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Scenario contained in this document

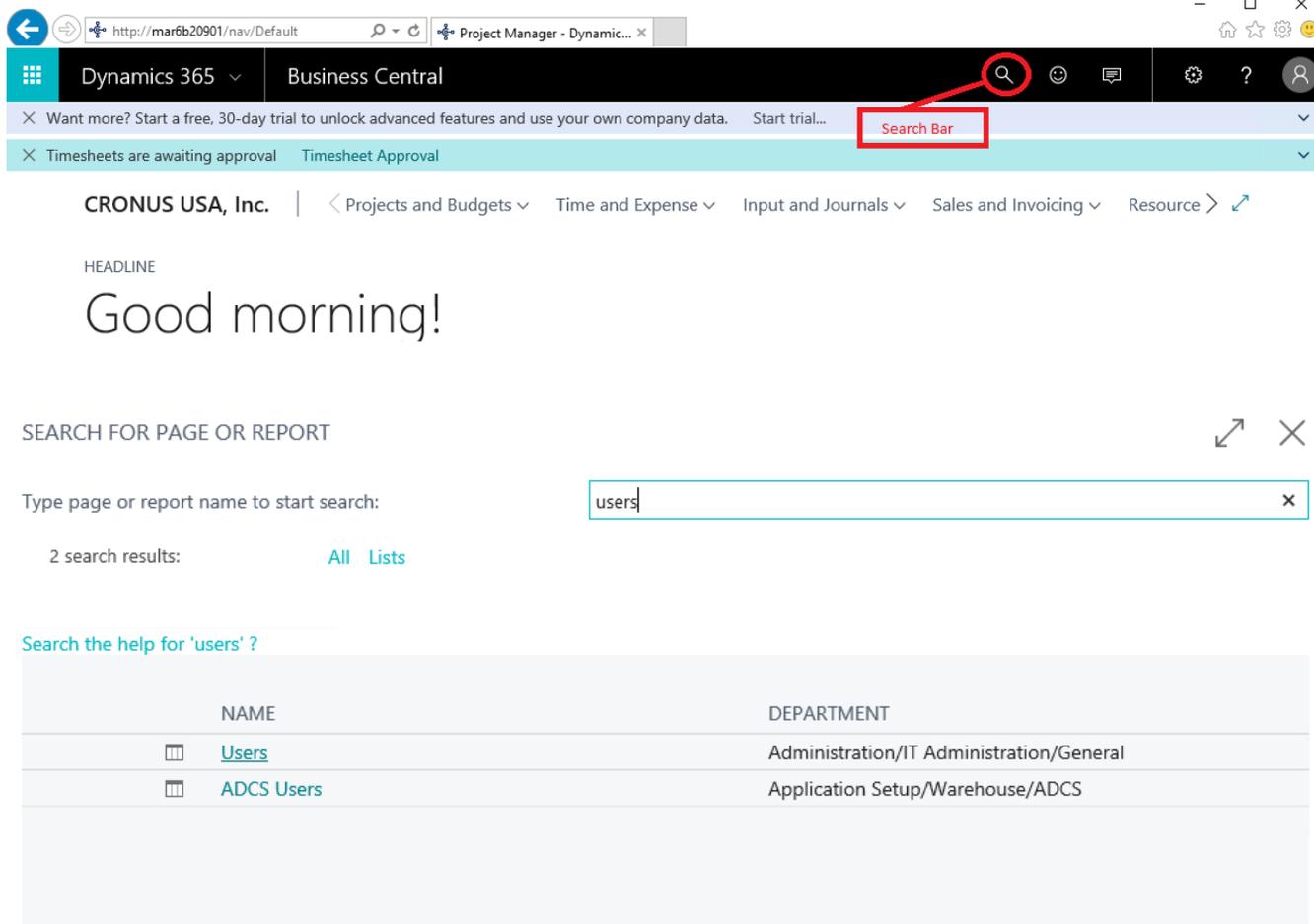
This document is designed to step through the setup and work flow of a Time and Materials Project.

- 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.



The screenshot shows the Microsoft Dynamics 365 Business Central interface. The browser address bar shows the URL <http://mar6b20901/nav/Default>. The page title is "Dynamics 365 Business Central". A search bar is highlighted with a red box and a red circle, containing the text "Search Bar". Below the search bar, there is a navigation menu with items: "CRONUS USA, Inc.", "Projects and Budgets", "Time and Expense", "Input and Journals", "Sales and Invoicing", and "Resource". A headline reads "Good morning!". Below the headline, there is a search section titled "SEARCH FOR PAGE OR REPORT" with a search input field containing the text "users". Below the search input, it says "2 search results:" and "All Lists". Below the search results, there is a table with the following data:

	NAME	DEPARTMENT
<input type="checkbox"/>	Users	Administration/IT Administration/General
<input type="checkbox"/>	ADCS Users	Application Setup/Warehouse/ADCS

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

HOME ACTIONS NAVIGATE

Get Users from Office 365 Invite External Accountant New Edit View Delete Edit List User Groups Permission Sets Permission Set by User Permission Set by User Group Process Open in Excel Page

VIEW - USERS + New

USER NAME	FULL NAME	STATE	AUTHENTICATION EMAIL
ADMIN	...	Enabled	

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

User Permission Sets

PERMISSION SET	DESCRIPTION	COMPANY	EXTENSION NAME
PROJECTMGRPGS	PROJECT Manager PGS		Progressus Software

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

SEARCH FOR PAGE OR REPORT

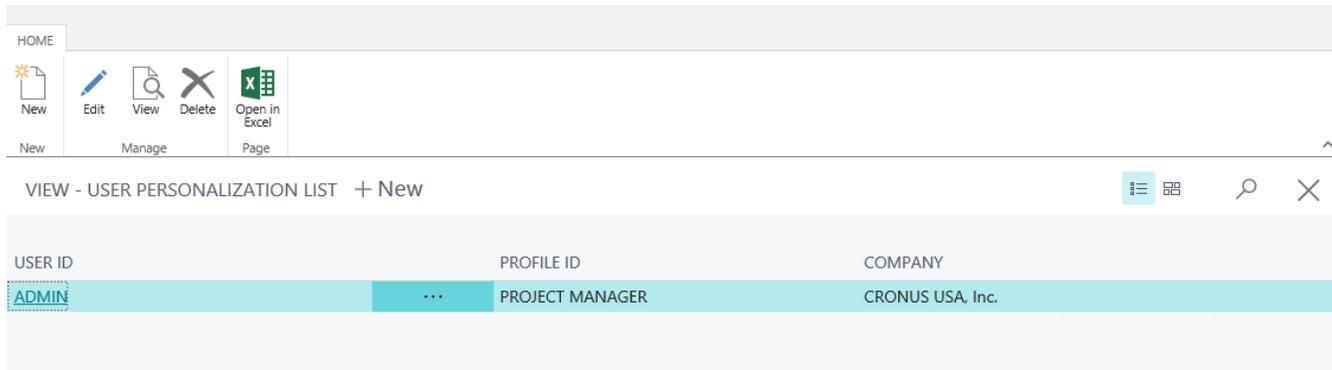
Type page or report name to start search:

2 search results: [All](#) [Lists](#)

[Search the help for 'User Personalization' ?](#)

NAME	DEPARTMENT
Delete User Personalization	IT Administration/Data Deletion/Configuration and Personali...
User Personalization	Administration/Application Setup/RoleTailored Client

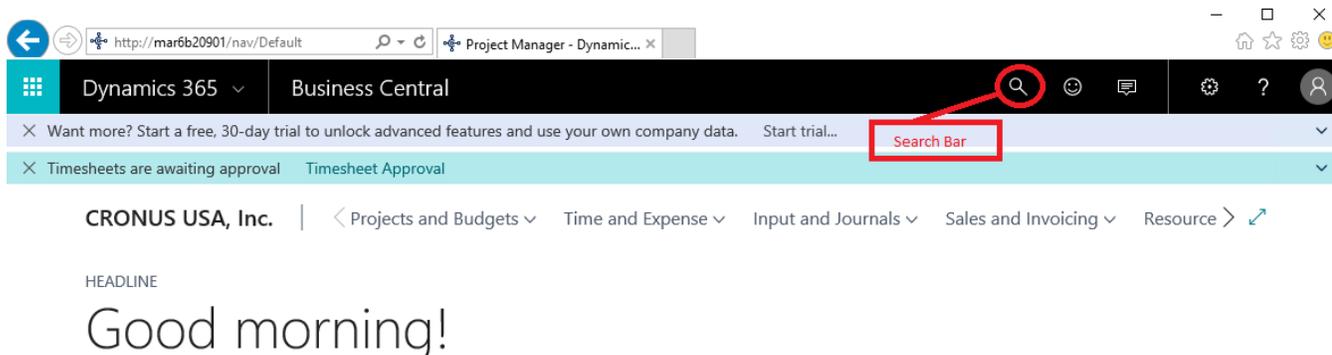
5. Select your **User ID** from the list and click to open it.



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



7. Search for **User Setup**.



SEARCH FOR PAGE OR REPORT



Type page or report name to start search:

user setup

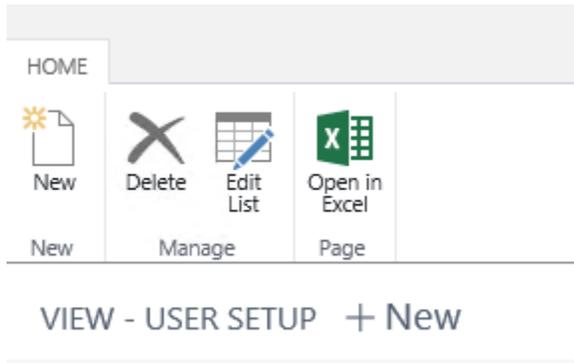
3 search results:

All Lists Administration

Search the help for 'user setup' ?

	NAME	DEPARTMENT
	User Setup	Administration/Application Setup/Users
	Approval User Setup	Administration/Application Setup/Workflow
	Approval User Setup	Administration/Application Setup/Document Approval

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



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

EDIT - USER SETUP + New

USER ID	ALLOW POSTING FROM	ALLOW POSTING TO	REGIST... TIME	RESOURCE CODE	SALESPERS./PURC... CODE	E-MAIL
ADMIN	...		<input checked="" type="checkbox"/>	MARK		
			<input type="checkbox"/>			

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.

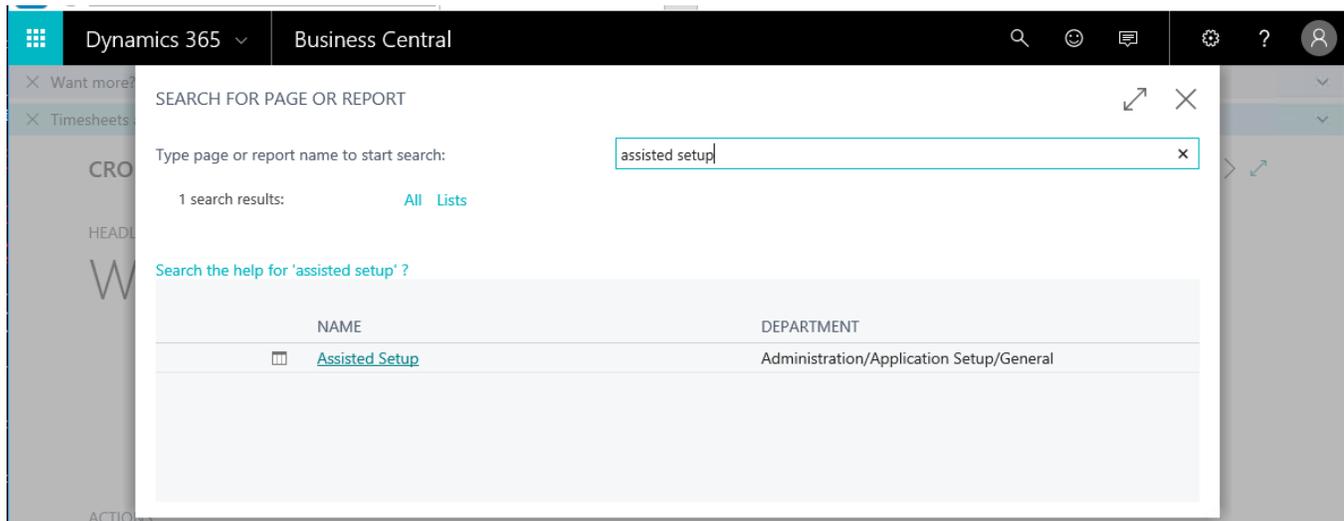
12. Sign out of the system and sign back in for the new Role Center to be loaded.

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

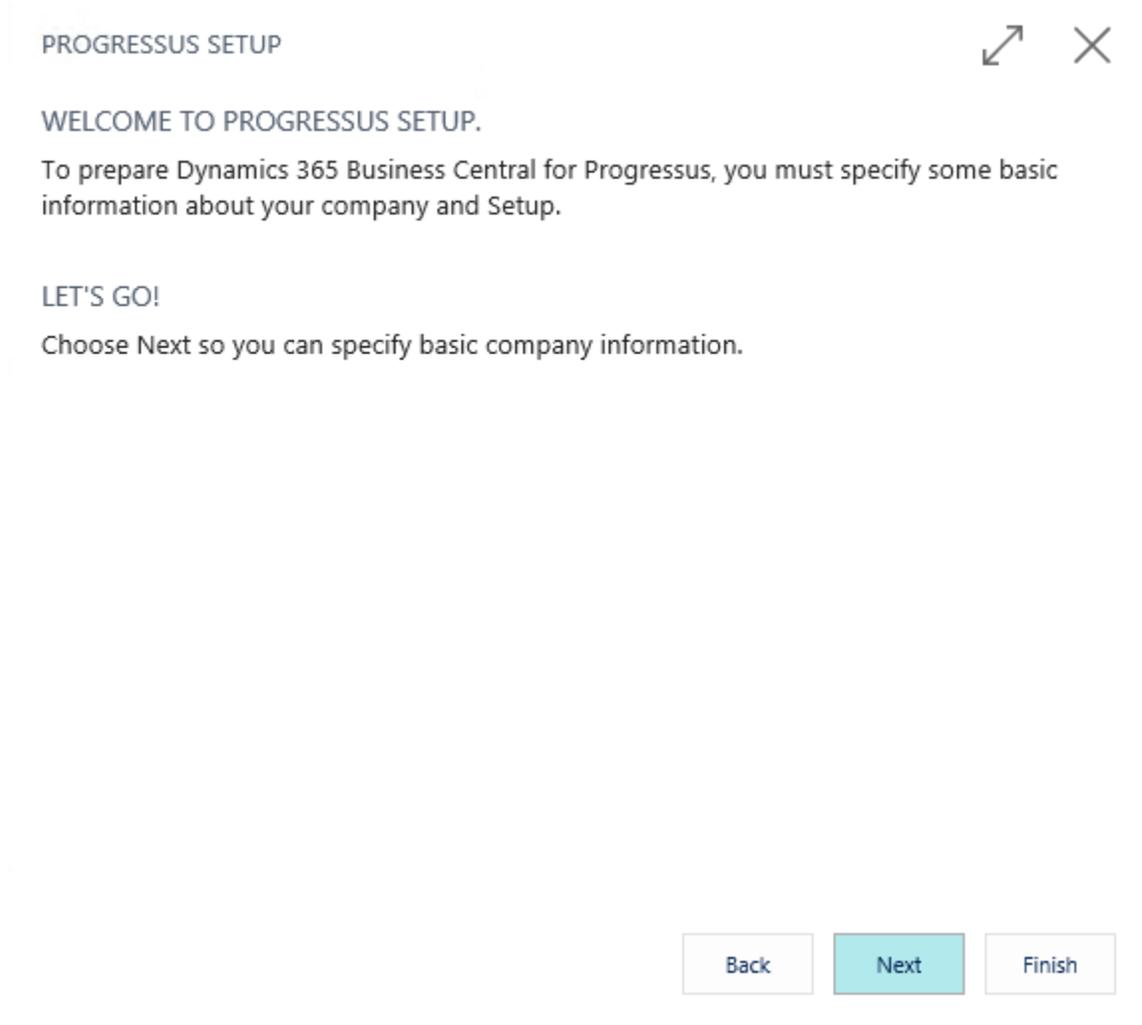
Set up Dynamics 365 for Sales connection

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*”.

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...	Marketing
What VAT Prod. Posting Group sh...	Software Development
What Project Posting Group shoul...	Legal
	Accounting
	SETTING UP ...
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

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.

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 ...

CODE	DESCRIPTION
NO TAX	Miscellaneous without tax
RETAIL	Retail
<u>SERVICES</u>	Resources, etc.

+ New Select from

Back Next Finish

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.

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...

What Project Posting Group shoul...

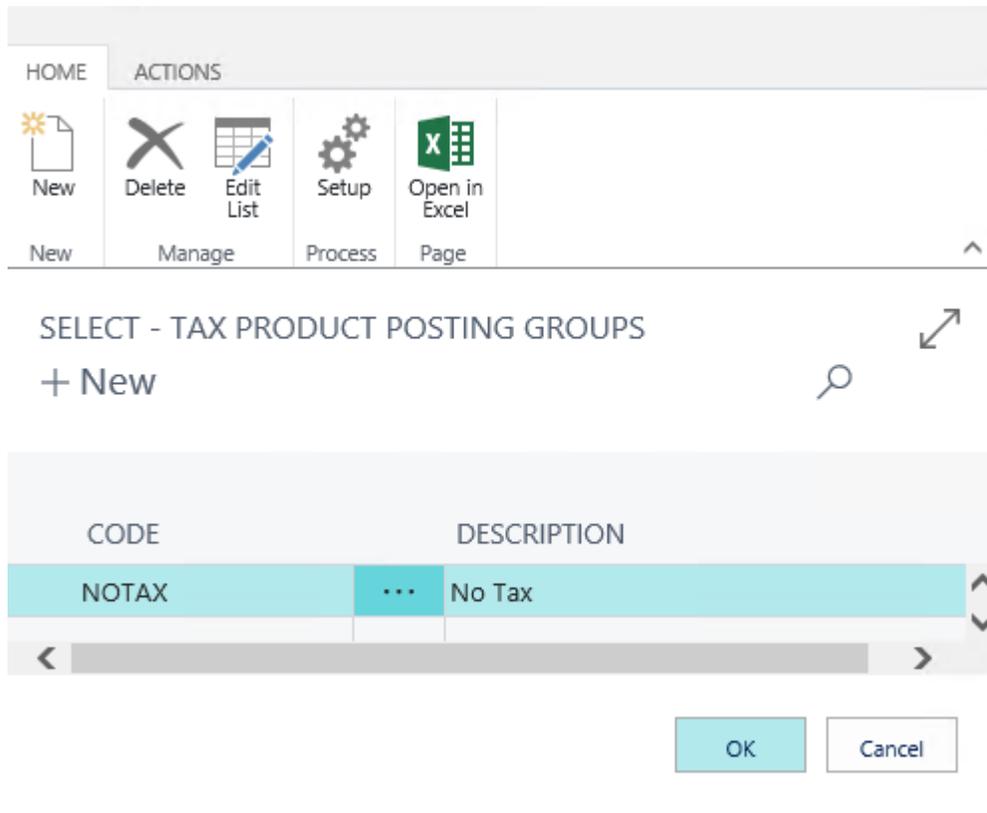
How do you want to Invoice Reso...

How do you want to Invoice Items?

How do you want to Invoice Expen...

CODE	DESCRIPTION
(There is nothing to show in this view)	
<input type="button" value="+ New"/>	<input type="button" value="Select 1"/>

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.



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.

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... SETTING UP

How do you want to Invoice Reso...

How do you want to Invoice Items?

How do you want to Invoice Expen...

CODE	DESCRIPTION
SETTING UP	Setting up furniture
+ New	Select f

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

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...	SETTING UP	
How do you want to Invoice Reso...	Fixed	
	Time/Material	
How do you want to Invoice Items?	Time/Material	▼
How do you want to Invoice Expen...	Time/Material	▼

Back	Next	Finish
------	------	--------

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

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...	SETTING UP	...
How do you want to Invoice Reso...	Time/Material	▼
How do you want to Invoice Items?	Fixed	
	Time/Material	
How do you want to Invoice Expen...	Time/Material	▼

Back Next Finish

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

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...	SETTING UP	...
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...	Fixed	▼
	Time/Material	

Back	Next	Finish
------	------	--------

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

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...	SETTING UP	...
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
------	------	--------



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

PROGRESSUS SETUP ↗ ✕

PROJECT MANAGER, TIME AND EXPENSE, TIME ENTRY STARTING DATE SETUP

How many Project Managers do y...	<input type="text" value="2"/>
What Unit Cost should we charge f...	<input type="text" value="0.00"/>
What Unit Price should we charge...	<input type="text" value="0.00"/>
How many Time and Expense User...	<input type="text" value="0"/>
What Unit Cost should we charge f...	<input type="text" value="0.00"/>
What Unit Price should we charge...	<input type="text" value="0.00"/>
What Date should we use as a Star...	<input type="text" value="..."/>
Do you want us to Create your Fir...	<input type="button" value="▼"/>

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

PROGRESSUS SETUP  

PROJECT MANAGER, TIME AND EXPENSE, TIME ENTRY STARTING DATE SETUP

How many Project Managers do y...	<input type="text" value="2"/>
What Unit Cost should we charge f...	<input type="text" value="35.00"/>
What Unit Price should we charge...	<input type="text" value="0.00"/>
How many Time and Expense User...	<input type="text" value="0"/>
What Unit Cost should we charge f...	<input type="text" value="0.00"/>
What Unit Price should we charge...	<input type="text" value="0.00"/>
What Date should we use as a Star...	<input type="text" value="..."/>
Do you want us to Create your Firs...	<input type="checkbox"/>

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

PROGRESSUS SETUP



PROJECT MANAGER, TIME AND EXPENSE, TIME ENTRY STARTING DATE SETUP

How many Project Managers do y...	<input type="text" value="2"/>
What Unit Cost should we charge f...	<input type="text" value="35.00"/>
What Unit Price should we charge...	<input type="text" value="175.00"/>
How many Time and Expense User...	<input type="text" value="0"/>
What Unit Cost should we charge f...	<input type="text" value="0.00"/>
What Unit Price should we charge...	<input type="text" value="0.00"/>
What Date should we use as a Star...	<input type="text" value="..."/>
Do you want us to Create your Firs...	<input type="checkbox"/>

<input type="button" value="Back"/>	<input type="button" value="Next"/>	<input type="button" value="Finish"/>
-------------------------------------	-------------------------------------	---------------------------------------

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

PROGRESSUS SETUP



PROJECT MANAGER, TIME AND EXPENSE, TIME ENTRY STARTING DATE SETUP

How many Project Managers do y...	<input type="text" value="2"/>
What Unit Cost should we charge f...	<input type="text" value="35.00"/>
What Unit Price should we charge...	<input type="text" value="175.00"/>
How many Time and Expense User...	<input type="text" value="5"/>
What Unit Cost should we charge f...	<input type="text" value="0.00"/>
What Unit Price should we charge...	<input type="text" value="0.00"/>
What Date should we use as a Star...	<input type="text" value="..."/>
Do you want us to Create your Firs...	<input type="checkbox"/>

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

PROGRESSUS SETUP



PROJECT MANAGER, TIME AND EXPENSE, TIME ENTRY STARTING DATE SETUP

How many Project Managers do y...	<input type="text" value="2"/>
What Unit Cost should we charge f...	<input type="text" value="35.00"/>
What Unit Price should we charge...	<input type="text" value="175.00"/>
How many Time and Expense User...	<input type="text" value="5"/>
What Unit Cost should we charge f...	<input type="text" value="25.00"/>
What Unit Price should we charge...	<input type="text" value="0.00"/>
What Date should we use as a Star...	<input type="text" value="..."/>
Do you want us to Create your Firs...	<input type="checkbox"/>

<input type="button" value="Back"/>	<input type="button" value="Next"/>	<input type="button" value="Finish"/>
-------------------------------------	-------------------------------------	---------------------------------------

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

PROGRESSUS SETUP



PROJECT MANAGER, TIME AND EXPENSE, TIME ENTRY STARTING DATE SETUP

How many Project Managers do y...	<input type="text" value="2"/>
What Unit Cost should we charge f...	<input type="text" value="35.00"/>
What Unit Price should we charge...	<input type="text" value="175.00"/>
How many Time and Expense User...	<input type="text" value="5"/>
What Unit Cost should we charge f...	<input type="text" value="25.00"/>
What Unit Price should we charge...	<input type="text" value="150.00"/>
What Date should we use as a Star...	<input type="text" value="..."/>
Do you want us to Create your Firs...	<input type="checkbox"/>

<input type="button" value="Back"/>	<input type="button" value="Next"/>	<input type="button" value="Finish"/>
-------------------------------------	-------------------------------------	---------------------------------------

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

PROGRESSUS SETUP



PROJECT MANAGER, TIME AND EXPENSE, TIME ENTRY STARTING DATE SETUP

How many Project Managers do y...	<input type="text" value="2"/>
What Unit Cost should we charge f...	<input type="text" value="35.00"/>
What Unit Price should we charge...	<input type="text" value="175.00"/>
How many Time and Expense User...	<input type="text" value="5"/>
What Unit Cost should we charge f...	<input type="text" value="25.00"/>
What Unit Price should we charge...	<input type="text" value="150.00"/>
What Date should we use as a Star...	<input type="text" value="1/1/2017"/> <input type="button" value="..."/>
Do you want us to Create your Firs...	<input type="checkbox"/>

<input type="button" value="Back"/>	<input type="button" value="Next"/>	<input type="button" value="Finish"/>
-------------------------------------	-------------------------------------	---------------------------------------

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

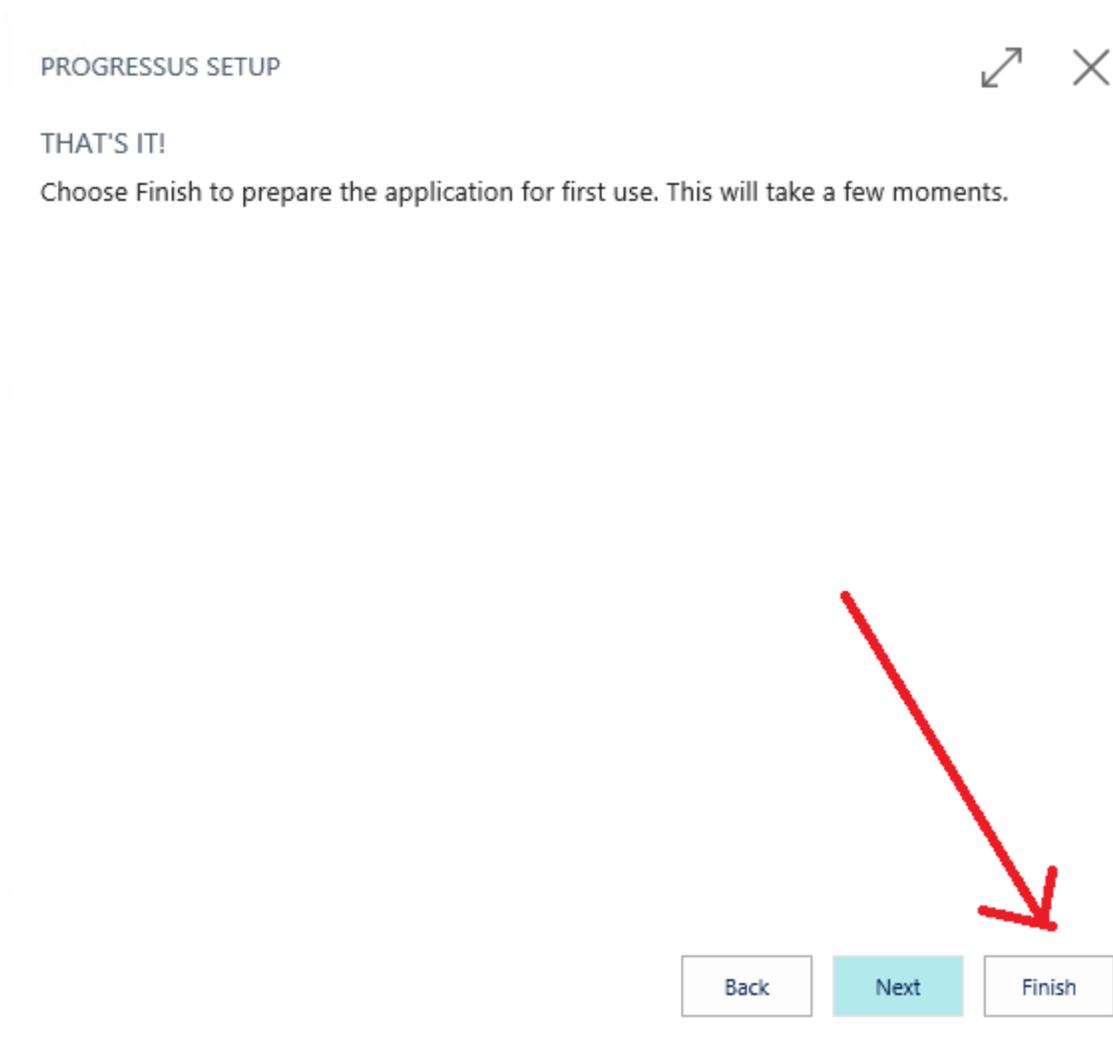
PROGRESSUS SETUP



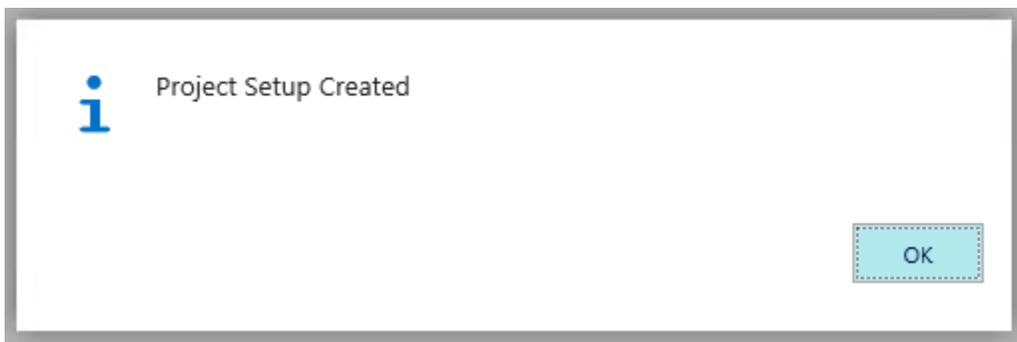
PROJECT MANAGER, TIME AND EXPENSE, TIME ENTRY STARTING DATE SETUP

How many Project Managers do y...	<input type="text" value="2"/>
What Unit Cost should we charge f...	<input type="text" value="35.00"/>
What Unit Price should we charge...	<input type="text" value="175.00"/>
How many Time and Expense User...	<input type="text" value="5"/>
What Unit Cost should we charge f...	<input type="text" value="25.00"/>
What Unit Price should we charge...	<input type="text" value="150.00"/>
What Date should we use as a Star...	<input type="text" value="1/1/2017"/> ...
Do you want us to Create your Firs...	<input type="text" value="No"/> ▼

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.

SEARCH FOR PAGE OR REPORT ↗ ✕

Type page or report name to start search: ✕

3 search results: [All](#) [Lists](#) [Administration](#)

[Search the help for 'user setup' ?](#)

	NAME	DEPARTMENT
☰	User Setup	Administration/Application Setup/Users
⚙️	Approval User Setup	Administration/Application Setup/Workflow
⚙️	Approval User Setup	Administration/Application Setup/Document Approval

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

The screenshot shows the top navigation bar of Dynamics 365 Business Central. The left pane is partially visible with 'W' and 'Ti' tabs. The main header contains 'Dynamics 365', 'Business Central', and 'User Setup'. Below the header is the 'HOME' tab, which is active. The action bar contains four buttons: 'New' (with a document icon), 'Delete' (with a trash icon), 'Edit List' (with a calendar icon), and 'Open in Excel' (with the Excel icon). Below these buttons are the labels 'New', 'Manage', and 'Page'. At the bottom of the action bar, it says 'VIEW - USER SETUP + New'.

3. Select the user you are logged in as.

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

The screenshot shows the Dynamics 365 Business Central interface. The top navigation bar includes 'Dynamics 365', 'Business Central', and 'User Setup'. Below this is a ribbon with 'HOME' and several icons: 'New', 'Delete', 'Edit List', and 'Open in Excel'. The main area is titled 'EDIT - USER SETUP + New' and contains a table with the following columns: 'USER ID', 'ALLOW POSTING FROM', 'ALLOW POSTING TO', 'REGIST... TIME', and 'RESOURCE CODE'. The first row of the table is highlighted in light blue and contains the following data: 'ADMIN', a menu icon (three dots), and 'PM0001' (with a search icon and a dropdown arrow). The second row is empty.

USER ID	ALLOW POSTING FROM	ALLOW POSTING TO	REGIST... TIME	RESOURCE CODE
ADMIN	...		<input checked="" type="checkbox"/>	PM0001
			<input type="checkbox"/>	

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.

SEARCH FOR PAGE OR REPORT ↗ ✕

Type page or report name to start search: ✕

1 search results: [All](#) [Administration](#)

[Search the help for 'create project wizard' ?](#)

NAME	DEPARTMENT
 Create Project Wizard	Departments/Progressus Software

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.

CREATE PROJECT WIZARD

Choose a number series...

PROJECT

or a Project No.

What is the description of the project?

Project Template

What is the status of the project?

Quote

Back Next Finish

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

CREATE PROJECT WIZARD ↗ ✕

Choose a number series...

PROJECT ...

or a Project No.

Proj1 ✕

What is the description of the project?

Project Template

...

What is the status of the project?

Quote ▼

4. In the **Project Description** field key in the Description **“Software Project”**.

CREATE PROJECT WIZARD

Choose a number series...

or a Project No.

PROJ1

What is the description of the project?

Software Project

Project Template

What is the status of the project?

Quote

Back Next Finish

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

6. Enter the **Project Status** of **“Order”**.

The screenshot shows a 'CREATE PROJECT WIZARD' dialog box with the following fields and options:

- Choose a number series...**: An empty text input field with a dropdown arrow on the right.
- or a Project No.**: A text input field containing the value 'PROJ1'.
- What is the description of the project?**: A text input field containing the value 'Software Project'.
- Project Template**: An empty text input field with a dropdown arrow on the right.
- What is the status of the project?**: A dropdown menu with 'Order' selected and highlighted in blue.

At the bottom of the dialog, there are three buttons: 'Back', 'Next', and 'Finish'.

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

CREATE PROJECT WIZARD

Software Project

Project Template

What is the status of the project?

Order

Is the project created on a customer or a prospect?

Customer

Contact

Back Next Finish

8. Type **Customer “10000”** for The Cannon Group PLC.

CREATE PROJECT WIZARD ↗ ✕

Software Project

Project Template

...

What is the status of the project?

Order ▼

Is the project created on a customer or a prospect?

Customer ▼

On which Customer/Contact should the project be created?

10000 ...

Adatum Corporation

Back Next Finish

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.

CREATE PROJECT WIZARD

Choose a number series...

or a Project No.

What is the description of the project?

Project Template

What is the status of the project?

Back Next Finish

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

CREATE PROJECT WIZARD ↗ ✕

What is the Project Posting Group of the Project?

SETTING UP	...	
What is the starting date of the proj...	1/24/2019	...
What is the ending date of the proje...		...
Resource Discount %	0.00	
Item Discount %		0.00
Expense Discount %		0.00
Resource Group Discount %		0.00

Back Next Finish

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

CREATE PROJECT WIZARD ↗ ✕

What is the Project Posting Group of the Project?

SETTING UP	...
What is the starting date of the proj...	1/1/2017 ✕ ...
What is the ending date of the proje...	...
Resource Discount %	0.00
Item Discount %	0.00
Expense Discount %	0.00
Resource Group Discount %	0.00

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

CREATE PROJECT WIZARD ↗ ✕

What is the Project Posting Group of the Project?

SETTING UP		...
What is the starting date of the proj...	1/1/2017	...
What is the ending date of the proje...	12/31/2017	...
Resource Discount %	0.00	✕
Item Discount %		0.00
Expense Discount %		0.00
Resource Group Discount %		0.00

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

CREATE PROJECT WIZARD ↗ ✕

What is the Project Posting Group of the Project?

SETTING UP	...	
What is the starting date of the proj...	1/1/2017	...
What is the ending date of the proje...	12/31/2017	...
Resource Discount %	10	✕
Item Discount %		0.00
Expense Discount %		0.00
Resource Group Discount %		0.00

Back Next Finish

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

CREATE PROJECT WIZARD ↗ ✕

What is the Project Posting Group of the Project?

SETTING UP	...	
What is the starting date of the proj...	1/1/2017	...
What is the ending date of the proje...	12/31/2017	...
Resource Discount %	10.00	
Item Discount %	0.00 ✕	
Expense Discount %	0.00	
Resource Group Discount %	0.00	

Back Next Finish

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

CREATE PROJECT WIZARD  

What is the Project Posting Group of the Project?

SETTING UP	...	
What is the starting date of the proj...	1/1/2017	...
What is the ending date of the proje...	12/31/2017	...
Resource Discount %	10.00	
Item Discount %	0.00	
Expense Discount %	0.00	✕
Resource Group Discount %	0.00	

Back Next Finish

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

CREATE PROJECT WIZARD ↗ ✕

What is the Project Posting Group of the Project?

SETTING UP	...	
What is the starting date of the proj...	1/1/2017	...
What is the ending date of the proje...	12/31/2017	...
Resource Discount %	10.00	
Item Discount %	0.00	
Expense Discount %	0.00	
Resource Group Discount %	0.00 ✕	

Back Next Finish

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

CREATE PROJECT WIZARD ↗ ✕

What is the Project Posting Group of the Project?

SETTING UP		...
What is the starting date of the proj...	1/1/2017	...
What is the ending date of the proje...	12/31/2017	...
Resource Discount %	10.00	
Item Discount %		0.00
Expense Discount %		0.00
Resource Group Discount %		0.00

Back Next Finish



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.

CREATE PROJECT WIZARD

What is the pipeline of the project?

[Empty input field with dropdown arrow]

Code	Description
(There is nothing to show in this view)	
+ new	Select from full list

Who is the person responsible for the project?

[Empty input field with dropdown arrow]

Responsible

[Empty input field]

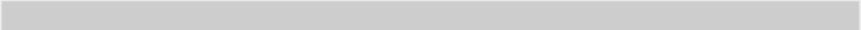
Back Next Finish

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

HOME ACTIONS

SELECT - PIPELINE + New  

CODE	DESCRIPTION	PERCENTAGE
<input type="text" value="100"/> 	 100% possibility	100.00

<  >

CREATE PROJECT WIZARD  

What is the pipeline of the project?



What is the active budget version of the project?



Who is the Project Manager on the Project?



Project Manager

Who is the person responsible for the project?



Responsible

Accept **“Anchor”** as the **Active Budget Version**.

CREATE PROJECT WIZARD ↗ ✕

What is the pipeline of the project?

...

What is the active budget version of the project?

...

Who is the Project Manager on the Project?

...

Project Manager

Who is the person responsible for the project?

...

Responsible

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

CREATE PROJECT WIZARD

What is the pipeline of the project?

100

What is the active budget version of the project?

ANCHOR

Who is the Project Manager on the Project?

PM0001

Project Manager

PM0001

Who is the person responsible for the project?

Responsible

Back Next Finish

HOME ACTIONS NAVIGATE REPORT

New New Resource Group Edit View Delete Statistics Resource Statistics Resource Usage Resource - Cost Breakdown Resource - Price List Open in Excel Page

RESOURCE LIST + New

NO.	NAME	TYPE	BASE UNIT OF MEASURE	UNIT COST	PRICE/PR... CALCULATI	PROFIT %	UNIT PRICE
PM0001	PM0001	Person	HOUR	35.00	Profit=Price...	0	175.00
PM0002	PM0002	Person	HOUR	35.00	Profit=Price...	0	175.00

OK Cancel

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

CREATE PROJECT WIZARD

What is the pipeline of the project?

100

What is the active budget version of the project?

ANCHOR

Who is the Project Manager on the Project?

PM0001

Project Manager

PM0001

Who is the person responsible for the project?

PM0001

Responsible

PM0001

Back Next Finish

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

CREATE PROJECT WIZARD

Project manager

PM0001

Who is the person responsible for the project?

PM0001 ...

Responsible

PM0001

Create task template ←

Create payment

Create invoicing setup

Internal Project

Private Project

Customer Project

Back Next Finish

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

CREATE PROJECT WIZARD

Project manager

PM0001

Who is the person responsible for the project?

PM0001 ...

Responsible

PM0001

Create task template	<input checked="" type="checkbox"/>
Create payment	<input type="checkbox"/>
Create invoicing setup	<input checked="" type="checkbox"/>
Internal Project	<input type="checkbox"/>
Private Project	<input type="checkbox"/>
Customer Project	<input checked="" type="checkbox"/>

Back Next Finish

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

CREATE PROJECT WIZARD

Project manager

PM0001

Who is the person responsible for the project?

PM0001

Responsible

PM0001

Create task template

Create payment

Create invoicing setup

Internal Project

Private Project

Customer Project

Back Next Finish

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

CREATE PROJECT WIZARD

Project manager

PM0001

Who is the person responsible for the project?

PM0001

Responsible

PM0001

Create task template

Create payment

Create invoicing setup

Internal Project

Private Project

Customer Project

Back Next Finish

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

CREATE PROJECT WIZARD

What is the KPI type of the Project?

Fixed
Time/Material

What is the Resource Invoice type of the Project?

Time/Material

What is the Item Invoice type of the Project?

Fixed

What is the Expense Invoice type of the Project?

Fixed

Back Next Finish

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

CREATE PROJECT WIZARD

What is the KPI type of the Project?

Time/Material

What is the Resource Invoice type of the Project?

Fixed
Time/Material
Use Template

Fixed

What is the Expense Invoice type of the Project?

Fixed

Back Next Finish

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

CREATE PROJECT WIZARD

What is the KPI type of the Project?

Time/Material

What is the Resource Invoice type of the Project?

Time/Material

What is the Item Invoice type of the Project?

Time/Material

What is the Expense Invoice type of the Project?

Fixed

Back Next Finish

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

CREATE PROJECT WIZARD

What is the KPI type of the Project?

Time/Material

What is the Resource Invoice type of the Project?

Time/Material

What is the Item Invoice type of the Project?

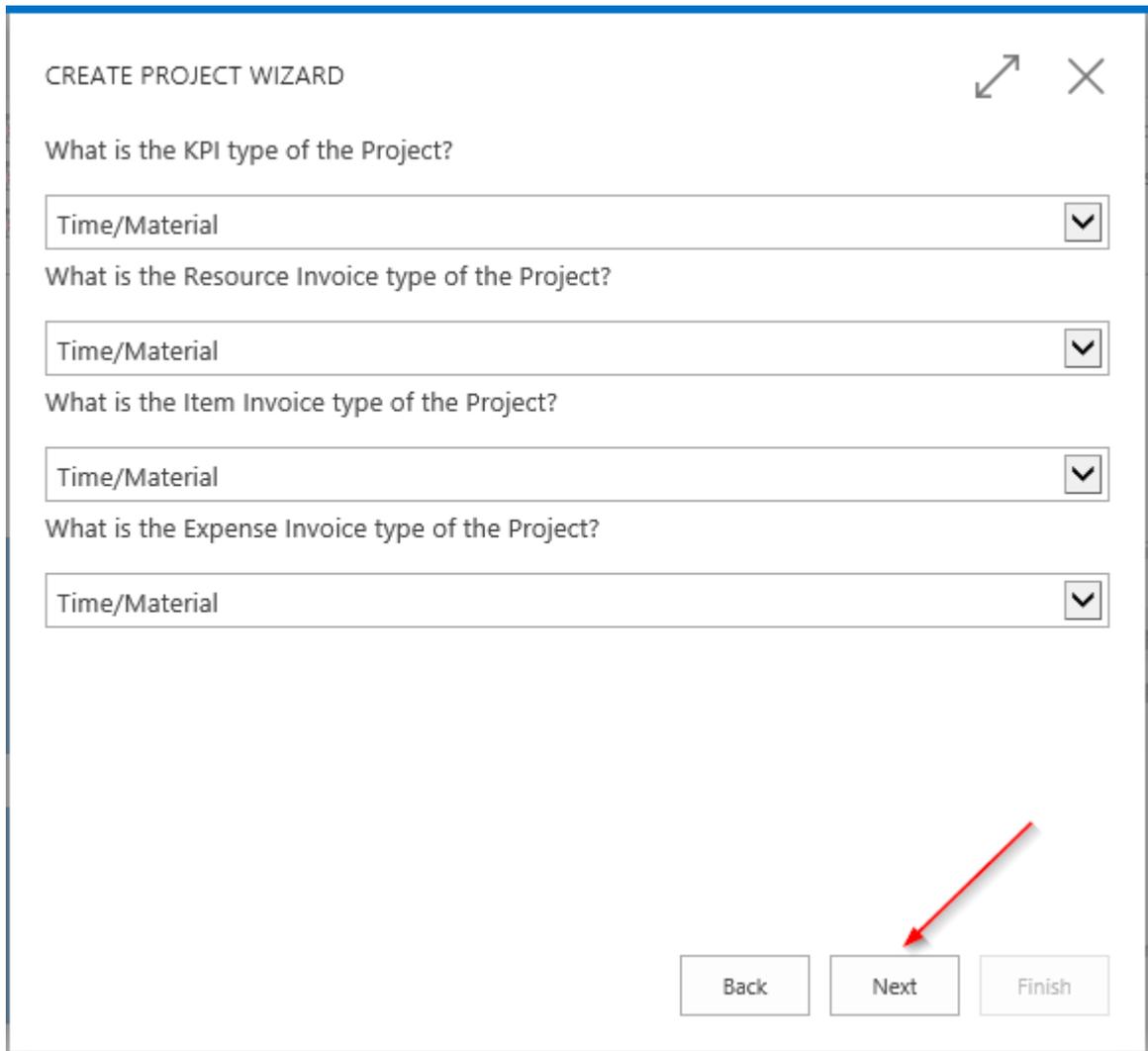
Time/Material

What is the Expense Invoice type of the Project?

Time/Material

Back Next Finish

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



CREATE PROJECT WIZARD

What is the KPI type of the Project?

Time/Material

What is the Resource Invoice type of the Project?

Time/Material

What is the Item Invoice type of the Project?

Time/Material

What is the Expense Invoice type of the Project?

Time/Material

Back Next Finish

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.

CREATE PROJECT WIZARD

Dimensions

DEPARTMENT	...
	...
PROJECT	...
	...
DEPARTMENT	...
	...
PROJECT	...
	...
CUSTOMERGROUP	...
	...

ADCA

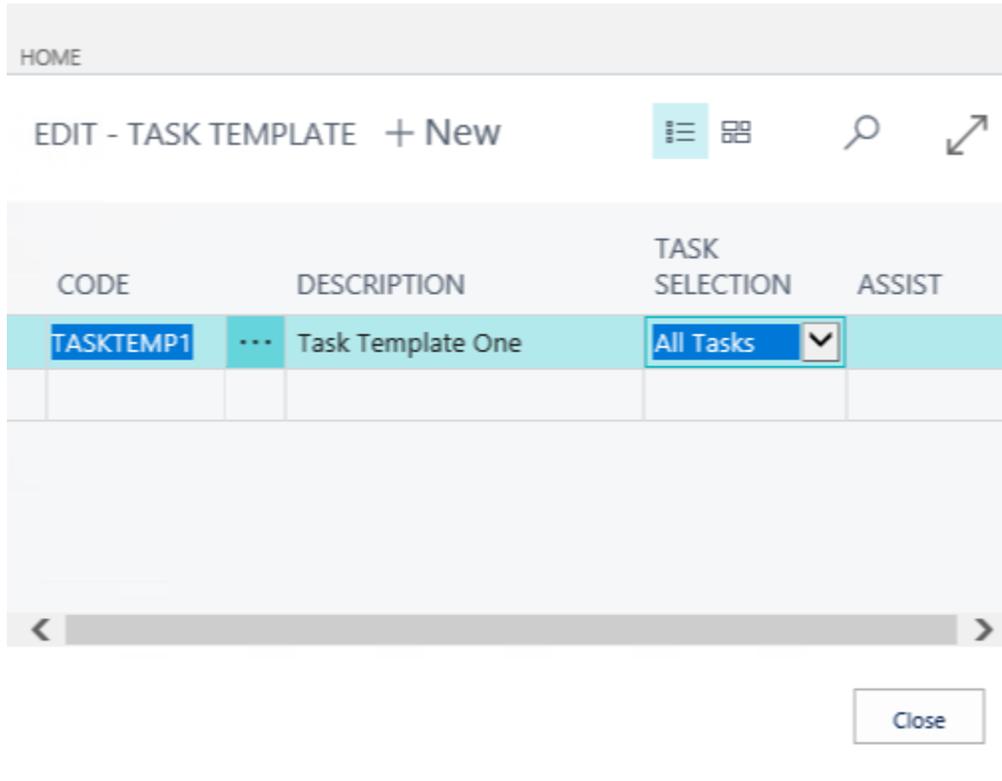
Back Next Finish

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

? Do you want to change the Project Manager on the Task List?

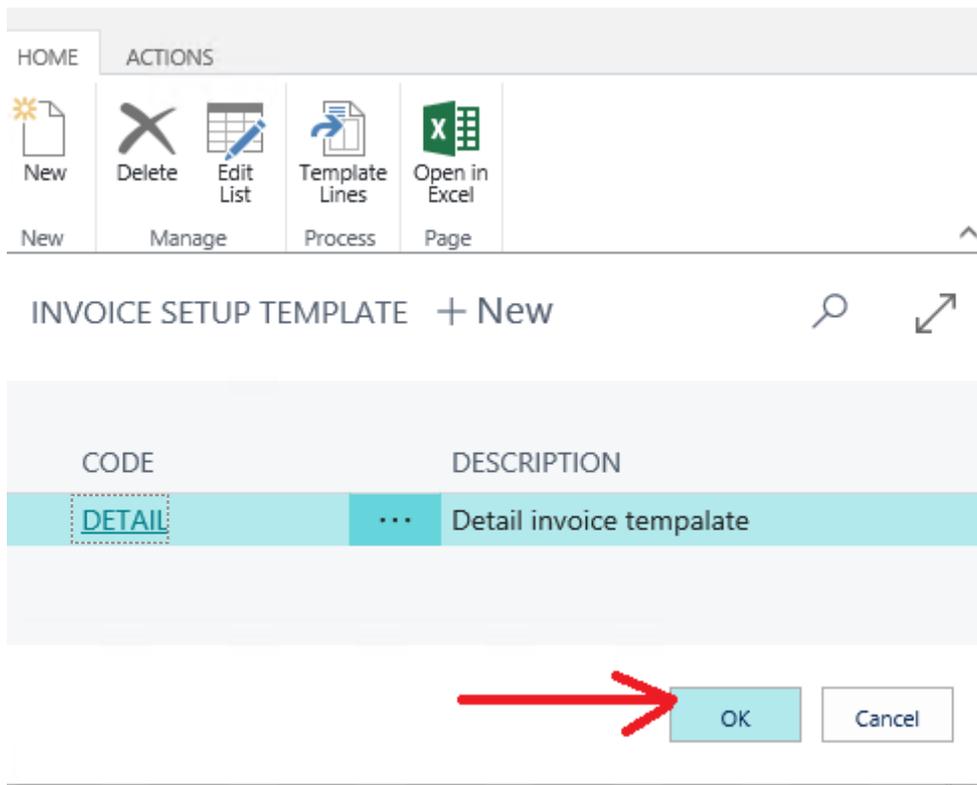
Yes No

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.

SEARCH FOR PAGE OR REPORT



Type page or report name to start search:

timesheet periods



1 search results:

[Search the help for 'timesheet periods' ?](#)

	NAME	DEPARTMENT
	Timesheet Periods	Time and Expense

- 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.

Resource: PM0001

Start Date	End Date	Resource	Type	Detail Level	Description	Open	Post...	Entr...
1/21/2019	1/27/2019	PM0001	Week	Day	Week 4/2019	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1/28/2019	2/3/2019	PM0001	Week	Day	Week 5/2019	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2/4/2019	2/10/2019	PM0001	Week	Day	Week 6/2019	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2/11/2019	2/17/2019	PM0001	Week	Day	Week 7/2019	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2/18/2019	2/24/2019	PM0001	Week	Day	Week 8/2019	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2/25/2019	3/3/2019	PM0001	Week	Day	Week 9/2019	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3/4/2019	3/10/2019	PM0001	Week	Day	Week 10/2019	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3/11/2019	3/17/2019	PM0001	Week	Day	Week 11/2019	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3/18/2019	3/24/2019	PM0001	Week	Day	Week 12/2019	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3/25/2019	3/31/2019	PM0001	Week	Day	Week 13/2019	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4/1/2019	4/7/2019	PM0001	Week	Day	Week 14/2019	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4/8/2019	4/14/2019	PM0001	Week	Day	Week 15/2019	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Close

- 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**.

HOME ACTIONS NAVIGATE **Time Sheet Lines** MANAGE LINE

Close Period Invoice All Previous Set Next Set Copy Period Copy Period Incl. Expenses/Items Update with budget Dimensions Expenses

Process Navigate Copy Update Entries

Edit - Timesheet

Filter
 Resource Code: PM0001 ... Period: Week 4/2019 ...
 Name: PM0001 Show Column Name:

Time Sheet Lines

Project No.	Task Code	Service Order Document Type	Service Lookup	Service Order No.	Work Type Code	Hour Bank No.	Unit of Measure Code	Tin Cu
<input type="text" value="..."/>		Quote					HOUR	

Close

HOME ACTIONS NAVIGATE REPORT

New Edit View Delete Job Actual to Budget (Price) Copy Job... Job Task Lines Statistics Dimensions WIP Invoice Documents History Report Page

New Manage Report Prepare Job WIP WIP

Jobs **+ new**

× You are all set up to create your first project. [Create it now](#)

No.	Description	Bill-to Customer No.	Status	Search Description
DEERFIELD, 8 WP ...	Setting up Eight Work Areas	40000	Open	SETTING UP EIG...
GUILDFORD, 10...	Setting up Ten Conference Rooms	50000	Open	SETTING UP TEN...
PROJ1 ...	Software Project	10000	Open	SOFTWARE PROJ...

OK Cancel

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

Time Sheet Lines

HOME ACTIONS NAVIGATE MANAGE LINE

Close Period Invoice All Previous Set Next Set Copy Period Copy Period Incl. Expenses/Items Update with budget Dimensions Expenses

Process Navigate Copy Update Entries

Edit - Timesheet

Filter

Resource Code ... Period ...

Name Show Column Name

Time Sheet Lines

Project No.	Task Code	Service Order Document Type	Service Lookup	Service Order No.	Work Type Code	Hour Bank No.	Unit of Measure Code	Times Currer
PROJ1	... 10110 ...	Quote					HOUR	

Close

Job Task Lines + new

HOME ACTIONS NAVIGATE REPORT

New Delete Edit List Job Actual to Budget (Price) Job Planning Lines Split Planning Lines... Indent Job Tasks Job Task Statistics WIP Create Sales Invoice... Sales Invoices/Credit Memos Open in Excel

New Manage Report Job Planning Lines Prepare Job Task WIP Invoice Documents Page

Job Task No.	Description	Job Task Type	Totaling	Job Posting Group	WIP-Total	WIP Method	Start
00000	... Project Begin	Begin-Total	00000..99999	SETTING UP			
10000	... Planning	Begin-Total	10000..19999	SETTING UP			
10110	... Initial Meeting	Posting		SETTING UP			
10120	... Requirments Gathering	Posting		SETTING UP			
10130	... Design	Posting		SETTING UP			
10140	... Presentation	Posting		SETTING UP			
19999	... Planning End	End-Total	10000..19999	SETTING UP			
20000	... Development	Begin-Total	20000..20999	SETTING UP			
20110	... Interface	Posting		SETTING UP			
20220	... Database	Posting		SETTING UP			
20230	... Screens	Posting		SETTING UP			
20240	... Reports	Posting		SETTING UP			
20250	... Menu Structure	Posting		SETTING UP			

OK Cancel

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

The screenshot shows the 'Edit - Timesheet' window with the following configuration:

- Resource Code: PM0001
- Period: Week 4/2018
- Time Sheet Lines table:

Project No.	Task Code	Unit of Measure Code	Keep when period closed	Cost Type	01/22/18	01/23/18	01/24/18	01/25/18	01/26/18	01/27/18	01/28/18
PROJ 1	100.10	HOUR	<input type="checkbox"/>	LABOR							

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

The screenshot shows the 'Edit - Timesheet' window with the following configuration:

- Resource Code: PM0001
- Period: Week 4/2018
- Time Sheet Lines table:

Project No.	Project Description	Task Code	Work Type Code	Keep when period closed	Cost Type	01/22/18	01/23/18	01/24/18	01/25/18	01/26/18	01/27/18
PROJ 1	WBS	100.10		<input checked="" type="checkbox"/>	LABOR	8.00	8.00	8.00	8.00	8.00	

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.

The screenshot shows the 'Time Sheet Lines' ribbon with the 'Submit Timesheet' button highlighted. A red arrow points from the 'Submit Timesheet' button to the 'Resource Name' field, which contains 'PM0001'. Below the ribbon, there is a table with columns: Project No., Task Code, Work Type Code, Hour Bank No., Unit of Measure Code, and Timesheet Currency Code. The first row of data shows 'PROJ1', '...', '10110', an empty cell, 'HOUR', and an empty cell.

Project No.	Task Code	Work Type Code	Hour Bank No.	Unit of Measure Code	Timesheet Currency Code
PROJ1	...	10110		HOUR	

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

The dialog box contains a question mark icon and the text 'Do you want to close the period?'. There are two buttons: 'Yes' and 'No'. The 'No' button is highlighted with a dashed border.

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

The screenshot displays a software application window titled "EDIT - TIME PERIODS LIST + new". The interface includes a top navigation bar with "HOME" and "ACTIONS" tabs. Below the navigation bar is a toolbar with icons for "New", "Delete", "Edit List", "Delete Periods", "Show Time Entries", "Show Time Sheet", and "Open in Excel". The main content area features a table with the following columns: Start Date, End Date, Resource, Type, Detail Level, Description, Open, Posted, and Entries. The table contains 17 rows of data, each representing a time period for resource PM0001. The "Open" column has checkboxes, and the "Entries" column has checkmarks. A search bar is located at the top right of the table area. The window title bar includes a close button (X) and a search icon.

Start Date	End Date	Resource	Type	Detail Level	Description	Open	Posted	Entries
1/21/2019	... 1/27/2019	PM0001	Week	Day	Week 4/2019	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
1/28/2019	... 2/3/2019	PM0001	Week	Day	Week 5/2019	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2/4/2019	... 2/10/2019	PM0001	Week	Day	Week 6/2019	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2/11/2019	... 2/17/2019	PM0001	Week	Day	Week 7/2019	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2/18/2019	... 2/24/2019	PM0001	Week	Day	Week 8/2019	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2/25/2019	... 3/3/2019	PM0001	Week	Day	Week 9/2019	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3/4/2019	... 3/10/2019	PM0001	Week	Day	Week 10/2019	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3/11/2019	... 3/17/2019	PM0001	Week	Day	Week 11/2019	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3/18/2019	... 3/24/2019	PM0001	Week	Day	Week 12/2019	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3/25/2019	... 3/31/2019	PM0001	Week	Day	Week 13/2019	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4/1/2019	... 4/7/2019	PM0001	Week	Day	Week 14/2019	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4/8/2019	... 4/14/2019	PM0001	Week	Day	Week 15/2019	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4/15/2019	... 4/21/2019	PM0001	Week	Day	Week 16/2019	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4/22/2019	... 4/28/2019	PM0001	Week	Day	Week 17/2019	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>