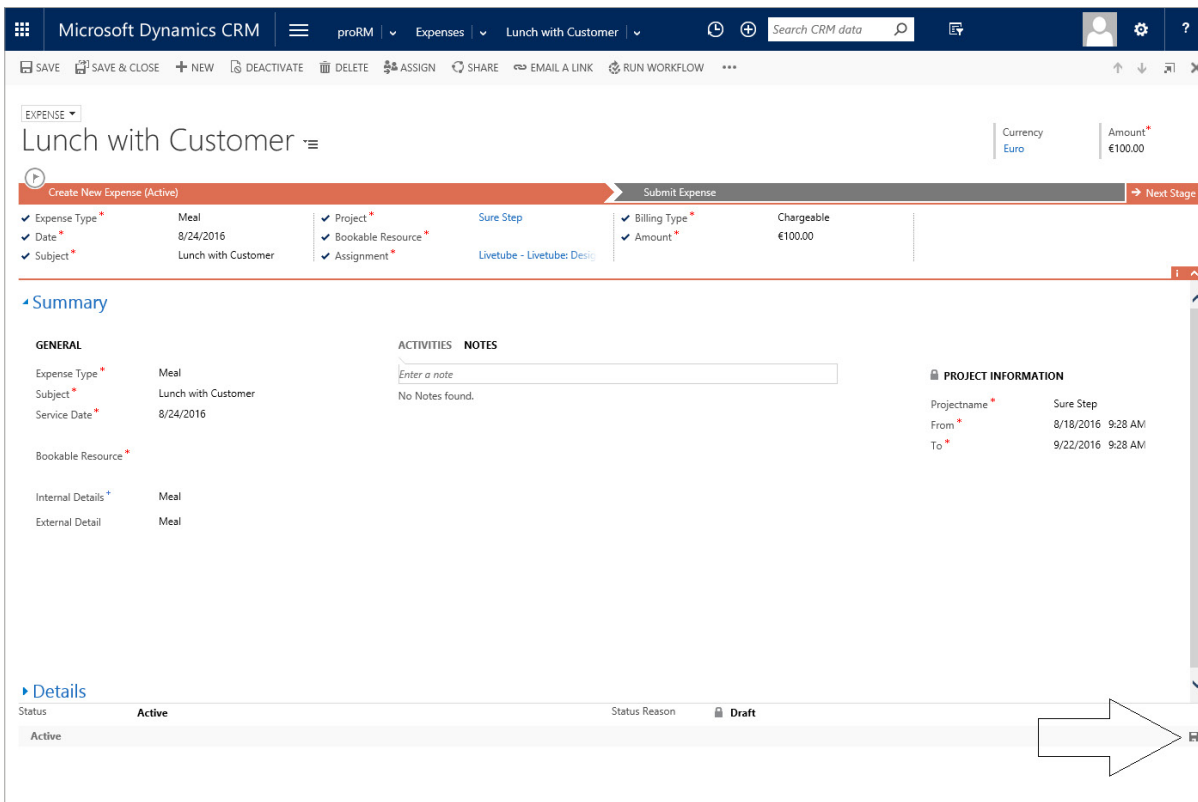
## Step 4: Save the Record

After filling in all required data (marked with a red \*), save the record with the SAVE button in the CRM Task bar:



For more information about the Business Process Flow feature please visit the related [Microsoft TechNet website](https://technet.microsoft.com/en-gb/library/90000000-0000-0000-0000-000000000000).

Or choose the SAVE button on the bottom right corner of the screen:



## 3.5.4 Creating Expense in Microsoft Dynamics 365 Mobile Application

### Introduction

The Microsoft Dynamics 365 Application is available for phones, tablets and additional also for Windows 8.1 or higher via the related App stores. It features the access to activities, accounts, contacts, leads, dashboards and custom entities so it is possible to track the progress of the daily work.

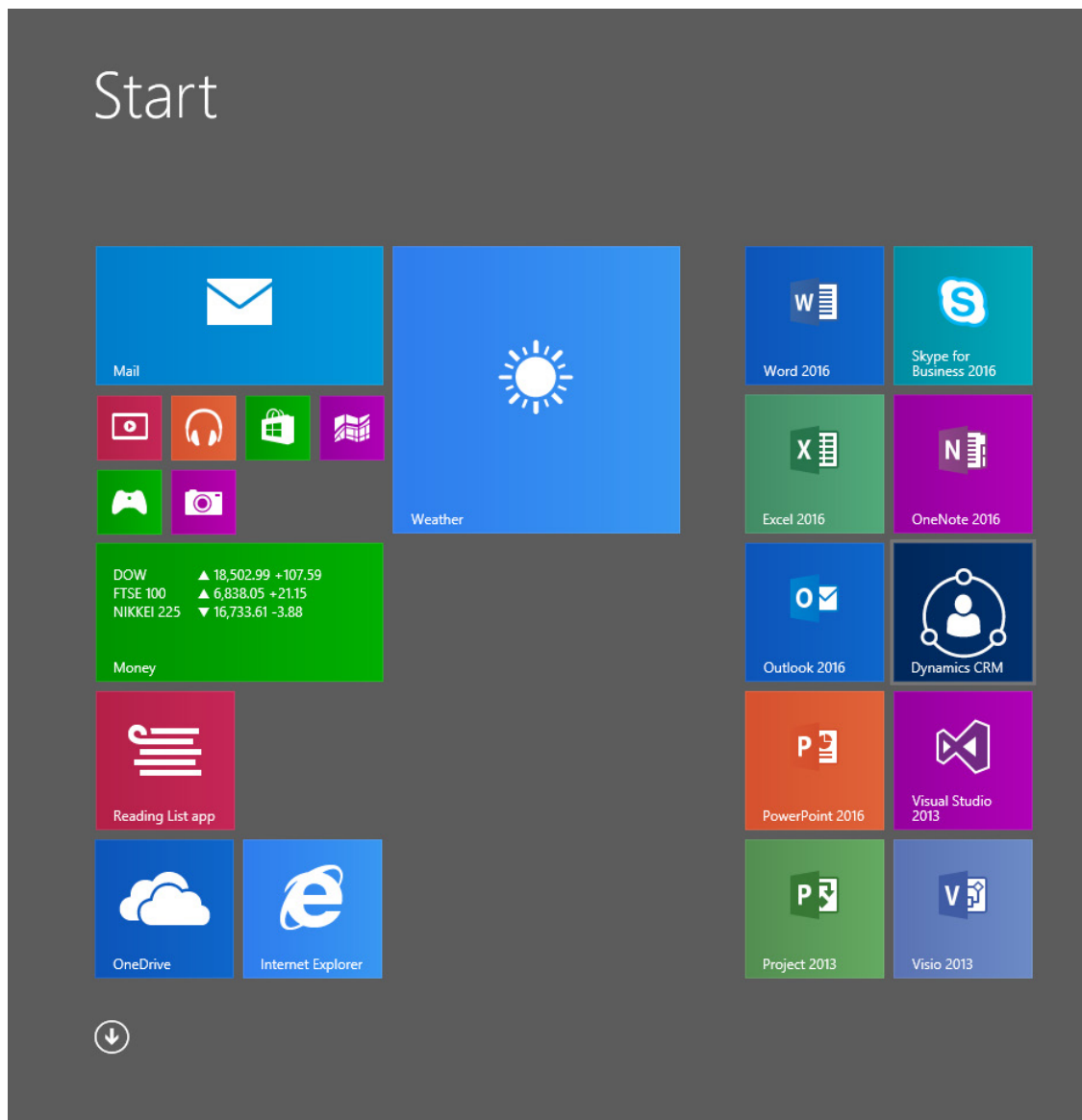
### Step 1: Open Application

Open the Mobile Application on phone, tablet or PC:



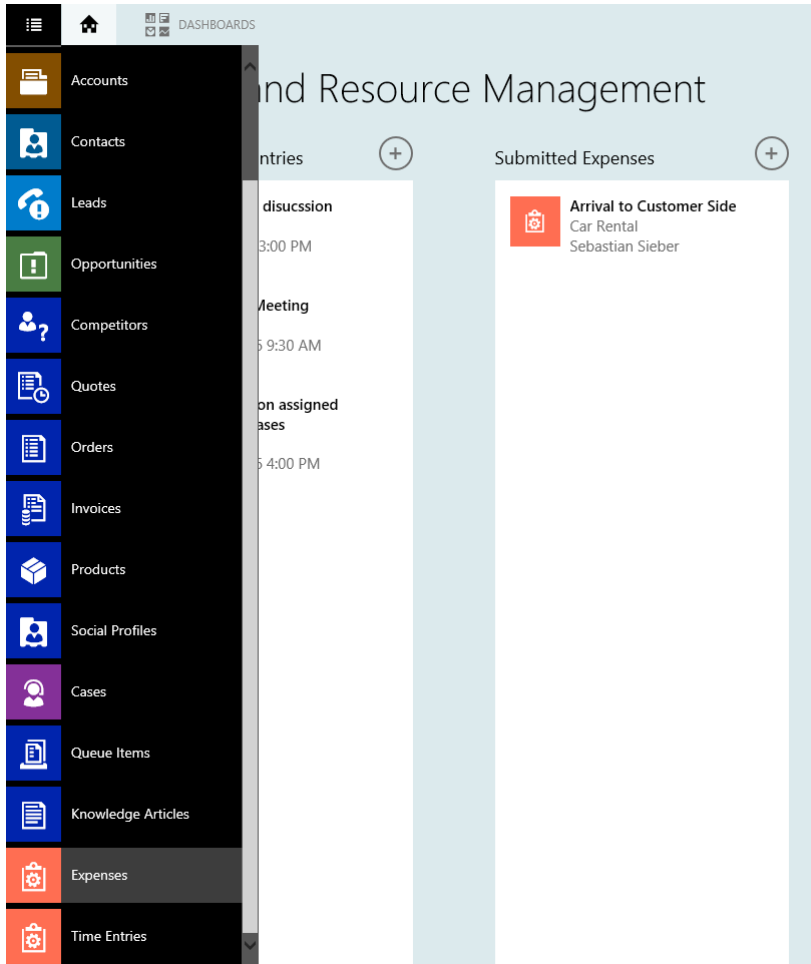
Please find all related to app for phones and tablets information [here](#).

For Windows PCs the application is available via the [Microsoft Store](#).

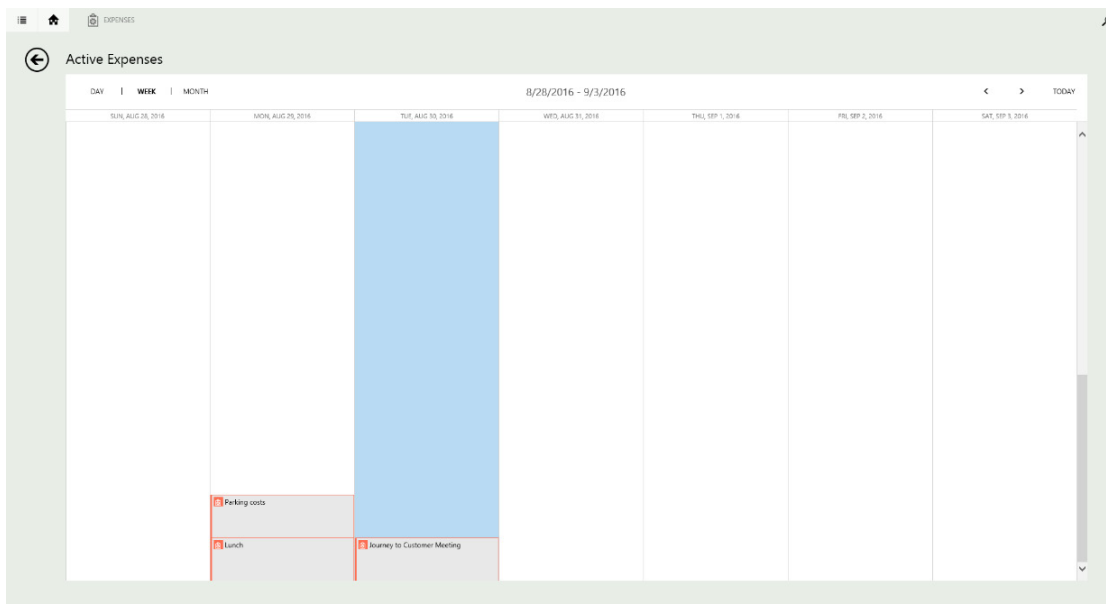


## Step 2: Select the Expense Entity

Navigate to the Menu Icon in the App Navigation to select Expenses in the shown List:

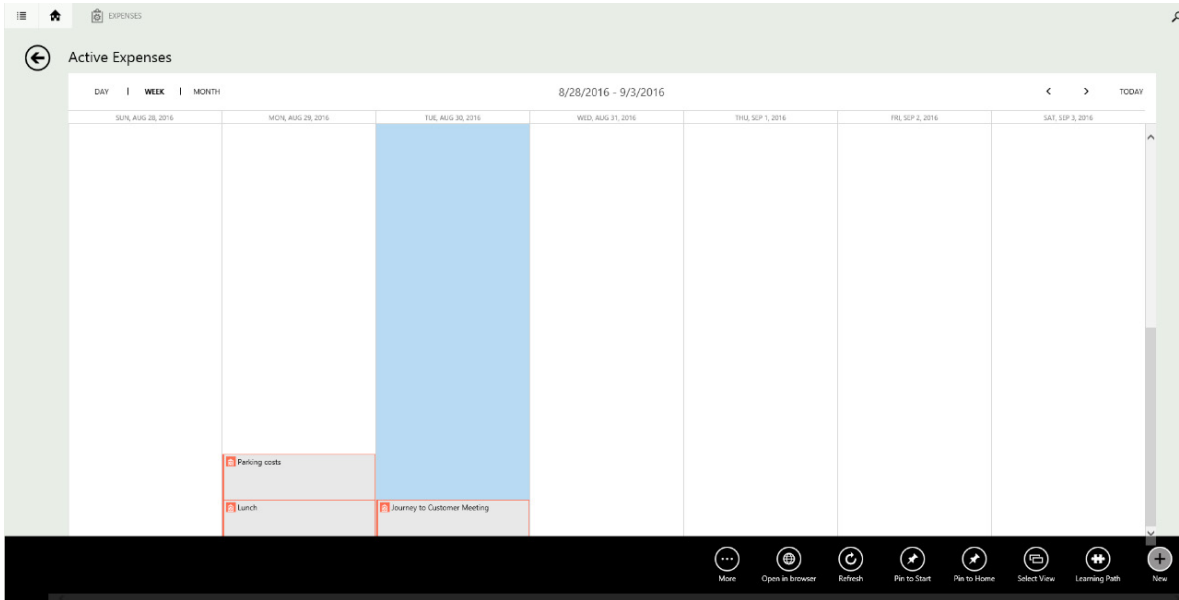


With opening, the entity there is an overview of the current week including already existing Expenses:



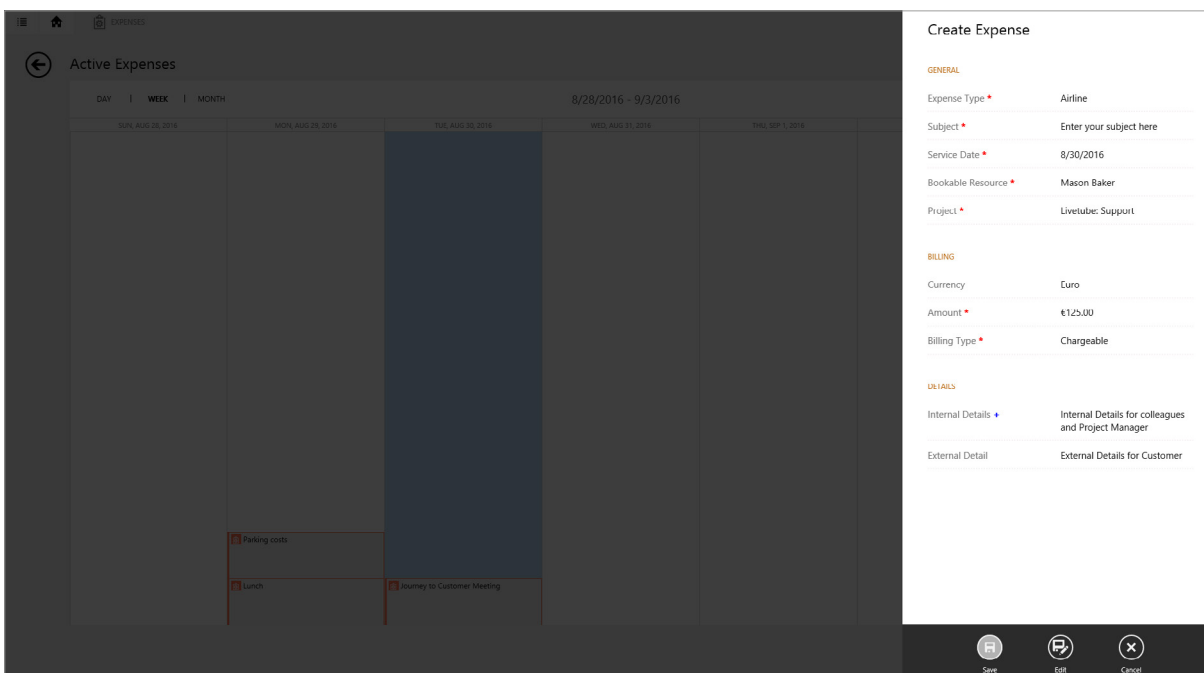
### Step 3: Open Creation Form

In order to create a new Expense right click or tap – if using a mobile - somewhere to open the context menu. Click the NEW button:



### Step 4: Enter the Required Data

After clicking the NEW button, the form where it is possible to enter the required data, is shown. Enter all required data and click on SAVE button to create the new Expense.





## 3.6 Time Stamps Creation

With Time Stamps every employee is able to track his/her office time – parallel to the project tracking with his/her Time Entries. The office time describes the presence of the employee in the office regardless of the work he is doing, it is a definition for “came to office” “leave the office” times.

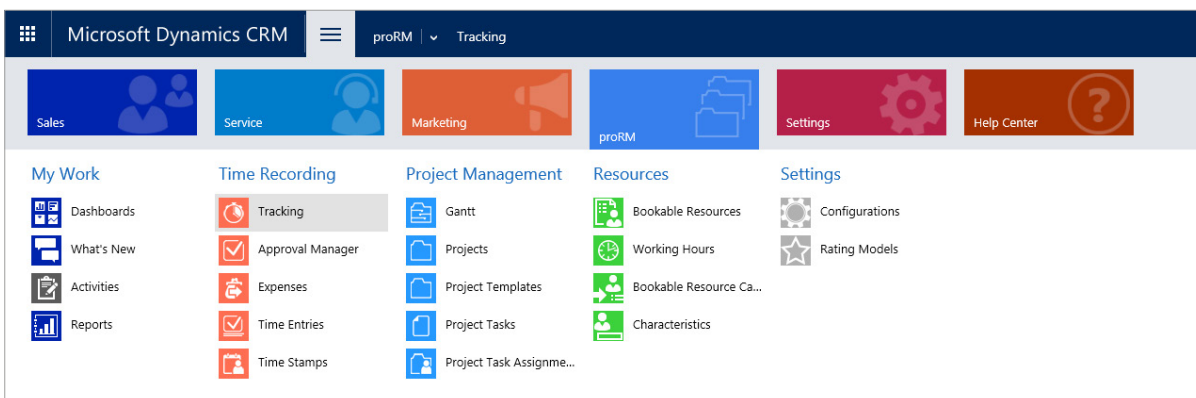
Idea behind this is that the employee creates one Time Stamp each day he/she arrives at the office and one before he/she leaves.

There are different options to create own Time Stamps. by Either out of CRM or with the help of the Tracking application - both ways are supported.

### 3.6.1 Adding Time Stamp via Tracking Application

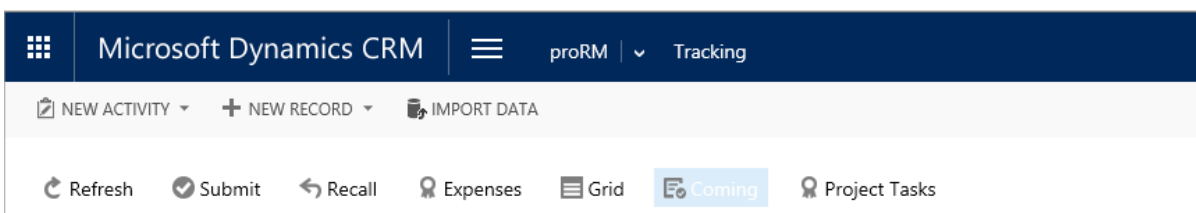
#### Step 1: Open the Application

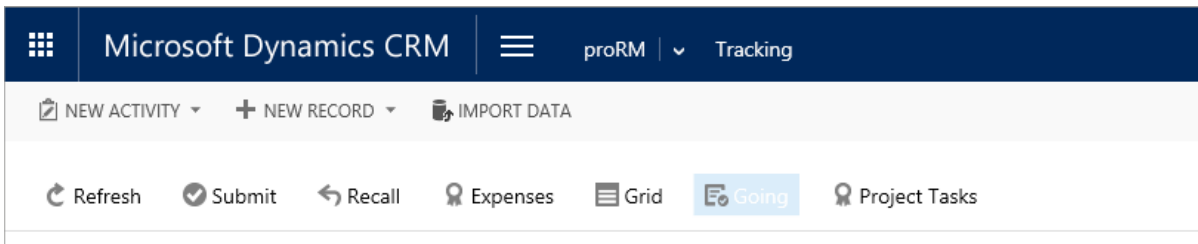
Navigate to the proRM Area and select Tracking in the Time Recording Group:



#### Step 2: Create the New Time Stamp

Related to the latest Time Stamp the User created he/she will have the option to create a Time Stamp as “Come” or “Go”. A new Time Stamp can be created by pressing the related button:



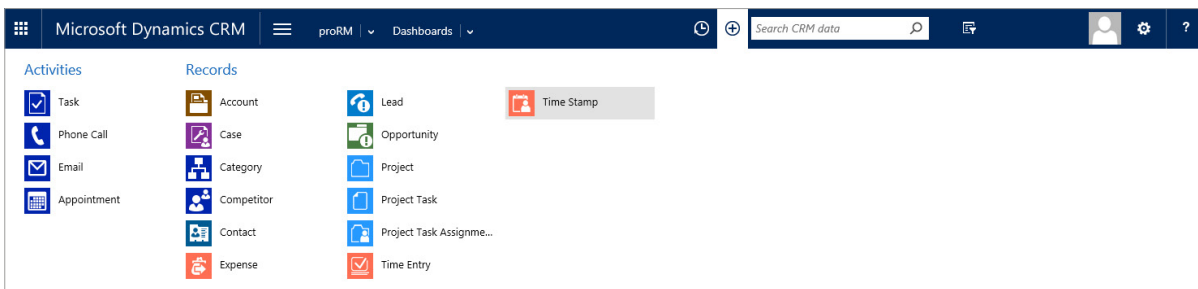


Please Note: The application changes the button regarding to the last Time Stamp the User created so it is always either of these two options.

### 3.6.2 Adding Time Stamp via Quick Create functionality

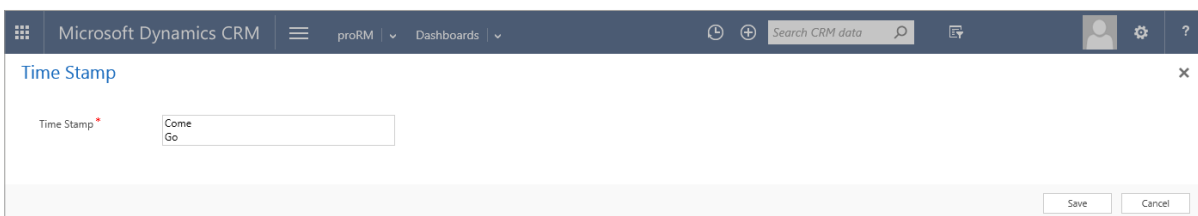
#### Step 1: Open Quick Create Form

Navigate to the + Icon in the CRM Navigation to select Time Stamp in the Records Group:



#### Step 2: Enter the Desired Data to Create the Record

After clicking on Time Stamp the form, where it is possible to decide if it should be a "Come" or "Go" record, is will be shown:



Select the option based on the latest Time Stamp. It should always be either "Come" or "Go". In order to create the new data record click on the SAVE button.



For a more general overview about the functionality and content of the Quick Create Feature, please visit the [Microsoft Dynamics CRM Help & Training](#).

## 3.7 Tracking Entry Submission

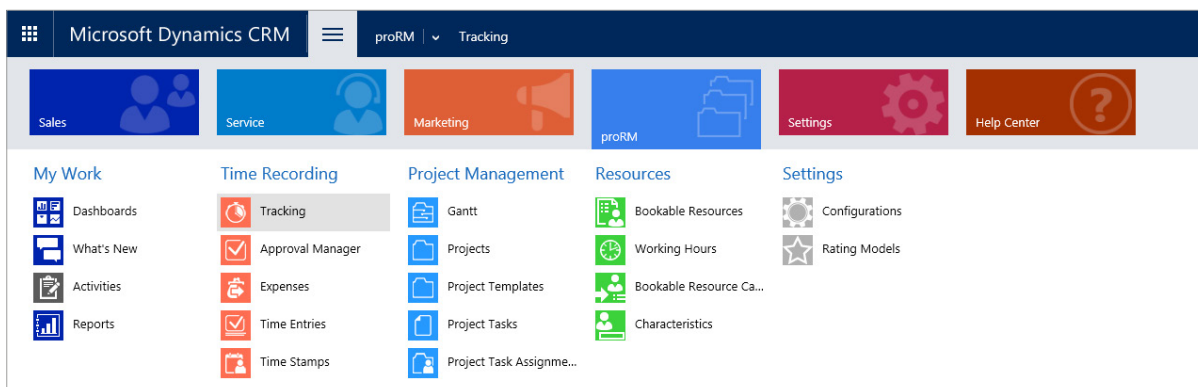
Time Entry creation starts in the draft phase and remain editable by the employee. To enable Time Entries for the invoicing process they have to be submitted by the employee. At this stage he/she has the possibility to check the accuracy of the booking, the details and if the project assignment is selected correctly.

There are different options to submit own Time Entries. Either by CRM or with the help of the Tracking application – both ways are supported.

### 3.7.1 Submitting and Recalling Tracking Entry via Tracking Application

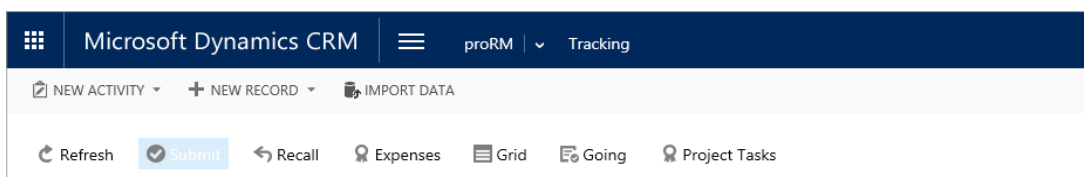
#### Step 1: Open the Application

Navigate to the proRM Area and select Tracking in the Time Recording Group:



#### Step 2: Open Submit Dialog

Click on the SUBMIT button to open the dialog:



#### Step 3: Select Time Entries to Submit

In the Submit dialog all draft Time Entries for the current time

period are shown. Select the desired Time Entries that should be to submitted with left mouse button:

Submit Records							
Time Entries		Expenses					
From	To	Duration (h)	Type	Subject	Task	Status Reason	
8/30/2016	8/30/2016	1.5	Work	Defining Customer Requirements	Livetube: Analyzing	Draft	
9/1/2016	9/1/2016	9	Vacation	Vacation - out of the Office	Skipfire: Conception	Draft	
8/30/2016	8/30/2016	4	Work	Implementation of defined Customizations	Gevee: Deployment	Draft	
9/2/2016	9/2/2016	2	Work	Support Case: CAS-3294-1883: Remote Session with Mrs.	Skipfire: 1st & 2nd Level Support	Draft	

[Submit](#)

It is possible to select more Time Entries at once by holding the CTRL key.

### Step 4: Submit Time Entries

With clicking on the SUBMIT button, all selected Time Entries are going to change from draft phase to submitted phase:

Submit Records							
Time Entries		Expenses					
From	To	Duration (h)	Type	Subject	Task	Status Reason	
8/30/2016	8/30/2016	1.5	Work	Defining Customer Requirements	Livetube: Analyzing	Draft	
9/1/2016	9/1/2016	9	Vacation	Vacation - out of the Office	Skipfire: Conception	Draft	
8/30/2016	8/30/2016	4	Work	Implementation of defined Customizations	Gevee: Deployment	Draft	
9/2/2016	9/2/2016	2	Work	Support Case: CAS-3294-1883: Remote Session with Mrs.	Skipfire: 1st & 2nd Level Support	Draft	

[Submit](#)

In the submitted phase Time Entries are no longer editable for the employee.

### Step 5: Recall Time Entries

In case Time Entry has not been submitted on purpose or something has to be changed afterwards it is possible to recall submitted Time Entries.

Open the Recall dialog in Tracking Application:

The screenshot shows the Microsoft Dynamics CRM Tracking application interface. The top navigation bar includes the Microsoft Dynamics CRM logo, a hamburger menu, and the text 'proRM | Tracking'. Below the navigation bar, there are three main action buttons: 'NEW ACTIVITY', 'NEW RECORD', and 'IMPORT DATA'. At the bottom of the interface, there is a row of utility buttons: 'Refresh', 'Submit', 'Recall' (which is highlighted with a blue background), 'Expenses', 'Grid', 'Going', and 'Project Tasks'.

Select the Time Entries that should be recalled and click the **RECALL** button:

Recall Records							
Time Entries		Expenses					
From	To	Duration (h)	Type	Subject	Task	Status Reason	
8/29/2016	8/29/2016	5.5	Work	Kick Off Meeting	Livetube: Analyzing	Submitted	
8/29/2016	8/29/2016	1	Work	Working on assigned Supportcases	Skiopfire: 3rd Level Support	Submitted	

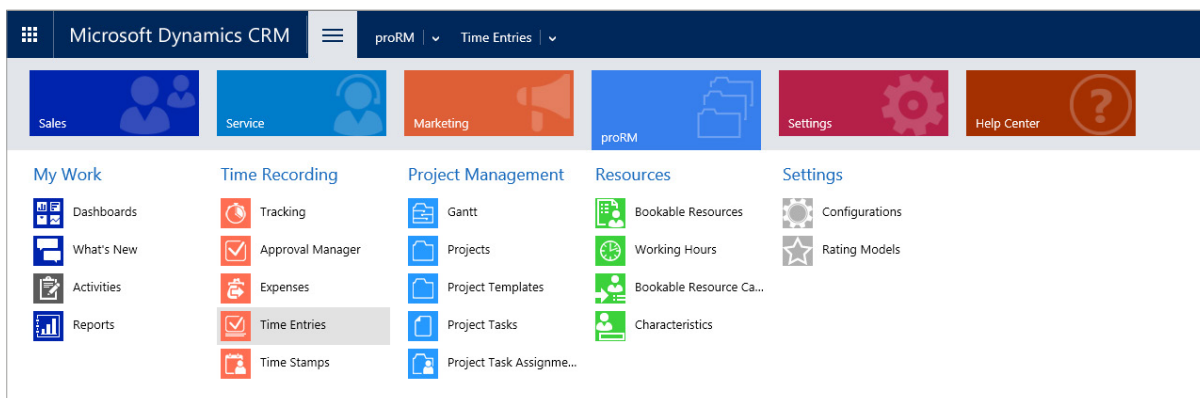
[Recall](#)

The submitted Time Entries will now go back into draft phase again and the desired changes can be made.

### 3.7.2 Submitting Tracking Entry via CRM Form

#### Step 1: Open the Time Entry Overview in CRM

Navigate to the proRM Area and select Time Entries in the Time Recording Group:



#### Step 2: Open an Existing Time Entry

Select the desired Time Entry in the list of the Bookings and

open it via double click or with the help of the context menu:

Type	Subject	From	To	Break (h)	Billing Type	Chargeable Dura...	Bookable Resour...	Task	Project	Status Reason
Absence	Absence	8/31/2016 1:30...	8/31/2016 5:00...	0.0000000000	Non Chargeable		Sebastian Sieber	Skipfire: 1st & 2...	Skipfire: Support	Draft
Absence	Absence	9/9/2016 11:00...	9/9/2016 6:00 PM	0.0000000000	Chargeable		Sebastian Sieber	Livetube: Design	Livetube: Micros...	Draft
Work	Consultation of Development Team	9/6/2016 2:30 PM	9/6/2016 5:00 PM	0.0000000000	Chargeable		Sebastian Sieber	Livetube: Analy...	Livetube: Micros...	Draft
Work	Creating Process Flow Charts	9/7/2016 12:30...	9/7/2016 3:30 PM	0.0000000000	Chargeable		Sebastian Sieber	Skipfire: Process...	Skipfire: Product...	Draft
Work	Defining Customer Requirements	8/30/2016 8:00...	8/30/2016 9:30...	0.0000000000	Chargeable		Sebastian Sieber	Livetube: Analy...	Livetube: Micros...	Draft
Work	Defining Feature Requests	9/7/2016 10:00...	9/7/2016 12:30...				Sebastian Sieber	Skipfire: Concep...	Skipfire: Product...	Draft
Work	Defining of Customizations within the Team	9/2/2016 8:30 AM	9/2/2016 10:00...				Sebastian Sieber	Vestibulum: Req...	Vestibulum: CR...	Draft
Work	FDD Review	8/25/2016 9:30...	8/25/2016 1:30...				Sebastian Sieber	Zoombox: Design	Zoombox: Micro...	Draft
Work	FDD: Short Summary	9/8/2016 12:30...	9/8/2016 5:30 PM				Sebastian Sieber	Livetube: Design	Livetube: Micros...	Draft
Work	Feedback discussion	8/8/2016 3:00 PM	8/8/2016 4:30 PM			1.0000000000	Sebastian Sieber	Livetube: Design	Livetube: Micros...	Submitted
Work	FRD Creation	8/23/2016 9:30...	8/23/2016 2:30...	0.0000000000	Chargeable		Sebastian Sieber	Zoombox: Design	Zoombox: Micro...	Draft
Work	FRD Creation	8/22/2016 10:30...	8/22/2016 5:00...	0.0000000000	Chargeable		Sebastian Sieber	Zoombox: Design	Zoombox: Micro...	Draft
Work	FRD Review	8/24/2016 2:30...	8/24/2016 4:30...	0.0000000000	Chargeable		Sebastian Sieber	Zoombox: Design	Zoombox: Micro...	Draft
Work	Go Live with Productiv System	8/31/2016 9:18...	8/31/2016 9:18...	0.0000000000	Chargeable	4.0000000000	Sebastian Sieber	Livetube: Go Live	Livetube: Micros...	Draft
Work	Implementation of defined Customizations	8/30/2016 1:00...	8/30/2016 5:00...	0.0000000000	Chargeable		Sebastian Sieber	Gevee: Deploy...	Gevee: Microsof...	Draft
Work	Kick Off Meeting	8/29/2016 9:30...	8/29/2016 3:00...	0.0000000000	Chargeable	3.5000000000	Sebastian Sieber	Livetube: Analy...	Livetube: Micros...	Submitted
Work	Preparing Power Point for Key User Training	9/2/2016 2:00 PM	9/2/2016 4:30 PM	0.5000000000	Chargeable		Sebastian Sieber	Vestibulum: Key...	Vestibulum: CR...	Draft
Work	Review of Project Tasks	9/6/2016 8:30 AM	9/6/2016 1:00 PM	0.0000000000	Non Chargeable		Sebastian Sieber	Skipfire: 1st & 2...	Skipfire: Support	Draft
Work	Scenario Test: Processes	8/30/2016 9:30...	8/30/2016 12:30...	0.0000000000	Chargeable		Sebastian Sieber	Gevee: Quality A...	Gevee: Product...	Draft
Work	Support Case: CAS-11994-3300: Analyze with help of IT	9/7/2016 8:30 AM	9/7/2016 9:30 AM	0.0000000000	Chargeable		Sebastian Sieber	Skipfire: 3rd Lev...	Skipfire: Support	Draft
Work	Support Case: CAS-3294-1883: Remote Session with Mrs...	9/2/2016 10:00...	9/2/2016 12:00...	0.0000000000	Non Chargeable	0.0000000000	Sebastian Sieber	Skipfire: 1st & 2...	Skipfire: Support	Draft
Vacation	Vacation - out of the Office	9/1/2016 8:00 AM	9/1/2016 5:00 PM	0.0000000000	Chargeable		Sebastian Sieber	Skipfire: Concep...	Skipfire: Product...	Draft

### Step 3: Follow the Business Process Flow

Follow the proRM Fast Start Business Process Flow for Time Entries to the 2nd Step called "Submit Time Entry" by clicking the NEXT STAGE function button.

**Microsoft Dynamics CRM** | proRM | Time Entries | Defining Feature Re...

TIME ENTRY | Defining Feature Requests

Create New Time Entry (Active) | Submit Time Entry | Next Stage

Project\* Skipfire: Product Development | Full Day\* No | Type\* Work

Task\* Skipfire: Conception | Subject\* Defining Feature Requests | Duration (h) 2.5000000000

Assignment\* Skipfire GmbH - Skipfire: Conception | Date\* 9/7/2016 10:00 AM | Break (h) 0.0000000000

---

**Summary**

**GENERAL**

Project\* Skipfire: Product Development

Task\* Skipfire: Conception

Assignment\* Skipfire GmbH - Skipfire: Conception

Subject\* Defining Feature Requests

From\* 9/7/2016 10:00 AM

To\* 9/7/2016 12:30 PM

Break (h) 0.0000000000

Duration (h) 2.5000000000

Status Reason Draft

**RESOURCE INFORMATION**

Bookable Resource

Resource Role Production Manager

Status Active

**ACTIVITIES NOTES**

Enter a note

No Notes found.

**PROJECT INFORMATION**

Projectname\* Skipfire: Product Development

From\* 8/29/2016 9:05 AM

To\* 9/28/2016 9:05 AM

**ASSIGNMENT INFORMATION**

Project Task\* Skipfire: Conception

From\* 8/29/2016 9:15 AM

To\* 9/28/2016 9:15 AM

Actual Effort (h) --

Progress % 0.00

## Step 4: Submit Time Entry

Make sure everything is correct in Time Entry and submit by changing the option "Submit Time Entry?" to YES.

The screenshot shows the 'Defining Feature Requests' time entry form in Microsoft Dynamics CRM. The record is currently in 'Draft' status. The 'Submit Time Entry?' checkbox is checked. A white arrow points to the 'unsaved changes' indicator at the bottom right of the form.

Section	Field	Value
GENERAL	Project	Skipfire: Product Development
	Task	Skipfire: Conception
	Assignment	Skipfire GmbH - Skipfire: Conception
	Subject	Defining Feature Requests
	From	9/7/2016 10:00 AM
	To	9/7/2016 12:30 PM
	Break (h)	0.0000000000
	Duration (h)	2.5000000000
	Status Reason	Draft
	Status	Active
RESOURCE INFORMATION	Bookable Resource	
	Resource Role	Production Manager
PROJECT INFORMATION	Projectname	Skipfire: Product Development
	From	8/29/2016 9:05 AM
	To	9/28/2016 9:05 AM
ASSIGNMENT INFORMATION	Project Task	Skipfire: Conception
	From	8/29/2016 9:15 AM
	To	9/28/2016 9:15 AM
	Progress %	0.00

Please Note: The submission will be done after saving the record.

The screenshot shows the 'Defining Feature Requests' time entry form after submission. The status is now 'Submitted' and 'Inactive'. The 'Submit Time Entry?' checkbox is still checked.

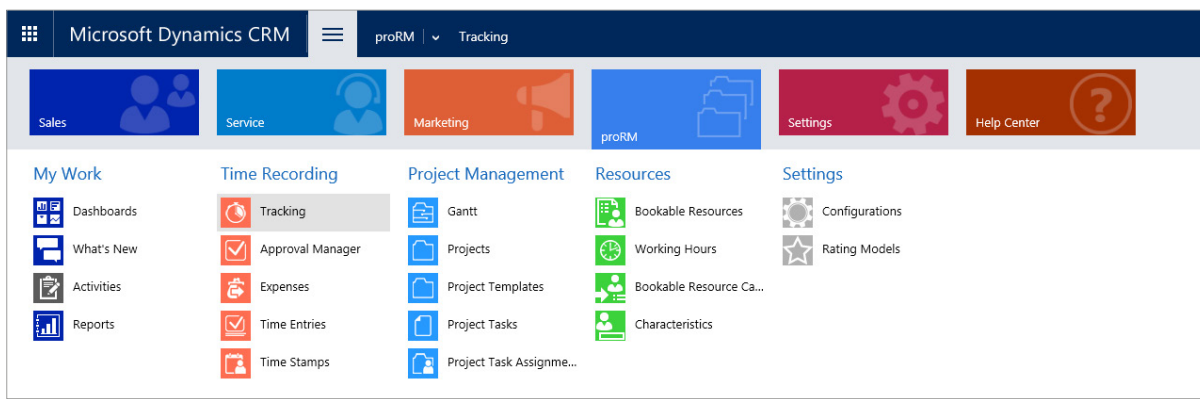
Section	Field	Value
GENERAL	Project	Skipfire: Product Development
	Task	Skipfire: Conception
	Assignment	Skipfire GmbH - Skipfire: Conception
	Subject	Defining Feature Requests
	From	9/7/2016 10:00 AM
	To	9/7/2016 12:30 PM
	Break (h)	0.0000000000
	Duration (h)	2.5000000000
	Status Reason	Submitted
	Status	Inactive
RESOURCE INFORMATION	Bookable Resource	
	Resource Role	Production Manager
PROJECT INFORMATION	Projectname	Skipfire: Product Development
	From	8/29/2016 9:05 AM
	To	9/28/2016 9:05 AM
ASSIGNMENT INFORMATION	Project Task	Skipfire: Conception
	From	8/29/2016 9:15 AM
	To	9/28/2016 9:15 AM
	Progress %	0.00

## 3.8 Expense Submission

### 3.8.1 Submitting and Recalling Expense via Tracking Application

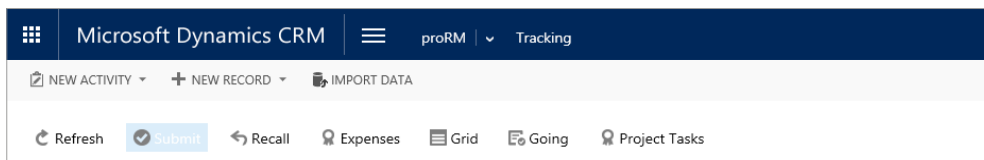
#### Step 1: Open the Application

Navigate to the proRM Area and select Tracking in the Time Recording Group:



#### Step 2: Open Submit Dialog

Click now on the SUBMIT button to open the dialog window:



#### Step 3: Select Expenses to Submit

In the Submit dialog window select the second tab called "Expenses". There are all draft Expenses listed here for the current time period. Select the desired Expenses that should be submitted with the left mouse button:

Submit Records					
Time Entries		Expenses			
Subject	Project	Service Date	Amount	Expense Type	Status Reason
Lunch	Skipfire: Product Development	8/29/2016	€23.50	Meal	Draft
Journey to Customer Meeting	Gevee: Microsoft Dynamics Sure Step Implementation	8/30/2016	€123.60	Car Rental	Draft
Parking costs	Livetube: Microsoft Dynamics Sure Step Implementation	8/29/2016	€15.00	Miscellaneous	Draft

Submit



It is possible to select more Expenses at once by holding the CTRL key of the keyboard.

### Step 4: Submit Expenses

When clicking on the SUBMIT button all selected Expenses are going to change from draft phase to submitted phase:

Submit Records						
Time Entries   Expenses						
Subject	Project	Service Date	Amount	Expense Type	Status Reason	
Lunch	Skipfire: Product Development	8/29/2016	€23.50	Meal	Draft	
Journey to Customer Meeting	Gevee: Microsoft Dynamics Sure Step Implementation	8/30/2016	€123.60	Car Rental	Draft	
Parking costs	Livetube: Microsoft Dynamics Sure Step Implementation	8/29/2016	€15.00	Miscellaneous	Draft	

[Submit](#)

In the submitted phase, Expenses are no longer editable for the employee.

### Step 5: Recall Expenses

In case an Expense has not been submitted on purpose or something has to be changed afterwards it is possible to recall submitted Expenses.

Open the Recall dialog in Tracking Application:

The screenshot shows the Microsoft Dynamics CRM Tracking application interface. The top navigation bar includes the Microsoft Dynamics CRM logo, a hamburger menu, and the text 'proRM | Tracking'. Below the navigation bar, there are buttons for 'NEW ACTIVITY', 'NEW RECORD', and 'IMPORT DATA'. A secondary bar contains several action buttons: 'Refresh', 'Submit', 'Recall' (highlighted in blue), 'Expenses', 'Grid', 'Going', and 'Project Tasks'.

Select the Expenses that should be recalled and click the RECALL button:

Recall Records						
Time Entries   Expenses						
Subject	Project	Service Date	Amount	Expense Type	Status Reason	
Arrival to Customer Side	Livetube: Microsoft Dynamics Sure Step Implementation	8/29/2016	€50.00	Car Rental	Submitted	

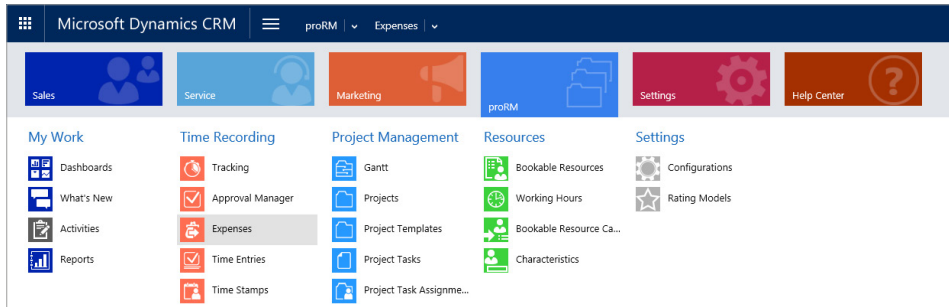
[Recall](#)

The submitted Expenses will now go back to the draft phase again and the desired changes can be made.

## 3.8.2 Submitting Tracking Entry via CRM Form

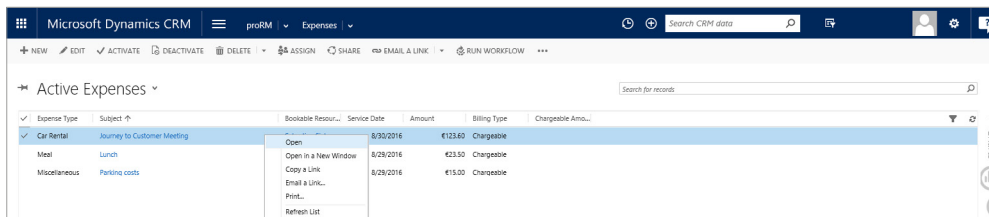
### Step 1: Open the Expense overview in CRM

Navigate to the proRM Area and select Expenses in the Time Recording Group:



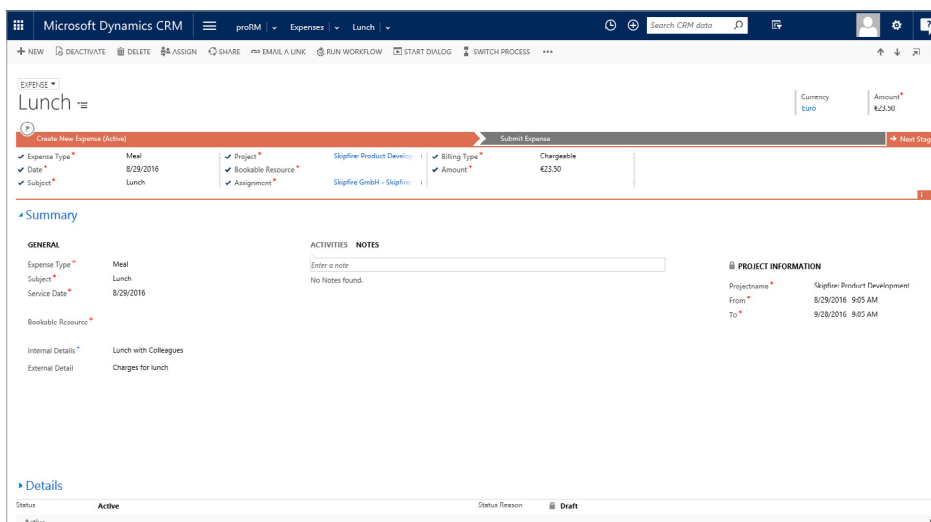
### Step 2: Open an existing Expense

Select the desired Time Entry in the list of the Bookings and open it via double click or with the help of the context menu:



### Step 3: Follow the Business Process Flow

Follow the proRM Fast Start Business Process Flow for Expenses to the 2nd Step called "Submit Expense" by clicking the NEXT STAGE function button.



## Step 4: Submit Expense

Make sure everything is correct with the Expense Entry and submit by changing the option "Submit Expense?" to YES.

The screenshot shows the Microsoft Dynamics CRM interface for an Expense entry titled "Lunch". The top navigation bar includes "EXPENSE" and "Lunch". The main content area shows the "Submit Expense (Active)" button highlighted in orange. Below this, the "Submit Expense?" checkbox is checked. The "Summary" section displays the following details:

GENERAL		ACTIVITIES	NOTES	PROJECT INFORMATION	
Expense Type*	Meal		Enter a note	Projectname*	Skipfire: Product Development
Subject*	Lunch		No Notes found.	From*	8/29/2016 9:05 AM
Service Date*	8/29/2016			To*	9/28/2016 9:05 AM
Bookable Resource*					
Internal Details*	Lunch with Colleagues				
External Detail	Charges for lunch				

The "Details" section shows the Status as "Active" and "Draft". An arrow points to the "unsaved changes" icon in the bottom right corner.

The screenshot shows the Microsoft Dynamics CRM interface for the same Expense entry "Lunch" after submission. The "Submit Expense (Active)" button is now greyed out. The "Submit Expense?" checkbox is still checked. The "Summary" section displays the following details:

GENERAL		ACTIVITIES	NOTES	PROJECT INFORMATION	
Expense Type*	Meal		Enter a note	Projectname*	Skipfire: Product Development
Subject*	Lunch		No Notes found.	From*	8/29/2016 9:05 AM
Service Date*	8/29/2016			To*	9/28/2016 9:05 AM
Bookable Resource*	Sebastian Sieber				
Internal Details*	Lunch with Colleagues				
External Detail	Charges for lunch				

The "Details" section shows the Status as "Inactive" and "Submitted". The bottom right corner now shows "Read only".



Please Note:  
The submission  
will be done  
after saving the  
record.

### 3.9 Time Entries and Expenses Approval

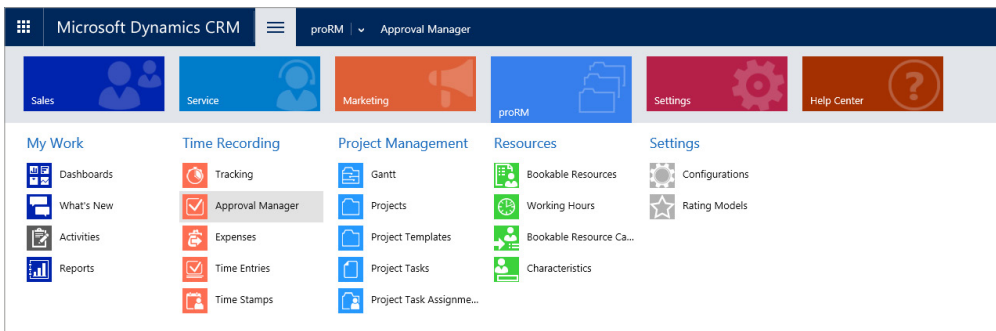
Approving a Time Entry or an Expense gives the project manager also the option to check if everything is correct with the created records.

Approved Time Entries and Expenses are free for invoicing and should be already corrected if there were any problems, failures or incorrect data. The records are, in most of the cases, part of the task of the project manager who is approving the items on his projects.

#### 3.9.1 Approving and Unapproving Time Entries

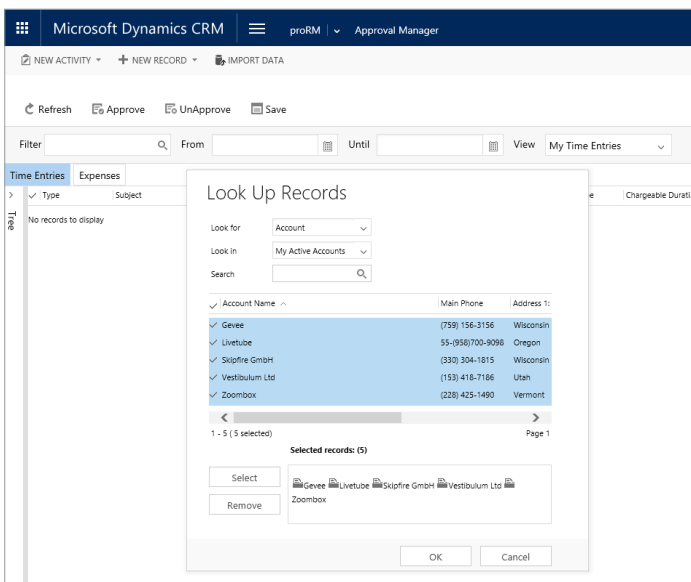
##### Step 1: Open the Application

Navigate to the proRM Area and select Approval Manager in the Time Recording Group:



##### Step 2: Select a Customer

Select a related Customer or Project through the Lookup called Filter:



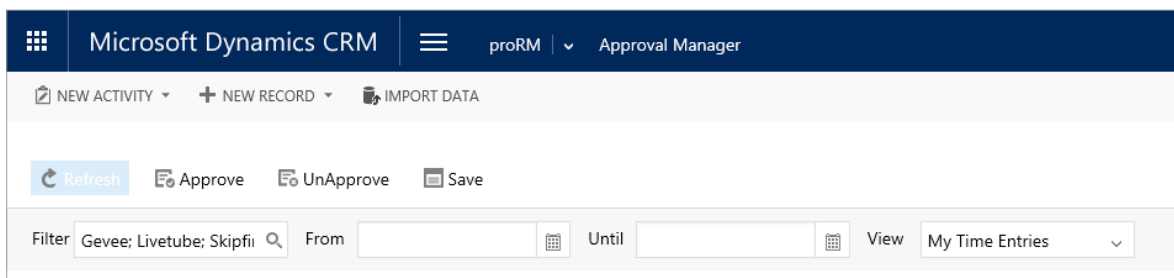
It is also possible to keep the filter empty to load all the data in the system.



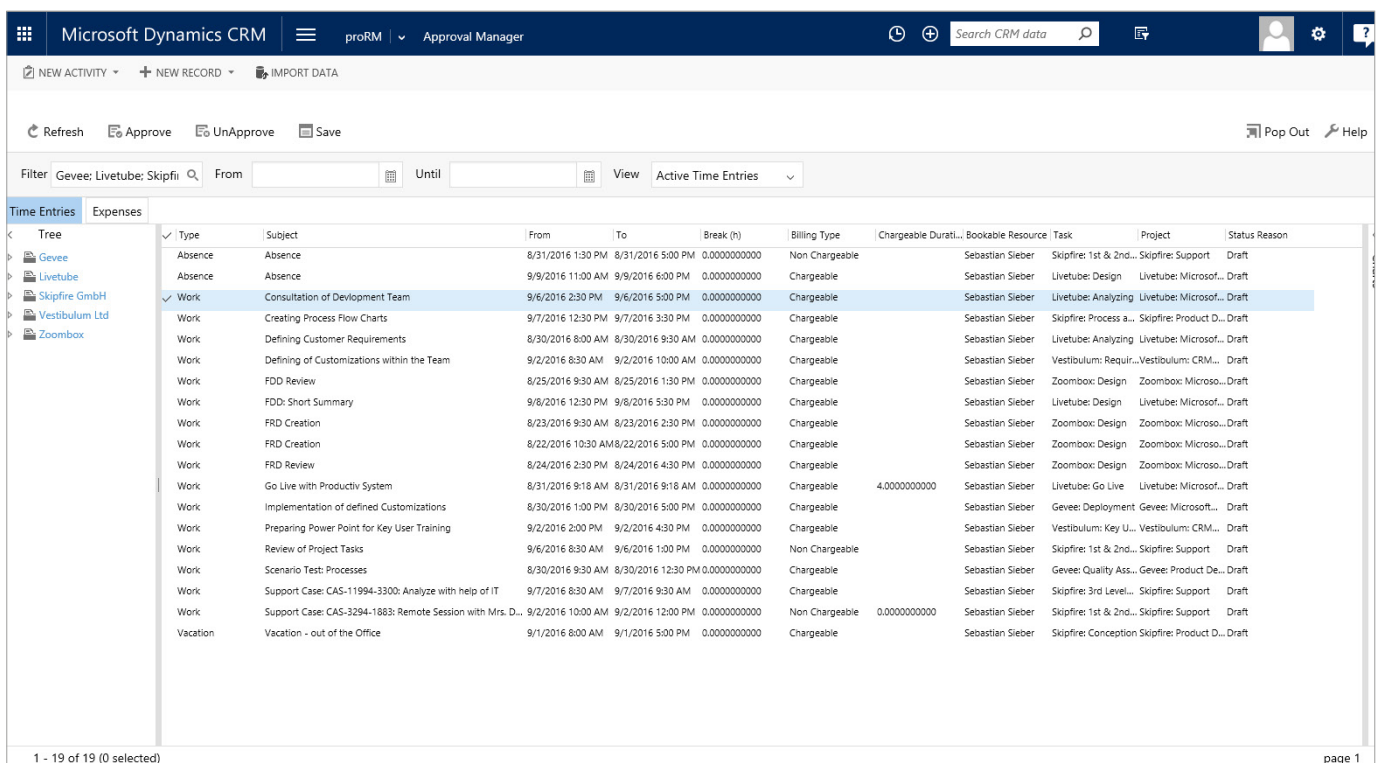
Please note: Loading all available data in the system will decrease the performance of the Application and will let the Project Tree empty.

### Step 3: Click Refresh to Load the Data

After choosing the desired filter, click on Refresh to load the data into the application.



The main panel in the center of the application is used to display data records based on the selected view, selected date range and filter.



## Step 4: Filter Loaded Time Entries

Project manager is able to filter the displayed Time Entries by a specific Employee or Project. This is possible with the collapsed Project Tree on the left hand side.

The screenshot shows the Microsoft Dynamics CRM interface. The top navigation bar includes 'Microsoft Dynamics CRM', 'proRM', and 'Approval Manager'. Below the navigation bar, there are buttons for 'Refresh', 'Approve', 'UnApprove', and 'Save'. The main area displays a list of Time Entries with columns for Type, Subject, From, To, Break (h), Billing Type, Chargeable Durati..., Bookable Resource, Task, Project, and Status Reason. The left-hand side shows a 'Tree' view with a collapsed project structure. The filter at the top is set to 'Gevee: Livetube: Skiptfi'. The status bar at the bottom indicates '1 - 19 of 19 (0 selected)' and 'page 1'.

Expand the Project Tree and select an option from the structure to filter the records.

The screenshot shows the Microsoft Dynamics CRM interface with the project tree expanded on the left-hand side. The tree structure includes 'Gevee', 'Livetube', 'Skiptfi: Product Development', 'Skiptfi: Support', 'Skiptfi: 3rd Level Support', 'Skiptfi: 1st & 2nd Level Support', 'Vestibulum Ltd', 'Vestibulum: CRM Online Implementat...', 'Vestibulum: CRM Training', 'Vestibulum: Key User Training', 'Vestibulum: Staff Training', and 'Zoombox'. The main area displays a list of Time Entries filtered by the selected project. The filter at the top is set to 'Gevee: Livetube: Skiptfi'. The status bar at the bottom indicates '1 - 3 of 3 (0 selected)' and 'page 1'.



Please note: this feature is not available until Filter in Step 2 is selected.

## Step 5: Edit Time Entries

If the project manager still wants to edit the time entries, it can be done directly by inline edit. Double click in the column, which should be changed and key in the new value.

Type	Subject	From	To	Break (H)	Billing Type	Chargeable Durati...	Bookable Resource	Task	Project	Status Reason
Absence	Absence	8/31/2016 1:30 PM	8/31/2016 5:00 PM	0.0000000000	Non Chargeable			Skipfire: 1st & 2nd... Skipfire: Support		Draft
Absence	Absence	9/9/2016 11:00 AM	9/9/2016 6:00 PM	0.0000000000	Chargeable			Livetube: Design	Livetube: Microsof...	Draft
Work	Consultation of Development Team	9/6/2016 2:30 PM	9/6/2016 5:00 PM	0.0000000000	Chargeable			Livetube: Analyzing	Livetube: Microsof...	Draft
Work	Creating Process Flow Charts	9/7/2016 12:30 PM	9/7/2016 3:30 PM	0.0000000000	Chargeable			Skipfire: Process a...	Skipfire: Product D...	Draft
Work	Defining Customer Requirement	8/30/2016 6:00 AM	8/30/2016 9:30 AM	0.0000000000	Chargeable			Livetube: Analyzing	Livetube: Microsof...	Draft
Work	Defining of Customizations within the Team	9/2/2016 6:30 AM	9/2/2016 1:00 AM	0.0000000000	Chargeable			Vestibulum: Requir...	Vestibulum: CRM...	Draft
Work	FDD Review	8/25/2016 9:30 AM	8/25/2016 1:30 PM	0.0000000000	Chargeable			Zoombox: Design	Zoombox: Microso...	Draft
Work	FDD: Short Summary	9/8/2016 12:30 PM	9/8/2016 5:30 PM	0.0000000000	Chargeable			Livetube: Design	Livetube: Microso...	Draft
Work	FRD Creation	8/23/2016 9:30 AM	8/23/2016 2:30 PM	0.0000000000	Chargeable			Zoombox: Design	Zoombox: Microso...	Draft
Work	FRD Creation	8/22/2016 10:30 AM	8/22/2016 5:00 PM	0.0000000000	Chargeable			Zoombox: Design	Zoombox: Microso...	Draft
Work	FRD Review	8/24/2016 2:30 PM	8/24/2016 4:30 PM	0.0000000000	Chargeable			Zoombox: Design	Zoombox: Microso...	Draft
Work	Go Live with Productiv System	8/31/2016 9:18 AM	8/31/2016 9:18 AM	0.0000000000	Chargeable	4.0000000000		Livetube: Go Live	Livetube: Microsof...	Draft
Work	Implementation of defined Customizations	8/30/2016 1:00 PM	8/30/2016 5:00 PM	0.0000000000	Chargeable			Gevee: Deployment	Gevee: Microsof...	Draft
Work	Preparing Power Point for Key User Training	9/2/2016 2:00 PM	9/2/2016 4:30 PM	0.0000000000	Chargeable			Vestibulum: Key U...	Vestibulum: CRM...	Draft
Work	Review of Project Tasks	9/6/2016 8:30 AM	9/6/2016 1:00 PM	0.0000000000	Non Chargeable			Skipfire: 1st & 2nd...	Skipfire: Support	Draft
Work	Scenario Test: Processes	8/30/2016 9:30 AM	8/30/2016 12:30 PM	0.0000000000	Chargeable			Gevee: Quality Ass...	Gevee: Product De...	Draft
Work	Support Case: CAS-11994-3300: Analyze with help of IT	9/7/2016 6:30 AM	9/7/2016 9:30 AM	0.0000000000	Chargeable			Skipfire: 3rd Level...	Skipfire: Support	Draft
Work	Support Case: CAS-3294-1883: Remote Session with Mrs. D.	9/2/2016 10:00 AM	9/2/2016 12:00 PM	0.0000000000	Non Chargeable	0.0000000000		Skipfire: 1st & 2nd...	Skipfire: Support	Draft
Vacation	Vacation - out of the Office	9/1/2016 6:00 AM	9/1/2016 5:00 PM	0.0000000000	Chargeable			Skipfire: Conception	Skipfire: Product D...	Draft

Afterwards click on SAVE to confirm the changes.

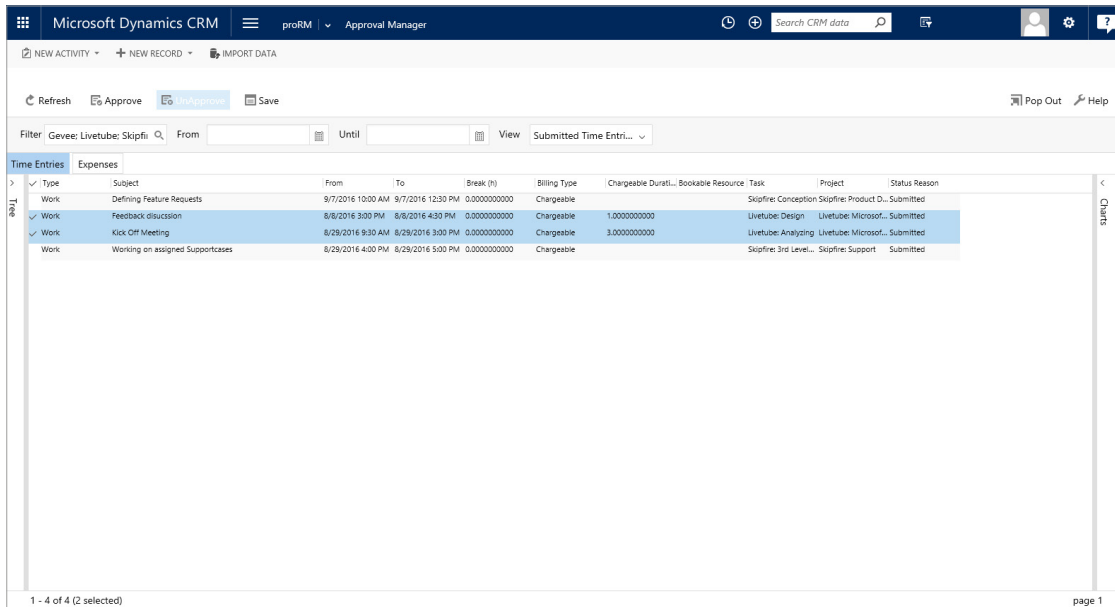
## Step 6: Approve Time Entries

To approve Time Entries tick the check column of the desired records. It is possible to select multiple records at once. As soon as the selection of records is finished, click the APPROVE button in order to approve the Time Entries.

Type	Subject	From	To	Break (H)	Billing Type	Chargeable Durati...	Bookable Resource	Task	Project	Status Reason
Absence	Absence	8/31/2016 1:30 PM	8/31/2016 5:00 PM	0.0000000000	Non Chargeable			Skipfire: 1st & 2nd... Skipfire: Support		Draft
Absence	Absence	9/9/2016 11:00 AM	9/9/2016 6:00 PM	0.0000000000	Chargeable			Livetube: Design	Livetube: Microsof...	Draft
Work	Consultation of Development Team	9/6/2016 2:30 PM	9/6/2016 5:00 PM	0.0000000000	Chargeable			Livetube: Analyzing	Livetube: Microsof...	Draft
Work	Creating Process Flow Charts	9/7/2016 12:30 PM	9/7/2016 3:30 PM	0.0000000000	Chargeable			Skipfire: Process a...	Skipfire: Product D...	Draft
Work	Defining Customer Requirements	8/30/2016 6:00 AM	8/30/2016 9:30 AM	0.0000000000	Chargeable			Livetube: Analyzing	Livetube: Microsof...	Draft
Work	Defining of Customizations within the Team	9/2/2016 6:30 AM	9/2/2016 1:00 AM	0.0000000000	Chargeable			Vestibulum: Requir...	Vestibulum: CRM...	Draft
Work	FDD Review	8/25/2016 9:30 AM	8/25/2016 1:30 PM	0.0000000000	Chargeable			Zoombox: Design	Zoombox: Microso...	Draft
Work	FDD: Short Summary	9/8/2016 12:30 PM	9/8/2016 5:30 PM	0.0000000000	Chargeable			Livetube: Design	Livetube: Microso...	Draft
Work	FRD Creation	8/23/2016 9:30 AM	8/23/2016 2:30 PM	0.0000000000	Chargeable			Zoombox: Design	Zoombox: Microso...	Draft
Work	FRD Creation	8/22/2016 10:30 AM	8/22/2016 5:00 PM	0.0000000000	Chargeable			Zoombox: Design	Zoombox: Microso...	Draft
Work	FRD Review	8/24/2016 2:30 PM	8/24/2016 4:30 PM	0.0000000000	Chargeable			Zoombox: Design	Zoombox: Microso...	Draft
Work	Go Live with Productiv System	8/31/2016 9:18 AM	8/31/2016 9:18 AM	0.0000000000	Chargeable	4.0000000000		Livetube: Go Live	Livetube: Microsof...	Draft
Work	Implementation of defined Customizations	8/30/2016 1:00 PM	8/30/2016 5:00 PM	0.0000000000	Chargeable			Gevee: Deployment	Gevee: Microsof...	Draft
Work	Preparing Power Point for Key User Training	9/2/2016 2:00 PM	9/2/2016 4:30 PM	0.0000000000	Chargeable			Vestibulum: Key U...	Vestibulum: CRM...	Draft
Work	Review of Project Tasks	9/6/2016 8:30 AM	9/6/2016 1:00 PM	0.0000000000	Non Chargeable			Skipfire: 1st & 2nd...	Skipfire: Support	Draft
Work	Scenario Test: Processes	8/30/2016 9:30 AM	8/30/2016 12:30 PM	0.0000000000	Chargeable			Gevee: Quality Ass...	Gevee: Product De...	Draft
Work	Support Case: CAS-11994-3300: Analyze with help of IT	9/7/2016 6:30 AM	9/7/2016 9:30 AM	0.0000000000	Chargeable			Skipfire: 3rd Level...	Skipfire: Support	Draft
Work	Support Case: CAS-3294-1883: Remote Session with Mrs. D.	9/2/2016 10:00 AM	9/2/2016 12:00 PM	0.0000000000	Non Chargeable	0.0000000000		Skipfire: 1st & 2nd...	Skipfire: Support	Draft
Vacation	Vacation - out of the Office	9/1/2016 6:00 AM	9/1/2016 5:00 PM	0.0000000000	Chargeable			Skipfire: Conception	Skipfire: Product D...	Draft

## Step 7: Unapprove Time Entries

In case a Time Entry has not been approved on purpose or some changes have to be done afterwards it is still possible to unapprove those records with the help of the UNAPPROVE button.

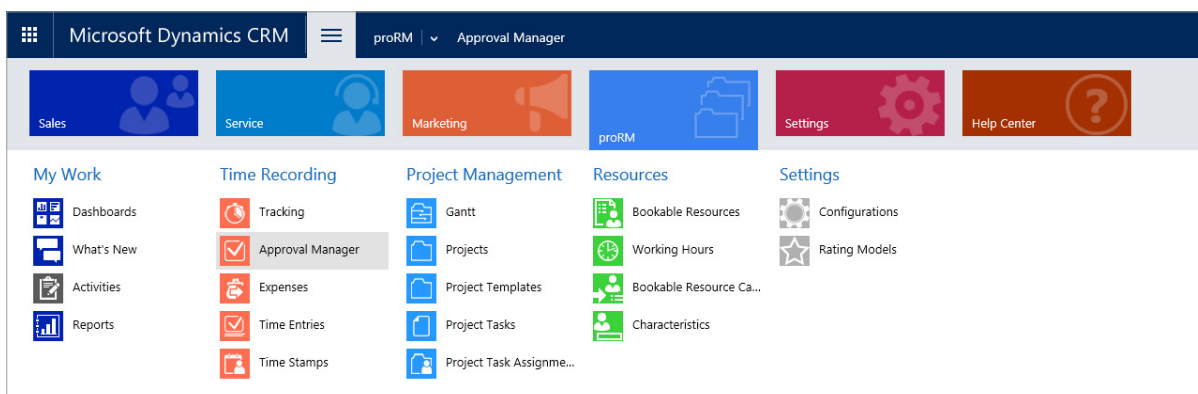


Please note: to display already approved items it is necessary to use a certain view with the related configuration.

## 3.9.2 Approving and Unapproving Expenses

### Step 1: Open the Application

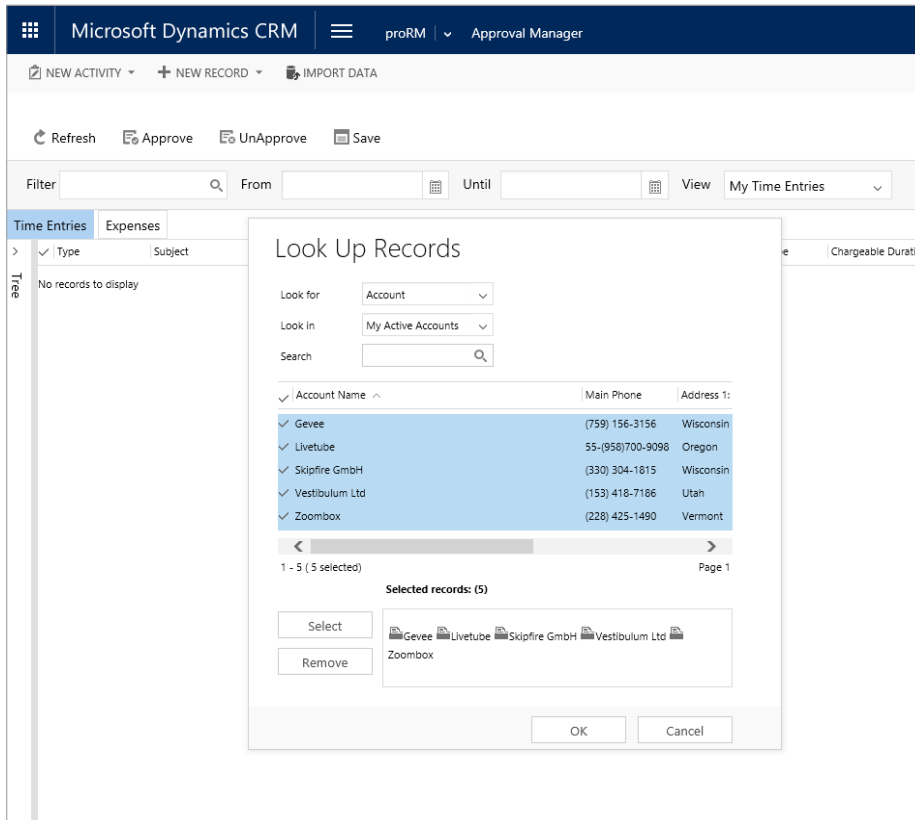
Navigate to the proRM Area and select Approval Manager in the Time Recording Group:





## Step 2: Select a Customer

Select a related Customer or Project through the Lookup called "Filter":

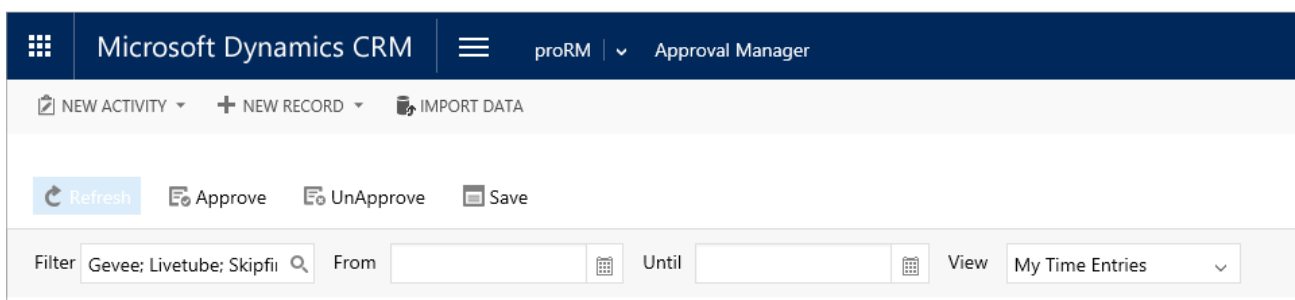


Please note: Loading all available data in the system decreases the performance of application and lets the Project Tree empty.

It is also possible to keep the filter empty to load all the data in the system.

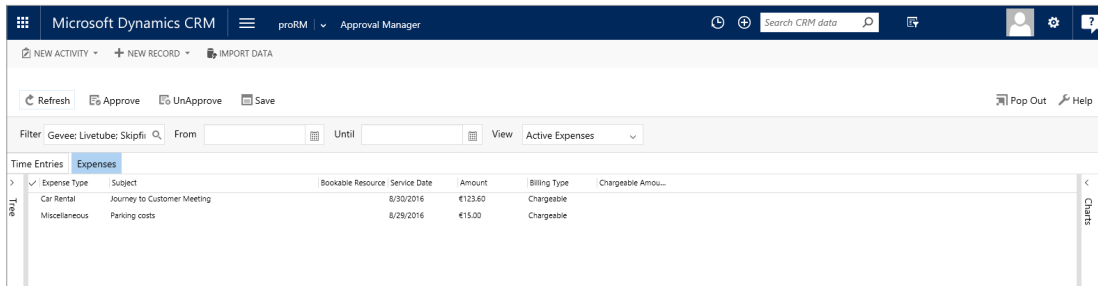
## Step 3: Click Refresh to Load the Data

After choosing the desired filter, click on REFRESH to load the data into the application. In order to display the Expenses select the second Tab called "Expenses".



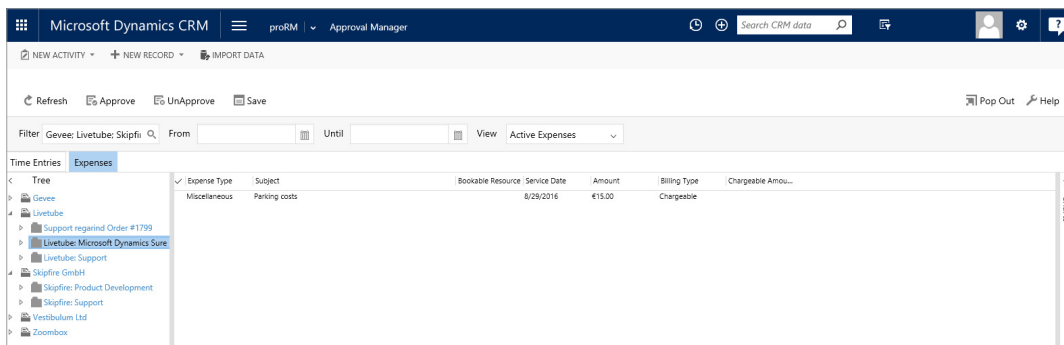
The main panel in the center of the application is used to display

data records based on the selected view, selected date range and filter.



### Step 4: Filter Loaded Expenses

Project manager can filter the displayed Expenses by a specific Employee or Project. This is possible with the collapsed Project Tree on the left hand side.

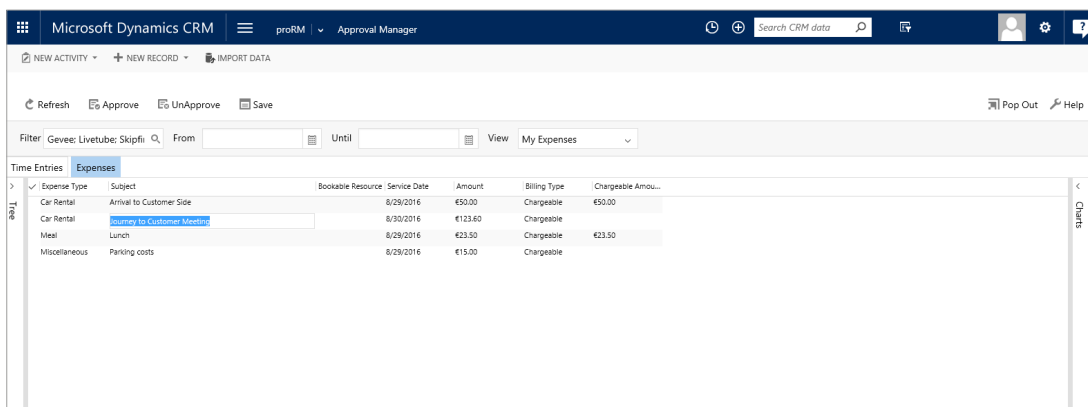


 Please note: This feature is not available until Filter in Step 2 is selected.

Expand the Project Tree and select an option from the structure to filter the records.

### Step 5: Edit Expenses

If the project manager still wants to edit the Expenses, it can be done directly by inline edit. Double click in the column, which should be changed and key in the new value.



Afterwards click on SAVE to confirm the changes.

## Step 6: Approve Expenses

To approve Expenses tick the check column of the desired records. It is possible to select multiple records at once. As soon as the selection of records is finished, click the APPROVE button in order to approve the Expenses.

The screenshot shows the Microsoft Dynamics CRM interface for the 'Approval Manager' section. The 'Expenses' view is active, displaying a table of expense records. The 'Approve' button is highlighted in blue. The table contains the following data:

Expense Type	Subject	Bookable Resource	Service Date	Amount	Billing Type	Chargeable Amou...
Car Rental	Arrival to Customer Side		8/29/2016	€50.00	Chargeable	€50.00
Car Rental	Journey to Customer Meeting		8/30/2016	€123.60	Chargeable	
Meal	Lunch		8/29/2016	€23.50	Chargeable	€23.50
Miscellaneous	Parking costs		8/29/2016	€15.00	Chargeable	

The status bar at the bottom indicates '1 - 4 of 4 (2 selected)'.

## Step 7: Unapprove Expenses

In case an Expense has not been approved on purpose or some changes have to be done afterwards it is still possible to unapprove those records with the help of the UNAPPROVE button.

The screenshot shows the Microsoft Dynamics CRM interface for the 'Approval Manager' section. The 'Expenses' view is active, displaying a table of expense records. The 'UnApprove' button is highlighted in blue. The table contains the following data:

Expense Type	Subject	Bookable Resource	Service Date	Amount	Billing Type	Chargeable Amou...
Car Rental	Journey to Customer Meeting		8/30/2016	€123.60	Chargeable	
Miscellaneous	Parking costs		8/29/2016	€15.00	Chargeable	

The status bar at the bottom indicates '1 - 2 of 2 (0 selected)'.



Please note: To display already approved items it is necessary to use a certain view with the related configuration.

## 3.10 Reporting

Using proRM Fast Start also allows evaluating created data of employees and project managers. For that, some of the following default features in the CRM are supported.

### 3.10.1 Dashboards

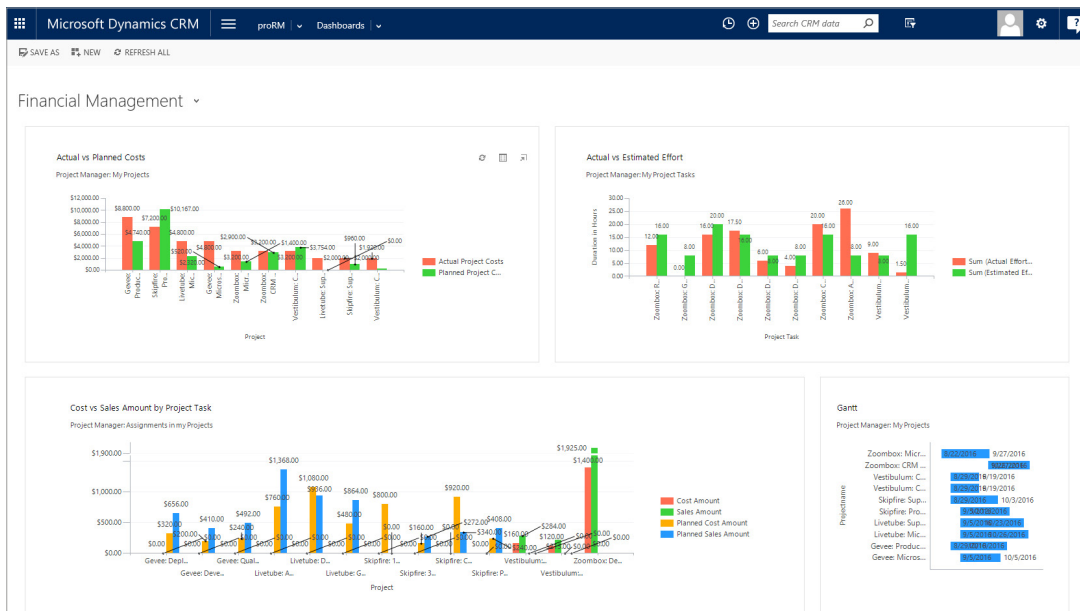
proRM Fast Start Dashboards are available in every Microsoft Dynamics 365 Dashboard selection in Sales, Service, Marketing and the new proRM area. Any Dashboard can be set as default.

#### 3.10.1.1 Financial Management

The financial Dashboards provides an overview of the actual and planned costs and over the actual and estimated efforts based on the project manager's projects.



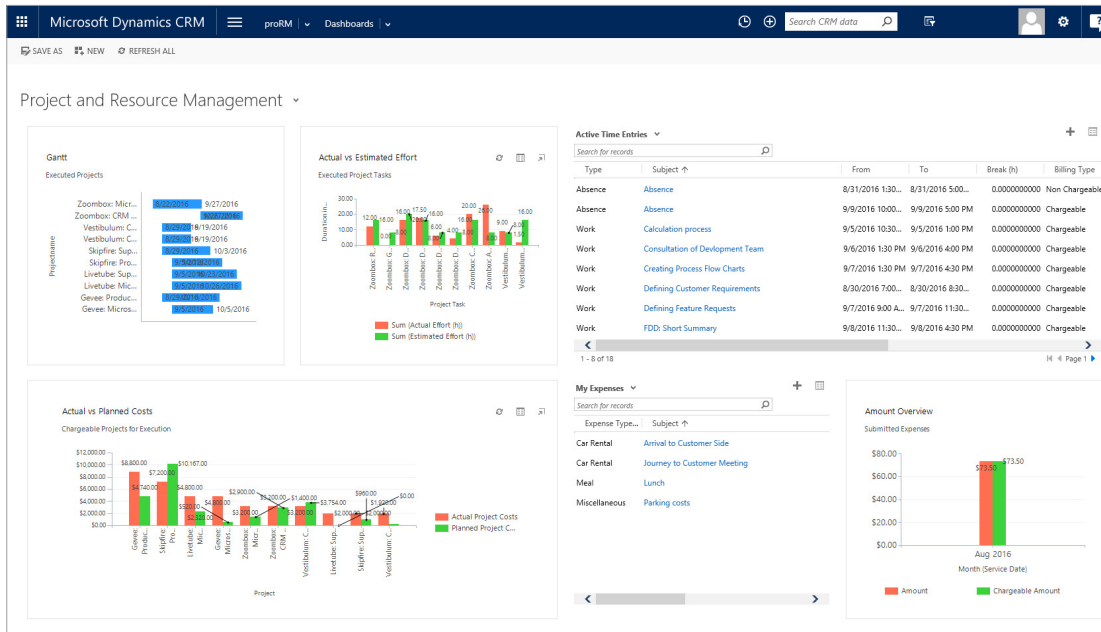
For more information about CRM Dashboards please visit [Microsoft Dynamics CRM Help & Training Dashboard section.](#)



#### 3.8.1.2 Project and Resource Management

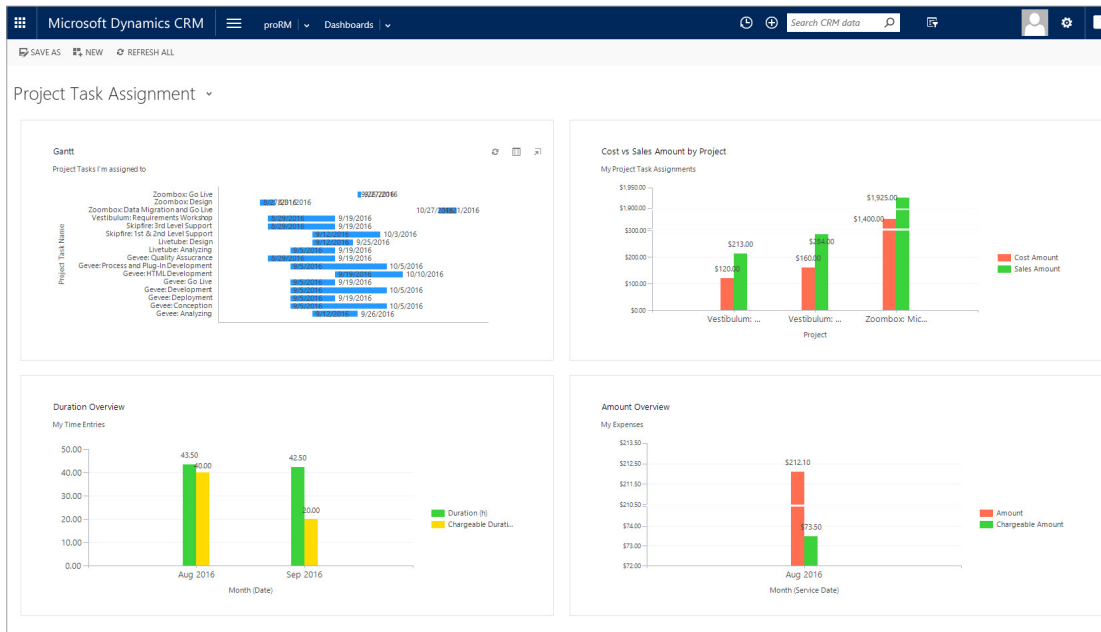
The Project and Resource Management additionally supports the display of submitted records and gives an overview of the amount and chargeable amount of the submitted expenses.

Dashboard based on the needs of a project manager can be created.



### 3.10.1.3 Project Task Assignment

Every employee is able to have an overview about his/her Project Tasks, durations and billing values in the Project Task Assignment Dashboard. With the help of a small Gantt Chart assigned Project Tasks are graphically displayed based on Start and End date.

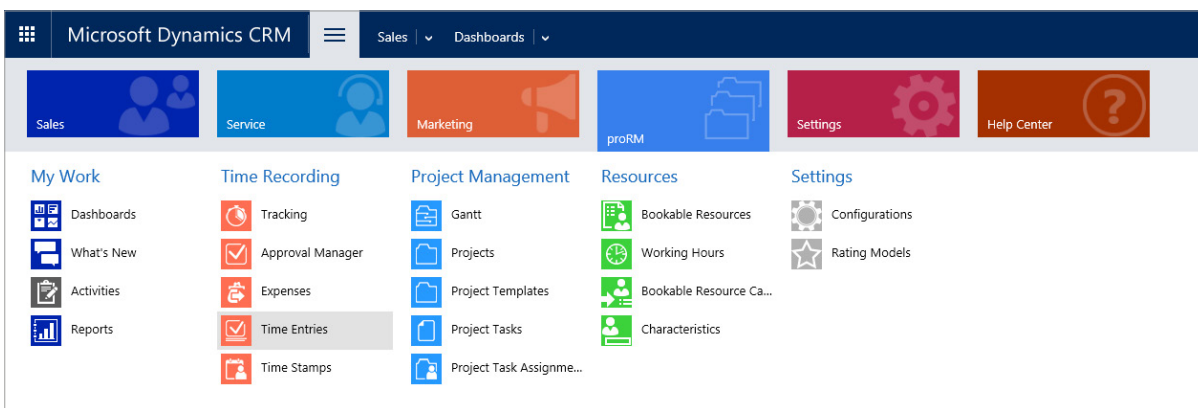


### 3.10.2 Charts

Every proRM Fast Start entity provides CRM charts by default. The CRM chart section can be reached via the entity overview on the right side.

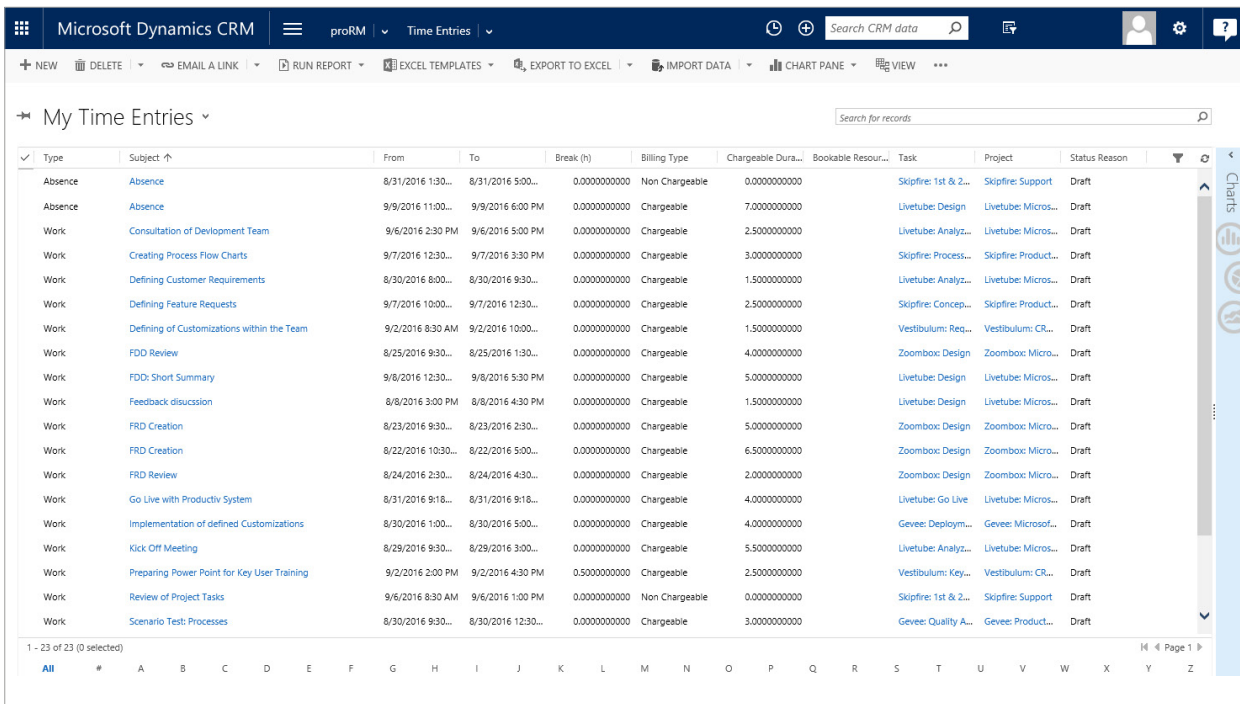
#### Step 1: Open the Entity Overview:

Navigate to the proRM Area and select the desired entity (used here: Time Entries):



#### Step 2: Open Chart Section

Open the CRM Chart section at the right border of the window.



### Step 3: Choose the desired Chart

Select via the dropdown menu the chart that should be displayed:

The screenshot shows the Microsoft Dynamics CRM interface. On the left, there is a table titled 'My Time Entries' with columns: Type, Subject, From, To, Break (h), Billing Type, and Chargeable Dura... The table contains 23 records. On the right, there is a chart titled 'Time Entry by Type' showing duration in hours for August and September 2016. The chart is a stacked bar chart with three categories: Work (green), Absence (yellow), and Vacation (red). The legend indicates: Vacation (red), Absence (yellow), Work (green).

Month	Work (h)	Absence (h)	Vacation (h)
Aug 2016	34.00	3.50	0.00
Sep 2016	24.00	7.00	9.00

### Step 4: Change Data for Filtering

Charts show their evaluation based on the records in the related list overview. By changing the view or filter the columns it is possible to filter the Charts.

Also it is possible to select certain areas of the Charts and the filtered data records will be shown (here we selected the red colored bar is selected in order to observe the Vacation type Time Entries):

The screenshot shows the same Microsoft Dynamics CRM interface as in Step 3, but now the 'Vacation' bar in the chart is selected. The table on the left shows only one record: 'Vacation - out of the Office' with a duration of 9.00 hours. The chart on the right shows the 'Vacation' bar highlighted in red, and a 'Select Fields' dropdown menu is open over it.

Type	Subject	From	To	Break (h)	Billing Type	Chargeable...
Vacation	Vacation - out of the Office	9/1/2016 8:00 AM	9/1/2016 5:00 PM	0.000000000	Chargeable	9.000000000

Own Views can be created in CRM. Please visit the [Microsoft TechNet article](#) for more advises.

### 3.10.3 Power BI

Based on proRM Fast Start entities it is possible to create evaluations in Microsoft Power BI. Please find more information about this feature on the [official website](#).





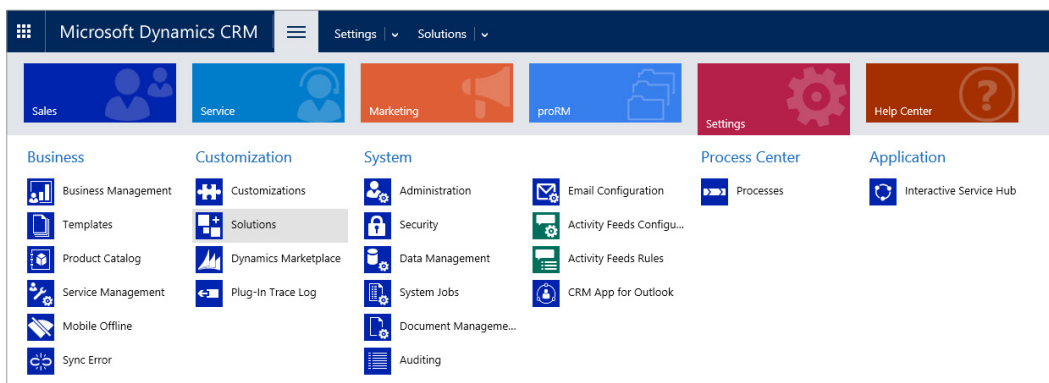
## 4. Uninstall proRM Fast Start



Please Note: Uninstalling proRM Fast Start will remove all created data for Projects, Project Tasks, Project Task Assignments, Expenses, Time Entries, Configurations, Time Stamps and Working Hours from the Microsoft Dynamics 365 Environment.

### Step 1: Open CRM

Open Microsoft Dynamics 365 and navigate to Settings -> Solutions.



## Step 2: Locate proRM Fast Start Solution

Under the menu option Solutions there is an overview of all installed solutions in the system in a list view. Select here the proRM Fast Start.

Name	Display Name	Version	Installed On	Package Type	Publisher	Description
proRMBusinessSolutions	proRM Fast Start	2016.6.0.19	8/29/2016	Managed	proMX GmbH	

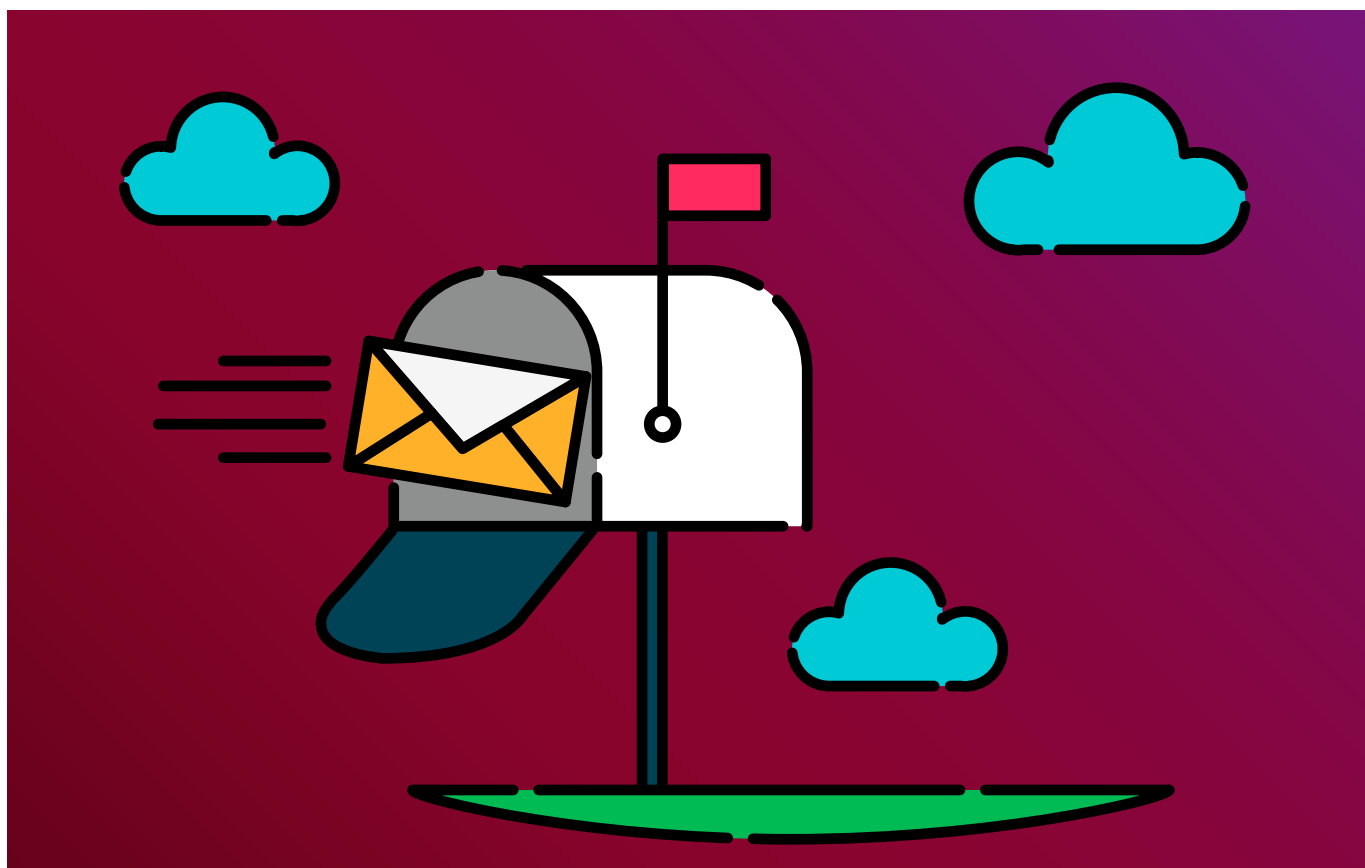
## Step 3: Delete Solution

After that click on DELETE button in the menu bar.

Name	Display Name	Version	Installed On	Package Typ...	Publisher
proRMBusinessSolutions	proRM Fast Start	2016.6.0.19	8/29/2016	Managed	proMX GmbH



For more information, how to delete a managed solution in the Microsoft Dynamics CRM Organization, please visit the related [Microsoft Developer Network](#).



## 5. Contact

For sales and licensing questions, please contact [sales@proMX.net](mailto:sales@proMX.net).

For further questions, wishes or any feedback please contact [support@proMX.net](mailto:support@proMX.net) or the corresponding contact information below.



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