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Scenario contained in this document

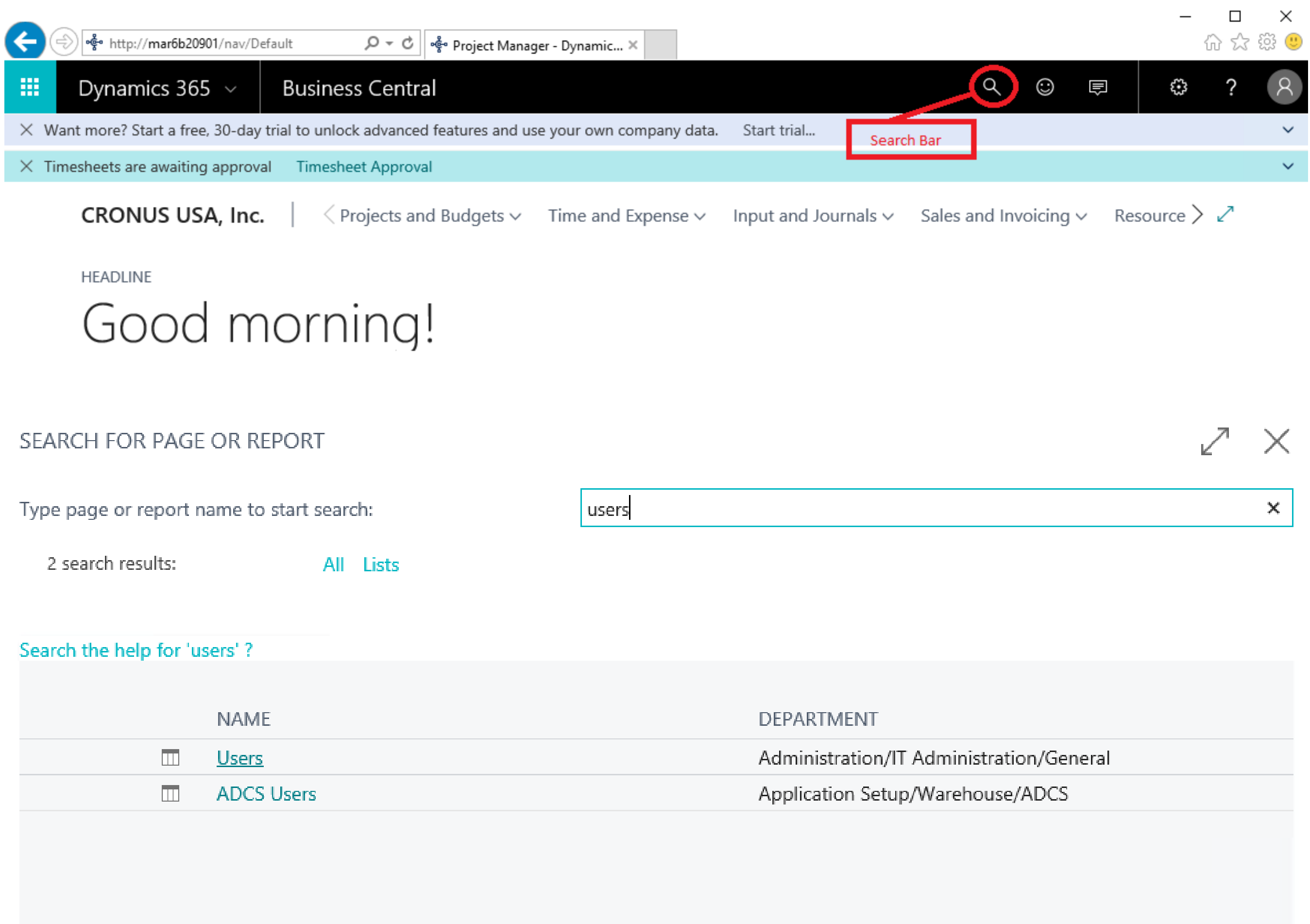
This document is designed to step through the setup and work flow of a Time and Materials Project.

- Ensure the Cronus Demo Data is populated
- Assign Permissions to the User and complete User Setup
- Progressus Wizard - > Populate Demo Data
- Assign Resource to User
- Project Wizard -> Create Your First Project
- Enter Time and Expenses

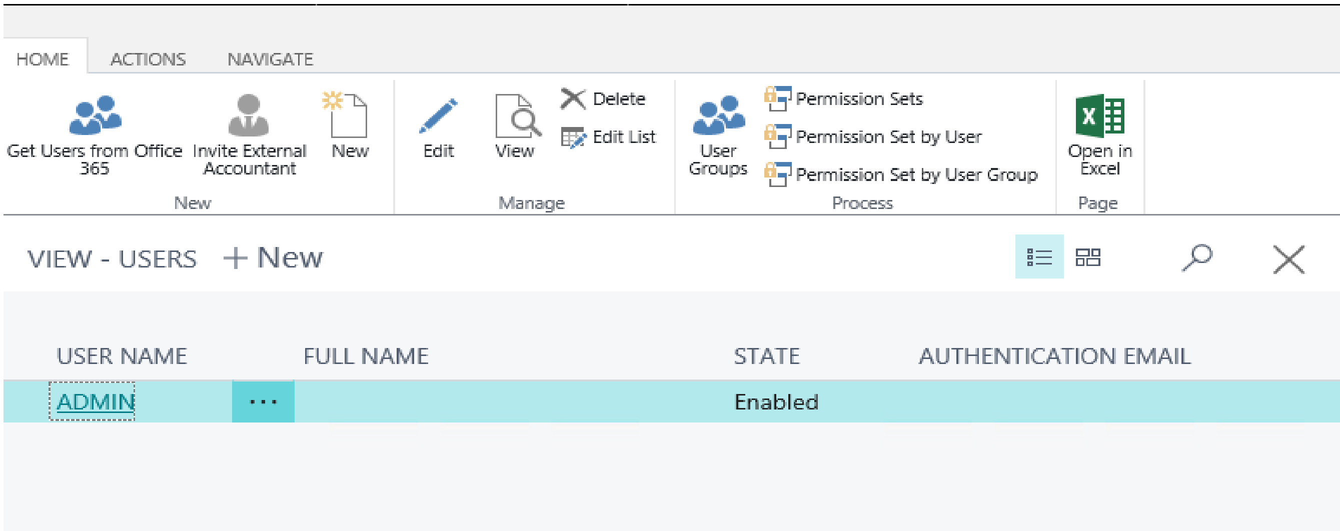
User Setup

Steps:

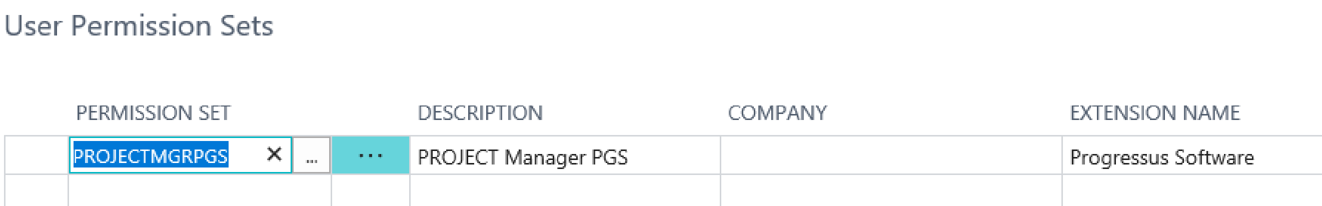
1. Search for Users and click to open the page.



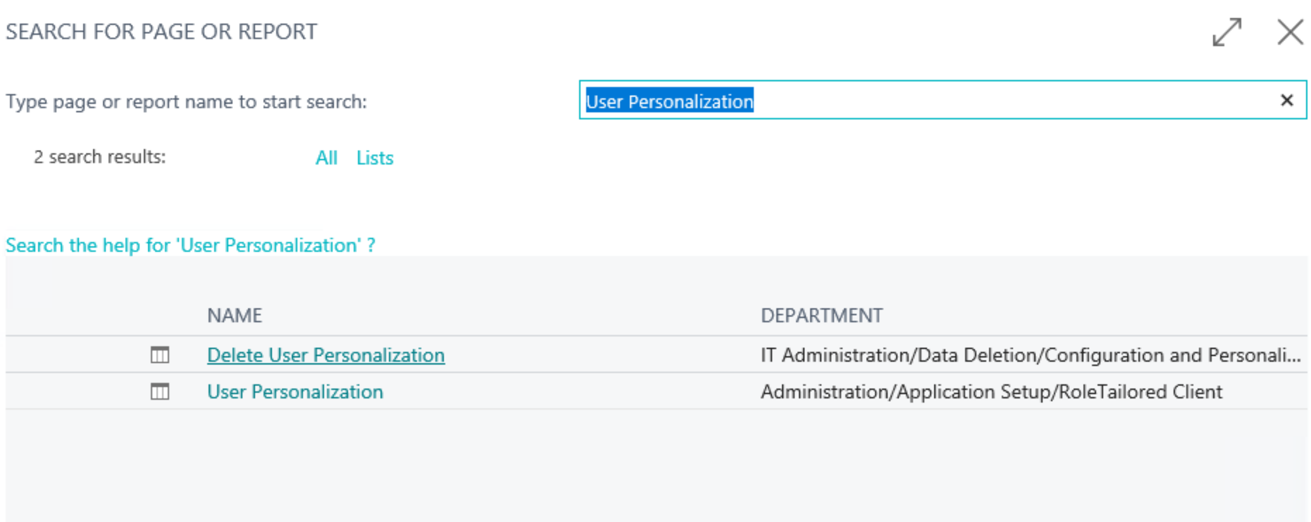
Select the **User Name** for your login and click ***Edit***.



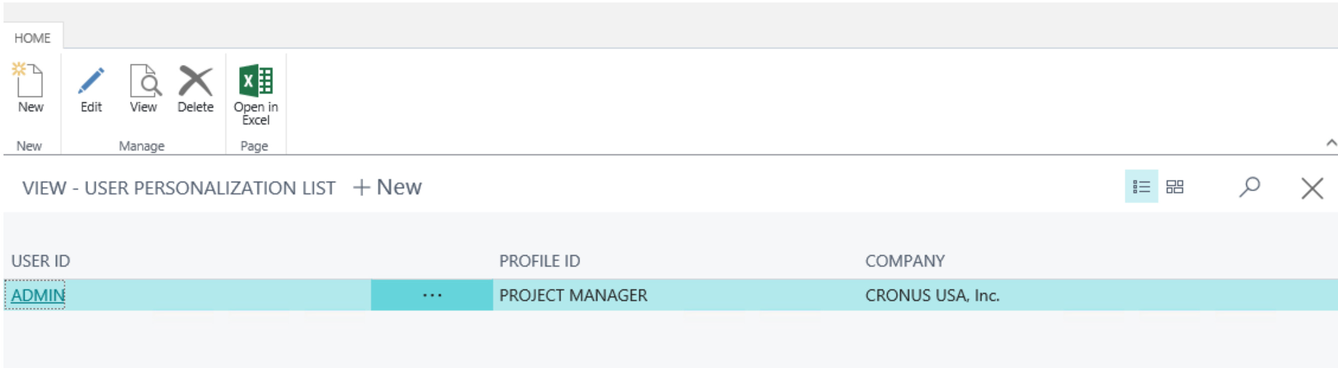
2. Page down. Under **User Permission Sets** add the following **PROJECTMGRPGS**.



3. Close the screen
4. Search for **User Personalization** and select it to open the page.

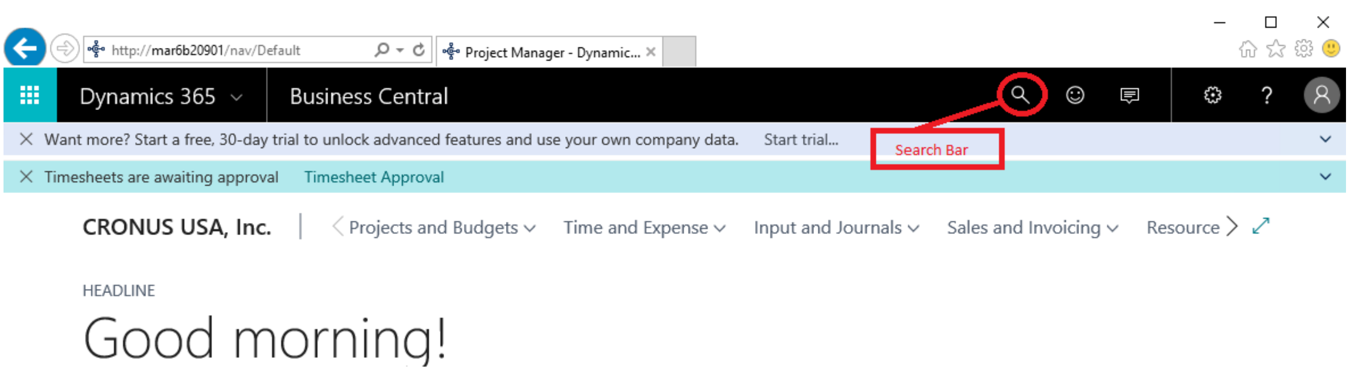


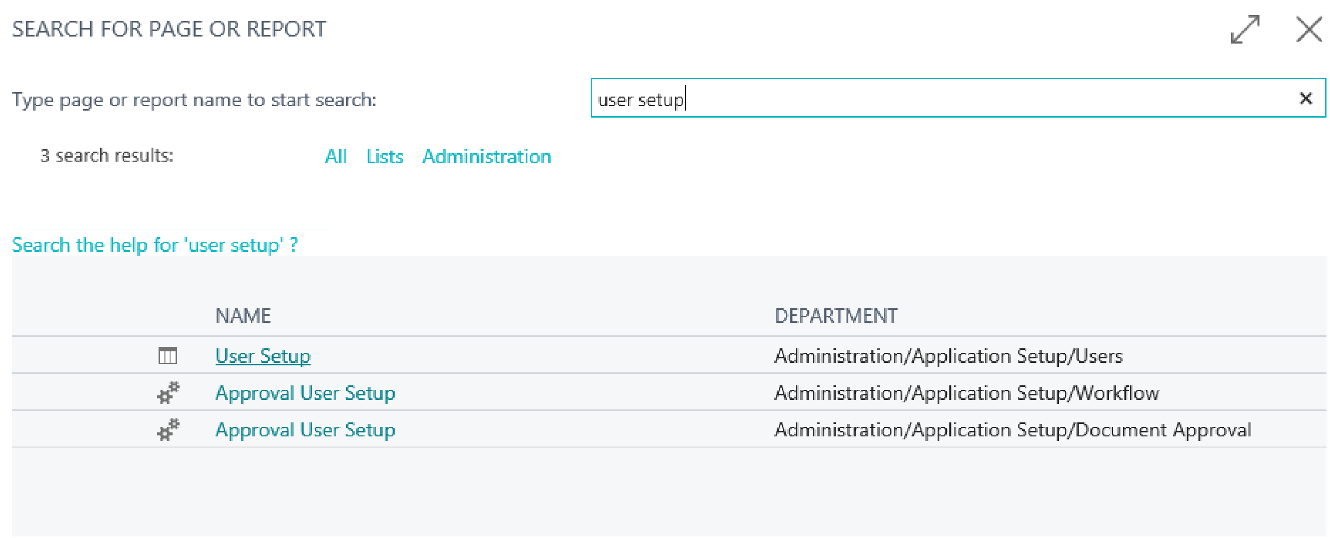
5. Select your **User ID** from the list and click to open it.



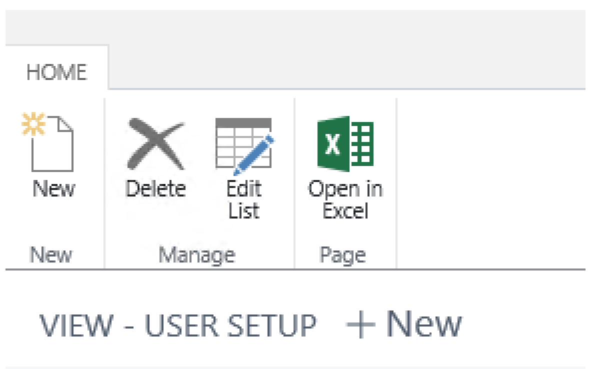
6. Under **Profile ID** select **Project Manager** then close the screen.

7. Search for **User Setup**.

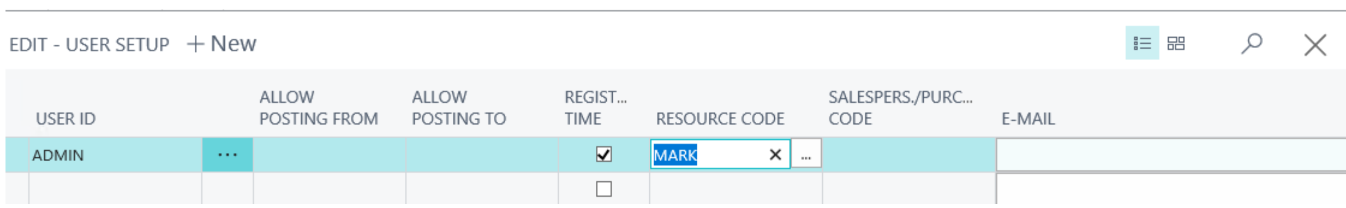




1. On the **User Setup** screen, click on the **Home** ribbon and ***New*** action button.



8. Click on your **User ID** to select.



9. Check the Options for:

   a. Register Time

10. Under Resource Code select “**Mark**”.

Note: In the user setup Resource Code field must have data.

11. Close the screen.

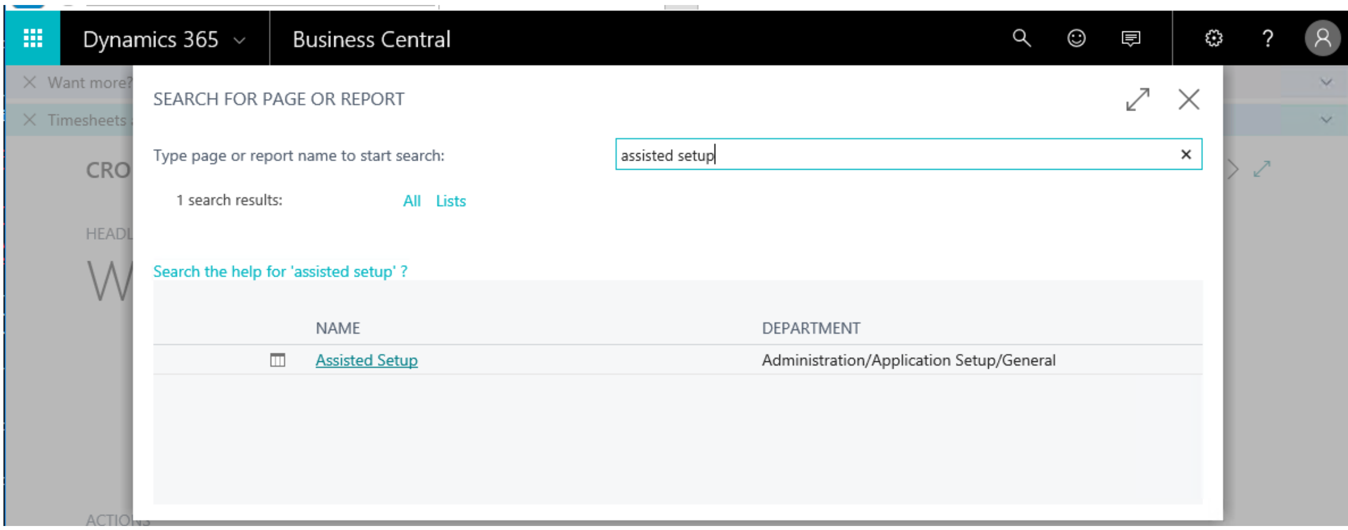
12. Sign out of the system and sign back in for the new Role Center to be loaded.

Progressus Wizard Populate Demo Data

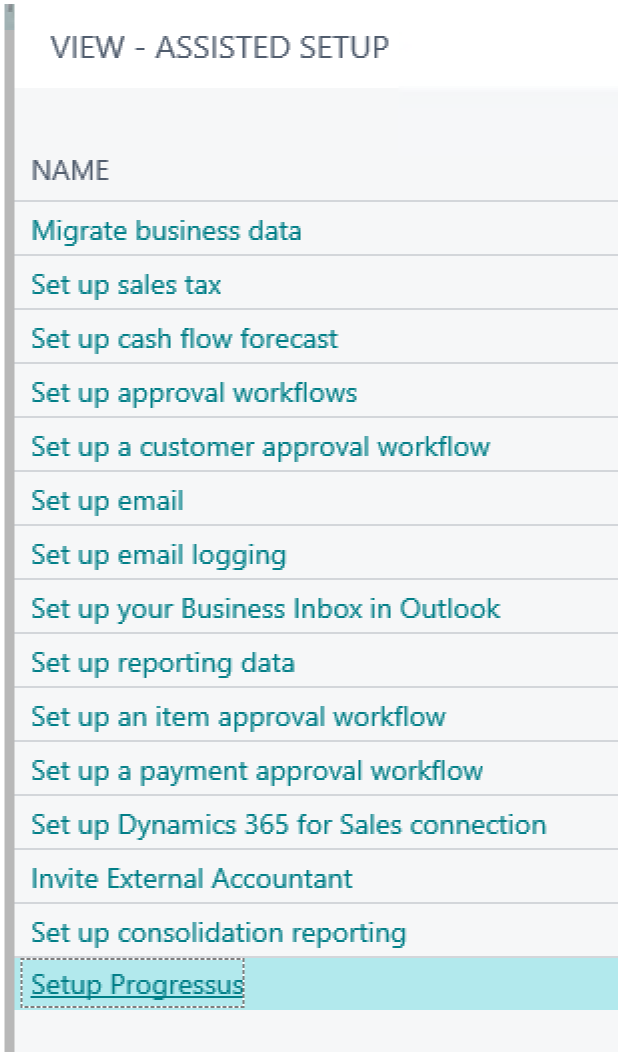
Profile: Project Manager

Steps:

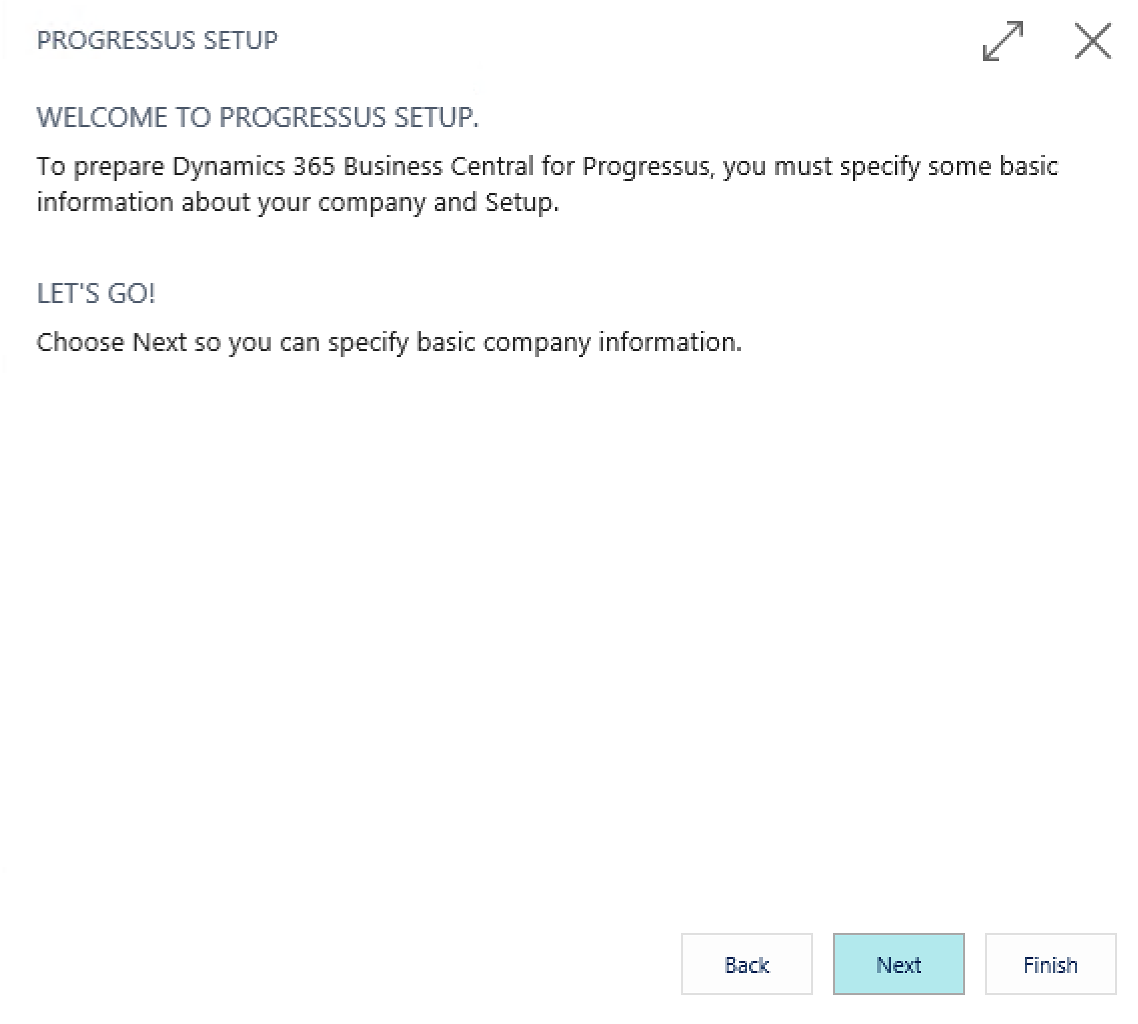
1. Search for **Assisted Setup**.



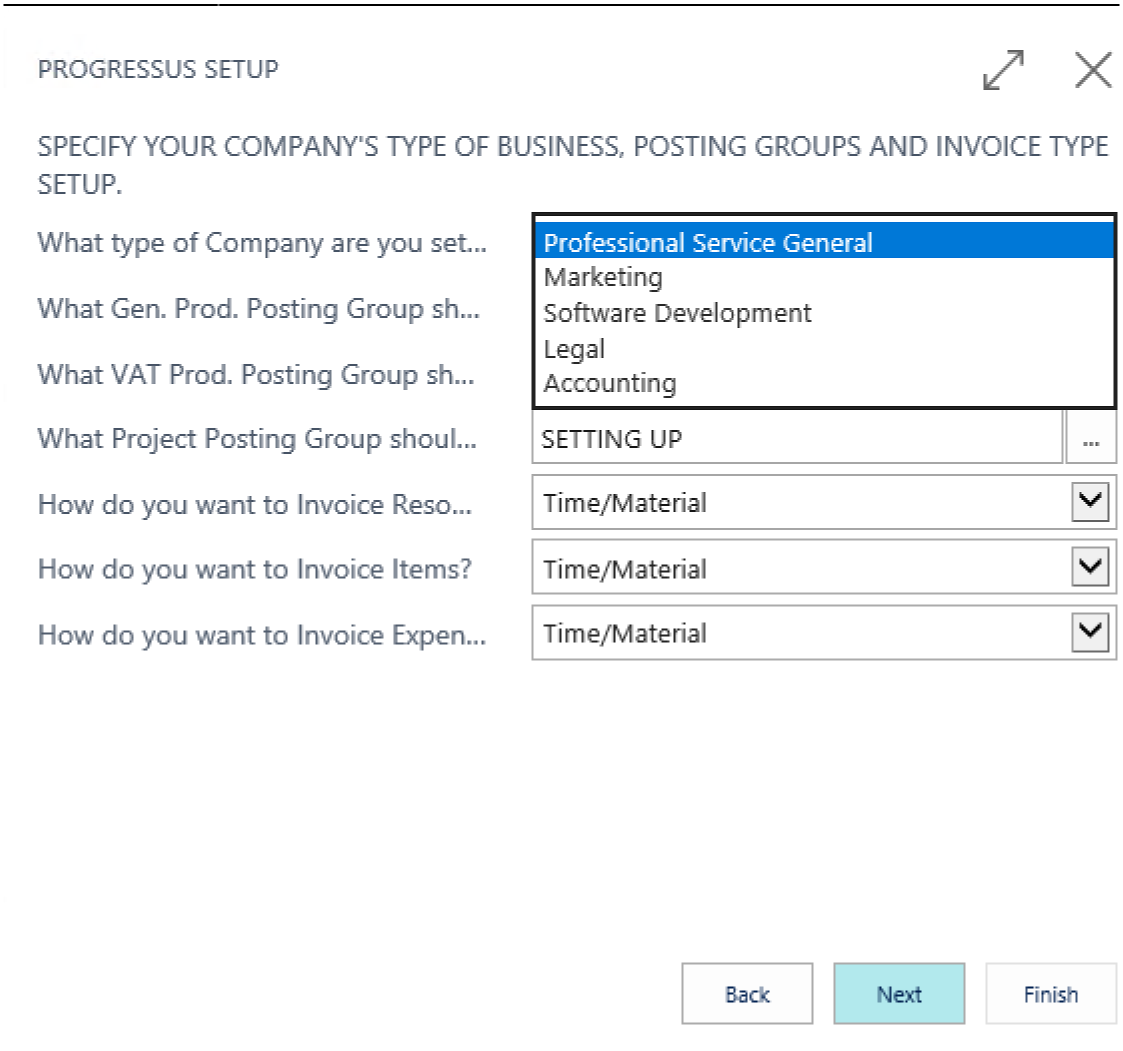
2. Select ***Setup Progressus*** from the ***View – Assisted Setup*** page.


VIEW - ASSISTED SETUP
NAME
Migrate business data
Set up sales tax
Set up cash flow forecast
Set up approval workflows
Set up a customer approval workflow
Set up email
Set up email logging
Set up your Business Inbox in Outlook
Set up reporting data
Set up an item approval workflow
Set up a payment approval workflow
Set up Dynamics 365 for Sales connection
Invite External Accountant
Set up consolidation reporting
Setup Progressus

3. The ***Progressus Setup Wizard*** will open. Click the ***Next*** button at the bottom of the screen.

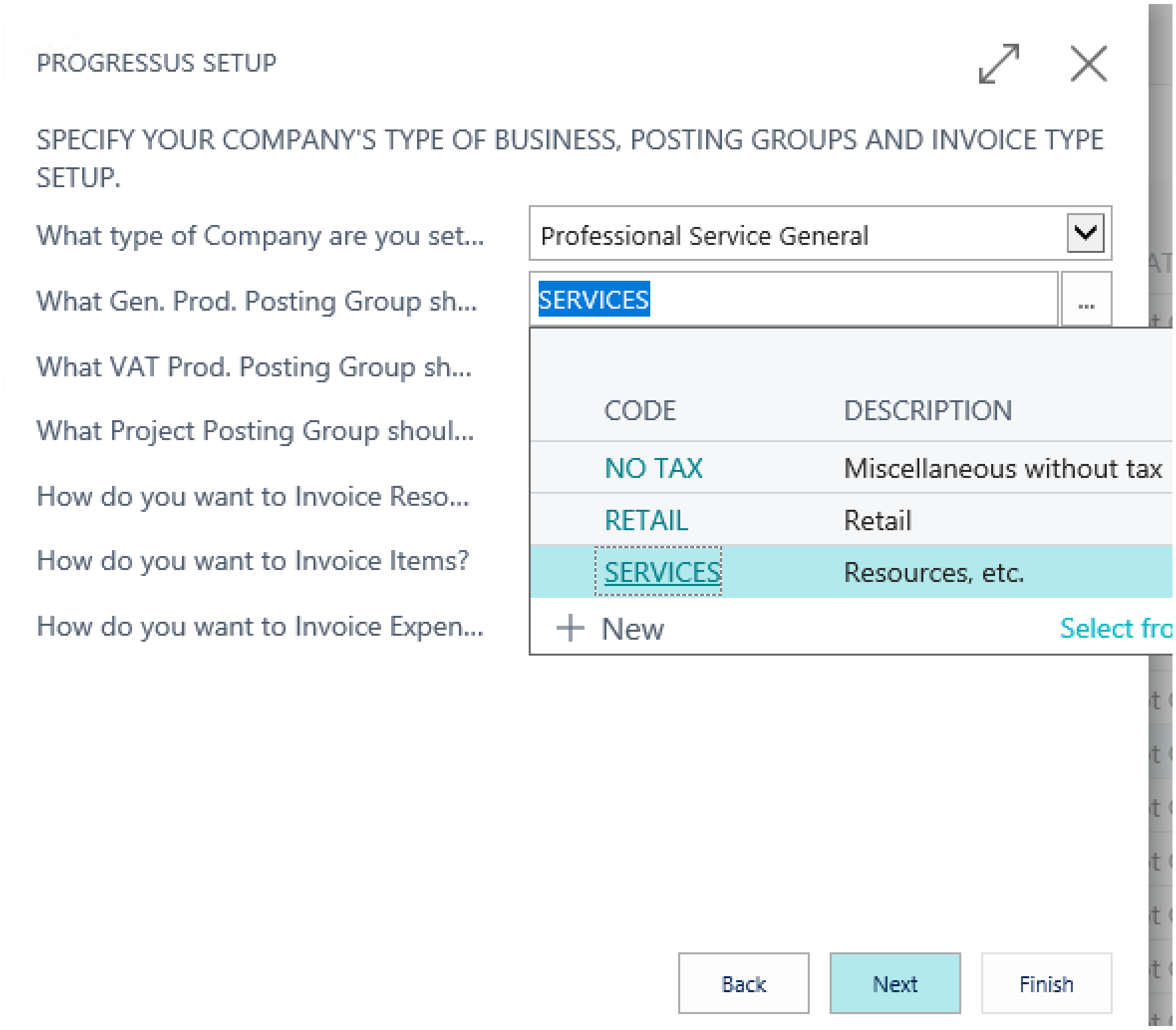


4. Enter ***Type of Company*** "***Professional Service General".***



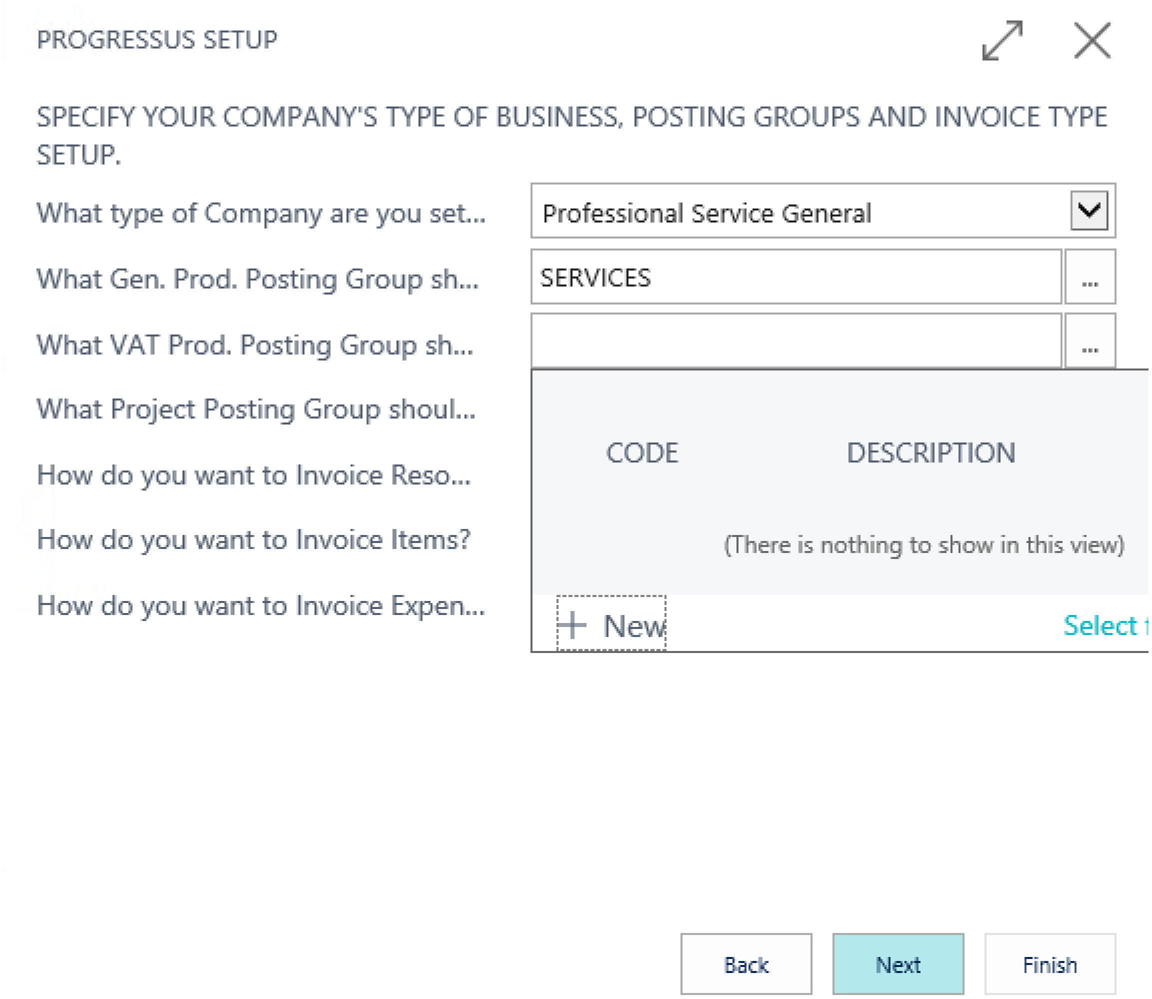
5. Enter the ***General Production Posting Group*** "***Services".***

Gen. Prod. Posting Group:
Specifies the general product posting group codes for items or resources for posting purposes. These codes distinguish between the types of items or resources that are sold or purchased.

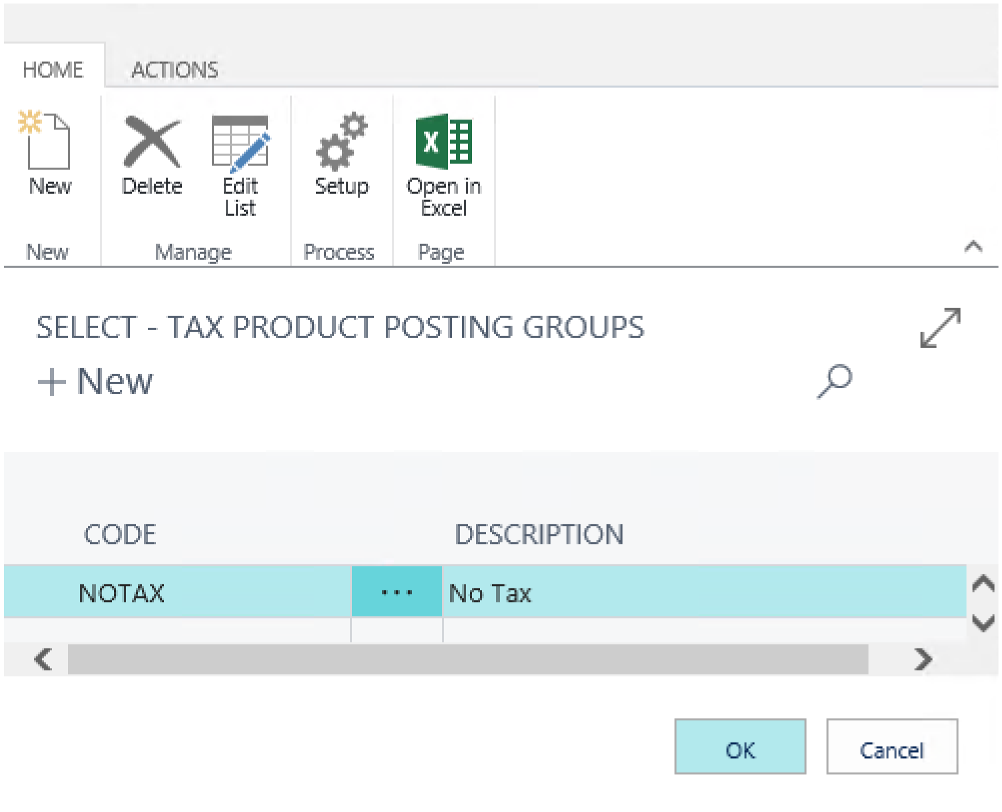


6. On the Field ***Vat Posting Group*** select the lookup and click ***New***.

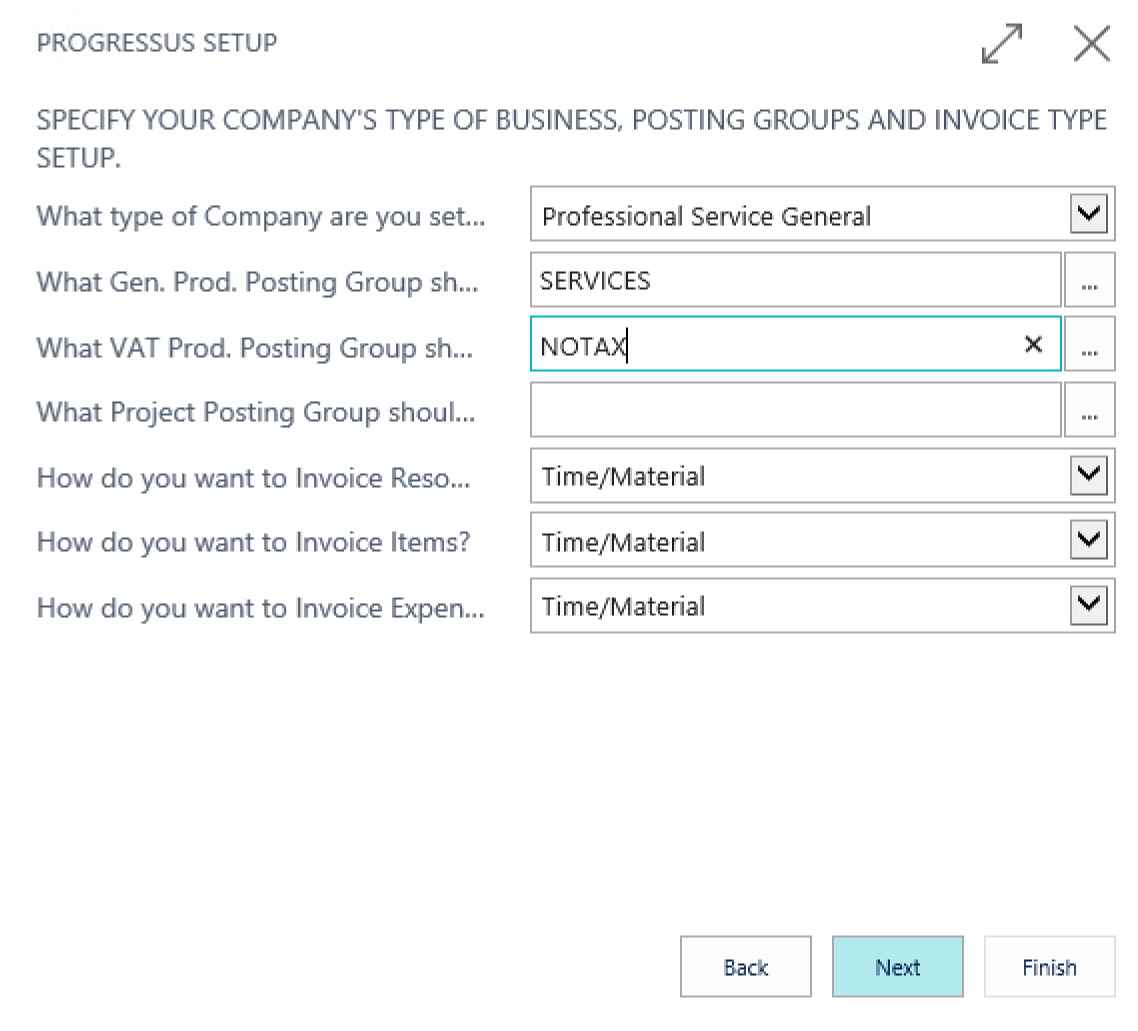
   VAT Prod. Posting Group:
   Specifies the VAT product posting group codes for items or resources for VAT purposes. These codes distinguish between the types of items or resources that are sold or purchased and whether they are subject to or exempt from VAT.



7. Enter “**NOTAX”** under **Code** and “**No Tax**” Under **Description**, then click OK to select what you have just added.

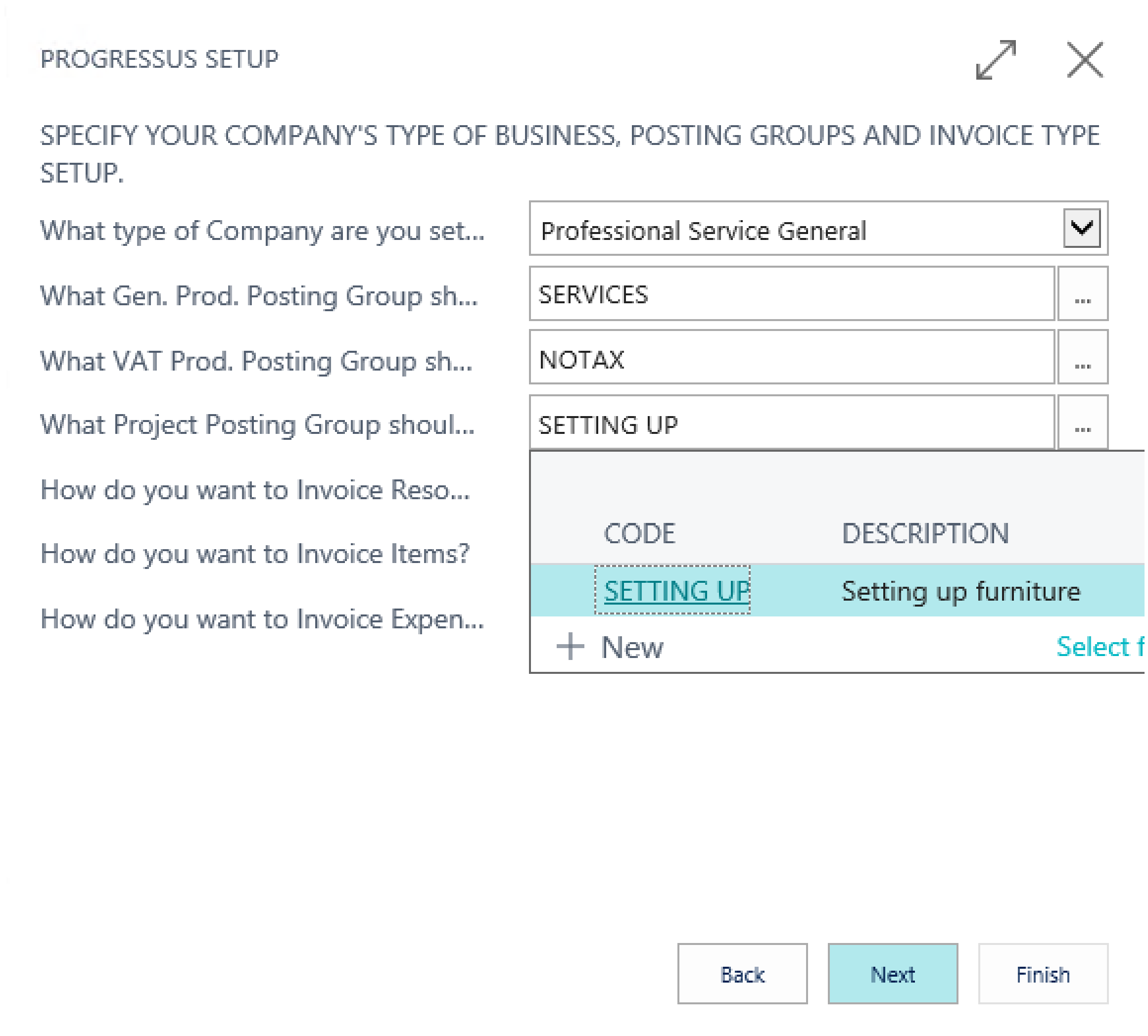


The selected code will then display.

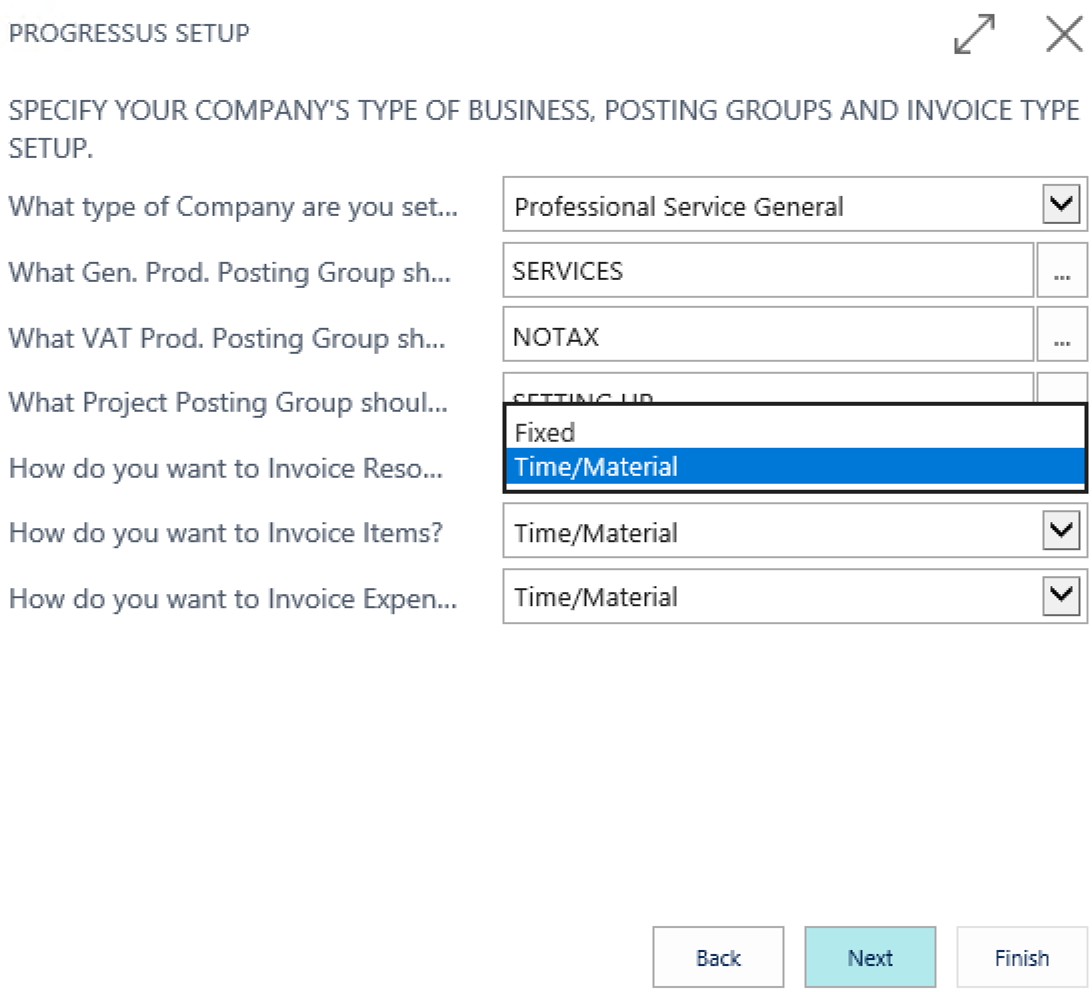

PROGRESSUS SETUP
SPECIFY YOUR COMPANY'S TYPE OF BUSINESS, POSTING GROUPS AND INVOICE TYPE SETUP.
What type of Company are you set...
Professional Service General
What Gen. Prod. Posting Group sh...
SERVICES
What VAT Prod. Posting Group sh...
NOTAX
What Project Posting Group shoul...
How do you want to Invoice Reso...
Time/Material
How do you want to Invoice Items?
Time/Material
How do you want to Invoice Expen...
Time/Material
Back
Next
Finish

8. Enter the ***Project Posting Group*** "Setting Up***".***

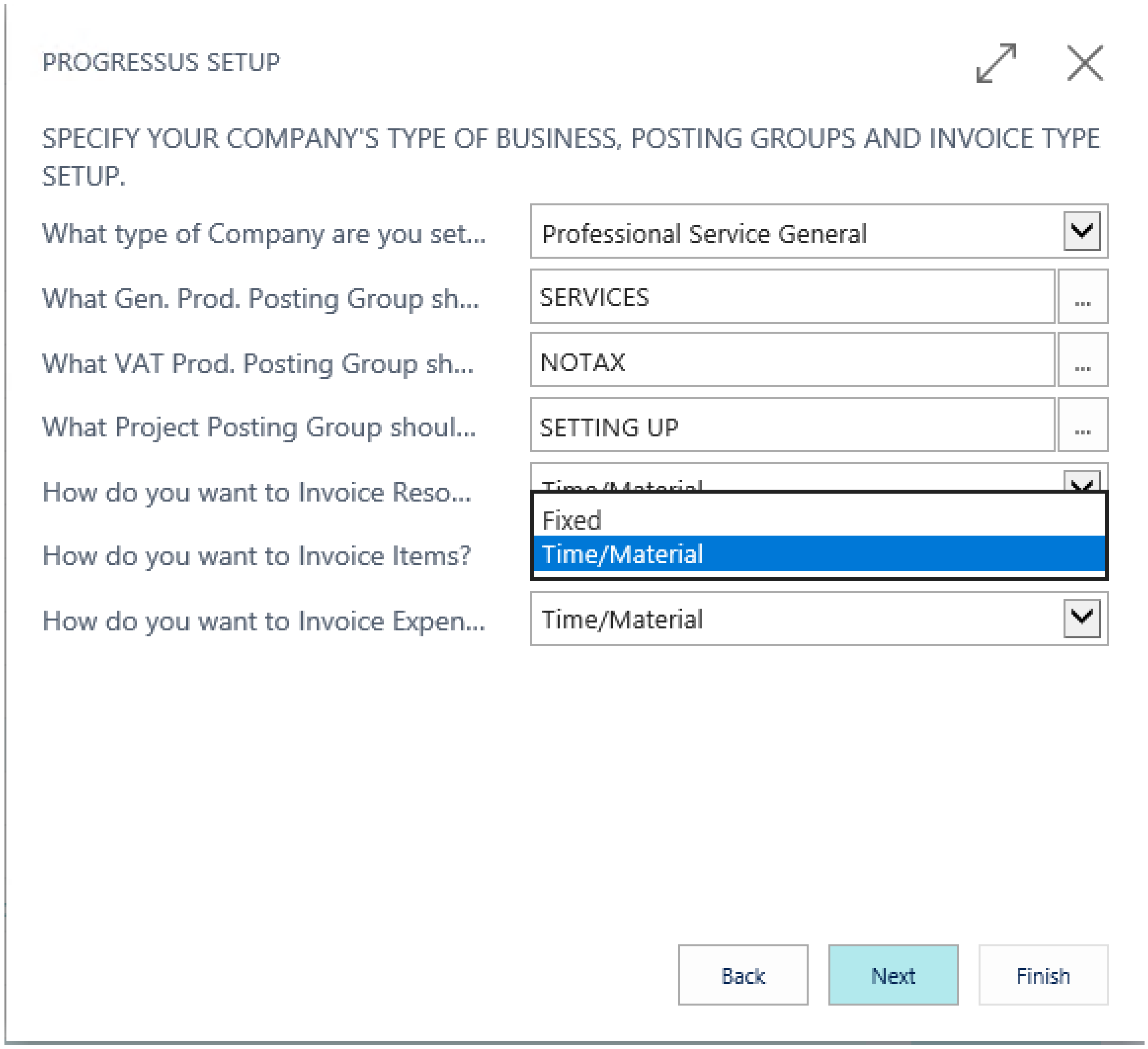
Project Posting Group:
A posting group represents a link between the job and how it should be treated in the general ledger. When you create a job, you specify a posting group, and by default, each task you create for the job is associated with that posting group. However, as you create tasks, you can override the default and select a posting group that is more appropriate.



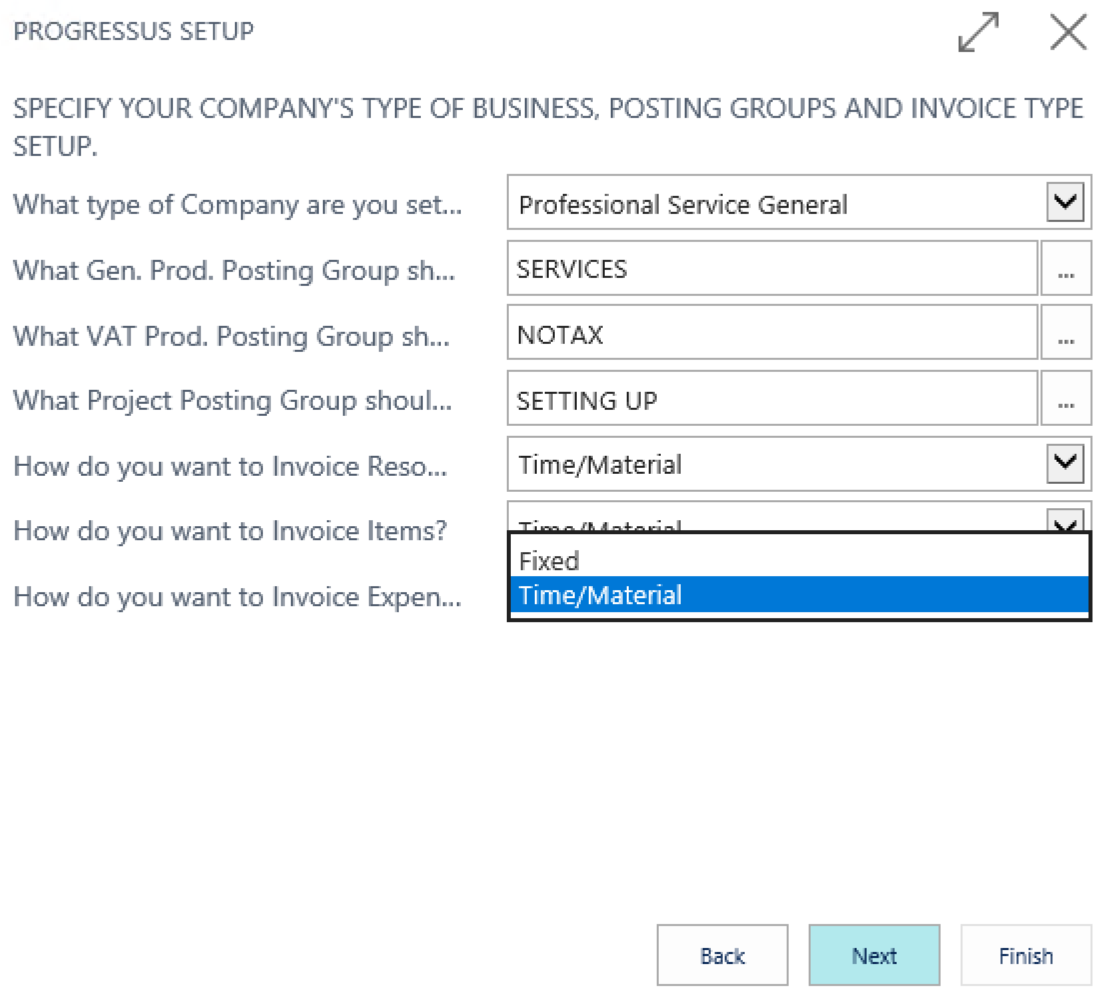
9. Select "***Time and Material"*** under how you want to ***Invoice Resources.***



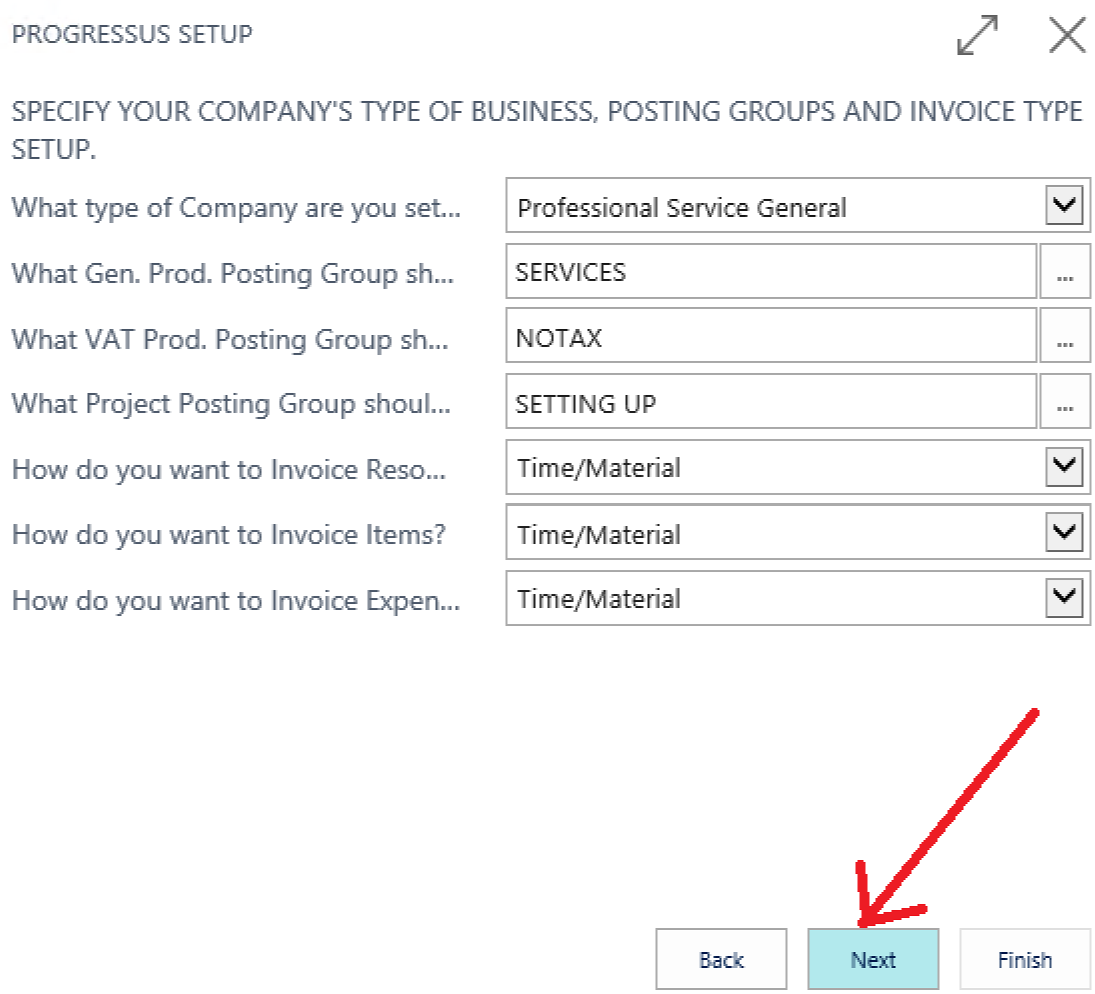
10. Select “***Time and Material”*** under how you want to ***Invoice Items.***



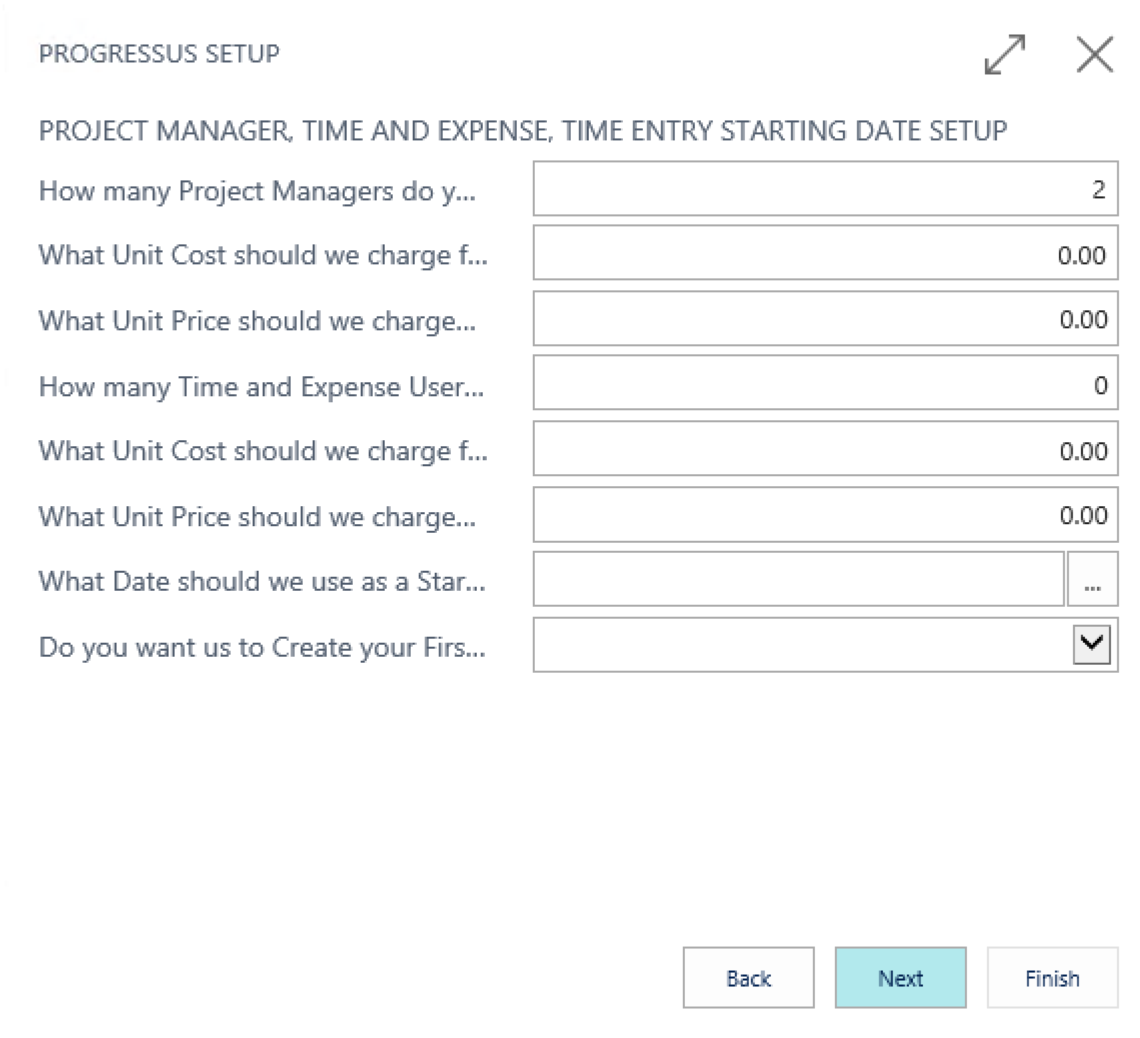
11. Select “***Time and Material”*** under how you want to ***Invoice Expenses.***



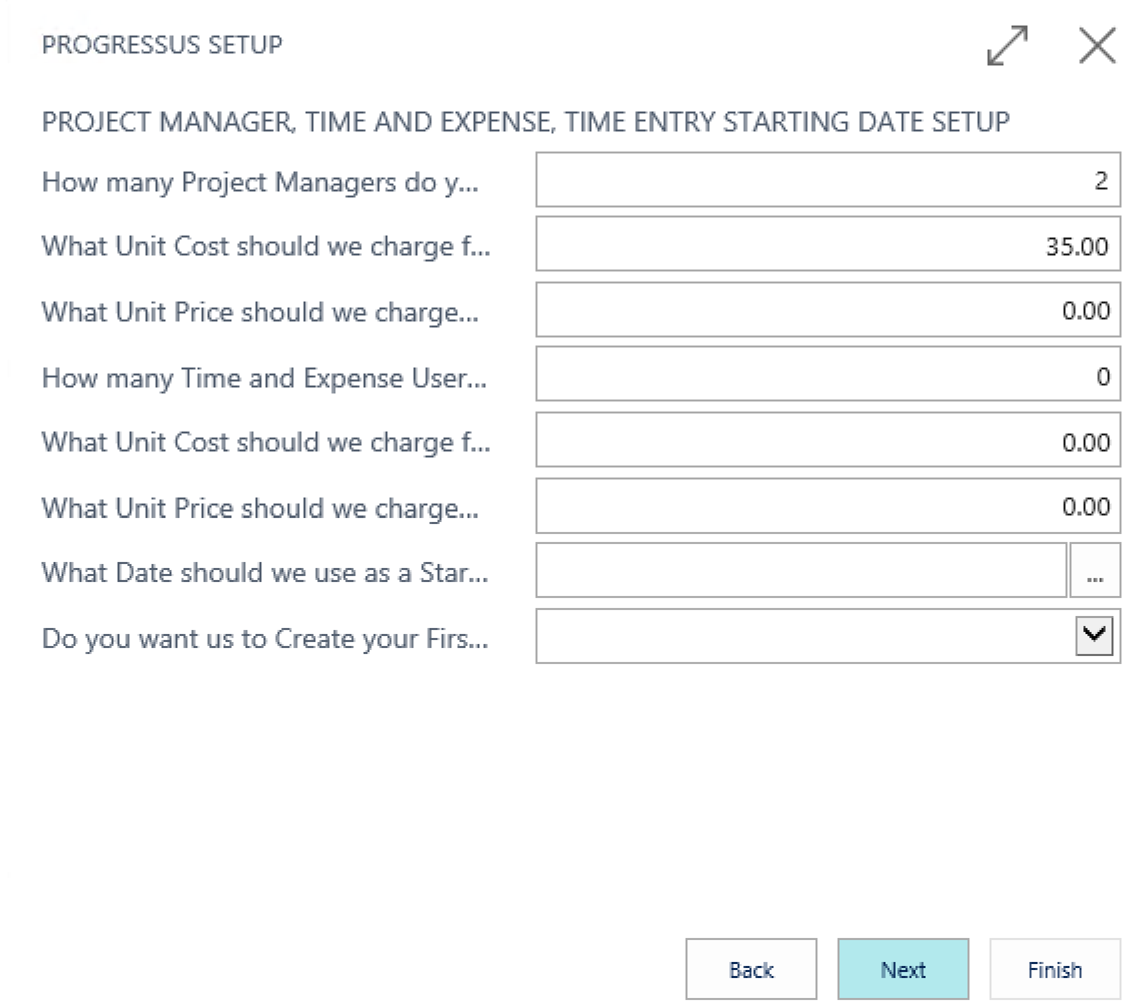
12. Select the ***Next*** button at the bottom of the page.



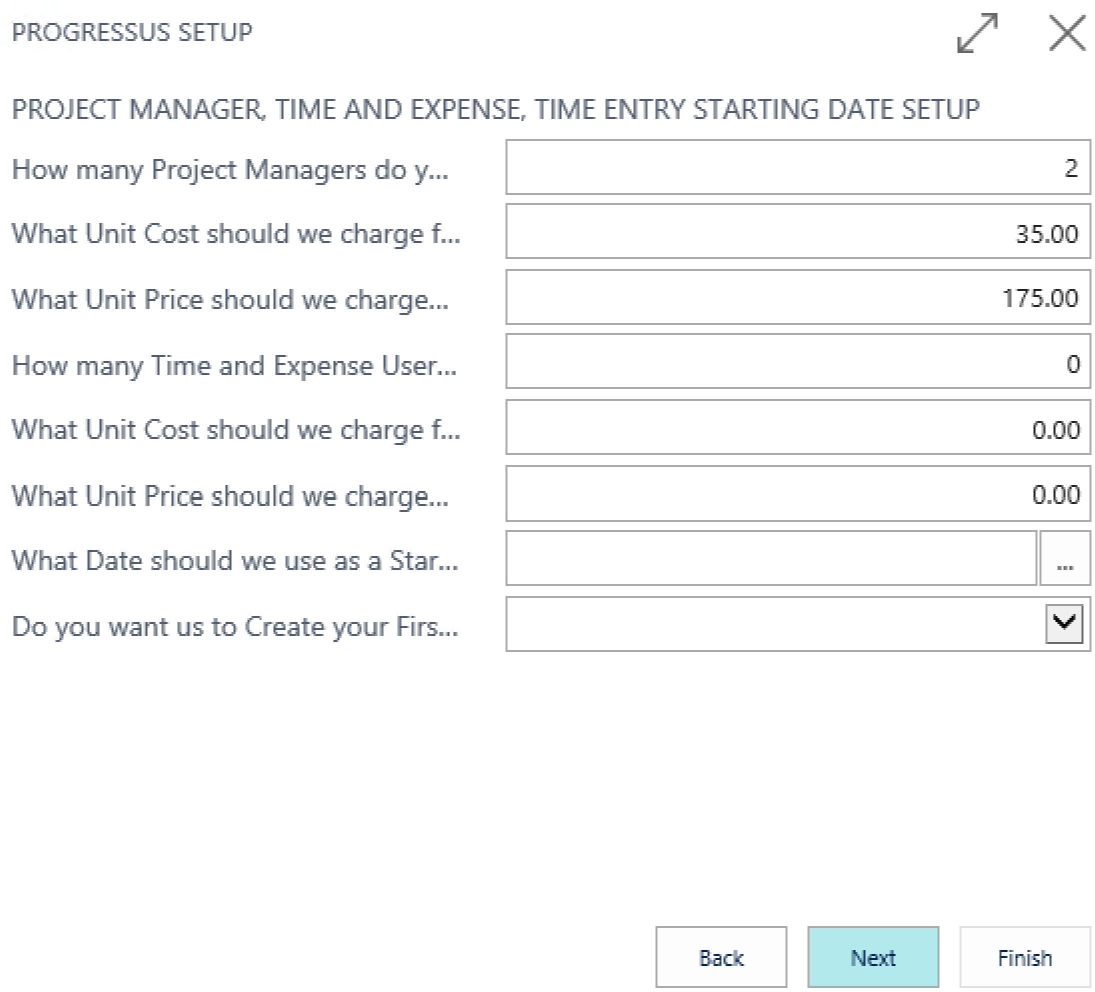
13. Enter the number “***2***” under ***How many Project Managers*** you want to create.



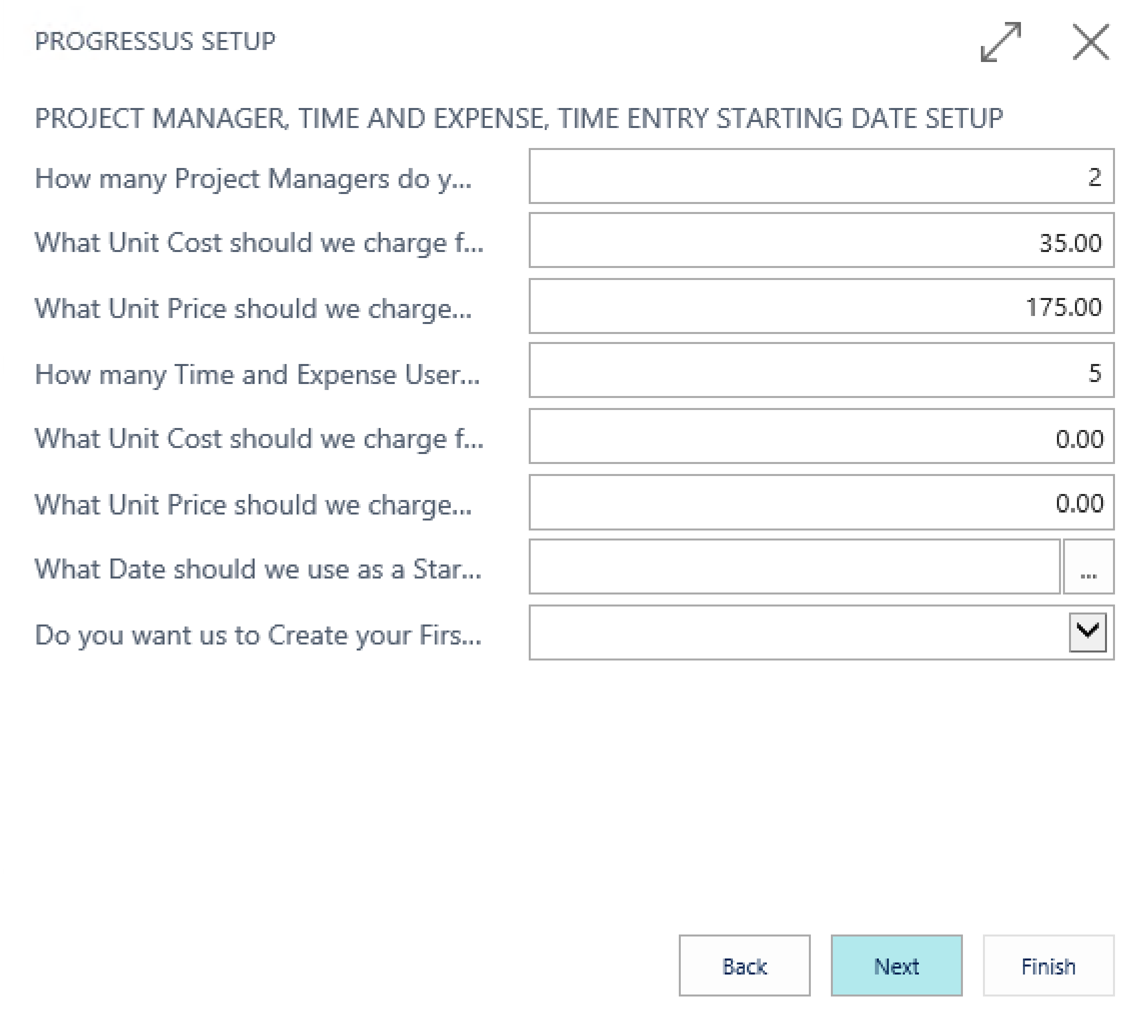
14. Enter the ***Unit Cost for Project Managers*** as "***35.00***".



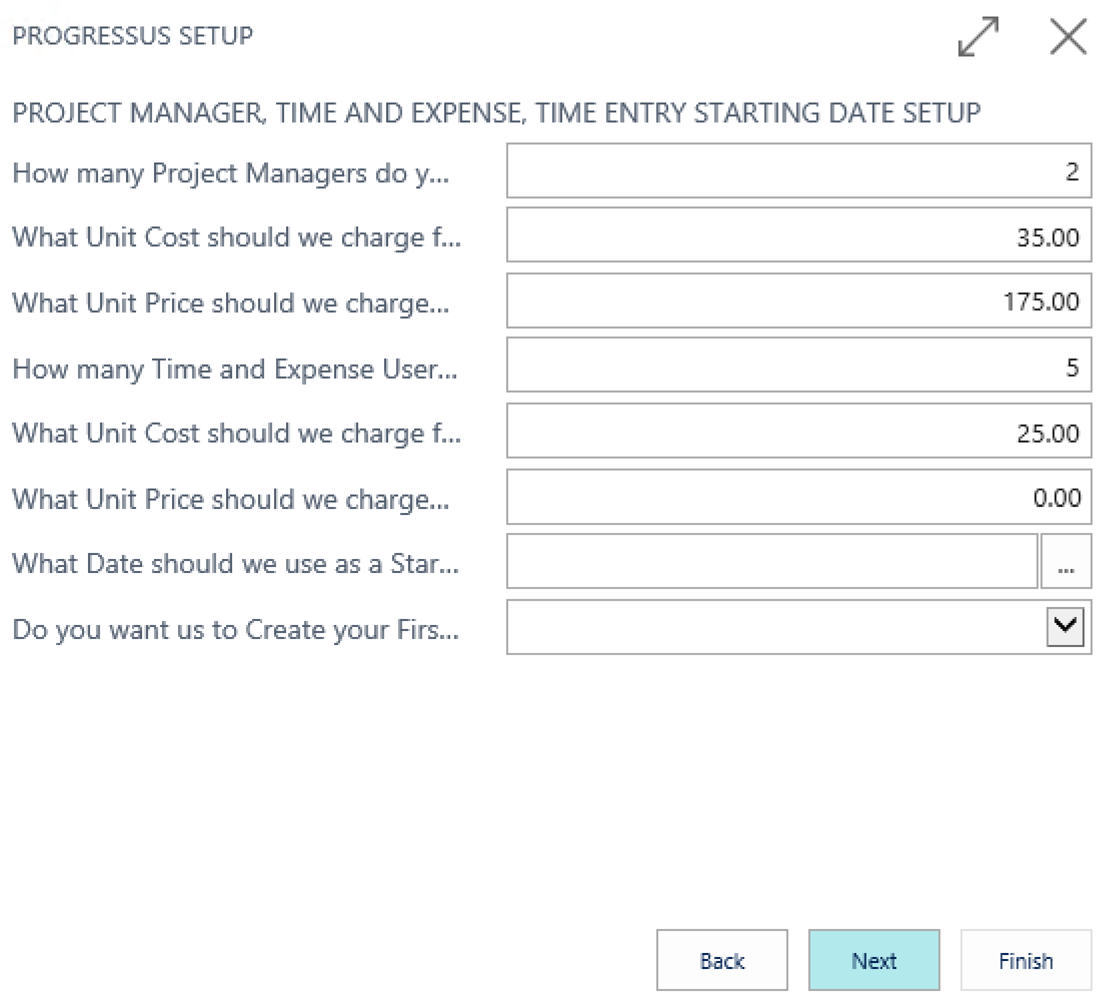
15. Enter the ***Unit Price to charge for Project Managers*** as “***175.00”***.



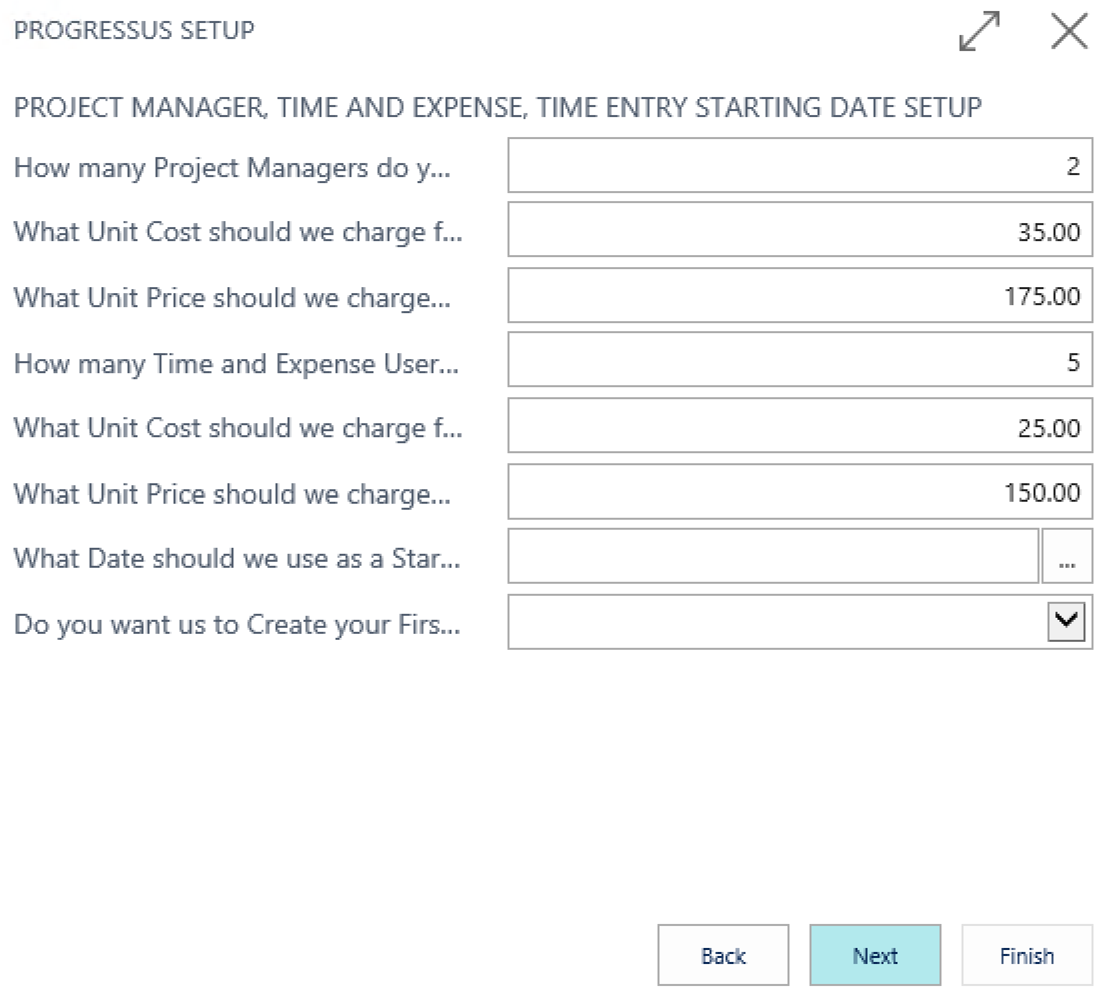
16. Enter the number “***5”*** under ***How many Time and Expense Users*** you want to create.



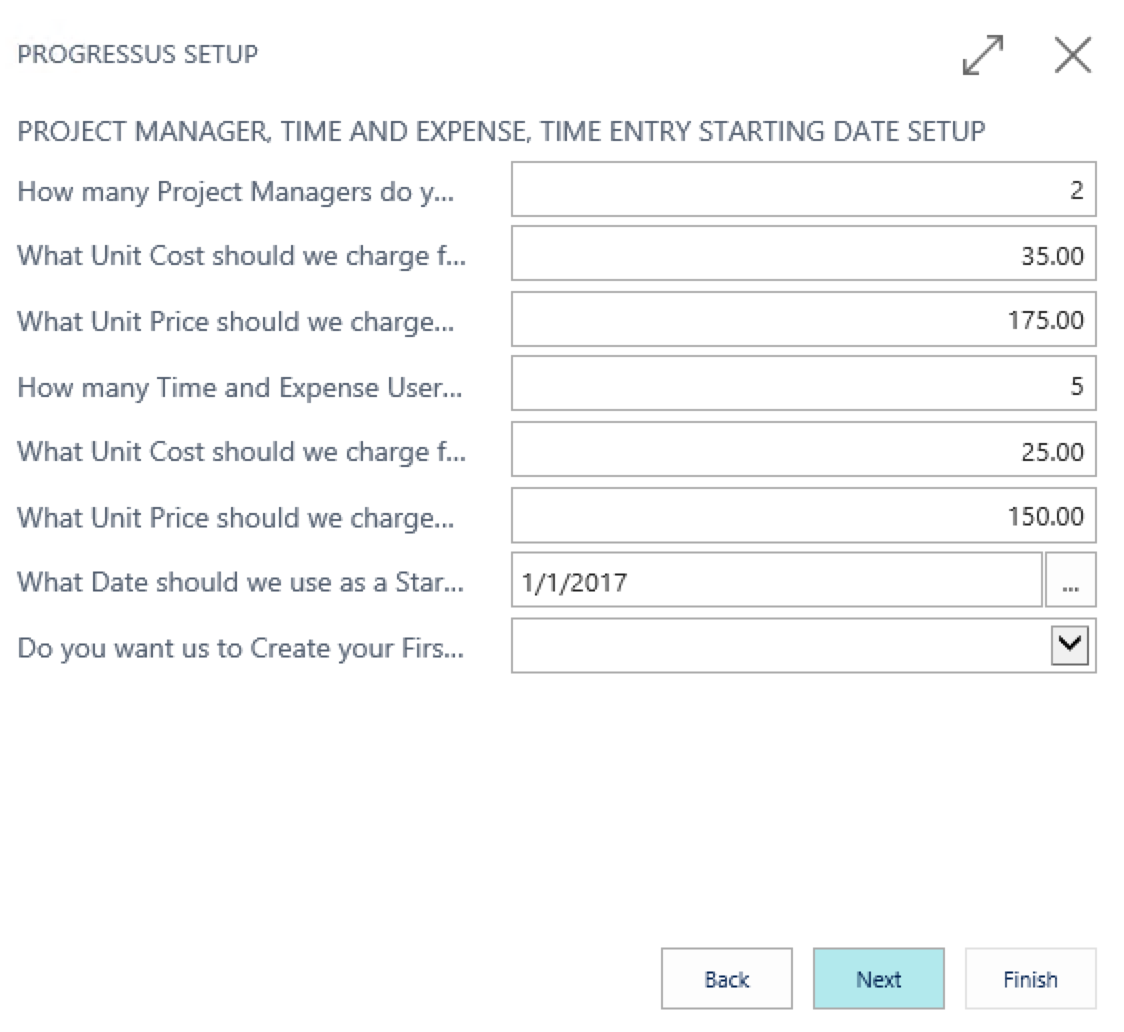
17. Enter the ***Unit Cost for Time and Expense Users*** as “***25.00”.***



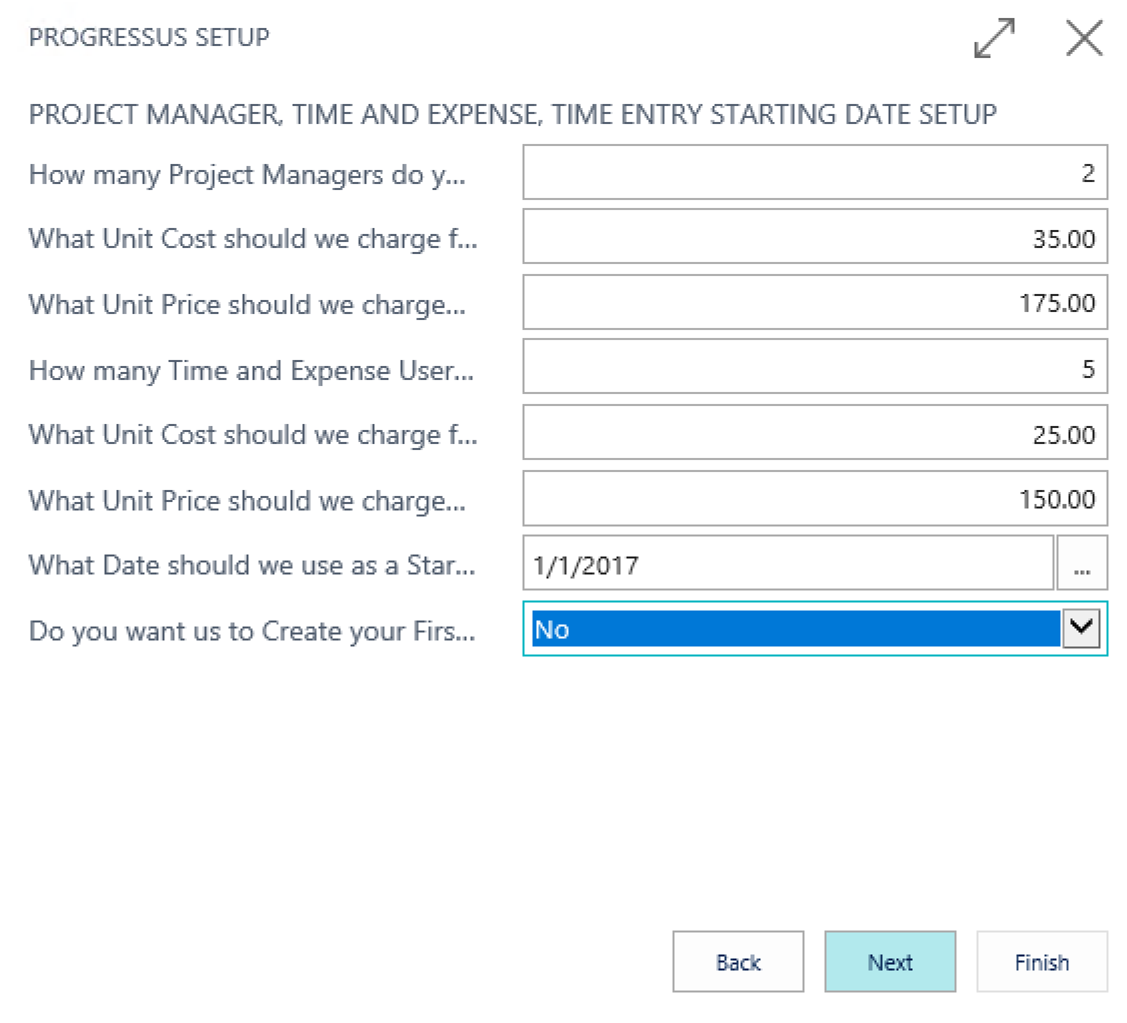
18. Enter the ***Price to charge for Time and Expense Users*** as “***150.00”***.



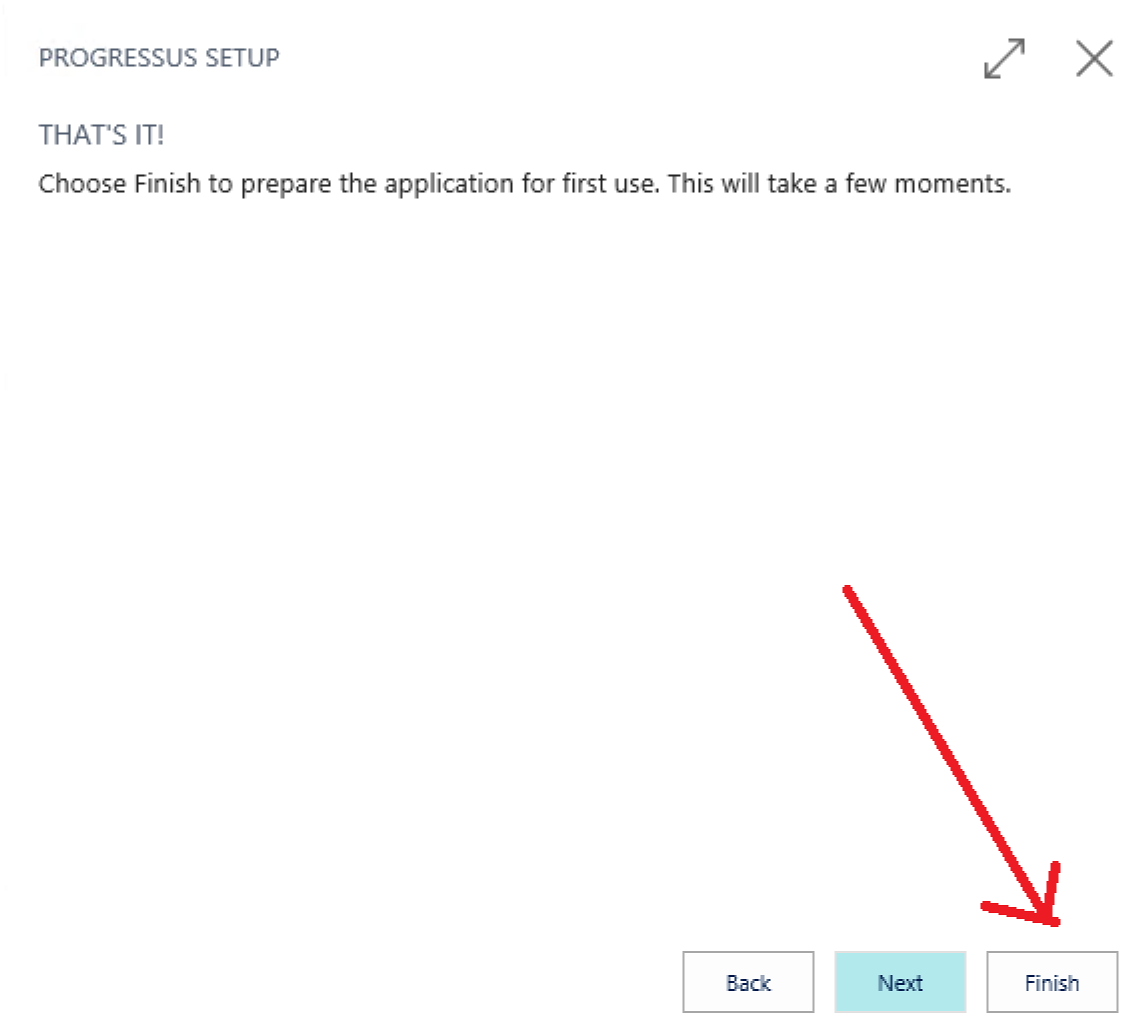
19. Enter “***01/01/2017”*** as the ***Starting Date for Time Entry***.



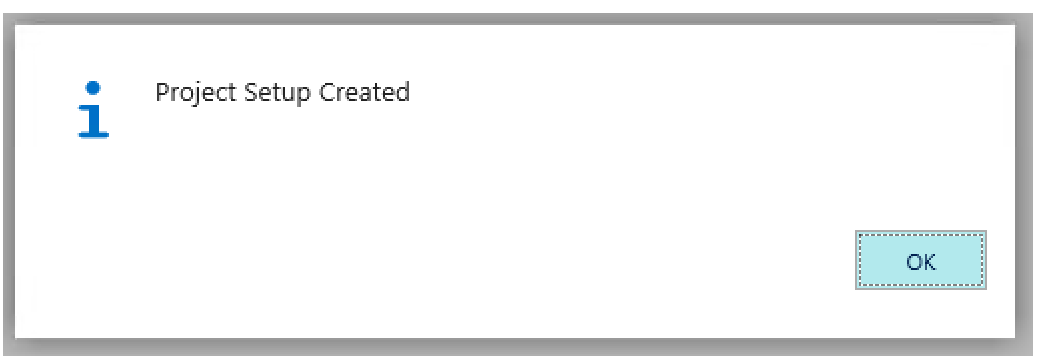
20. Select "***No"*** under ***Do you want us to create your first project*** to simply finish the wizard.



21. Click ***Next*** and then ***Finish*** to Exit the Wizard and have the data created.



22. The following message will display on completion. Click ***OK***.



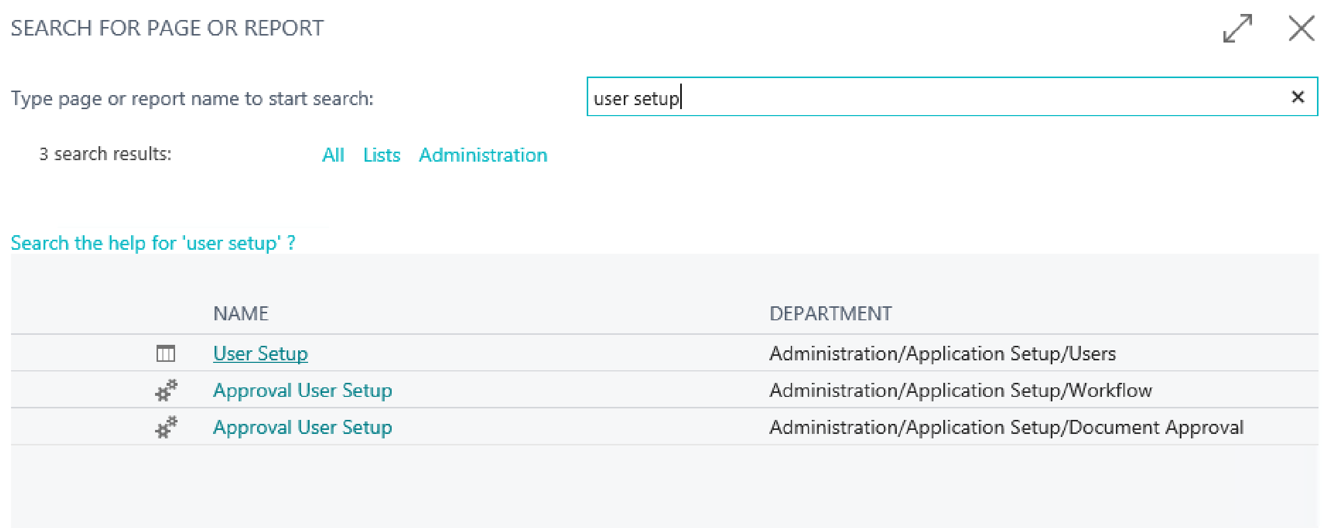
Continue to Resource Assignment.

User Resource Assignment

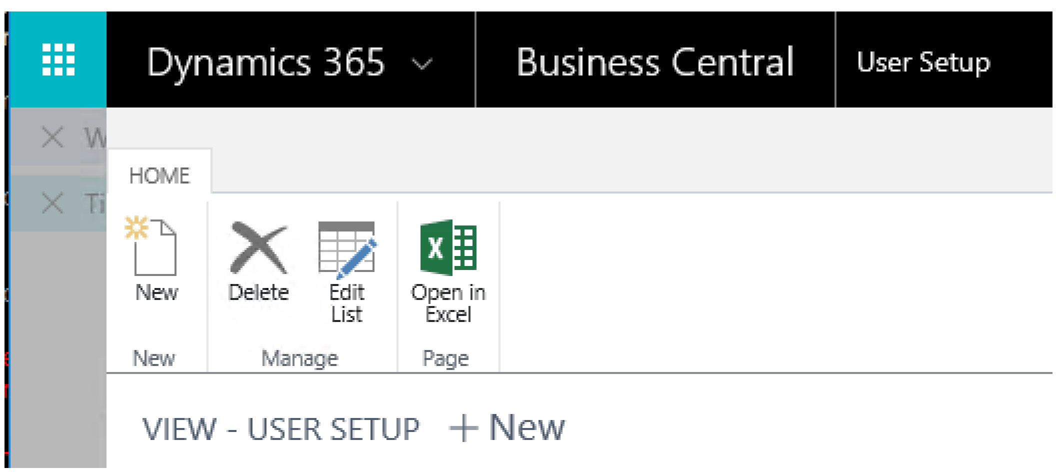
Now that the Resources have been added we must assign one of our resources.

Steps:

1. Search for User Setup.

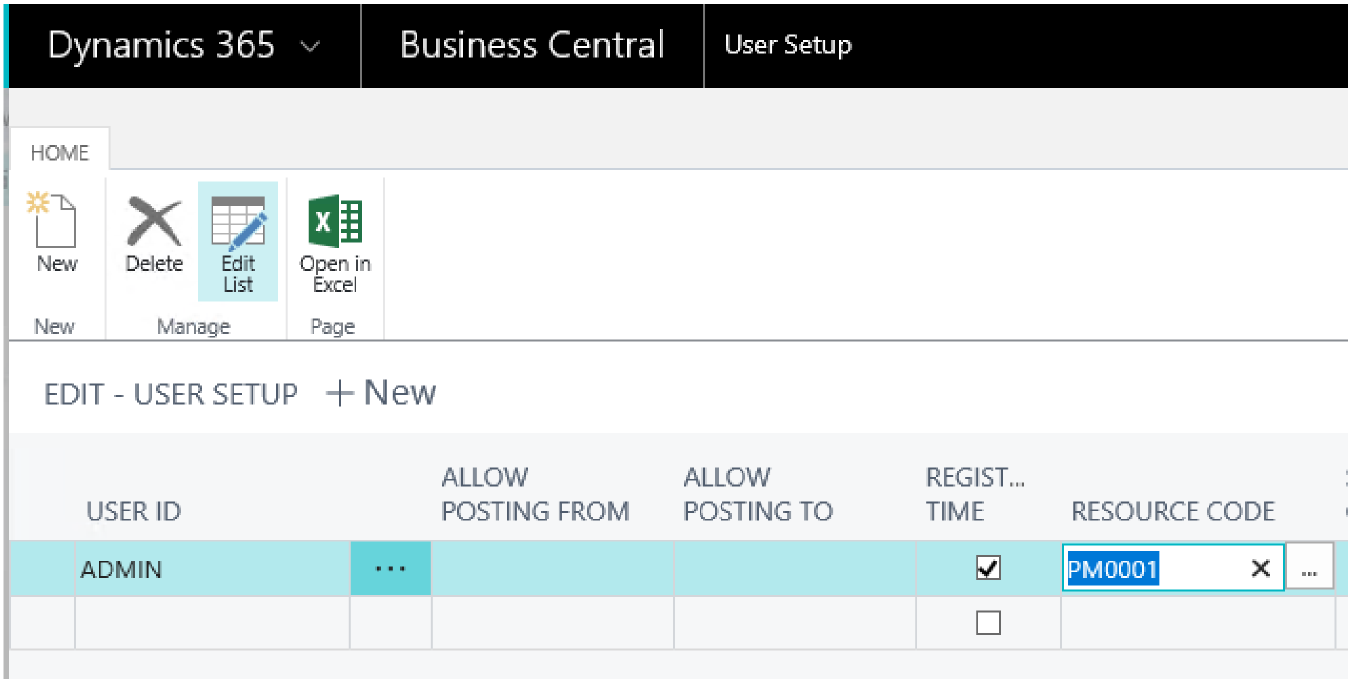


2. Once the screen appears, from the Action Bar - Home Tab, click ***Edit List***.



3. Select the user you are logged in as.

4. Under ***Resource Code*** key in **“PM0001”** or select it from the list.



5. Close the screen.

   Continue to the Create Project scenario.

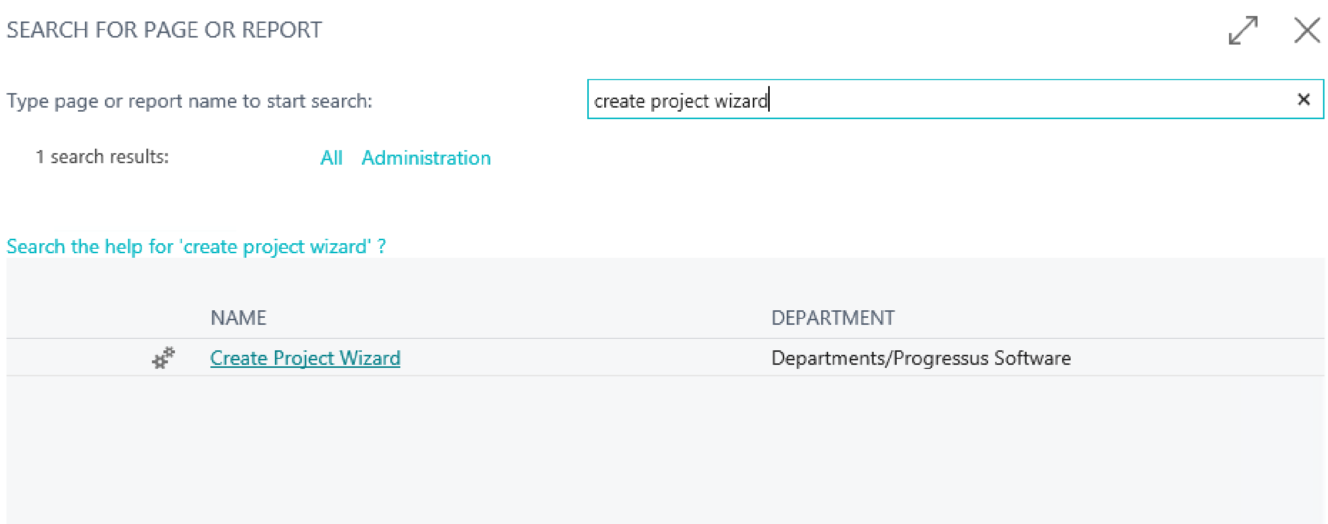
Project Wizard Create your first Project

Profile: Project Manager

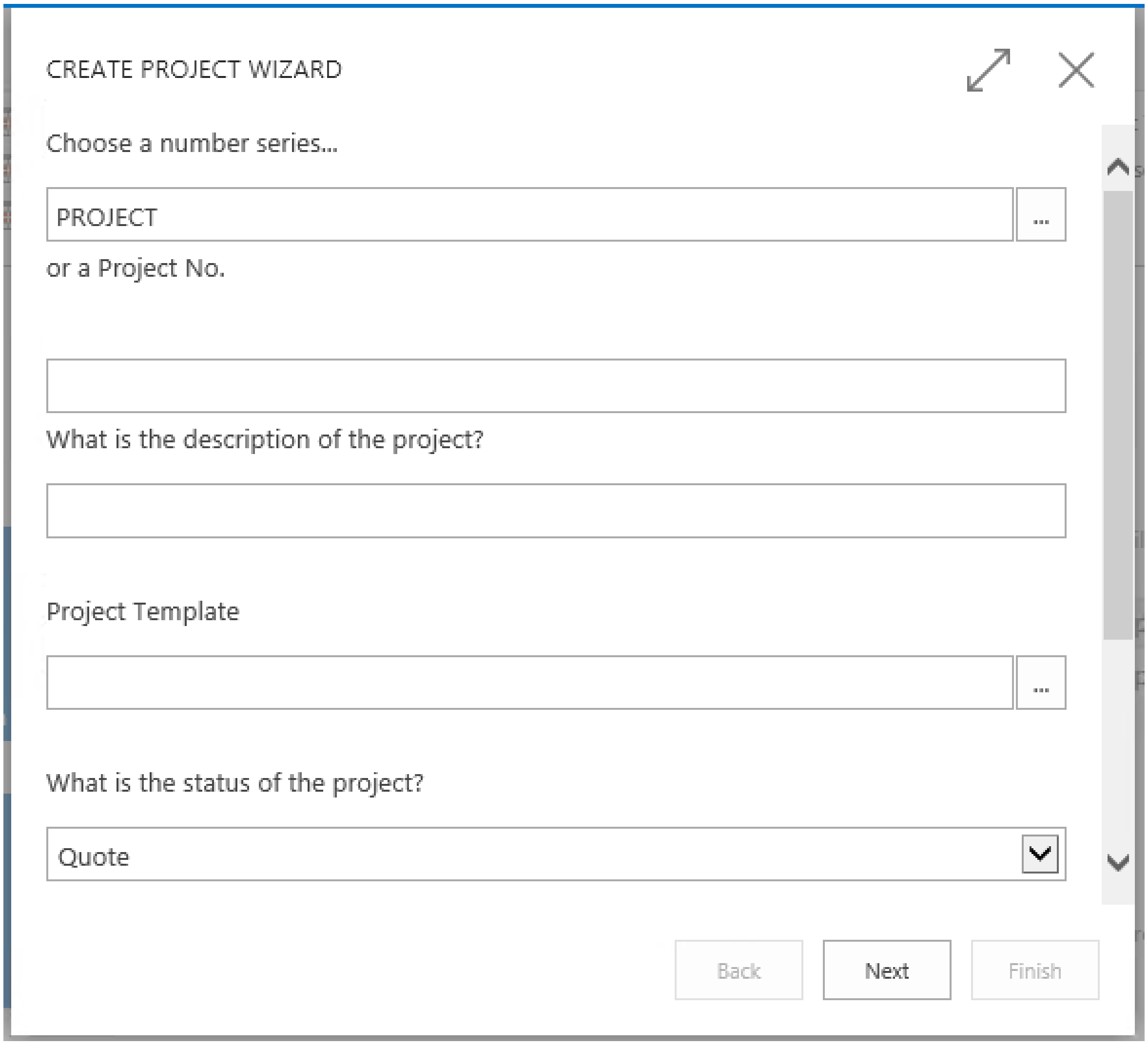
Profiles:
You use the Profile card to create unique profiles for end users. Each profile is associated with a Role Center that can then be configured to suit the specific user needs. Profiles are typically associated with job titles in a company.

Steps:

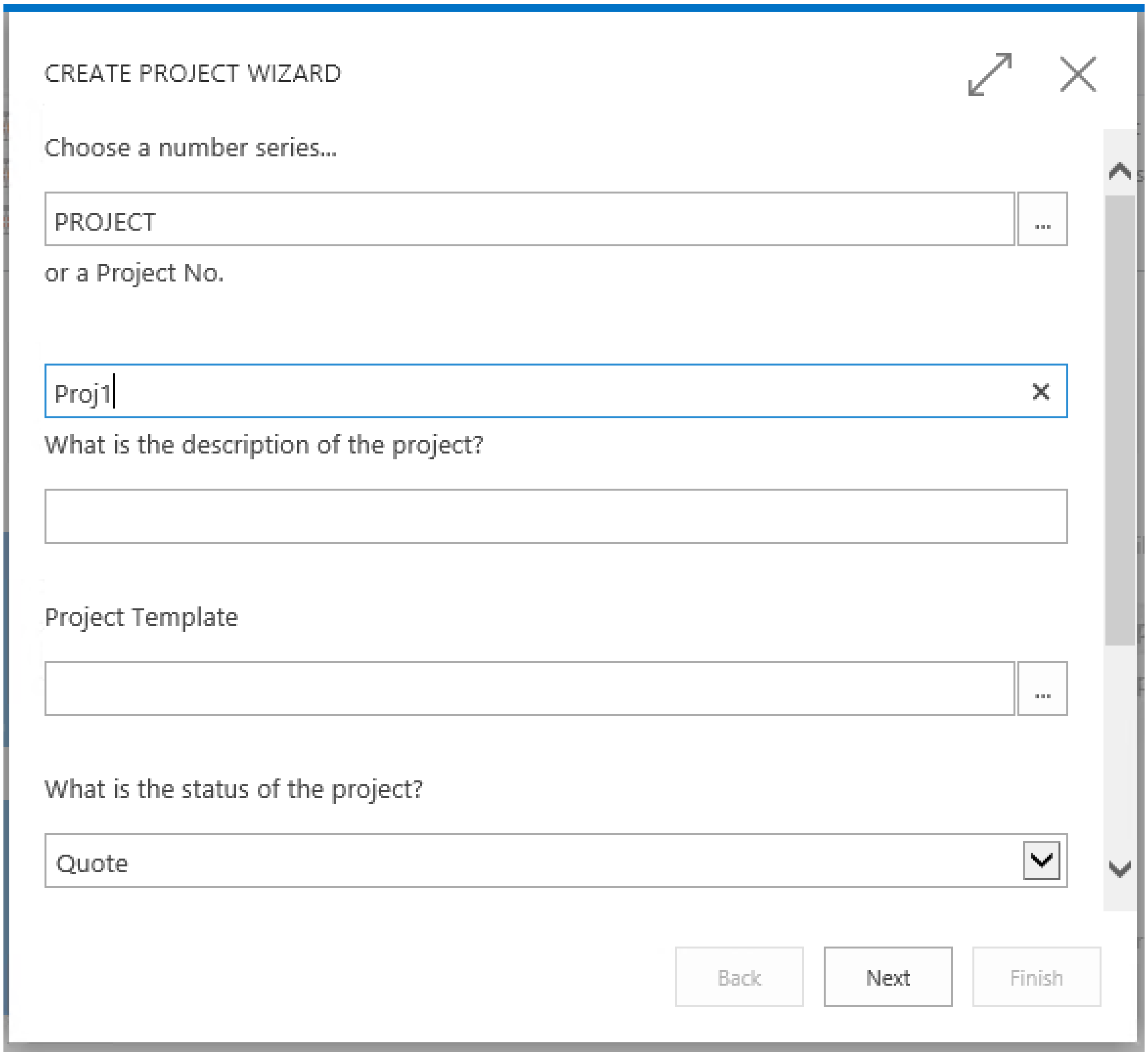
1. Search for ***Create Project Wizard*** and select the ***Create Project Wizard*** from the options shown.



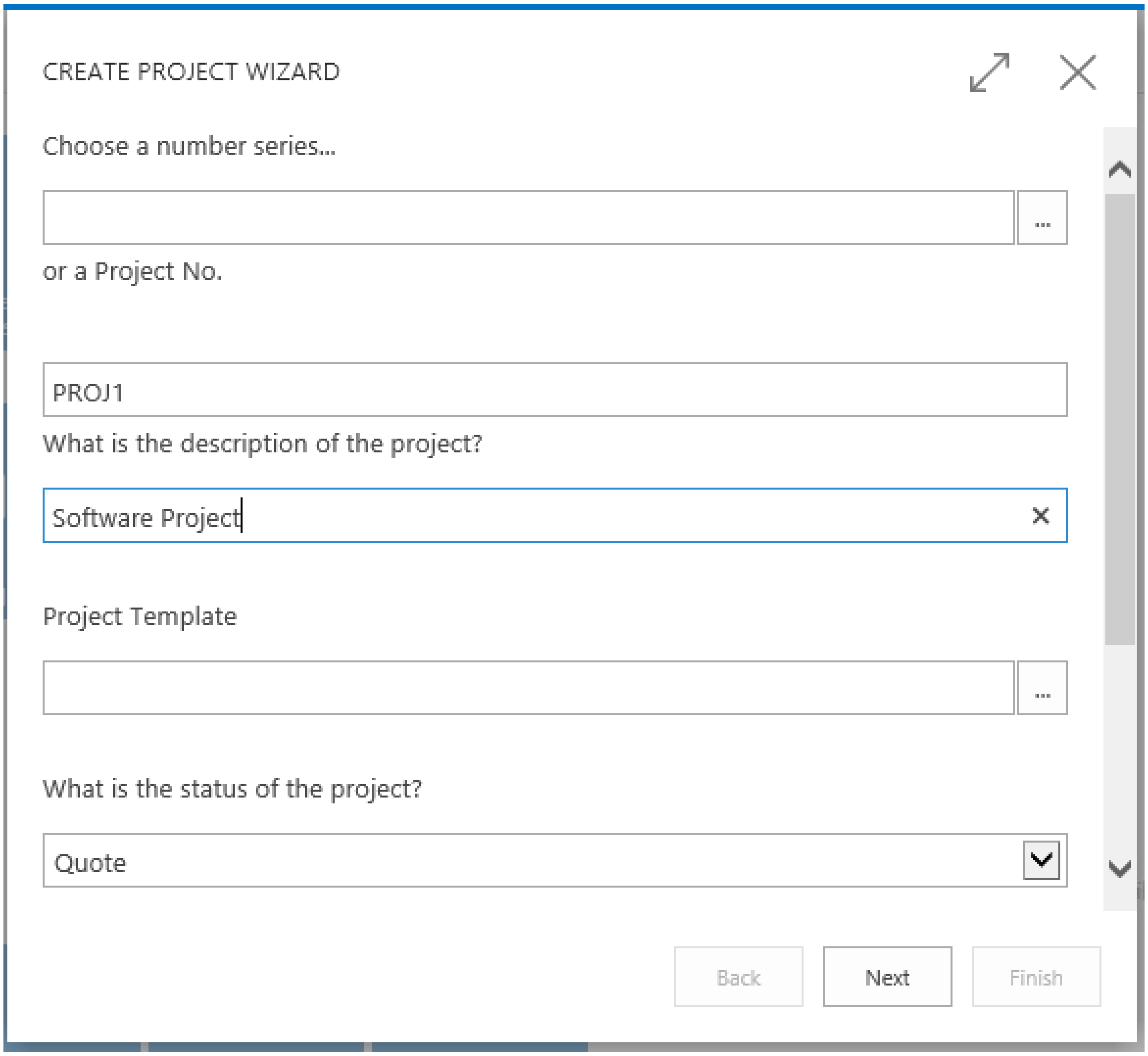
2. The ***Create Project Wizard*** is shown and the ***Default Numbering Series*** is shown as Project. Accept this and move to the ***Project No.*** field.



3. In the ***Project No.*** field key in ***"PROJ1"*** under the ***Project No.***

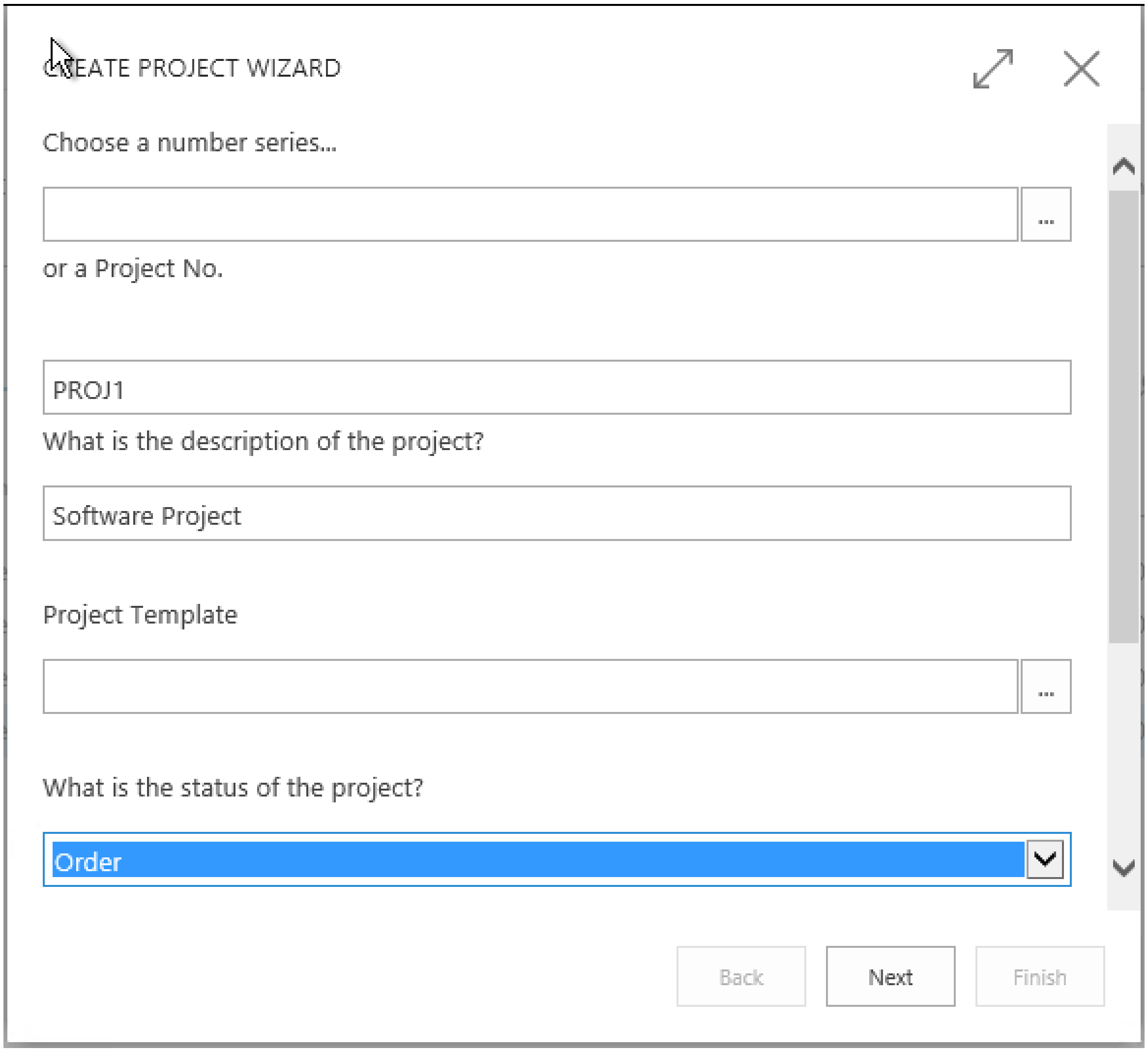


4. In the ***Project Description*** field key in the Description ***"Software Project"***.

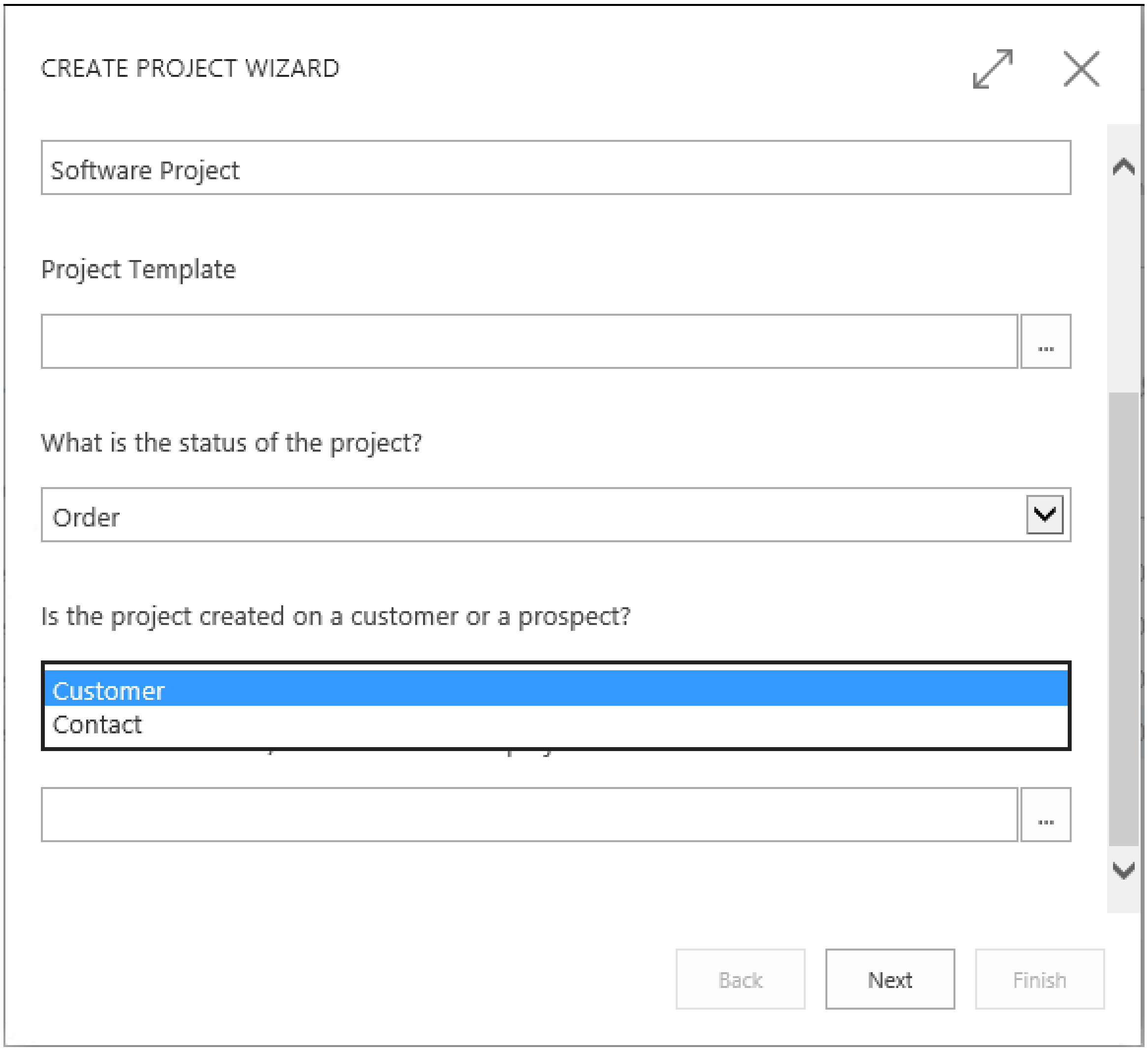


5. Leave the ***Project Template*** field blank.

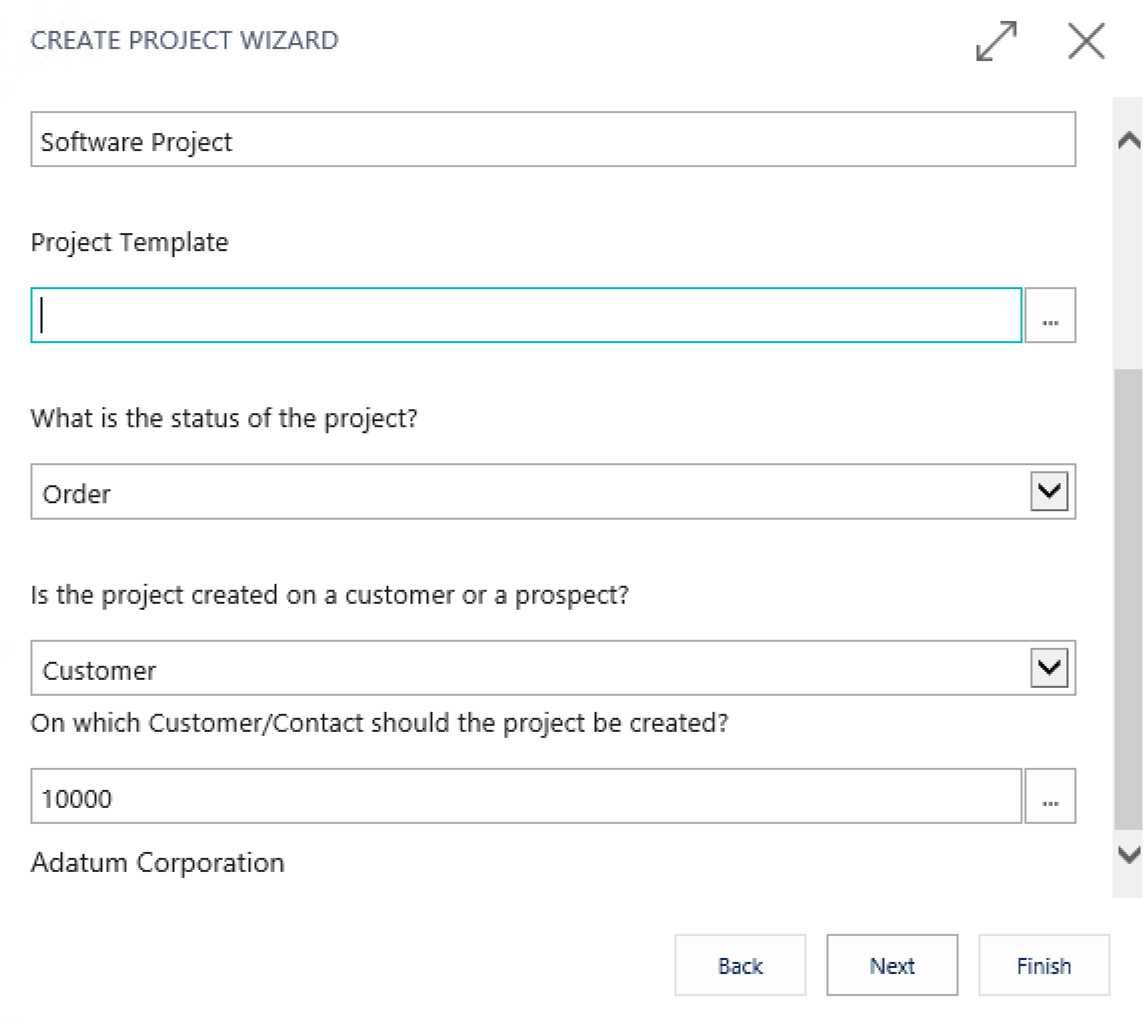
6. Enter the ***Project Status*** of ***"Order"***.



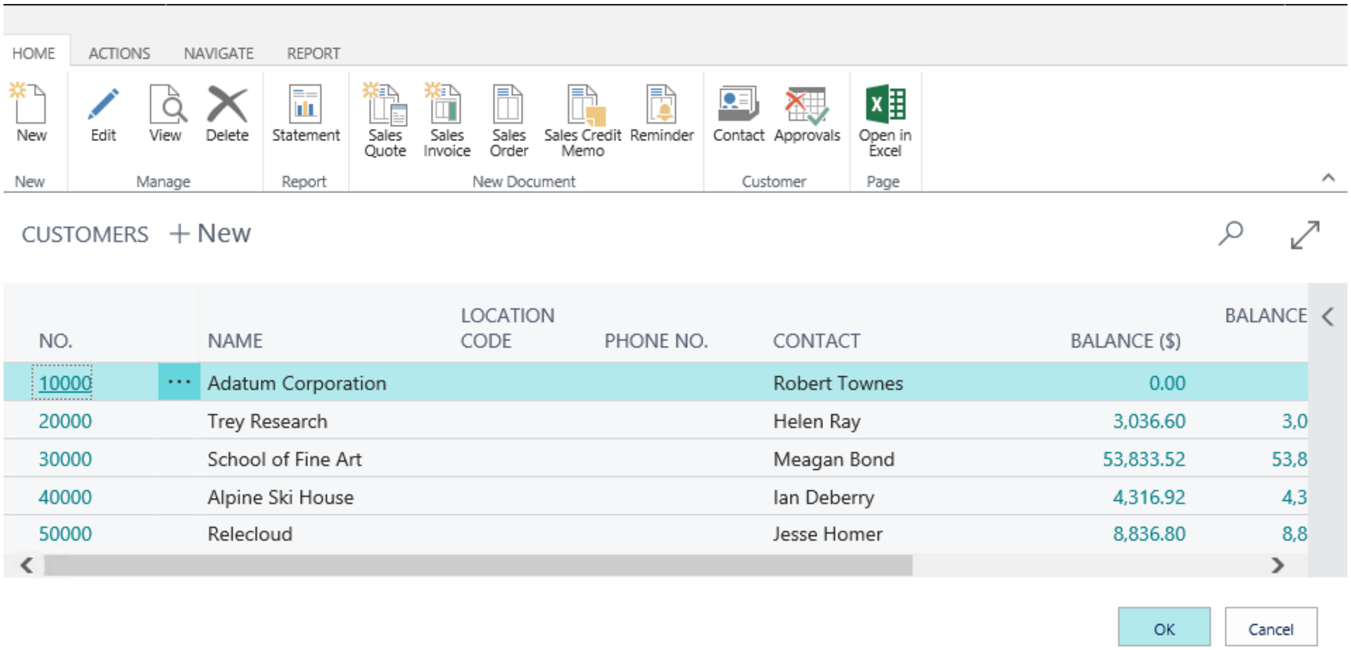
7. Scroll down and select "***Customer***" to indicate that this project will be for a customer.



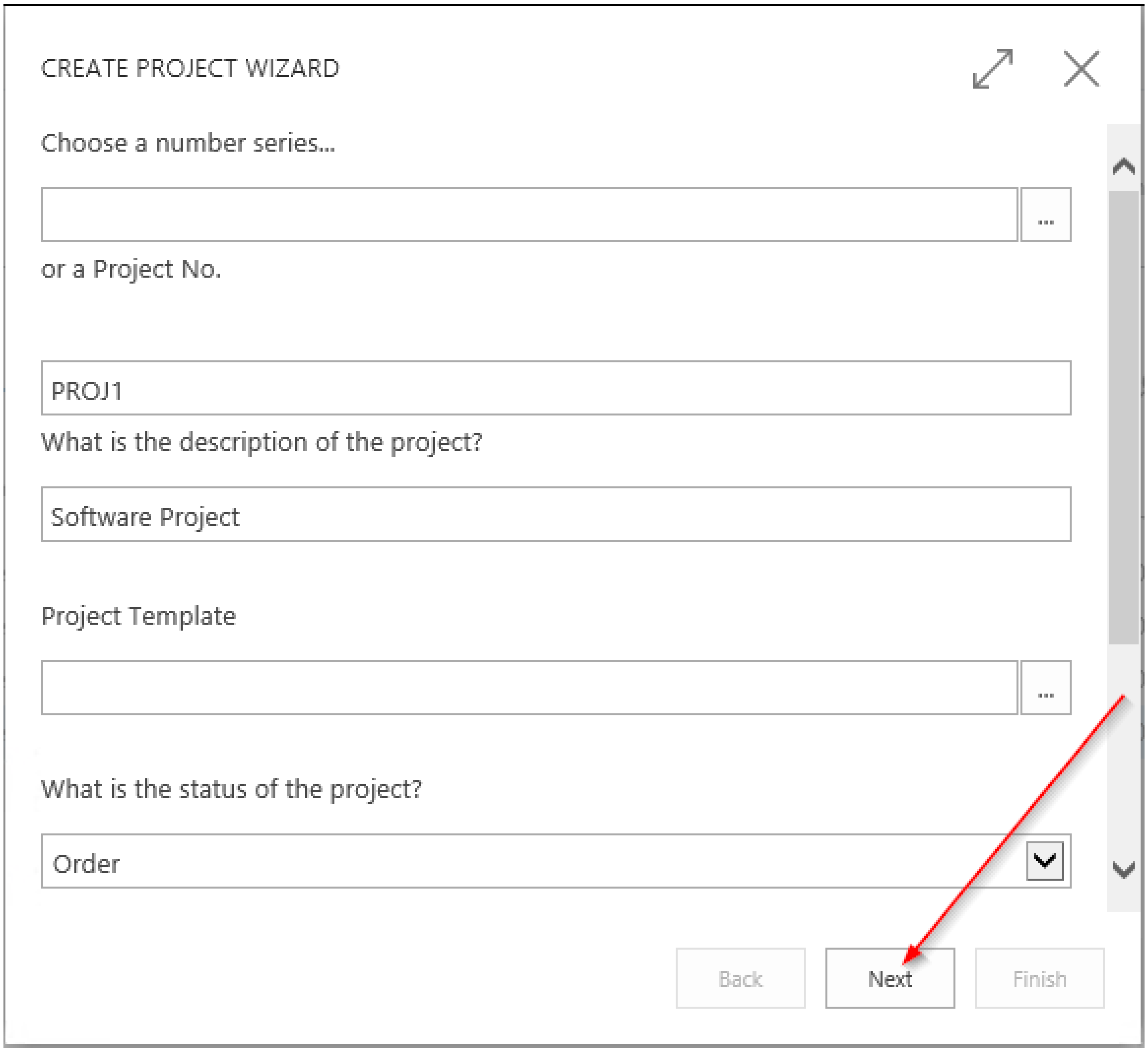
8. Type ***Customer "10000"*** for The Cannon Group PLC.



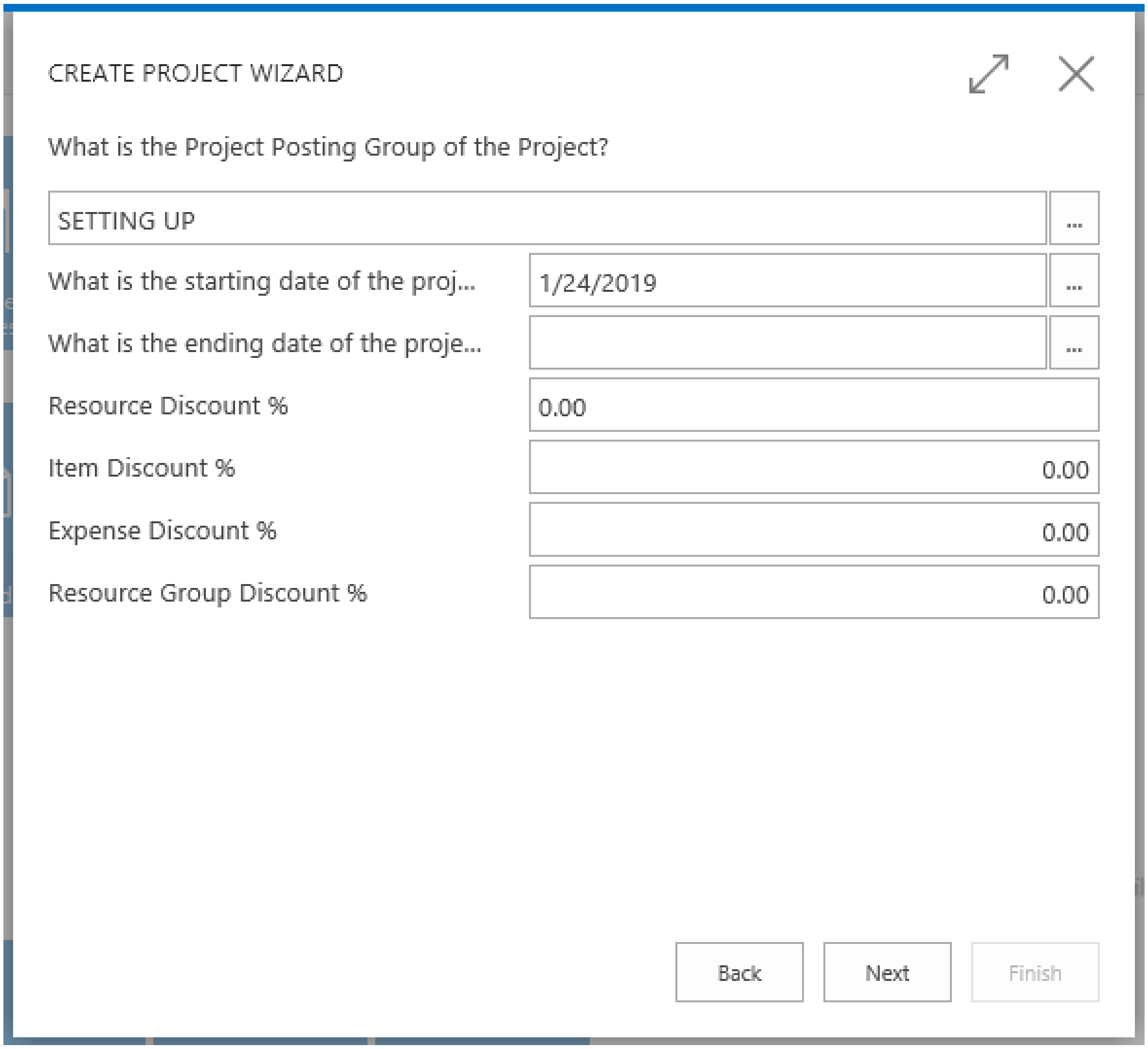
The customer list will display if you click on the ellipse.


HOME
ACTIONS
NAVIGATE
REPORT
New
Edit
View
Delete
Statement
Sales Quote
Sales Invoice
Sales Order
Sales Credit Memo
Reminder
Contact
Approvals
Open in Excel
New
Manage
Report
New Document
Customer
Page
CUSTOMERS
+ New
NO.
NAME
LOCATION CODE
PHONE NO.
CONTACT
BALANCE ($)
BALANCE
10000
Adatum Corporation
Robert Townes
0.00
20000
Trey Research
Helen Ray
3,036.60
3,0
30000
School of Fine Art
Meagan Bond
53,833.52
53,8
40000
Alpine Ski House
Ian Deberry
4,316.92
4,3
50000
Relecloud
Jesse Homer
8,836.80
8,8
OK
Cancel

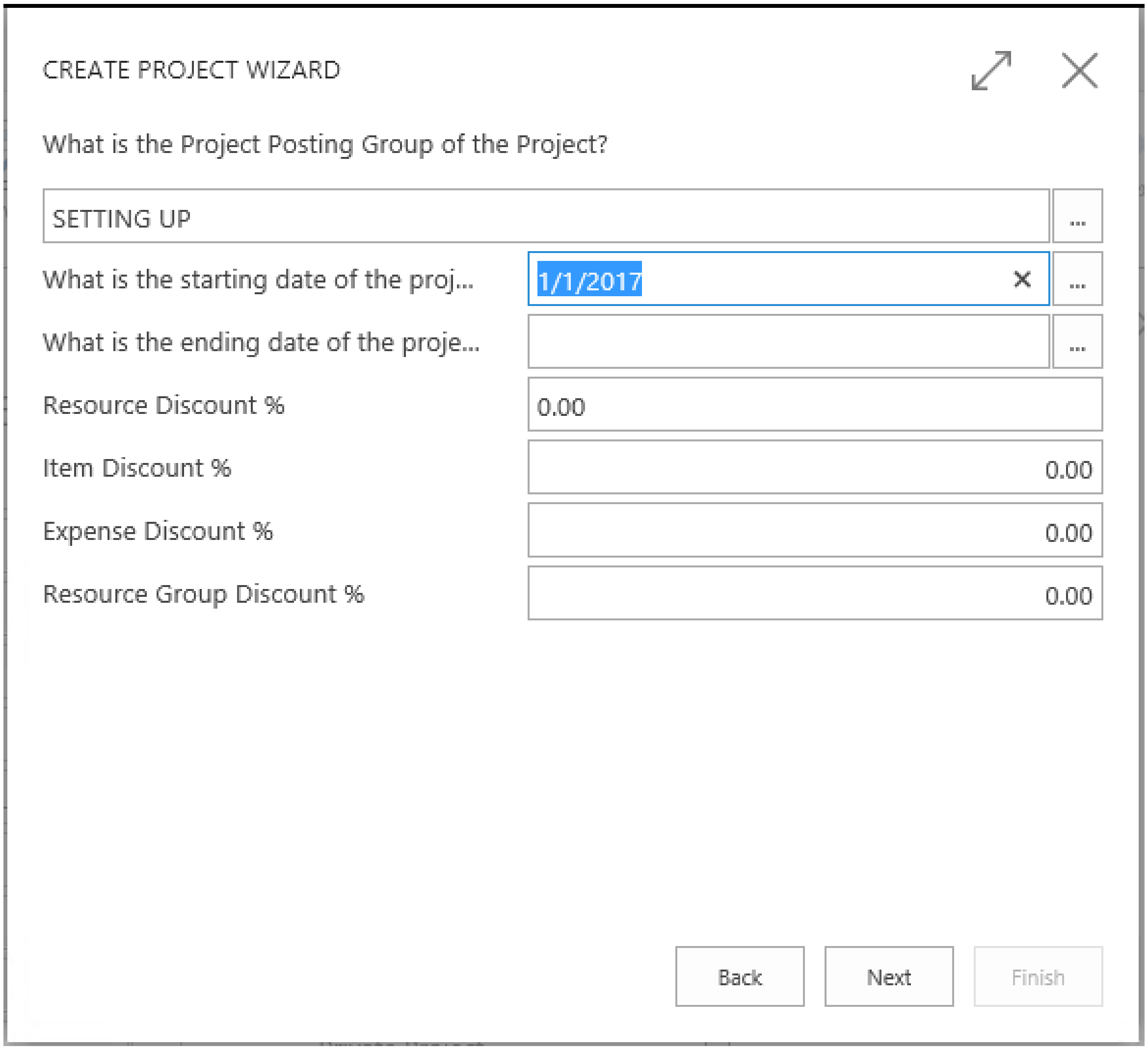
9. At the bottom of the screen click ***Next*** to move to the next page.



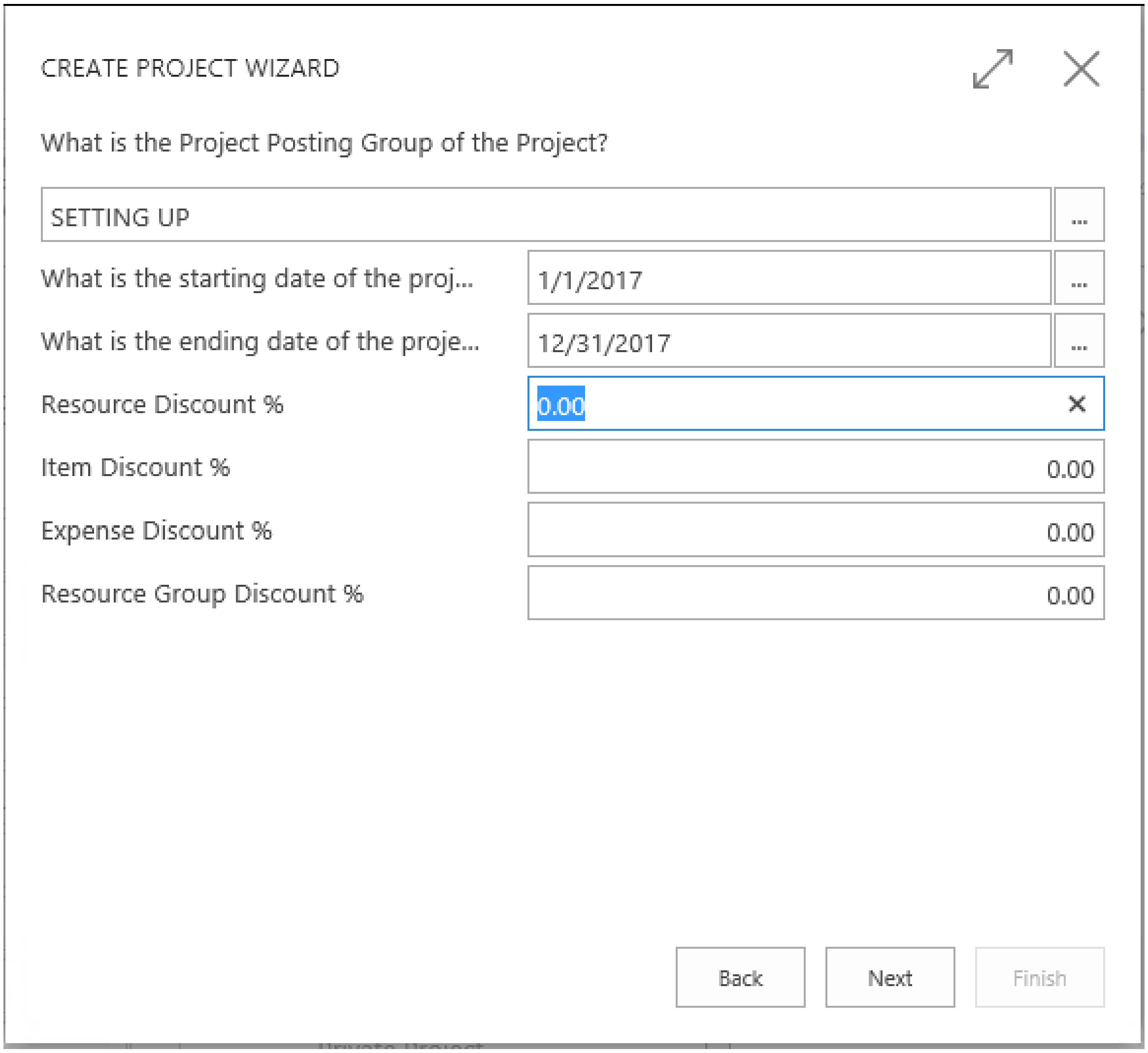
10. Accept ***"SETTING UP"*** from the ellipse button for the ***Project Posting Group***.



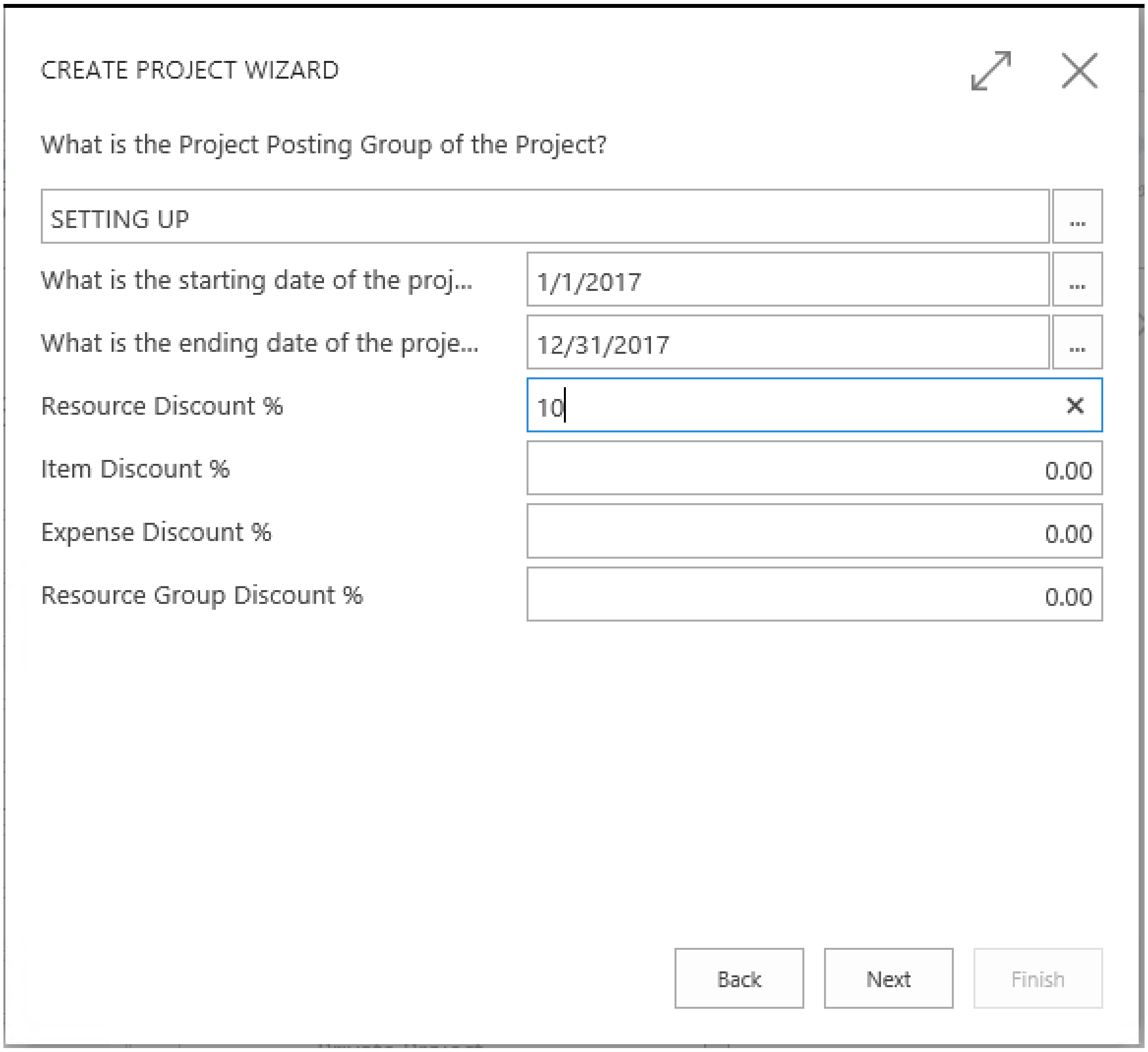
11. Enter the ***Starting Date*** for the Project as ***"01/01/2017".***



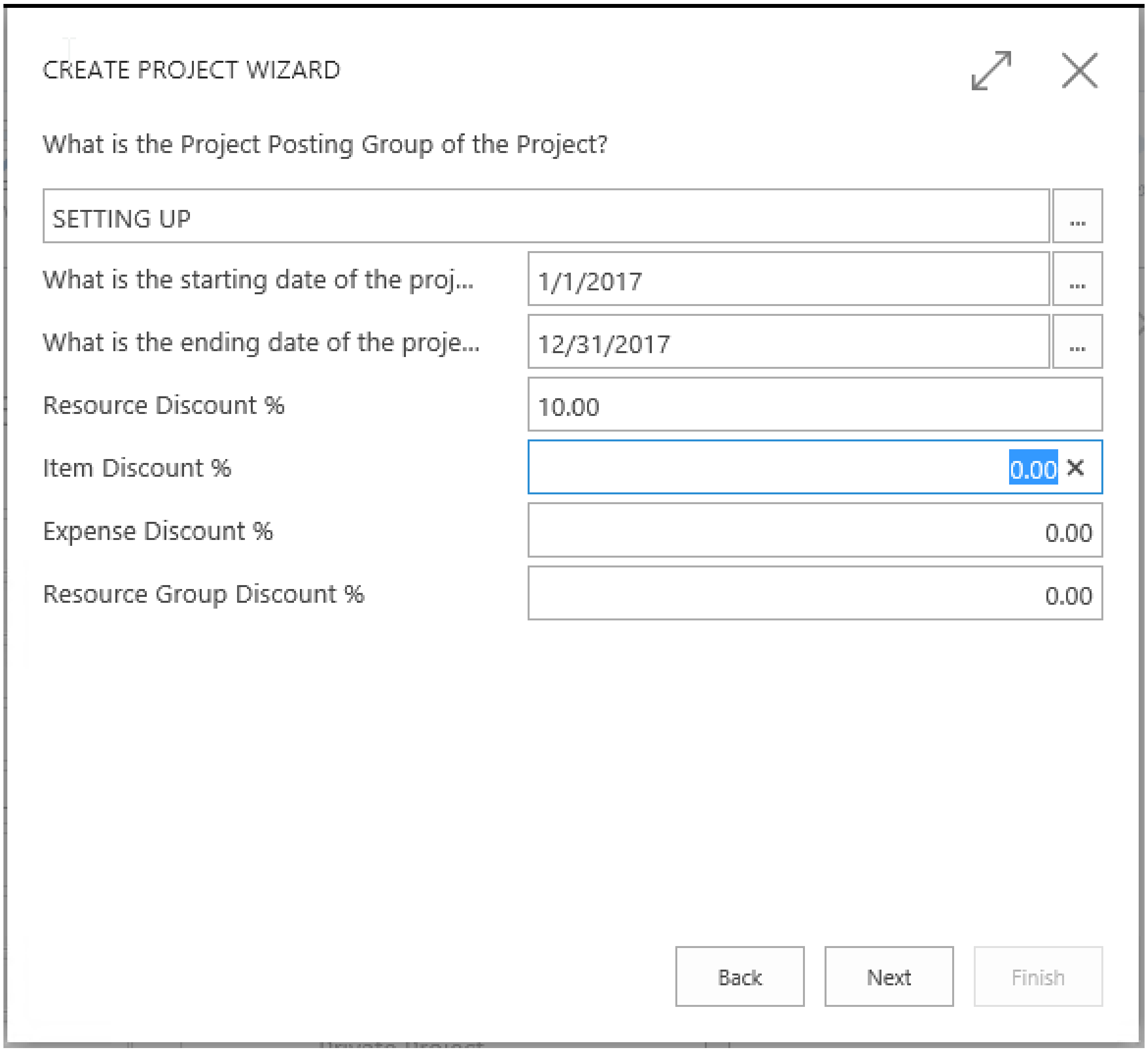
12. Enter the ***Ending Date*** for the Project as ***"12/31/2017".***



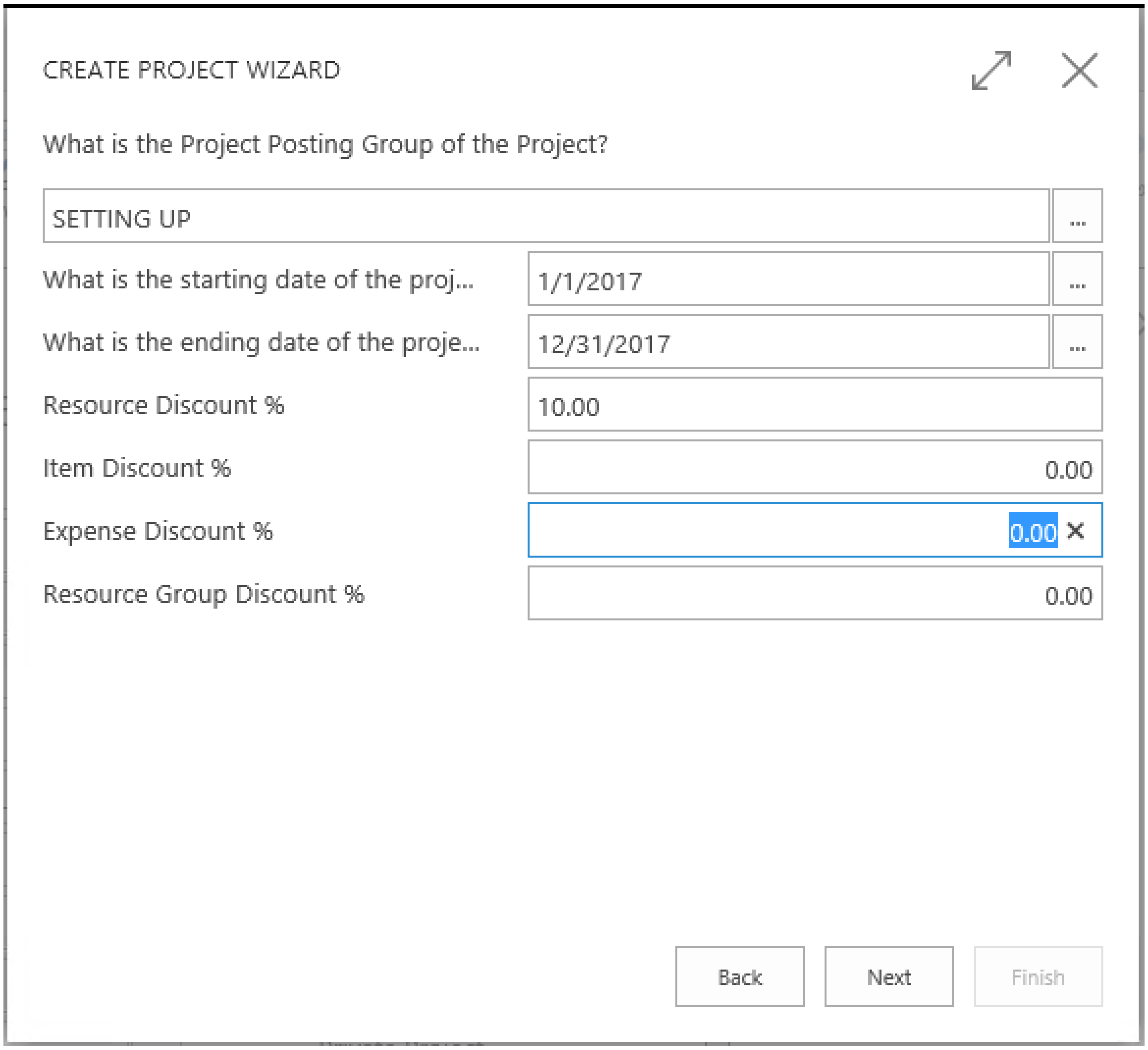
13. Enter ***"10"*** as the ***Resource Discount %.***



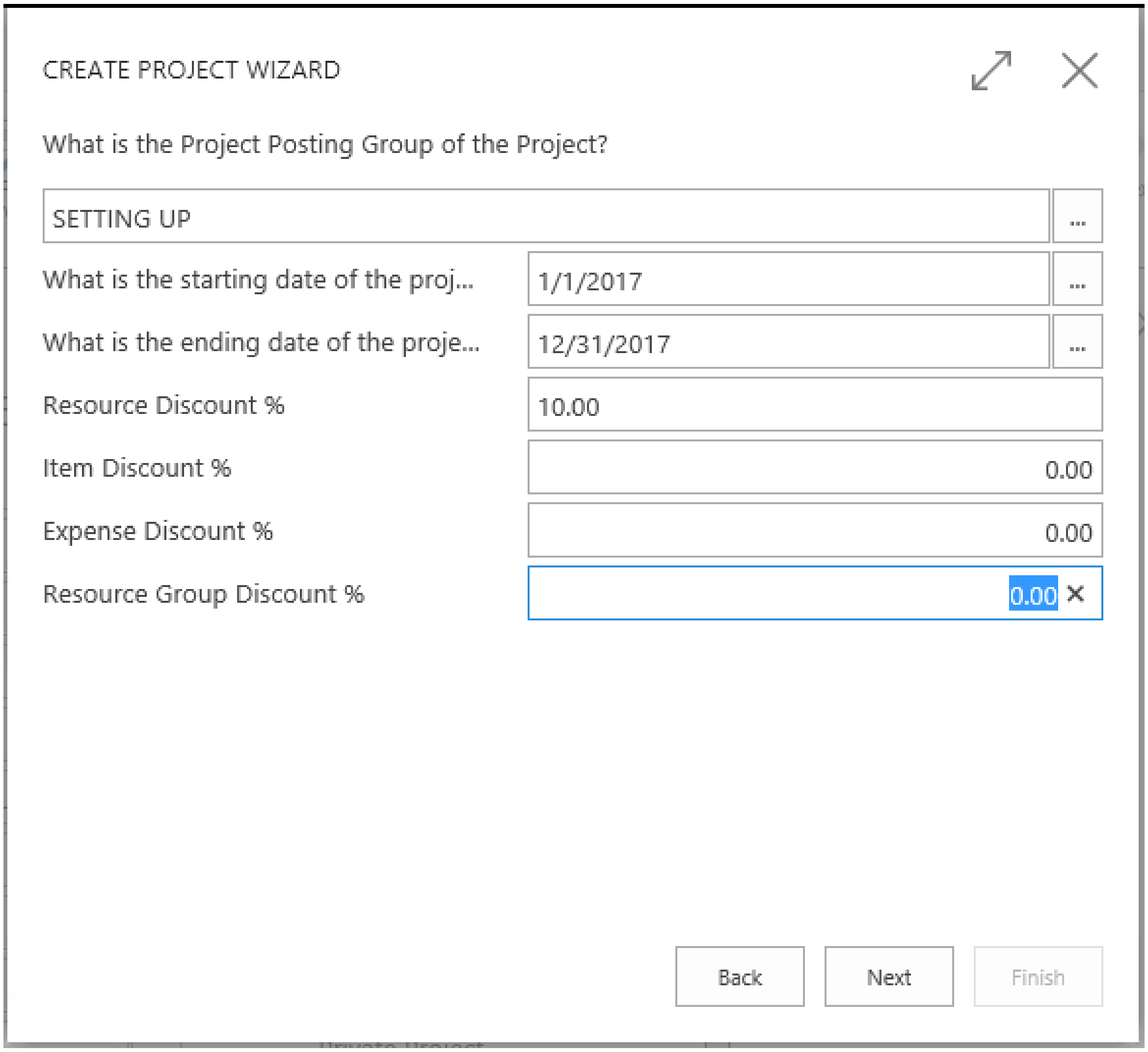
14. Enter ***"0"*** as the ***Item Discount %.***



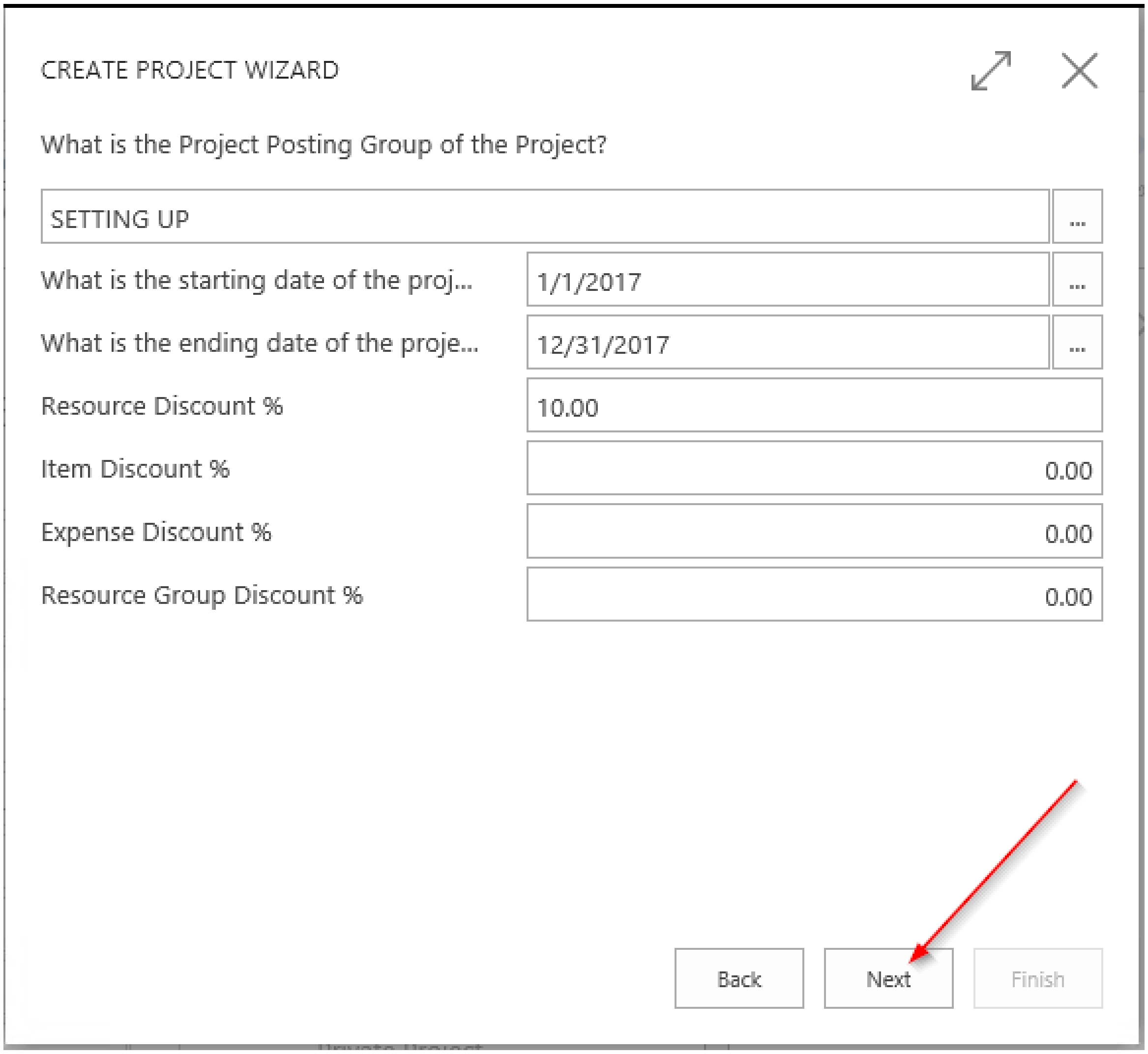
15. Enter ***"0"*** as the ***Expense Discount %.***



16. Enter ***"0"*** as the ***Resource Group Discount %.***

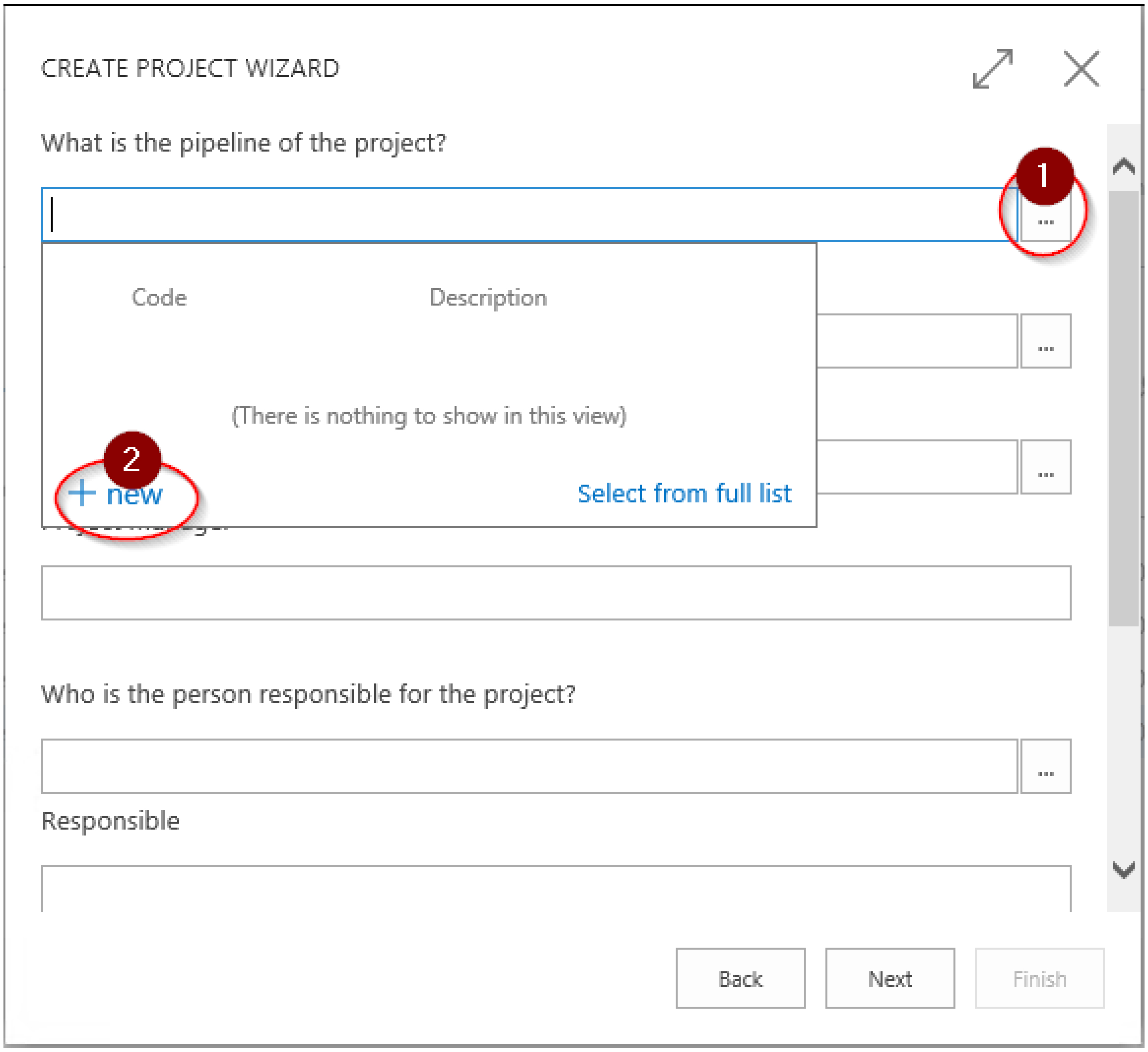


17. At the bottom of the screen click ***Next*** to move to the next page.

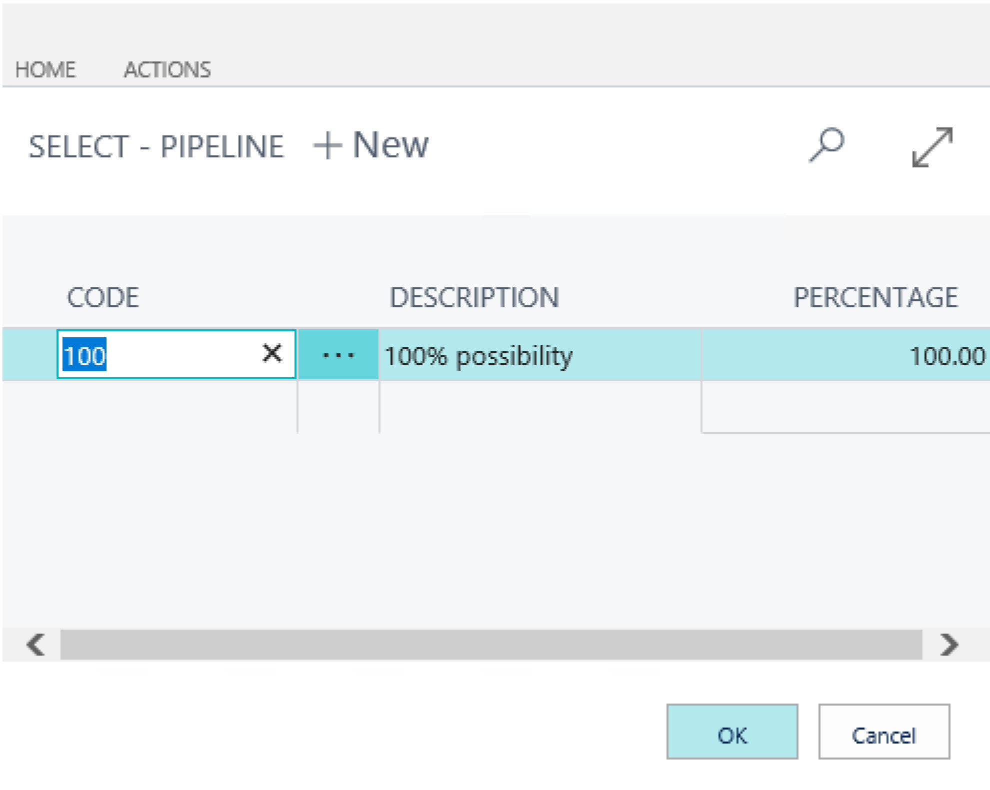


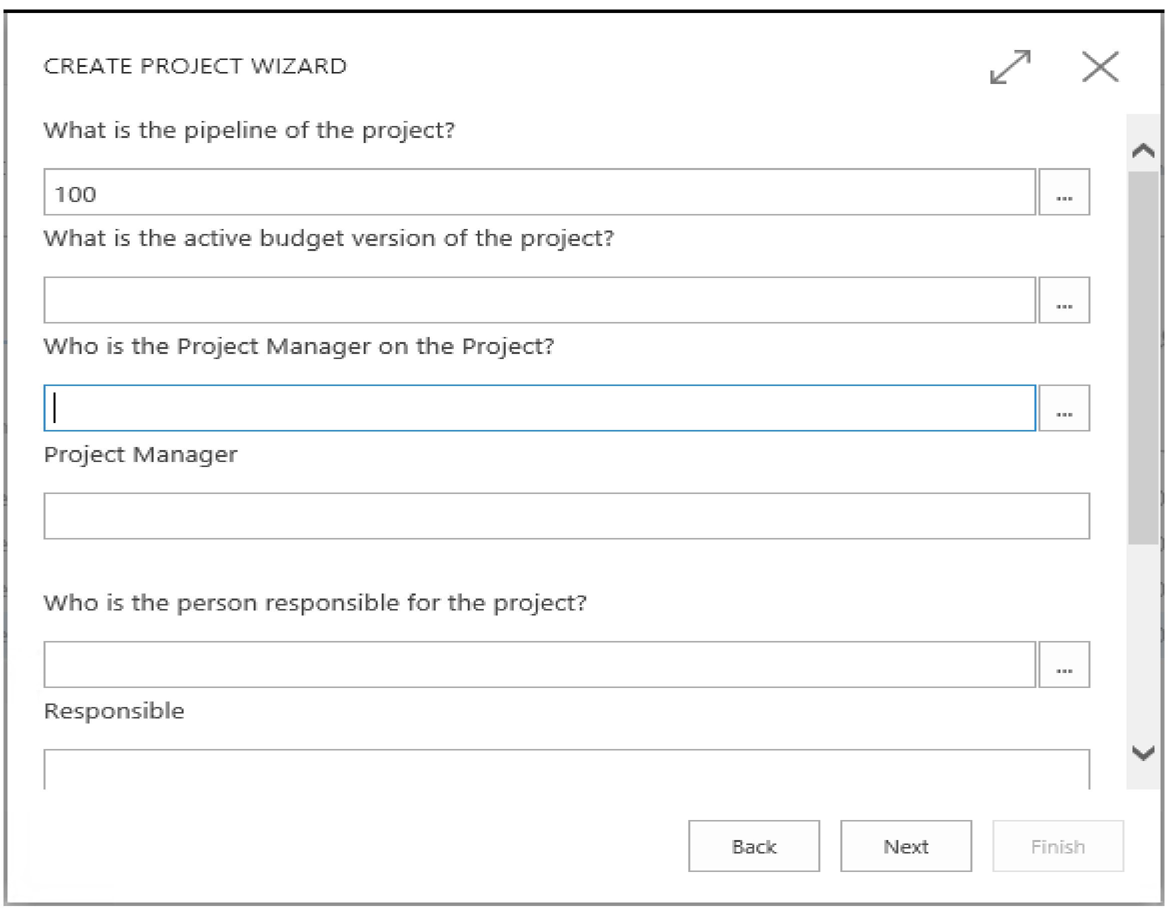
18. Enter the ***Pipeline*** percentage for the project. If the field is empty create a new code by clicking on the ellipse button. Please see the below screenshot.

The **Pipeline** window is used to set up codes to be used in indicating the percentage possibility that a quote will become an order.

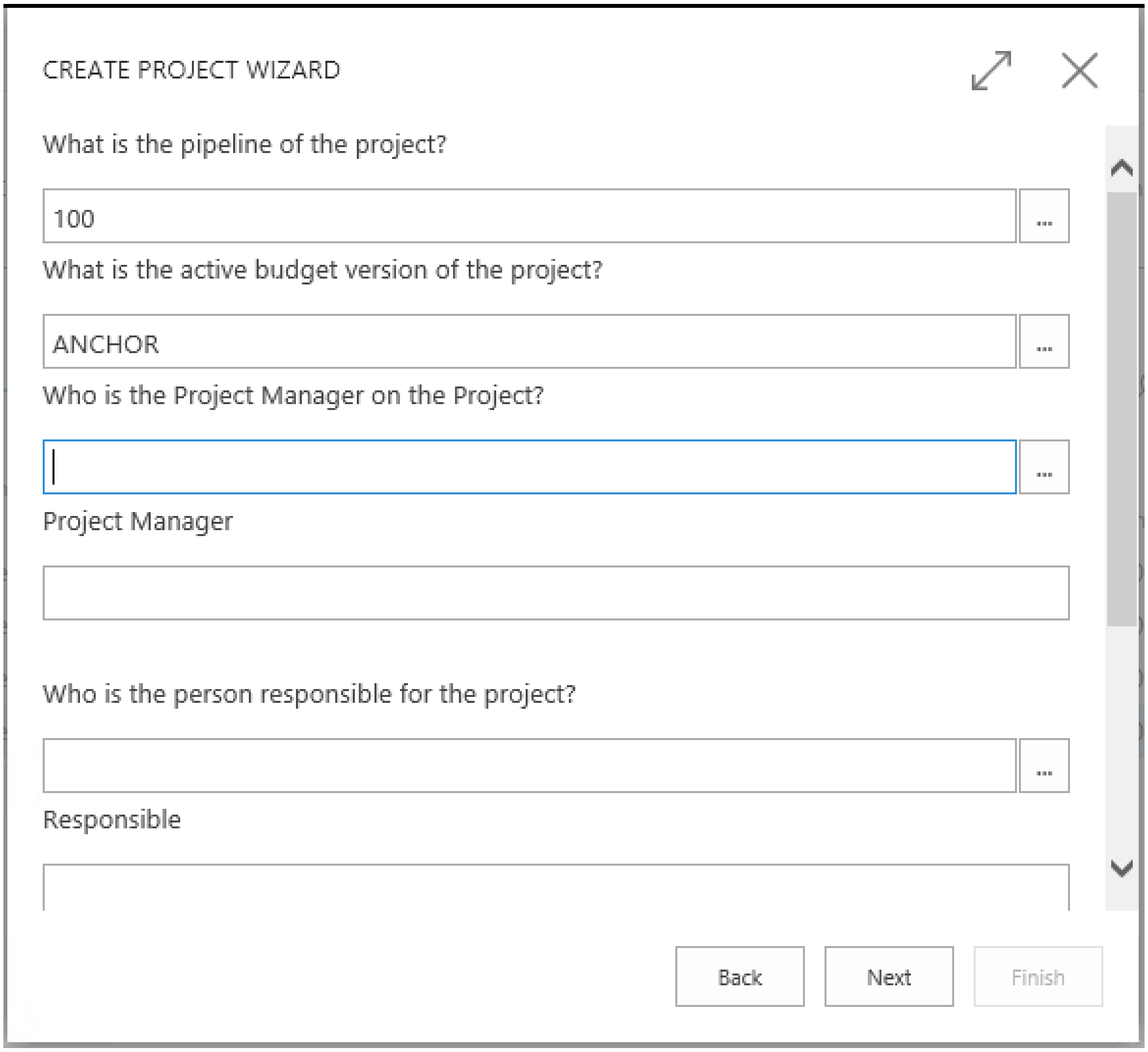


Enter the ***Code***, ***Description*** and pipeline ***Percentage*** and click ***OK***.

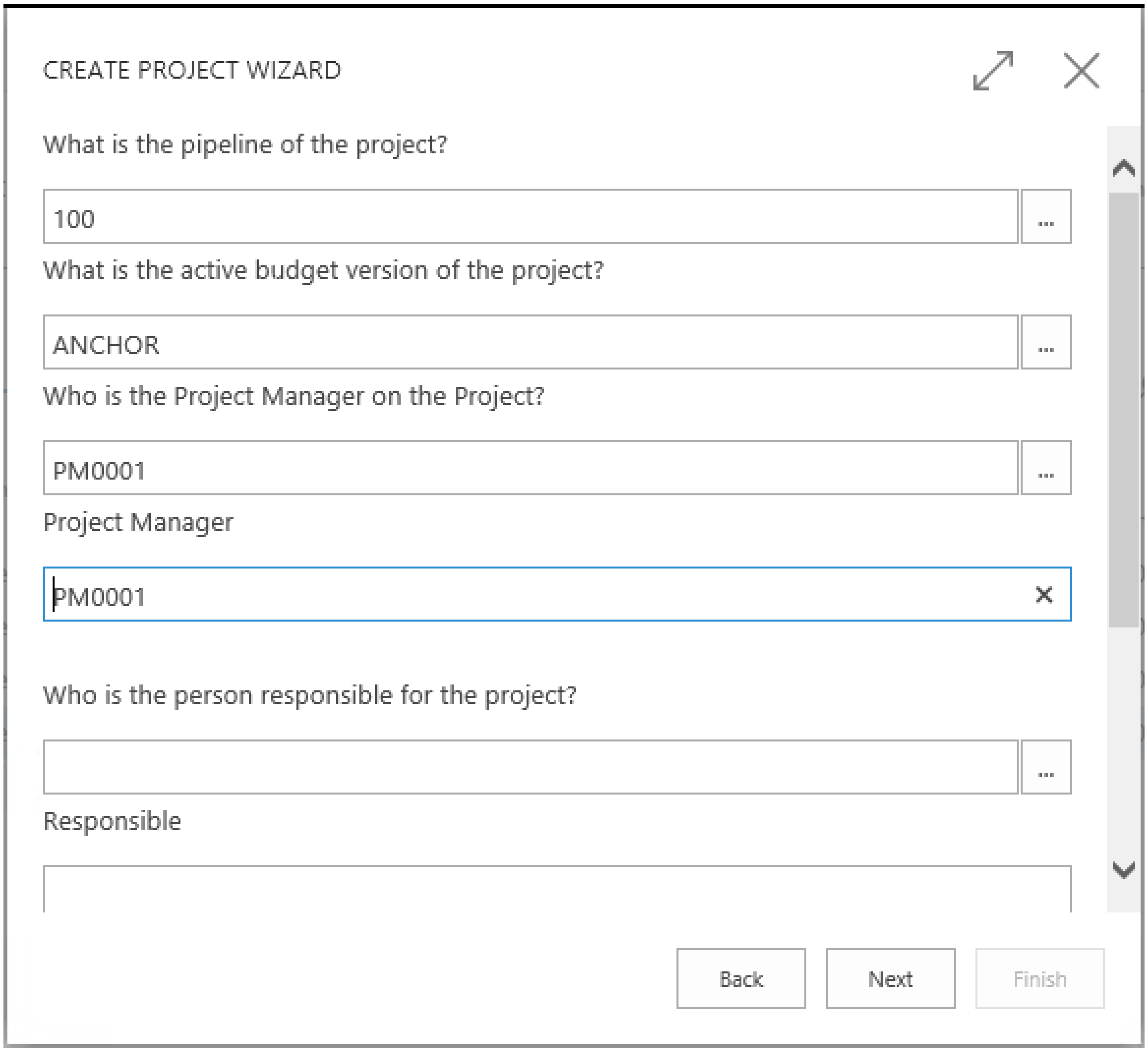


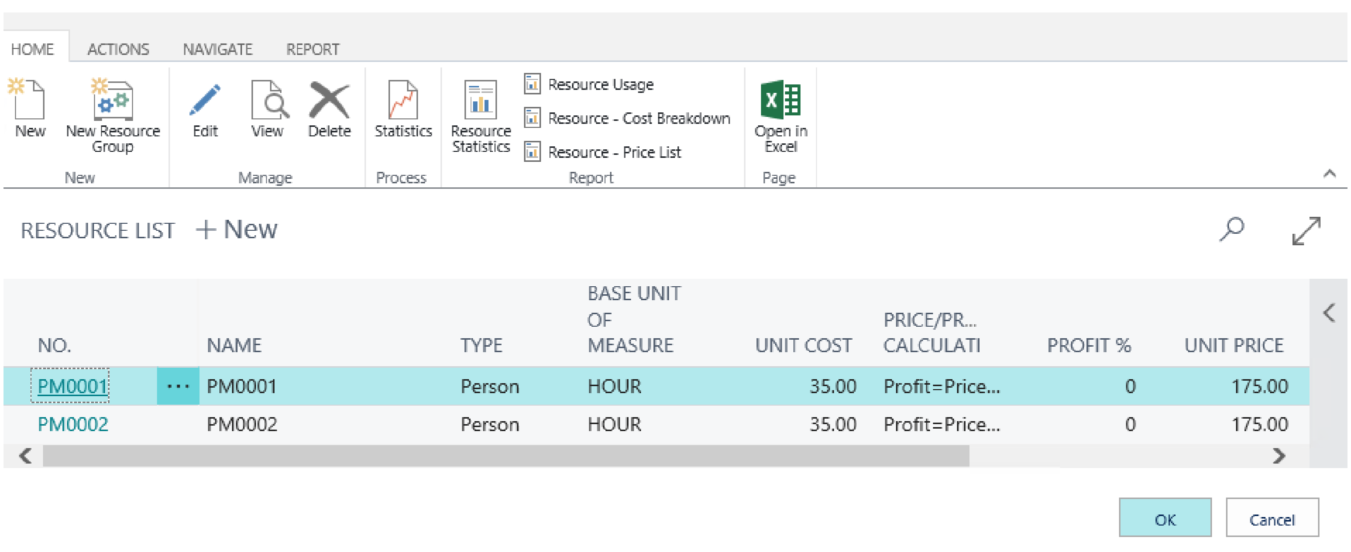


Accept ***"Anchor"*** as the ***Active Budget Version***.

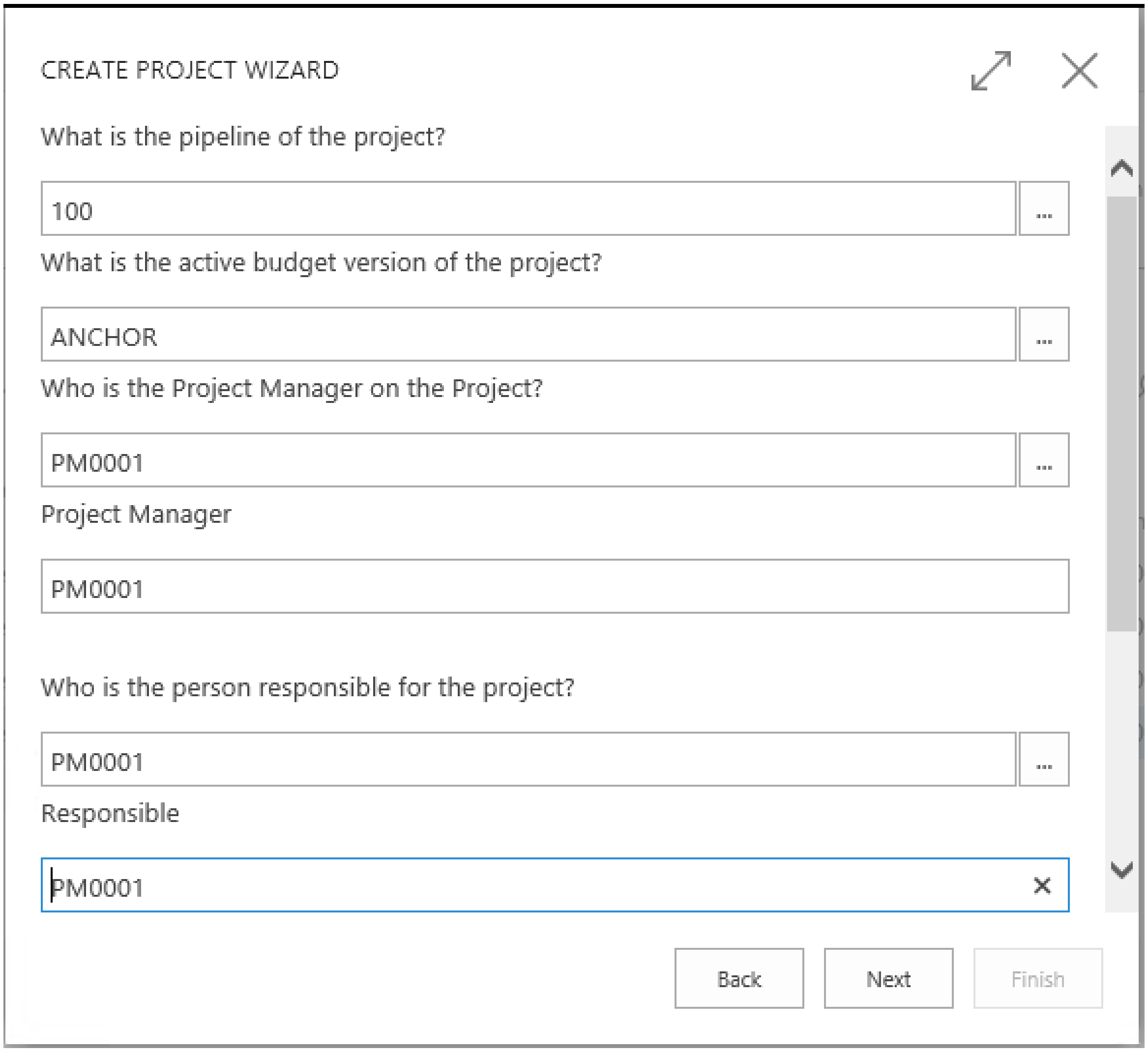


19. Enter ***"PM0001"*** as the ***Who is the Project Manager on the Project*** which populates the ***Project Manager*** field with the same information.

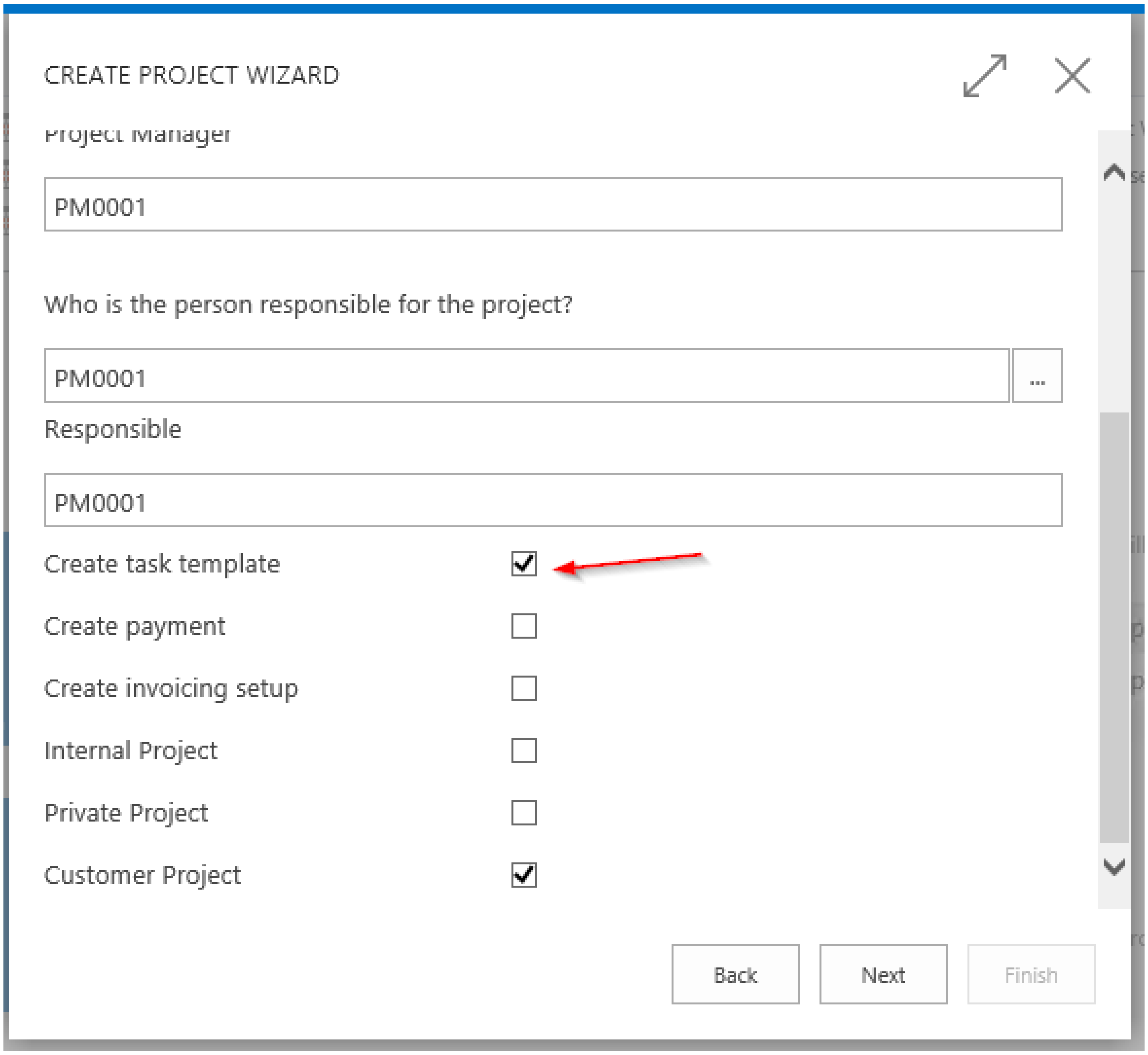




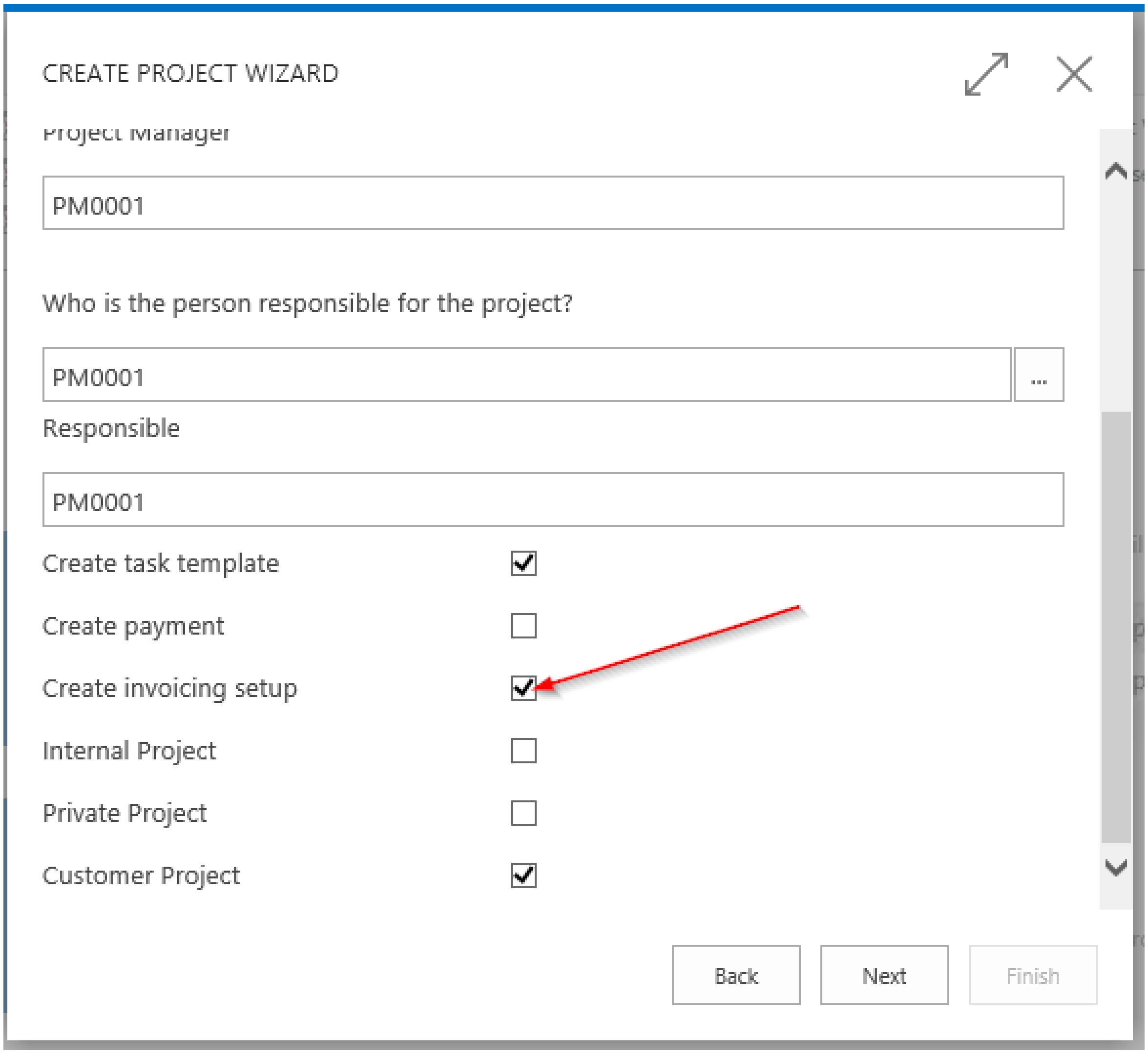
20. Enter ***"PM0001"*** as the ***Who is the Person Responsible for the Project*** which populates the ***Responsible*** field with the same information.



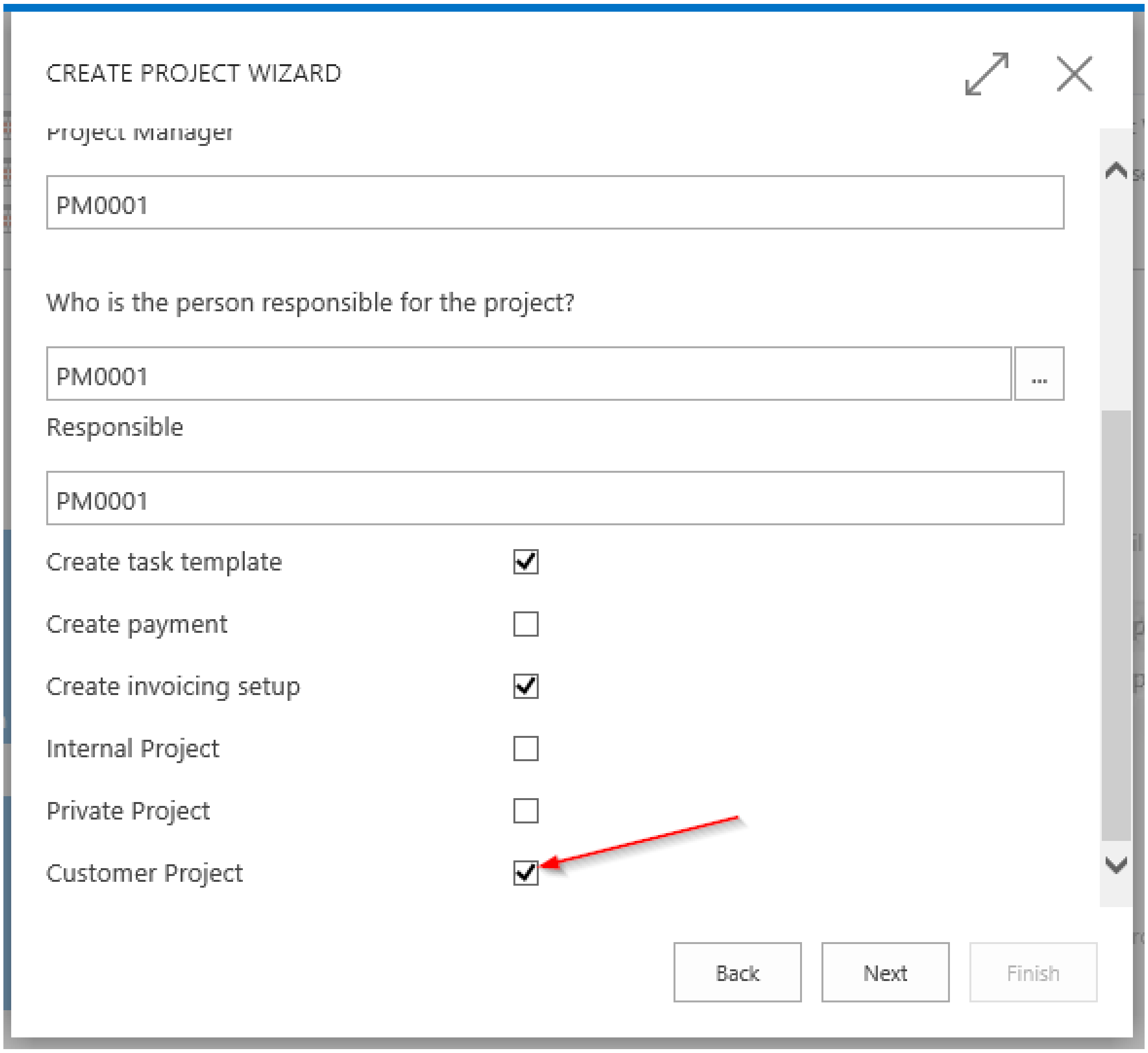
21. Using the Scroll bar, scroll down and check the box for ***Create Task Template.***



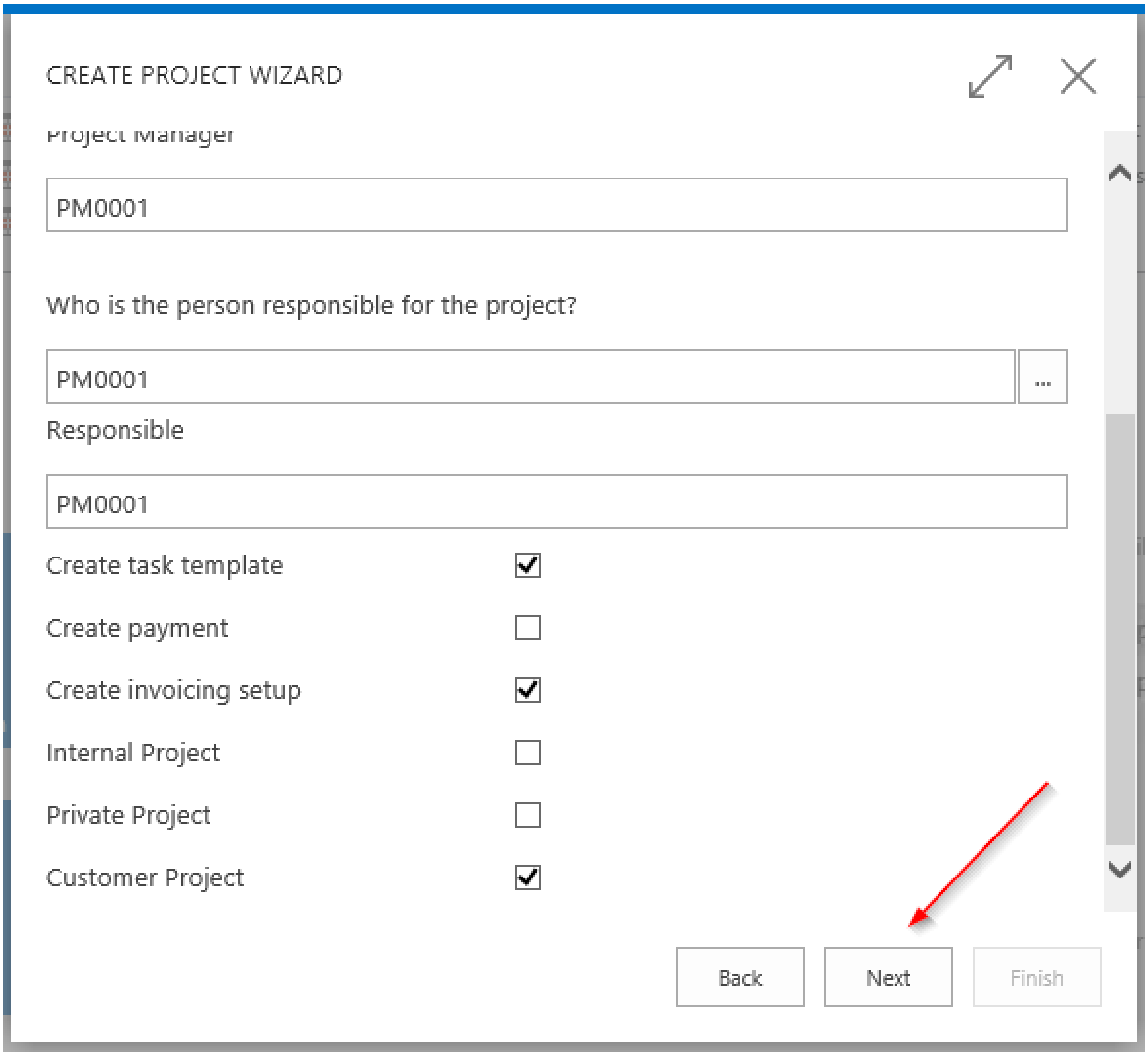
22. Using the Scroll bar, scroll down and check the box for ***Create Invoicing Setup.***



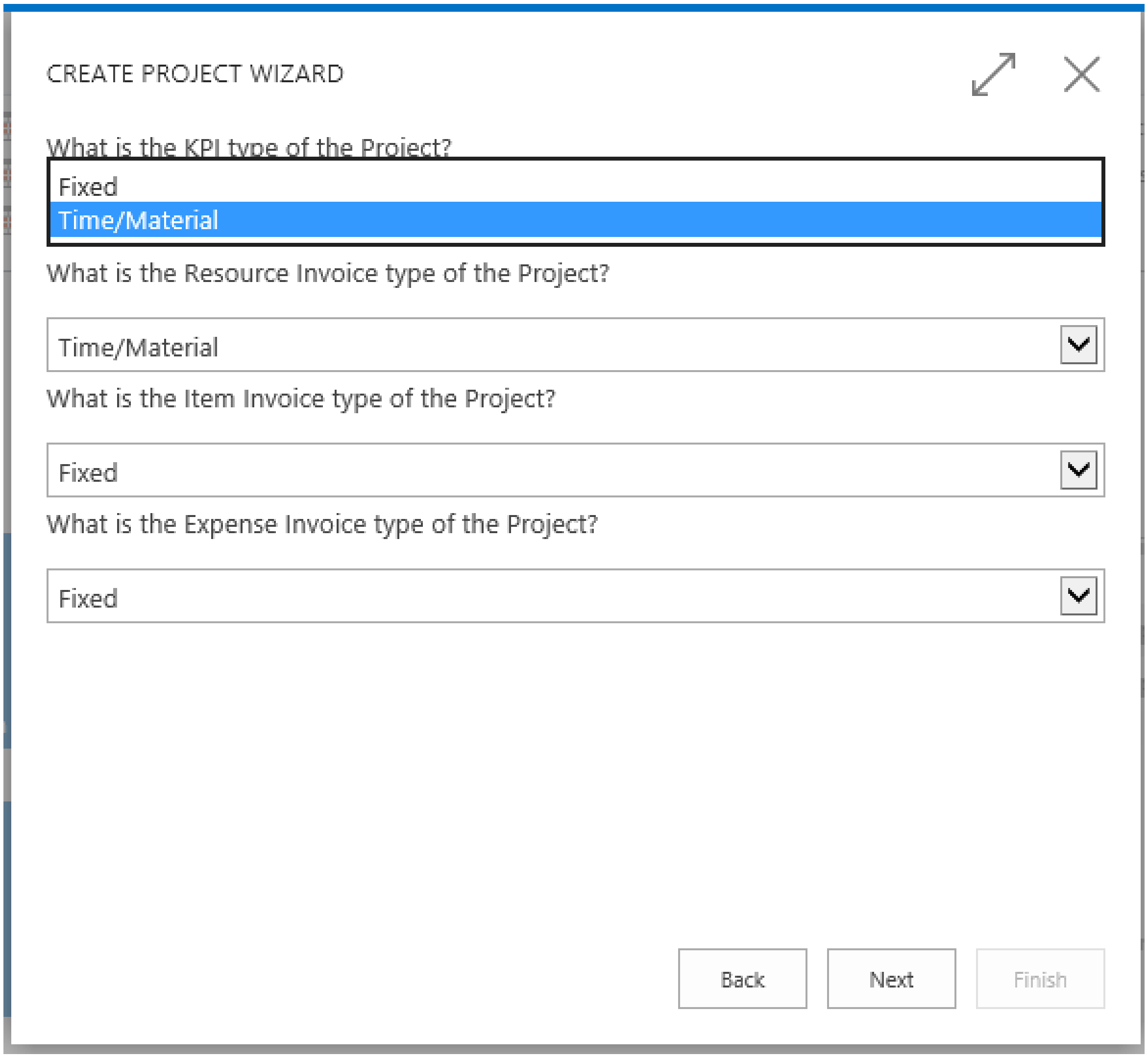
23. Using the Scroll bar, scroll down and check the box for ***Customer Project.***



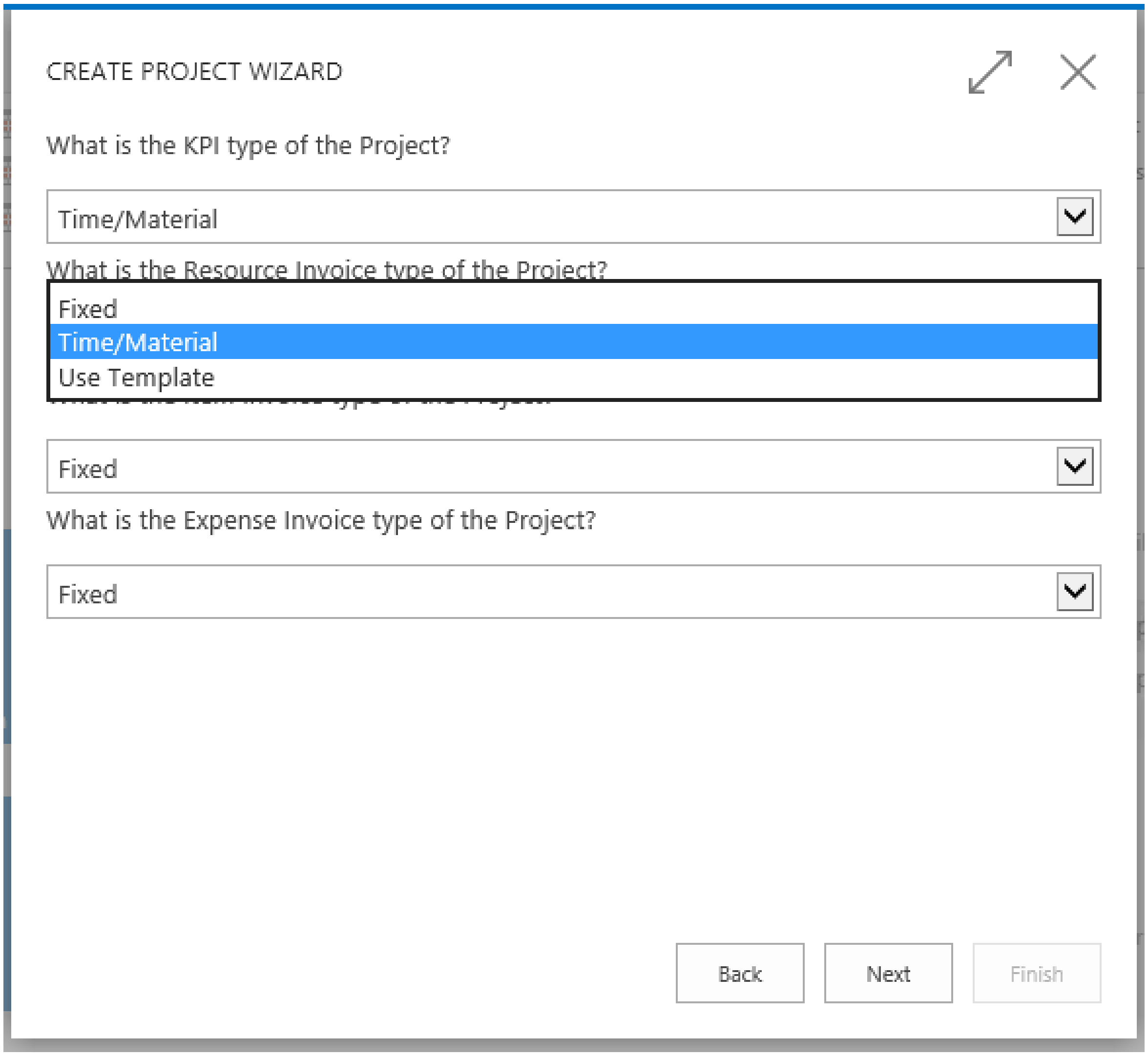
24. At the bottom of the screen click ***Next*** to move to the next page.



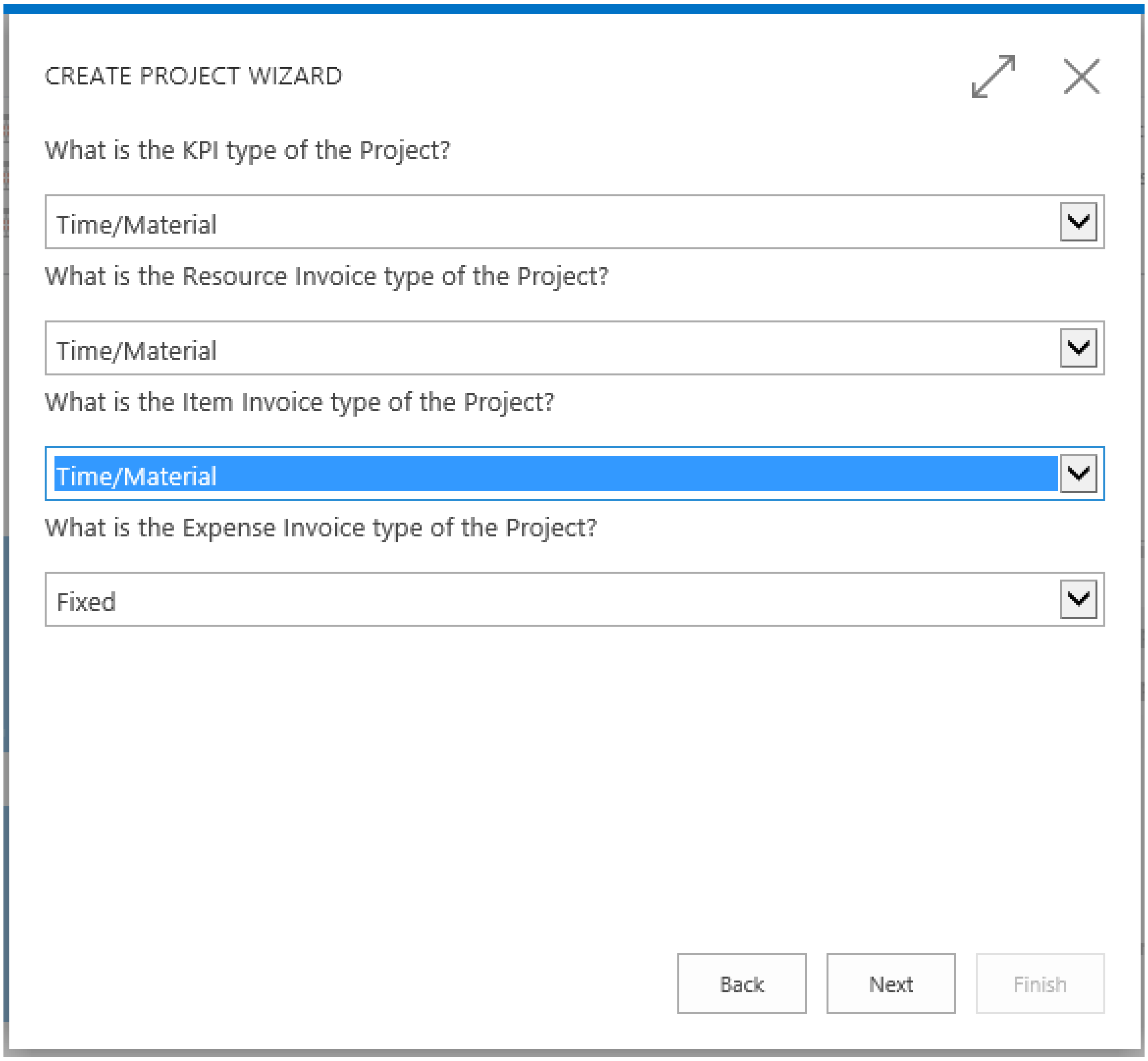
25. Select ***"Time/Material"*** from the selection list for the ***KPI of the Project.***



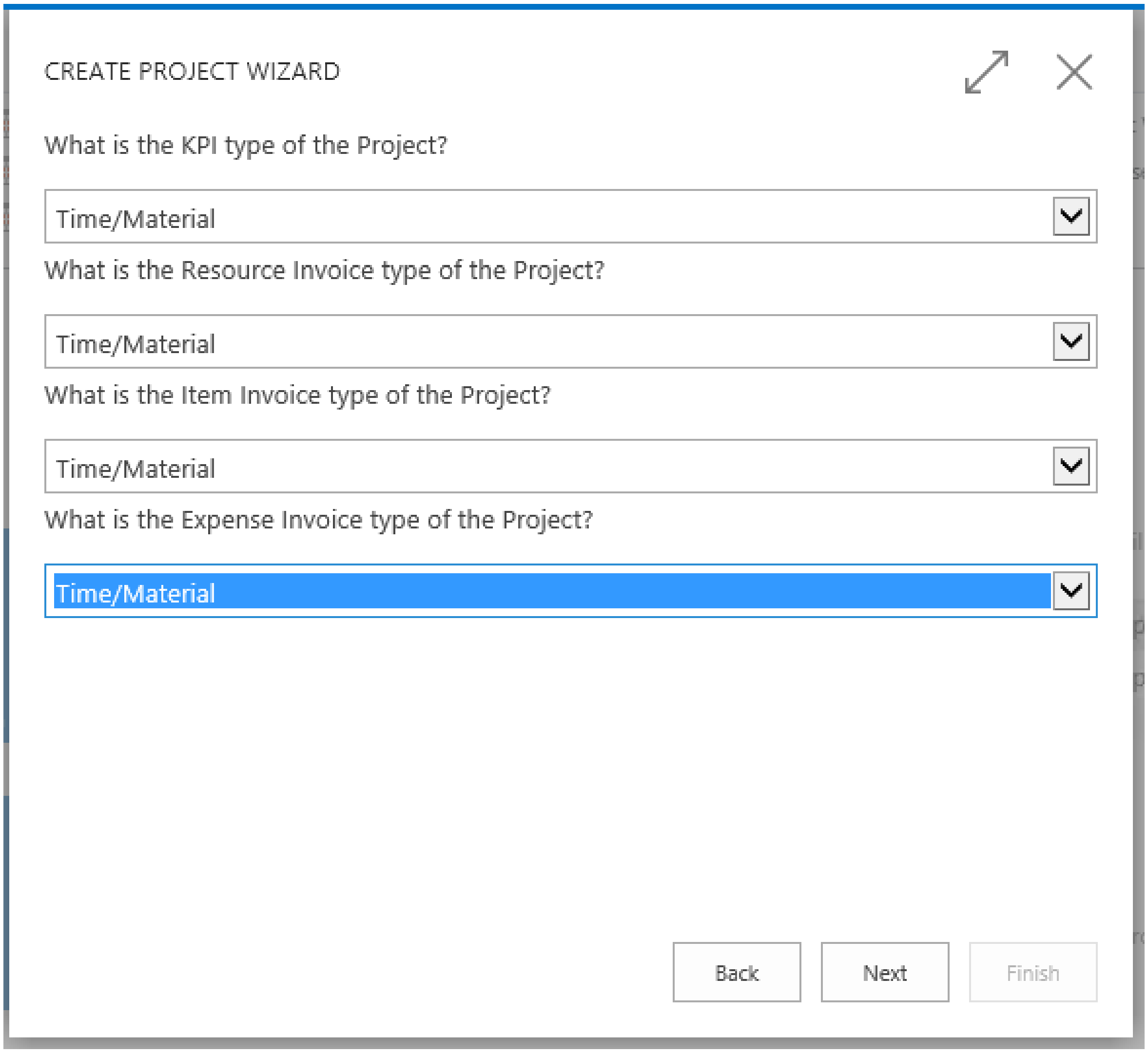
26. Select ***"Time/Material"*** from the selection list for the ***Resource Invoice type of the Project.***



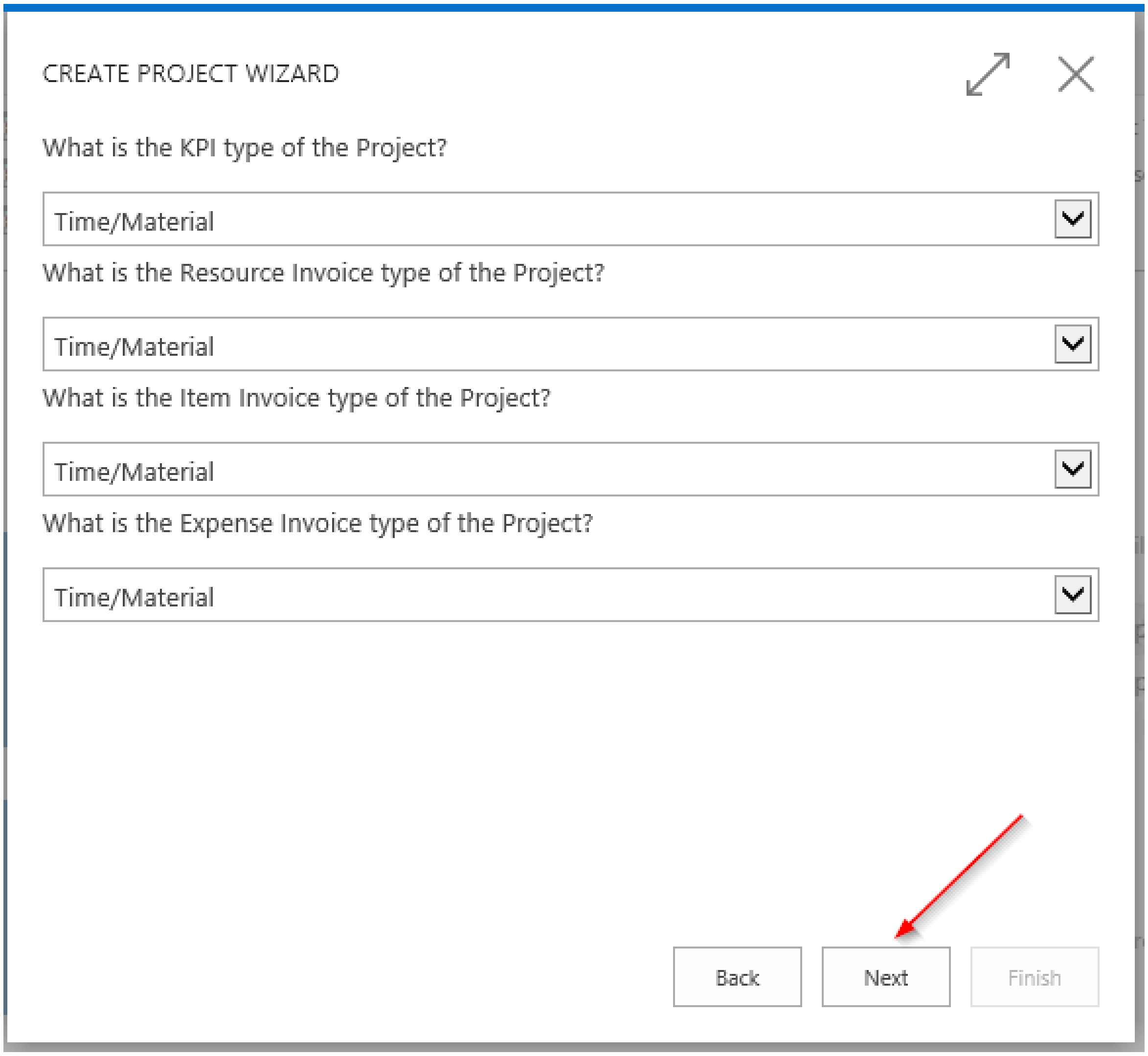
27. Select ***"Time/Material"*** from the selection list for the ***Item Invoice type of the Project.***



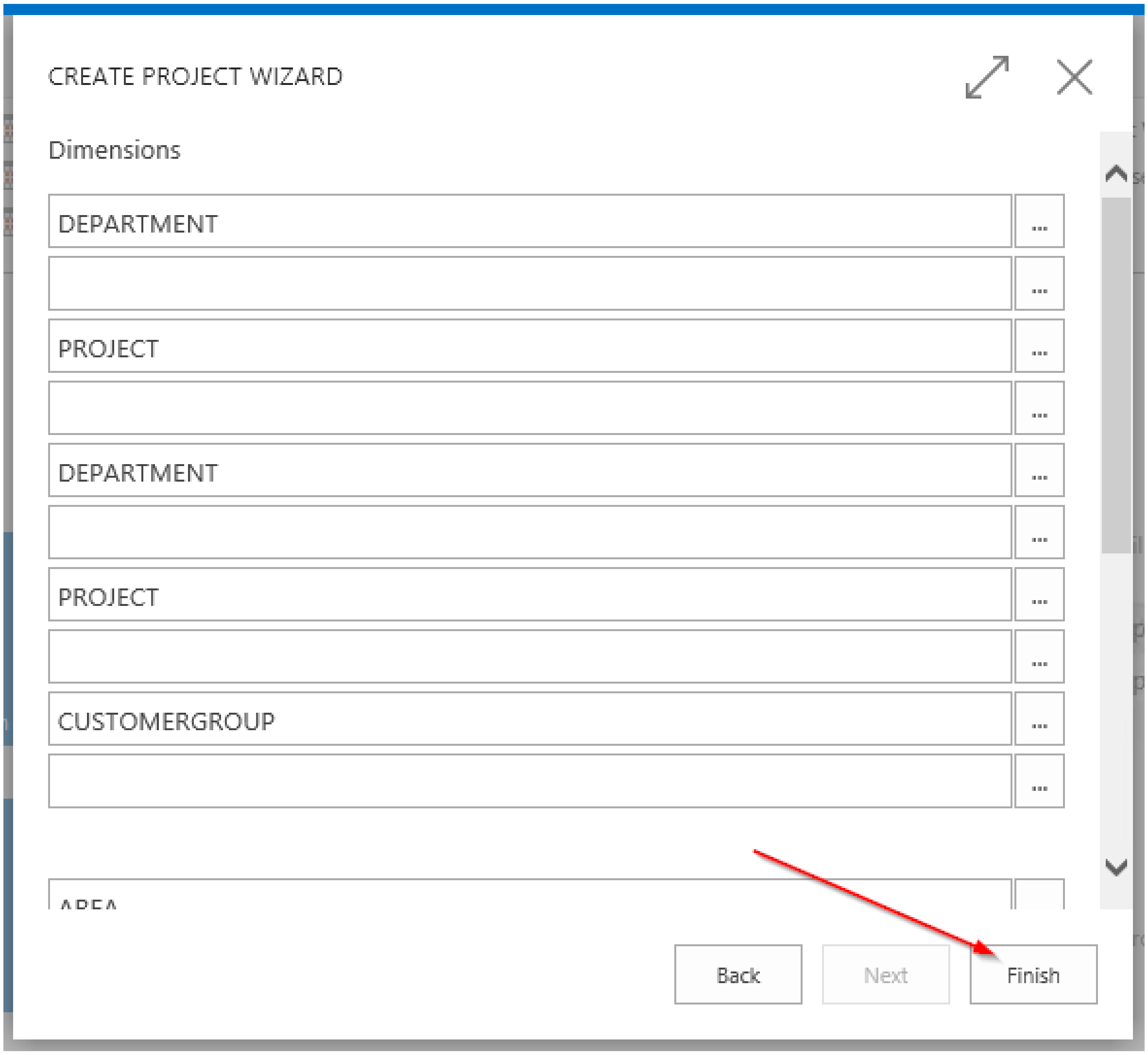
28. Select ***"Time/Material"*** from the selection list for the ***Expense Invoice type of the Project.***



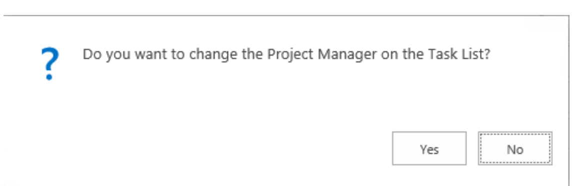
29. At the bottom of the screen click ***Next*** to move to the next page.



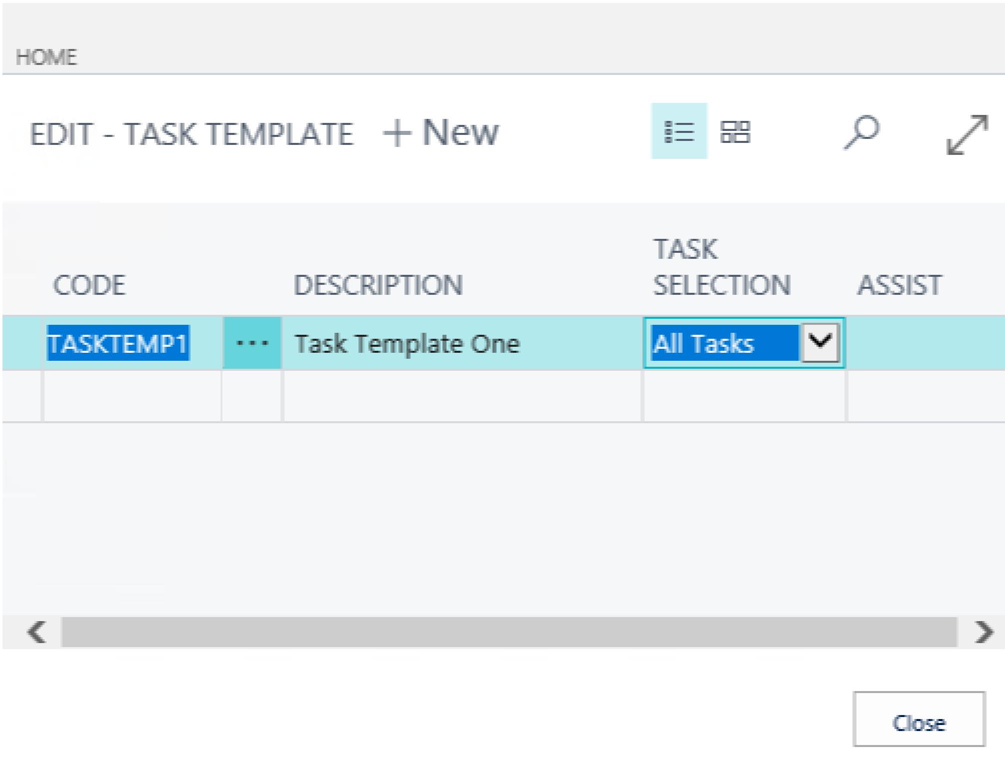
30. Accept the ***Dimensions*** shown and click ***Finish*** ***** Note your dimensions may be different than the ones displayed below depending on setup. Accept the Dimensions displayed in your system.***



31. You will receive the message below, click ***Yes***.

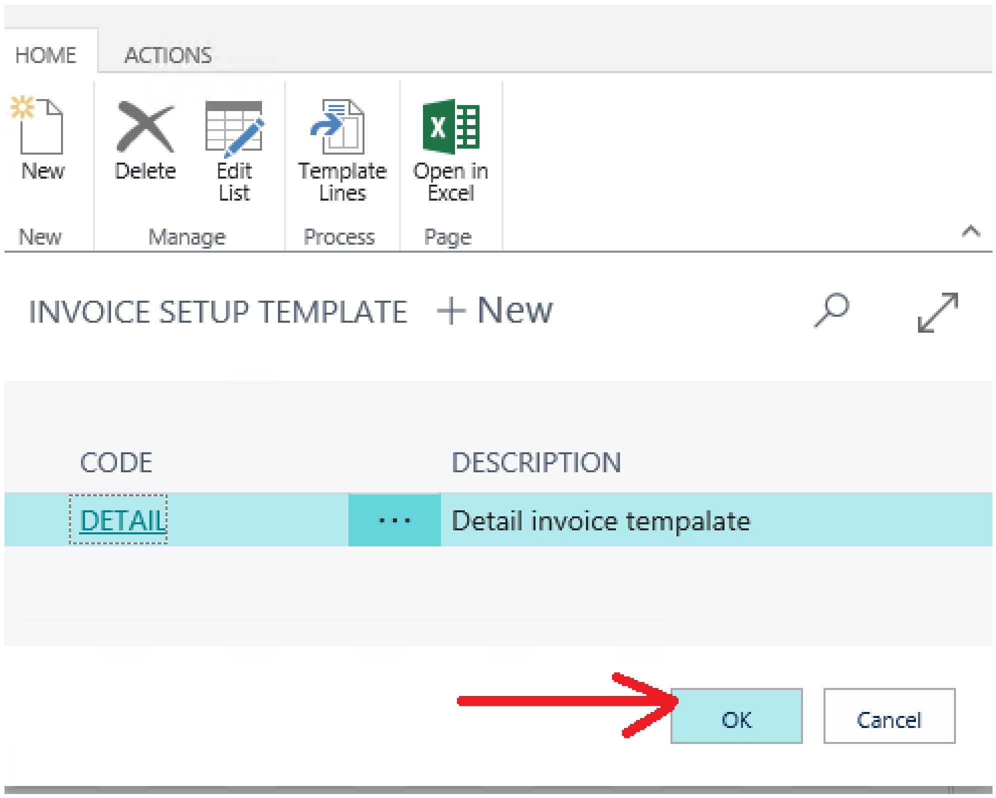


33. The ***Task Template*** page will appear. Under ***Task Selection*** on the "**TASKTEMP1**" line select ***All Tasks***.



34. Click on the ***Close*** button at the bottom of the screen.

35. The ***Invoice Selection*** page will appear. Select the ***Code***, "***Detail"*** and click ***OK***.



36. You will be notified that your Project was created. Click ***OK***.

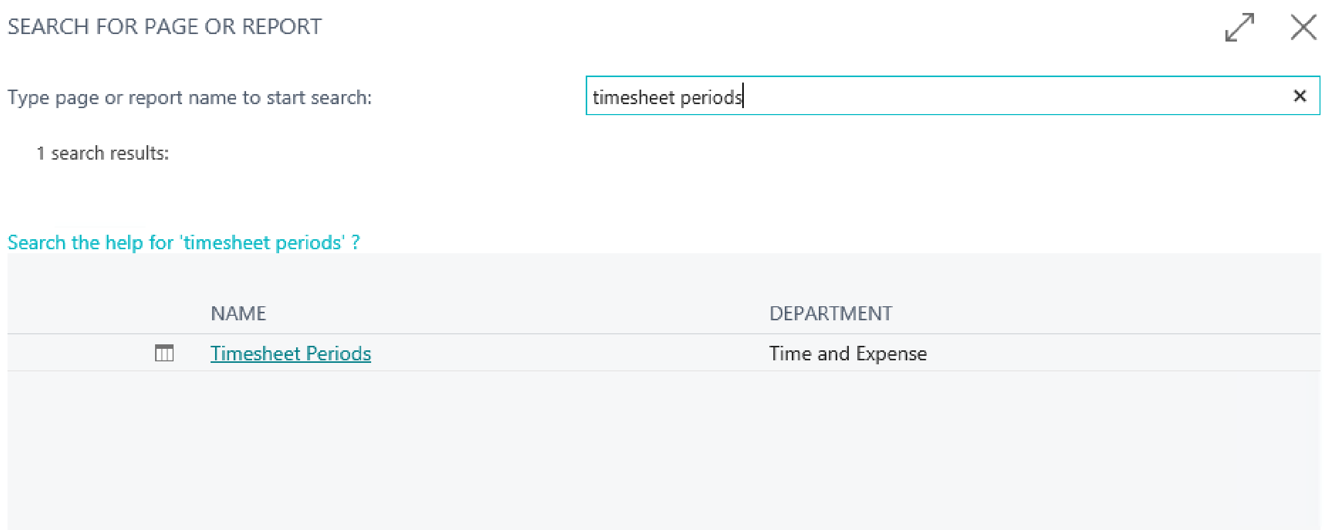
Continue to the Create Time Sheet scenario.

Time Periods List Enter Time Sheets

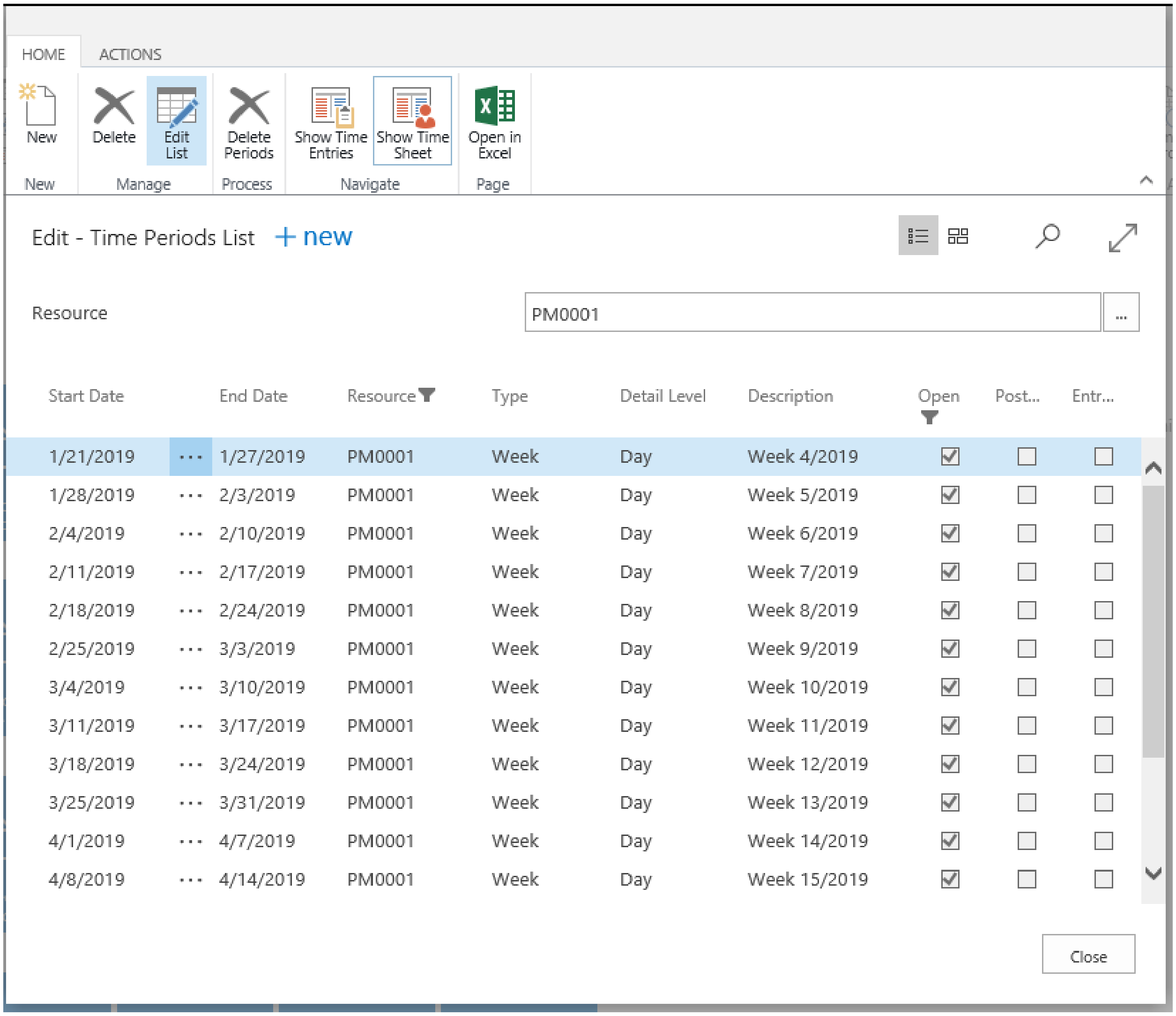
Profile: Project Manager

Steps:

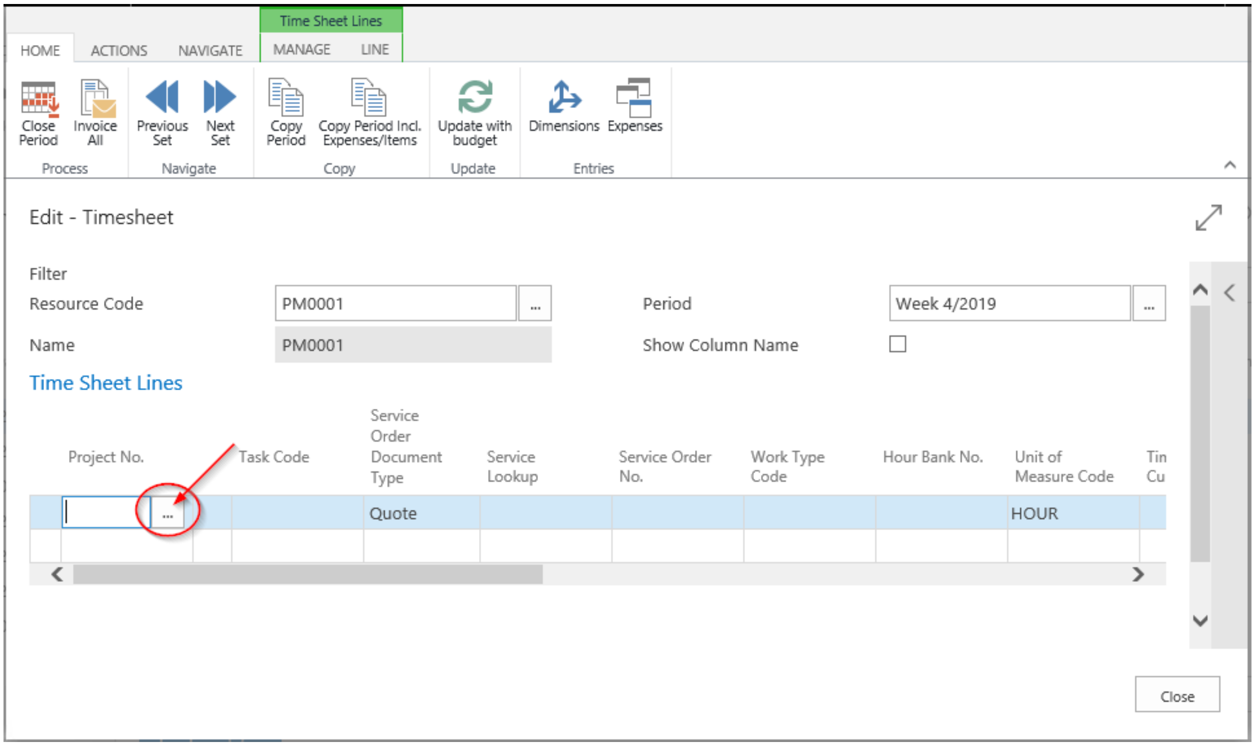
1. From the Search bar search for Timesheet Periods and select it from the list.

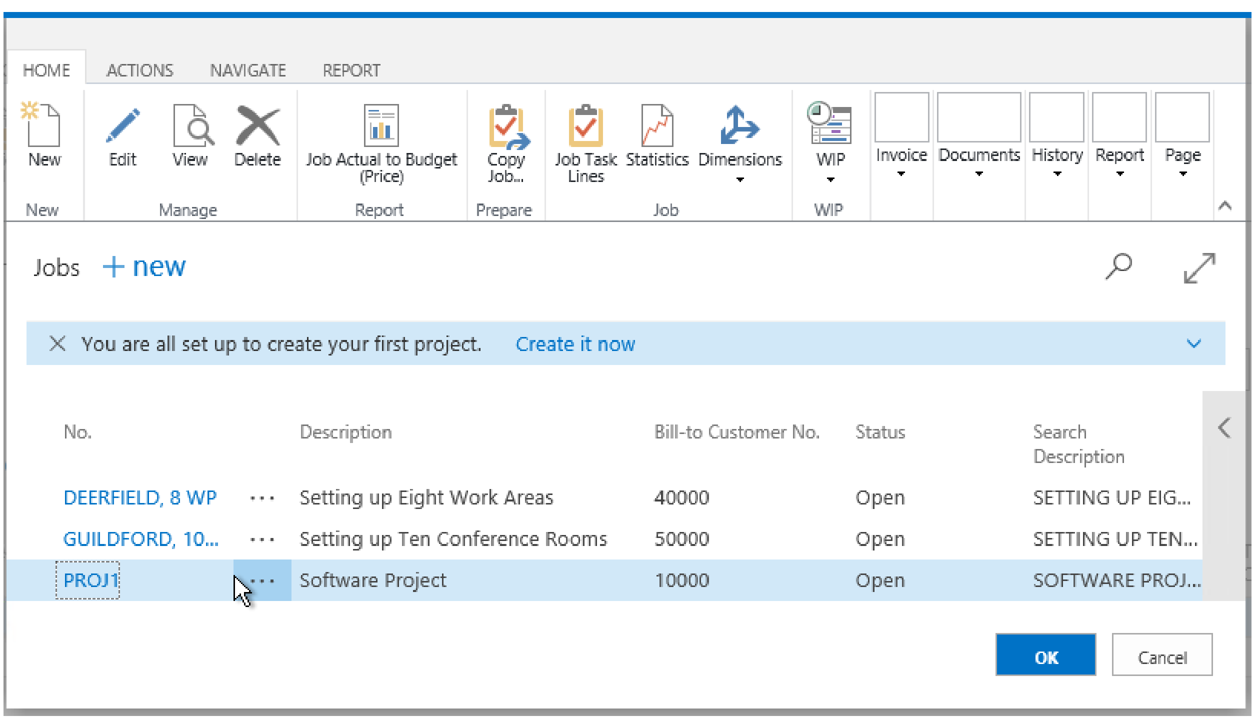


2. Select the first timesheet Period from the list, the date you created may be different. Then from the Home Tab select the ***Show Time Sheet*** button.

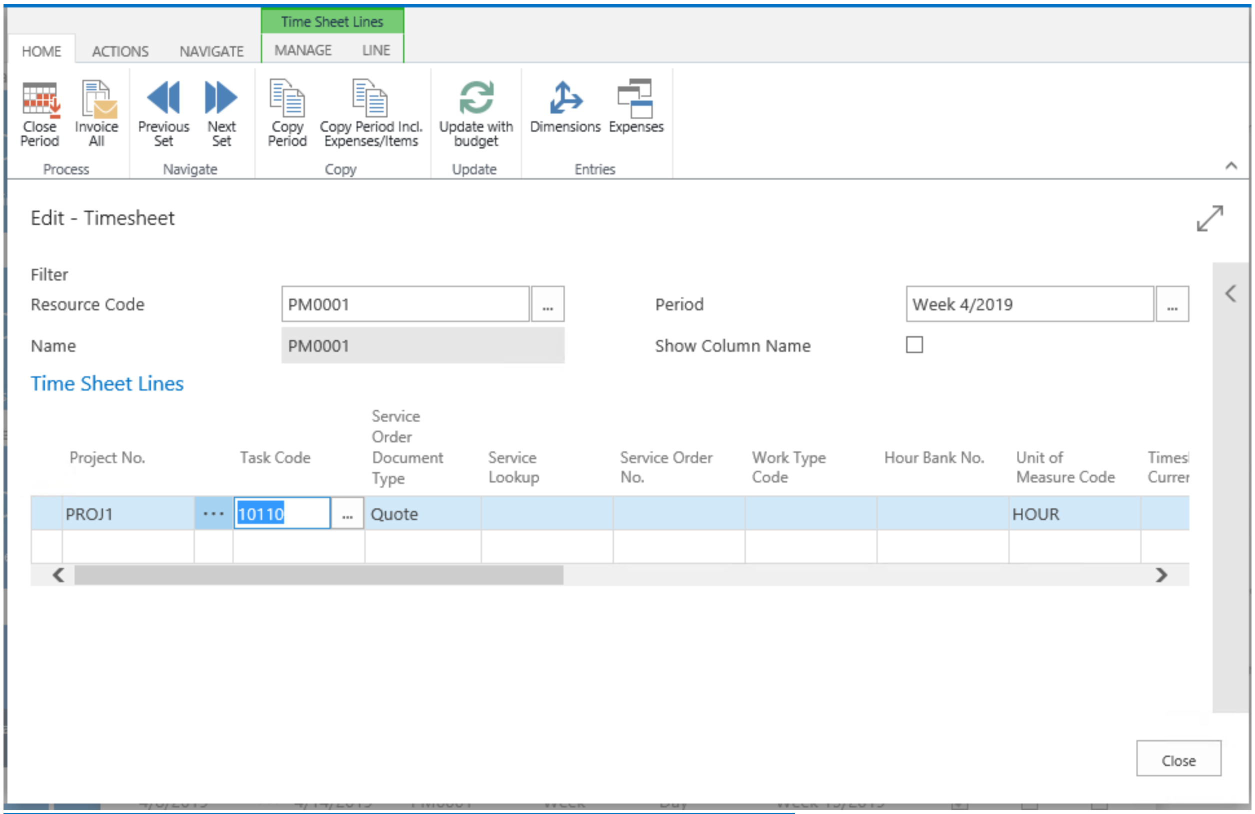


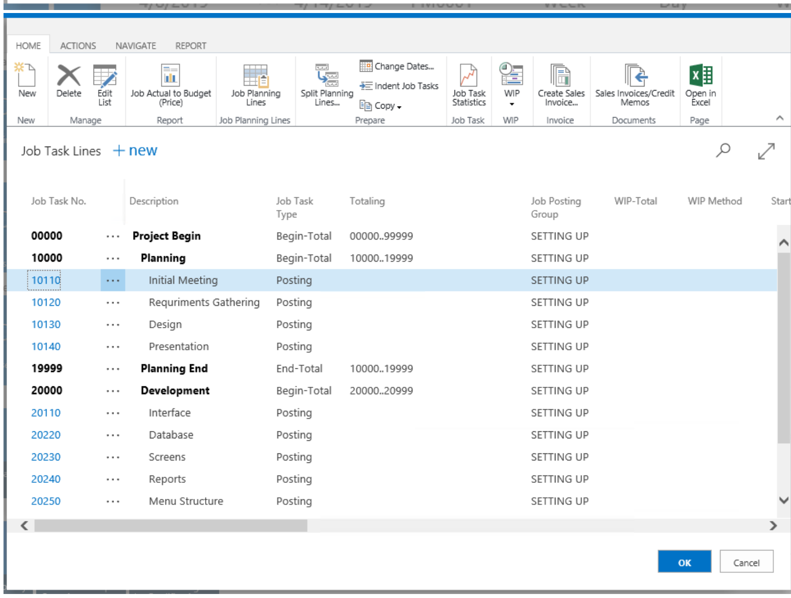
3. On the first Line of the Time Sheet click in the ***Project No.*** field and then on the ellipse button which opens the Jobs screen. Select the project number ***"PROJ1"*** and click ***OK***.



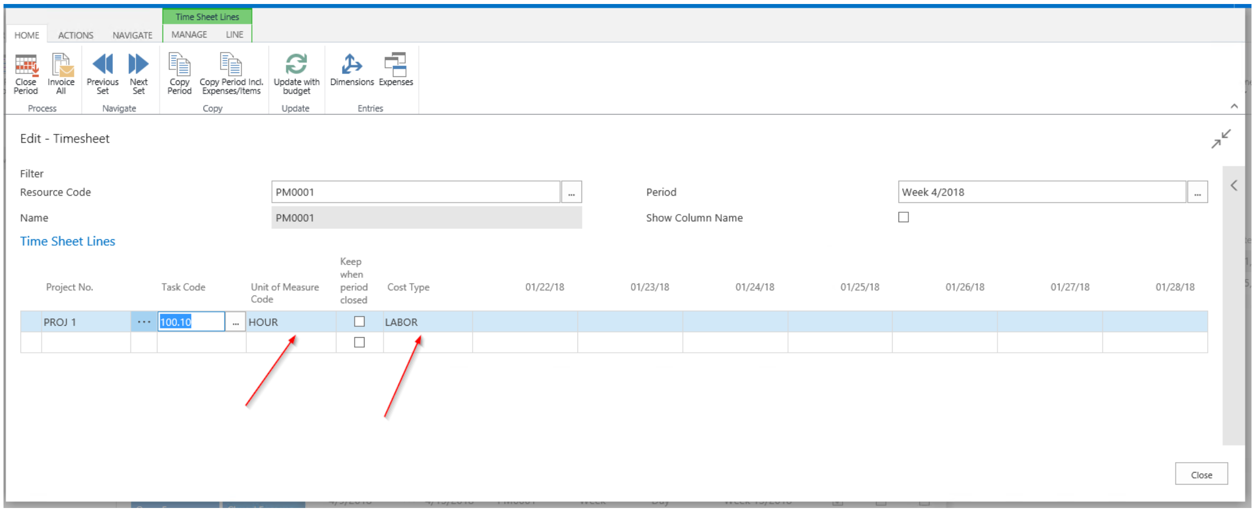


4. Click in the ***Task Code*** field and then on the ellipse button which opens the ***Job Task Lines*** screen. Choose ***"10110" Initial Meeting***.

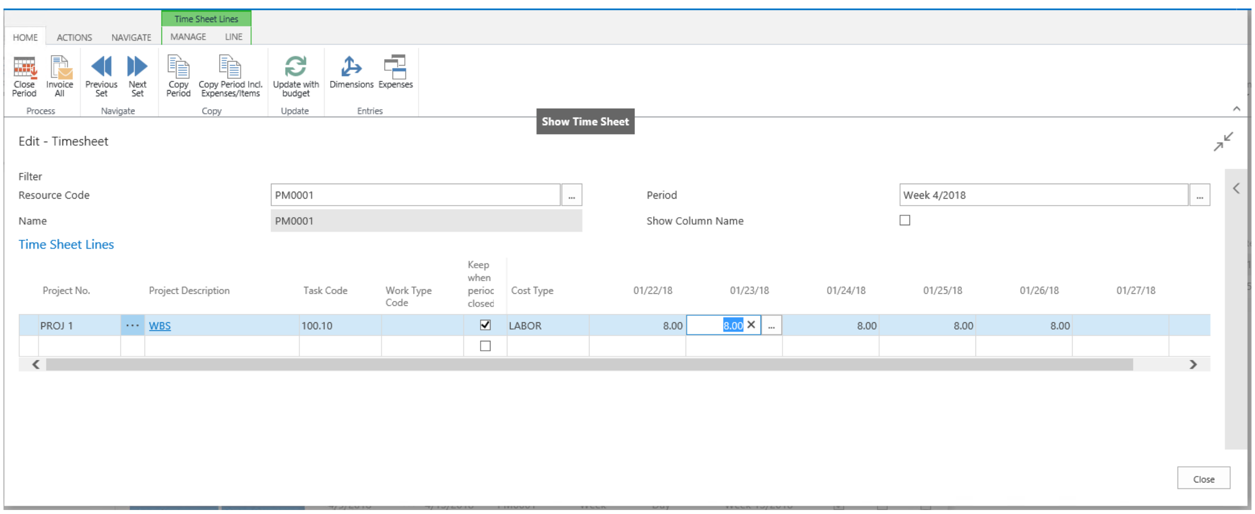




5. Accept the ***"Hour" Unit of Measure*** and the ***Cost Type*** of ***"Labor"***.

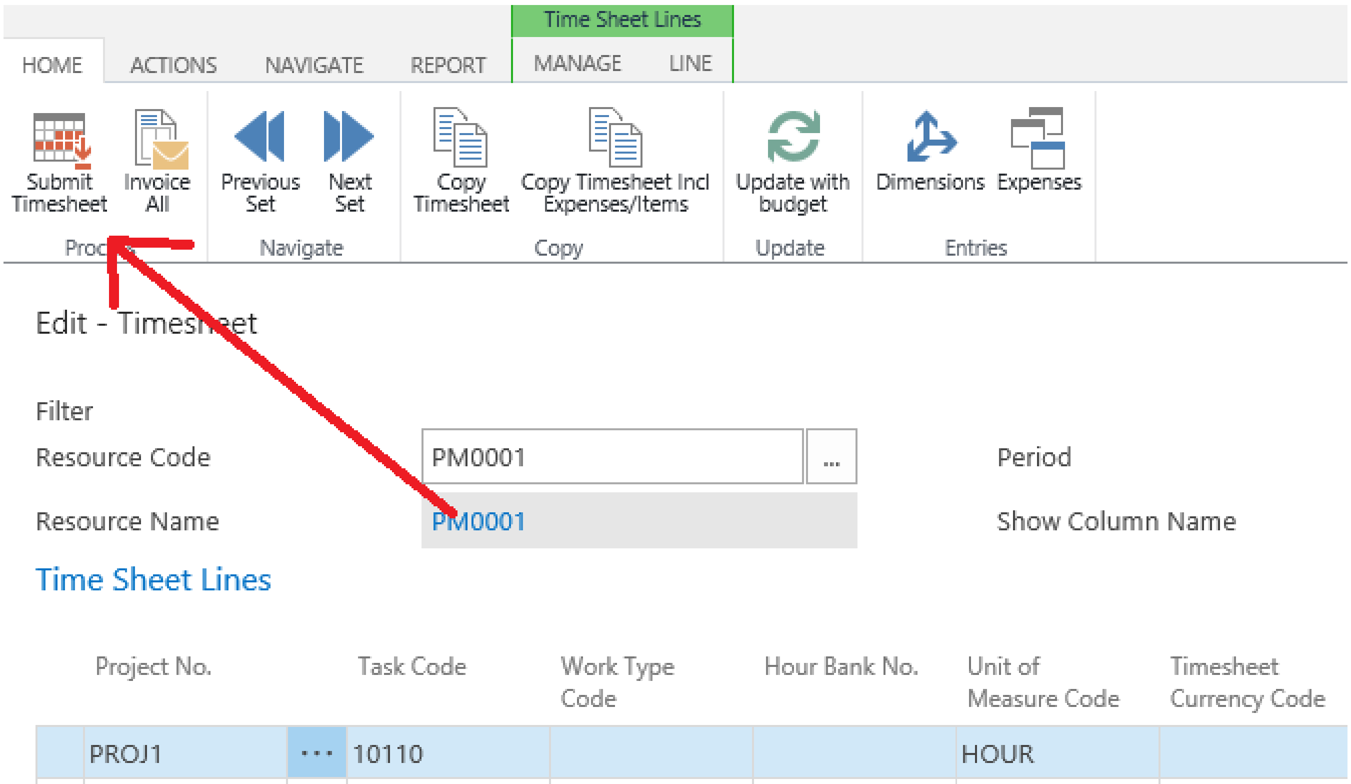


6. Enter ***"8"*** under the first five days of the week.

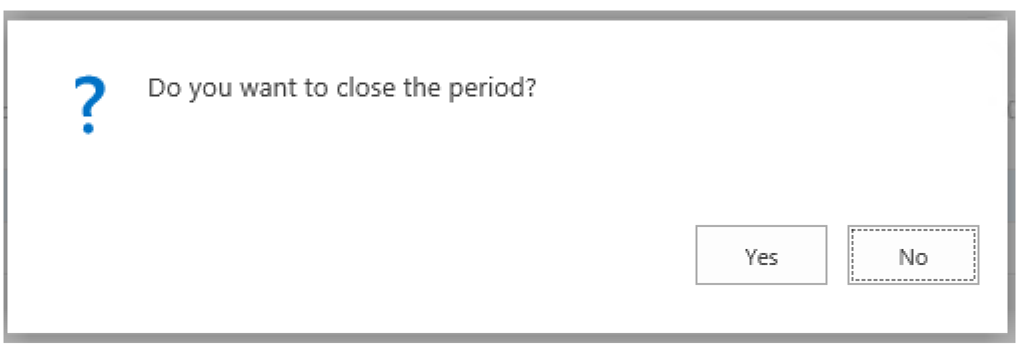


Each day disappears as you go to the next one. If you need to make a change, go back to the Time Currency Code field and tab twice to get the days to redisplay.

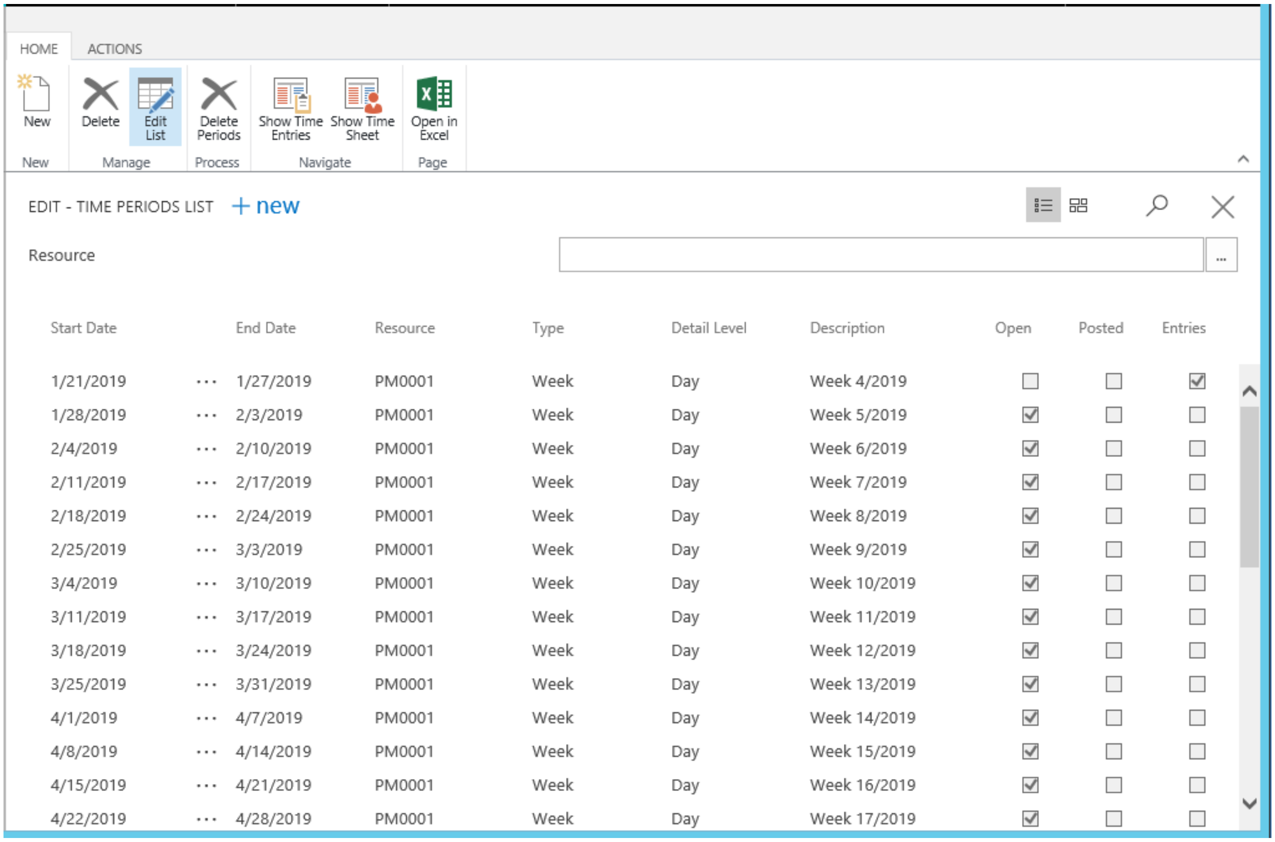
7. In the Home Ribbon at the top of the page select the ***Submit Timesheet*** Button.



8. Click ***Yes*** when prompted ***Do you want to Submit Timesheet?***



9. Close the Time Period List by clicking **X** or ***Close*** at the bottom of the screen.



Start Date		End Date	Resource	Type	Detail Level	Description	Open	Posted	Entries
1/21/2019	···	1/27/2019	PM0001	Week	Day	Week 4/2019	☐	☐	☑
1/28/2019	···	2/3/2019	PM0001	Week	Day	Week 5/2019	☑	☐	☐
2/4/2019	···	2/10/2019	PM0001	Week	Day	Week 6/2019	☑	☐	☐
2/11/2019	···	2/17/2019	PM0001	Week	Day	Week 7/2019	☑	☐	☐
2/18/2019	···	2/24/2019	PM0001	Week	Day	Week 8/2019	☑	☐	☐
2/25/2019	···	3/3/2019	PM0001	Week	Day	Week 9/2019	☑	☐	☐
3/4/2019	···	3/10/2019	PM0001	Week	Day	Week 10/2019	☑	☐	☐
3/11/2019	···	3/17/2019	PM0001	Week	Day	Week 11/2019	☑	☐	☐
3/18/2019	···	3/24/2019	PM0001	Week	Day	Week 12/2019	☑	☐	☐
3/25/2019	···	3/31/2019	PM0001	Week	Day	Week 13/2019	☑	☐	☐
4/1/2019	···	4/7/2019	PM0001	Week	Day	Week 14/2019	☑	☐	☐
4/8/2019	···	4/14/2019	PM0001	Week	Day	Week 15/2019	☑	☐	☐
4/15/2019	···	4/21/2019	PM0001	Week	Day	Week 16/2019	☑	☐	☐
4/22/2019	···	4/28/2019	PM0001	Week	Day	Week 17/2019	☑	☐	☐