Dynamics 365 for Project Service Automation - User's Guide

Contents

Manage project-based sales

Project Service Automation capabilities in Microsoft Dynamics 365 (online) provide an end-to-end solution that helps sales and delivery teams engage customers and deliver billable projects on time and within budget. Microsoft Dynamics 365 for Project Service Automation helps you:

- Estimate, quote, and contract work
- Plan and assign resources
- Enable team collaboration
- Capture time, expense, and progress data for real-time insights and accurate invoicing

Note

The capabilities in this solution require Microsoft Dynamics CRM Online 2016 Update 1.

Project-based contracts

Project-based contracts relate quotes and orders to project plans, financial estimates, labor pricing, and billing arrangements, like time and materials or fixed price. The contract highlights key metrics, including profitability and feasibility.

Project planning

Visual project planning and estimation includes predecessors, automatic task scheduling, and views of sales and cost information for time and expenses. You can use the resulting plan in quotes and project contracts.

Resource management

Resource information includes the skills and proficiencies of your workforce. You can view and filter resources based on skills and availability, so you can assign the right people to the right projects. You can also track resource utilization and forecasting metrics.

Time, expenses, and collaboration

Team members can use the web or mobile apps to record time and expenses for multiple projects. Managers can easily approve new entries while understanding the financial implications of the newly-approved items. All team members can collaborate with an Office 365 workspace created for their project.

Project billing

Project invoices reflect the terms of the contract and the approved work and expenses. The financial impact of project work, including costs, unbilled revenue, and invoices, are recorded for use in analytics and integration into financial systems.

The following guides will help you set up and use Microsoft Dynamics 365 for Project Service Automation:

Install and customize Dynamics 365 for Project Service Automation

Configure Dynamics 365 for Project Service Automation

Account Manager's Guide - Dynamics 365 for Project Service Automation

Project Manager's Guide - Dynamics 365 for Project Service Automation

Resource Manager's Guide - Dynamics 365 for Project Service Automation

Time, Expense, and Collaboration Guide - Dynamics 365 for Project Service Automation

Install and customize Dynamics 365 for Project Service Automation

Project Service Automation capabilities in Microsoft Dynamics CRM Online 2016 Update 1 is an end-to-end solution that you need to install before users can start using the capabilities to manage and deliver project-based sales. While it's an end-to-end solution, you can still make customizations as needed to suit your organization.

Install Microsoft Dynamics 365 for Project Service Automation

Microsoft Dynamics 365 for Project Service Automation is a preferred solution. There are several ways to purchase the solution.

Important

You can't run an older version of Microsoft Dynamics 365 for Field Service and a new version of Microsoft Dynamics 365 for Project Service Automation on the same instance.

Enable help for Microsoft Dynamics 365 for Project Service Automation

To make sure users get the right information when they click the **Help** button, you need to set Dynamics 365 to use custom Help. Go to **Settings** > **Administration**, click **System Settings**, click the **General** tab, and select **Yes** for **Use custom Help for customizable entities**.

Create required records for Microsoft Dynamics 365 for Project Service Automation

Now that you've installed Microsoft Dynamics 365 for Project Service Automation, you need to create the required records before you can start using Project Service Automation capabilities in Dynamics 365. In this step, you'll create a parameters setting (or edit an existing one), save it, and then tell Dynamics 365 to create certain records that the Project Service Automation capabilities need to work properly.

1. Go to **Project Service > Parameters**.
2. Click a parameters setting, or click **New** to create a new one.
3. Enter a description for the setting, and then click **Save**.
4. Click **Create Required Records**.
5. When you see a **Processing complete** message, click **OK.**

Customize Microsoft Dynamics 365 for Project Service Automation forms and reports

If you want to customize any of the Project Service Automation forms, dashboards, or reports, you can find more information about customizing Microsoft Dynamics 365 in the following links:

- TechNet: Customize your CRM system
- TechNet: Create and design forms
- TechNet: Create and edit dashboards
- TechNet: Create and edit processes
- MSDN: Developers guide to reports for Microsoft Dynamics CRM

Use demo data

To become familiar with Project Service Automation capabilities in Microsoft Dynamics CRM Online 2016 Update 1, it's useful to have a pre-configured environment to explore. For this purpose, we've created a separate managed solution that makes it easier to explore and learn about the new solution. Running this package deployer performs the following actions:

- Builds default parameters that drive behavior of Project Service Automation
- Creates default working calendars
- Imports sample data such as resources, projects, prices, roles, and other key information
- Associates resources with the proper working calendar
- Updates images of contacts and accounts

The preview demo data has skills, roles, projects, opportunities, and other configurations and settings that might be found in a global IT consulting firm.

Important

There is no way to un-install the demo data. You should only use this package on demonstration or test systems. Some elements of the demo data and package deployer may be used to provision basic Project Service Automation requirements.

Install Project Service Automation demo data

If you haven't already, install the Project Service Automation preferred solution. See Install and customize Dynamics 365 for Project Service Automation for information on how to do this.

When the configuration completes, you can load the demo data.

Download and unpack the Project Service Automation demo data

The demo data solution is distributed as a .zip file (**PS_DemoData_Preview.zip**) from the Microsoft Download Center at http://go.microsoft.com/fwlink/?LinkID=799201.

Modify users

The Project Service Automation demo data uses two standard users that act as two key roles in project-based organizations, a Project Manager (Prakash Kovvuru) and a Team Member (Tricia Fejfar). The Dynamics 365 organization that you are using must have two users that act as these standard roles. If your system is purely a demo environment, we recommend you create users with these names. For preview, the users you use should have System Administrator privileges in Dynamics 365.

If you want to use other user names, such as those of existing users on your tenant, edit the names in the config file named **DemoDataConfig.xml** within the **PkgFolder** folder in the demo data distribution package and replace the **NewName** value with the full name of your licenced and activated users. For example, if you have two users called User One and User Two, your config file would look like:

```
<configkeys>
          <user SecurityRole="Project Manager" NewName="User One" OriginalName="Prakash Kovvuru"/>
          <user SecurityRole="Project Consultant" NewName="User Two" OriginalName="Tricia Fejfar"/>
          <key KeyValue="Yes" KeyName="DoProjectServiceProcessing"/>
</configkeys>
```

Run the package

To set up demo data:

1. Run **PackageDeployer.exe** in the unzipped folder.
2. Agree to the terms.
3. On the next window:
    a. Select deployment type **Office 365**.
    b. Use the user and password of a system administrator.
    c. Make sure **Display list of available organizations** is checked.
4. Select the appropriate preview organization.
5. Click **Next** four times. Demo data will take up to two hours to load. Ensure your client computer remains on and connected to the Internet during the process.
6. After loading completes, click **Finish** to exit the package deployer.

Verify the data

After the demo data completely loads to the **Resource Availability** page or the **Projects** page within the Project Service Automation navigation menu, log in as one of the users defined in Modify Users above. You should see a list of projects and resources respectively. You can use the standard data import functions to review the status of your data load from the menu **Settings > Data Management > Data Imports**.

Add resource bookings

You can add resource bookings to make the **Resource Availability** page shows a more realistic assignment distribution. This file is currently not added automatically by the package deployer.

1. Go to **Settings > Data Management > Data Imports** and then click **Import Data**.
2. When prompted for the file, choose the file **Team Member Bookings** from the **PkgFolder** folder in the demo data that you extracted.
3. When prompted for a data map, choose **Team Member Bookings DM**.
4. Ignore any unmapped fields and complete the wizard.

Multi-currency scenarios and resource bookings

You can load two additional files from the **PkgFolder**:

- **C1 Bookable Resources**: Populates resource bookings and team members to show how the **Resource Availability** view appears with more realistic bookings.
- **Default Price Lists**: Populates the list of default price lists found in **Project Service > Parameters >Default Price Lists**. This helps demonstrate multi-currency, multi-organization functionality.

To load these files, you need to run Package Deployer a second time:

1. Open the **ImportConfig.xml** file in the **PkgFolder** folder using a text editor like Notepad.
2. Remove the comments around the two file names.
3. Re-run the package deployer, which will load just these two files. Note that all of the files already loaded will be skipped.

Activate products

If you want to explore using products and projects together, publish products and add them to price lists.

1. Go to **Settings > Product Catalog**.
2. Click **Families & Products**.
3. Select **Subscription Software** from the list and click **Publish > Publish Hierarchy**.
4. Refresh the grid to ensure that the family and associated items (Dynamics 365 Enterprise, Professional, and Standard) are now **Active**.
5. Go to **Project Service > Settings > Price Lists**. You will see different price lists for different currencies for Software Rates (such as France Software Rates 2016 or US Software Rates 2016).

6. For each currency you wish to use, open the price list.
7. Expand **Price List Items**, and add the three Dynamics 365 Software License products to the list.

Group collaboration

The Office 365 Groups integration feature is a great complement to Project Service Automation. To turn it on in your environment:

1. Enable the solution from the Dynamics 365 Administration Center.
2. Go to **Settings > Office 365 Groups**.
3. Add two entities, Opportunity and Project.
4. Publish the changes.

Customize the demo data

You might want to use this package deployer technique to tailor a demo environment to a different industry, language, or scenario. For instance, you might want skills and roles appropriate for an accounting firm, or different organizational units, or different resource names.

If you're familiar with the standard data management functions of Dynamics 365, you can use the contents of the **PkgFolder** in conjunction with editing the **ImportConfig.xml** file found in that folder to load subsets of data, or make changes to the demo data. For more information about the data import functions of Dynamics 365, see MSDN: Import data at https://msdn.microsoft.com/en-us/library/gg328321.aspx.

Configure Dynamics 365 for Project Service Automation

Before you can use the Project Service Automation capabilities in Microsoft Dynamics 365 to manage your accounts, projects, and resources, you need to complete a few configuration steps to ensure the Project Service Automation solution matches your organization's needs. These steps include:

- Set up time units (Project Service Automation). Configure the time units in the product catalog that you'll use as a base for scheduling and billing your projects.
- Set up currencies and exchange rates (Project Service Automation). Set up the currencies to use for your projects.
- Create organizational units (Project Service Automation). Set up the groups that your company uses to divide its business, whether by geography, business function, or other logical division.
- Set up invoice frequencies (Project Service Automation). Set up time periods that you want to use for billing your clients.
- Configure transaction categories (Project Service Automation). Set up transaction categories your consultants can charge their billable and unbillable expenses to.

- Configure expense categories (Project Service Automation). Set up the categories your consultants can charge their billable and unbillable expenses to.
- Create product catalog items (Project Service Automation). Add the products you sell, such as software licenses, to the product catalog.
- Create a price list (Project Service Automation). Configure different price lists, depending on how much you want to charge your clients for each role their project requires.
- Set up resources (Project Service Automation). Add the skills, proficiencies, resource roles, and other resource information that you'll need for your projects.

Note

The capabilities in this solution require Microsoft Dynamics CRM Online 2016 Update 1.

Set up time units

Configure the time units in the product catalog that you'll use as a base for scheduling and billing your projects.

1. Go to **Settings > Product Catalog**.
2. Click **Unit Groups**.
3. Click the **Time** unit group (created during Microsoft Dynamics 365 for Project Service Automation installation).
4. On the **Units** tab, click **Add New Unit**, and then change the values as necessary. Add as many units as you need. For example, you might want to create the following units:
    - **Day** with **Base unit** = **Hour** and **Quantity** = 8
    - **Week** with **Base unit** = **Day** and **Quantity** = 5

Set up currencies and exchange rates

To create quotes and invoice your customers in Microsoft Dynamics 365 for Project Service Automation, you need to set up the currencies and exchange rates for the areas in which you do business.

1. Go to **Settings > Business Management**.
2. Click **Currencies**.
3. Click **New**.
4. Select the three-letter ISO Code of the currency to set up and set the exchange rate with the base currency.

Create organizational units

Your company probably organizes its consulting business by geography, function, or other areas. You can create organizational units that reflect your consulting business. A Microsoft Dynamics 365 for Project Service Automation organizational unit is a group or division in a professional services company that employs billable resources with cost rates that are distinct from other such groups or divisions in the company.

Note

A Microsoft Dynamics 365 for Project Service Automation organizational unit is separate from a business unit in Dynamics 365. Business units are more of a security structure that affects levels of access to Dynamics 365 information, and are usually organized around company divisions, like parent company and subsidiaries or divisions. Organizational units represent how your consulting company categorizes its different businesses, whether by geographic location (like EMEA or LATAM), by function (like Product Development or IT Outsourcing), or by other parameters.

1. Go to **Project Service > Organizational Units**.
2. Click **New**.
3. In the **General** area, enter a name for the organization unit in **Name**, and fill in the other fields as necessary.
4. Click **Save** to create the record so you can continue editing it.
5. Under **Cost Price Lists**, click **+** to add a price list. You can only add price lists with the **Cost** context here.
6. In the **Name** field, click the **Search** button and select a price list you want to make available to this organizational unit. Continue adding price lists as needed.
7. When you're done, click **Save** at the bottom right corner of the screen.

Set up invoice frequencies

Project Service Automation invoice frequencies determine how often you bill your clients, and on which day of the time period you specify. Set up an invoice frequency for each time period you plan to use for billing your clients, such as monthly, biweekly, or weekly.

1. Go to **Project Service > Invoice Frequencies**.
2. Click **New**.
3. In the **General** area, enter a name for the invoice frequency in **Name**.
4. In **Period**, select **Monthly**, **Biweekly**, or **Weekly**.
5. If you specified a period of monthly or biweekly, in **Days of run**, select **Day of period** to invoice on the specified day of the period (whether weekday or weekend), or select **Weekday of period** to invoice on the specified weekday of the period.

6. If you specified a period of monthly, in **Runs per month**, select the number of times per month you want to run the invoice.
7. In the **Invoice Frequency Details** area, change the day or weekday details as necessary to make sure the invoice runs on the correct day or weekday of the period you specified.
8. When you're done, click **Save** at the bottom right corner of the screen.

Configure transaction categories

Set up transaction categories to define a superset of expense categories.

1. Go to **Project Service > Transaction Categories**.
2. Click **New**.
3. In the **General** area, fill in the fields as needed.
4. Click **Save** at the bottom right corner of the screen.

Configure expense categories

Your consultants incur expenses when they work for your clients, including airfare, meals, mileage, and other expenses. Set up expense categories your consultants can use to enter their expenses, so you can invoice your client for those expenses.

Each expense category can have its own unit group and unit. You can define pricing for each expense category for each unit in the unit group assigned to the expense category.

1. Go to **Project Service > Expense Categories**.
2. Click **New**.
3. In the **General** area, fill in the fields as needed. It's a good practice to set up the following expense categories at a minimum:
   - Airfare
   - Hotel
   - Meal
   - Car rental
   - Per diem
4. Click **Save** at the bottom right corner of the screen.

Create product catalog items

If you want to include products, such as software licenses, on your project quotes and estimates, you need to add each product to the product catalog in Microsoft Dynamics 365.

Create a price list

Price lists provide a template your account managers can use for creating quotes and projects, and for establishing the costs of a project. They provide a line item list of roles and expenses, and the price you will charge for each. You can create multiple price lists so that you can maintain separate price structures for different regions you sell your products in or for different sales channels. It's a good idea to create at least one price list for every currency you plan to bill your customers in.

To create financial estimates for the work to be delivered, make sure every project has a backing cost and sales price list. Set up a default cost and sales pricelist that applies to all projects created in your organization.

Price lists rely on roles and expense categories, so before you create a price list, make sure you've already configured the roles and expense categories you want to use while creating the price list.

1. Go to **Project Service > Price Lists**.
2. Click **New**.
3. In **Context**, select whether this price list is for **Cost**, **Purchase**, or **Sales**.
4. In **Name**, enter a name for the price list.
5. In **Currency**, select the currency you're going to use for billing or costing.
6. In **Time Unit**, specify the period of time the price applies to, such as day or hour.
7. Fill in the **Start Date**, **End Date**, and **Description** as needed.
8. Click **Save** to create the record so you can continue editing it.
9. To add a role price to the price list, click **+** under **Role prices**.
10. In the **Role Price** pane, fill in the details, and then click **Save**. Continue adding role prices as necessary. When you're done, click **Save** at the bottom right corner of the screen.
11. To add an expense category price to the price list, click **+** under **Category prices**.
12. In the **Transaction Category Price** pane, fill in the details, and then click **Save**. Continue adding category prices as necessary. When you're done, click **Save** at the bottom right corner of the screen.
13. To add price list items to the price list, click **+** under **Price List Items**.
14. In the **Price List Item** pane, fill in the details, and then click **Save**. Continue adding price list items as necessary. When you're done, click **Save** at the bottom right corner of the screen.
15. To add territory relationships to the price list, click **+** under **Territory Relationships**.
16. In the **New Connection** window, fill in the details, and then click **Save**. Continue adding territory relationships as necessary. When you're done, click **Save** at the bottom right corner of the screen.

Set up resources

Before requesting or assigning resources in Dynamics 365 Project Service Automation, you need to define the roles and the skill sets that your clients' projects need. This requires some configuration on your part:

- Add resource skills (Project Service Automation)
- Set up proficiency models (Project Service Automation)
- Add resource roles (Project Service Automation)
- Configure resource roles (Project Service Automation)
- Associate skills with resource roles (Project Service Automation)
- Add resources (Project Service Automation)
- Associate skills with resources (Project Service Automation)
- Create a work hours template (Project Service Automation)
- Apply a calendar to a resource (Project Service Automation)
- Configure additional parameters settings (Project Service Automation)

Add resource skills

Your clients' projects no doubt require a variety of different skills to complete the job, such as SQL programming or agile methodologies. Enter each skill so you can associate it with resource roles and resources later on.

1. Go to **Project Service > Resource Skills**.
2. Click **New**.
3. In the **General** area, enter a name for the skill in Name, and then fill in the other fields as necessary.
4. Click **Save**.

When you create a new skill, it's automatically activated. If you don't want this skill available for use yet, click **Deactivate** at the top of the screen. Then go back and activate it when you want to make it available.

In the next step, you'll set up proficiency models so you can rate a consultant's proficiency with each skill and match it to the proficiency a project requires.

Set up proficiency models

Now that you've added the skills for your clients' projects, you need a way to rate your consultants' skills so you can match them to project requirements. You can use the default proficiency model, edit it, or create a new one to match the needs of your organization.

1. Go to **Project Service > Proficiency Models**.
2. To view or edit the default proficiency model, click **Default Rating Model** in the list, or to create a new proficiency model, click **New**.
3. If you're creating a new proficiency model, fill in the fields in the **General** area, and then click **Save** to create the record so you can continue editing it. When you create your own proficiency model, keep in mind that higher numbers are better.

   For example, if you're viewing or editing the default rating model, you'll see the following proficiency levels in **Rating Values**.

Name	Value
Familiar	1
Good	2
Proficient	3

4. To add or change a proficiency level, click the table button and make the changes you want.
5. Click the **Save** button in the bottom right corner of the screen.

Add resource roles

Set target utilization rates for each role. These settings determine resource availability and utilization when you're staffing projects and analyzing actuals.

1. Go to the resource role you want to configure the utilization for (**Project Service > Resource Role**).
2. Click the down arrow next to the resource role at the top of the screen.
3. Click **Role Utilization**.
4. Click **Add New Role Utilization**.
5. In the **General** area, fill in the fields as needed.
6. Click **Save** or **Save & Close**.

Configure resource roles

Roles play an important part in project planning, when determining resource requirements or costs of a project. For each role your projects require, you need to create a resource role and associate skills and proficiencies to that role. For example, you might want to create roles for Developer, Project Manager, or Game Tester. You'll also set the skills and proficiency levels required for the role.

Configure resource roles to ensure effective project estimation for your organization. Also make sure you accurately set the billing type. An item set with a non-chargeable billing type doesn't show up on contract or quote lines.

Once you've set up resource roles, you can set up cost and sales prices with a price list.

For each role you want to add, do the following:

1. Go to **Project Service > Resource Roles**.
2. Click **New**.
3. In the **General** area, enter a name for the role in **Name**, and then fill in the other fields as necessary.
4. Click **Save** to create the record so you can continue editing it.
5. In the **Skills** area, click **+** to add a skill.
6. In the **Role competency requirement** pane, click in the **Skill** field, click the **Search** button, and then select a skill.
7. Select a proficiency for that skill, and then click **Save**.
8. Continue adding skills as necessary. When you're done, click **Save** at the bottom right corner of the screen.
9. To make this resource role available for projects to use, click **Activate**.

Associate skills with resource roles

While you were adding resource roles, you probably already associated some skills to them. From time to time, you might need to add additional skills to a resource role.

1. Go to **Project Service > Resource Roles.**
2. Click the resource role you want to add skills to.
3. In the **Skills** area, click **+** to add a skill.
4. In the Role competency requirement pane, click in the **Skill** field, click the **Search** button, and then select a skill.
5. Select a proficiency for that skill, and then click **Save**.
6. Continue adding skills as necessary. When you're done, click **Save** at the bottom right corner of the screen.

Add resources

Add resources so you can book them for projects. Resources can include users, contacts, accounts, groups, or equipment—anything that you might want to include in your project scheduling and invoicing.

You can assign resources to organizational units if you need to have different costing and pricing for resources for different divisions in your company.

1. Go to **Project Service > Resources.**
2. Click **New**.
3. Select the **Resource Type**, and then select the settings you want for each field.
4. Click **Save** to save the record so you can continue editing it.
5. To add a skill for the resource, click **+** under **Resource Skills**.
6. In the screen that pops up, fill in the fields as needed and click the **Save** button at the bottom right corner of the screen.
7. Continue adding skills as necessary.
8. To add a resource role, click **+** under **Resource Role**.
9. When you're done making changes, click **Save** at the bottom right corner of the screen.

Associate skills with resources

In the previous step, you already associated some skills with a new resource. From time to time, you might need to add additional skills to a resource.

1. Go to **Project Service > Resources**.
2. Double-click the resource you want to add skills to.
3. In the **Skills** area, click **+** to add a skill.
4. In the screen that pops up, fill in the fields as needed, and then click the **Save** button at the bottom right corner of the screen.
5. Continue adding skills as necessary. When you're done, click **Save** at the bottom right corner of the screen.

Create a work hours template

Before you can create project schedules, you need to set up a project calendar that defines the number of working hours to accommodate per day in the schedule and any business closures. You do this with a work hours template, which contains details about work hours per day, days off, and any other business closures.

When you're creating a project, you associate a work template to the project calendar to apply the schedule for the project.

There are two ways you can create a work hours template:

- Create a work hours template based on a resource's calendar.
- Create a new work hours template.

To create a work hours template based on a resource's calendar

1. Go to **Project Service > Resources**.
2. Select the resource you want to base your work hours on.
3. Click **Save Calendar As**, enter a name for the work hours template, and then click **Save**.
4. When you're done changing options, click **Save and Close**.
5. Click the **Save** button at the bottom right corner of the screen.

To create a new work hours template

1. Go to **Project Service > Work Hours Templates**.
2. Click **New**.
3. Enter a name for the work hours template.
4. Select a resource to base the work hours on, and then click **Save**.

Apply a calendar to a resource

Once you've created a work hours template, you need to assign it to resources so their calendars reflect the working hours specified in the template.

1. Go to **Project Service > Resources**.
2. Select the resource you want to set the calendar for. You can select more than one resource.
3. Click **Set Calendar**.
4. Choose the work hours template you want to apply.
5. Click **Apply**.

Configure additional parameters settings

Once you've configured the items in previous topics, you need to set additional project parameters to use for your projects. When you first installed Microsoft Dynamics 365 for Project Service Automation, you created a parameters setting to first create all the records required for Microsoft Dynamics 365 for Project Service Automation. Now it's time to go back and configure additional fields for this parameters setting.

You'll need to have configured the following settings:

- Organizational unit
- Invoice frequency

- Work hours template
- Price list

In this step, you'll also indicate what type of resource allocation you want:

- **Central**. Only resource managers can allocate resources to projects.
- **Hybrid**. Resource managers, project managers, and account managers can allocate resources to projects.

To set project parameters:

1. Go to **Project Service > Parameters**.
2. Click the parameters setting you want to configure (the one you created when you first installed Microsoft Dynamics 365 for Project Service Automation), or click **New** to create a new one.
3. In the **General** area, set all the options for your project parameters.
4. In the **Price List** area, click **+** to add a price list, select a price list in the **Project Parameter Price List** drop-down list, and then click **Save**.
5. Click the **Save** button in the bottom right corner of the screen.

Enable Project Finder Mobile app features

Your resources can use the Project Finder Mobile app on their phone with Microsoft Dynamics 365 for Project Service Automation to find new projects to work on and update their skill sets.

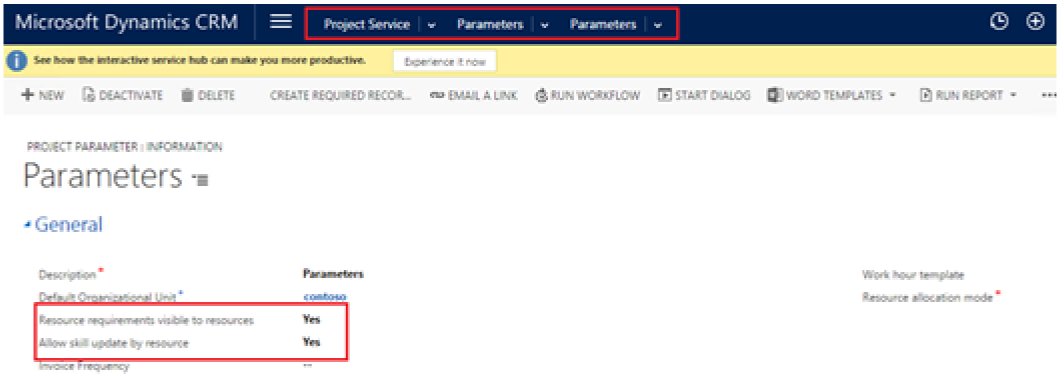
The app is available for Apple iPhone, Android phones, and Windows Phone.

You need to set a couple of options in the parameters setting for your organizational unit to allow users to view projects' resource requirements and update their skills.

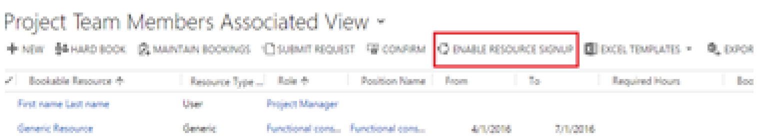
Note

The Project Finder Mobile app only works with Dynamics 365 (online) (not with on-prem installations).

1. Go to **Project Service > Parameters**.
2. Click the parameters setting you want to use for allowing the Project Finder Mobile app features.
3. In the **General** area, set **Resource requirements visible to resources** to **Yes**.
4. Set **Allow skill update by resource** to **Yes**.



This is a global setting. Project managers can set whether an individual project will be visible on that project's **Project Team** page.



Email notifications

Microsoft Dynamics 365 for Project Service Automation sends emails regarding resource requests to the following recipients at the following times:

Recipient	Event
Project manager	• When a resource signs up for a project with the Project Finder Mobile app.
Resource	• When the project work the resource has signed up for has already been fulfilled by another resource. • When their skill approval request has been approved or rejected. • When their project sign up request has been approved or rejected.

Privacy notice

By enabling the Project Finder mobile app, you provide users in the organization with visibility into project work and the ability to sign up for work. Users can also work with the Project Finder app to view and update their skills. The Project Finder mobile app is enabled via the Project Service Parameters Setting, by setting the value of the Resource requirements visible to resources and Allow skill update by resource attributes to Yes. Changing the value of these attributes to No disables this functionality.

When using this feature, be sure to consider the following key points:

- Resource requirements visible to resources. Setting this attribute to Yes provides users with visibility into project work exposes the following information about a project:
  - Project name
  - Role name
  - Customer name
  - Customer address
  - Work duration
- Allow skill update by resource. Setting this attribute to Yes provides users with the ability to add skills to their profiles and to set their level of proficiency for the skills they add.

Resource Manager's Guide - Dynamics 365 for Project Service Automation

The Project Service Automation capabilities in Microsoft Dynamics 365 help you find the right resources at the right time for the right project and make sure all resources are utilized efficiently.

Deploy your company's consultants efficiently and effectively with the Microsoft Dynamics 365 for Project Service Automation. These provide you with the tools you need to schedule resources based on the requirements and schedules of consulting projects and on the skills and availability of your consultants. You can quickly find the most qualified consultants who are available to work on projects, and you can easily see how to better schedule them during the course of each project.

Resource scheduling helps you do the following:

- Match resources to projects, based on how well their skills and proficiency levels match the project resource requirements.
- Match a resource's schedule to a project calendar, based on their availability and scheduled time off. The color-coded calendar gives you visual cues about resource availability.
- Review the capacity of each consultant and determine how that capacity is currently used. This can help you find where a consultant might be under- or over-utilized, or if they're working at capacity.
- Assign a percentage or a specific number of hours for a worker's capacity to a project.
- Make group resource bookings.
- Soft book or hard book resources, and convert soft-booked hours into hard-booked hours in one step.
- Automatically form a project team based on resources defined in a work breakdown structure for a project.
- Fulfill resource requests (book, propose, find substitute resources).
- Assign resources according to a central (resource manager assigns) or hybrid model (resource manager and other managers can assign). For more information about setting a central versus

hybrid resource management model, see Configure additional parameters settings (Project Service Automation).

You can manage resources efficiently across projects and ensure that projects are staffed appropriately. You'll need to perform the following tasks:

- Manage resource requests (Project Service Automation). Match the skills and proficiencies of your consultants to the right projects.
- View resource availability (Project Service Automation). Check consultants' availability in a calendar view.
- View resource utilization (Project Service Automation). See the percentage of time that your consultants are currently booked.
- Schedule resources for a project (Project Service Automation). Schedule consultants for a project.

For more information about submitting resource requests for individual projects, see Submit resource requests (Project Service Automation).

Note

The capabilities in this solution require Microsoft Dynamics CRM Online 2016 Update 1.

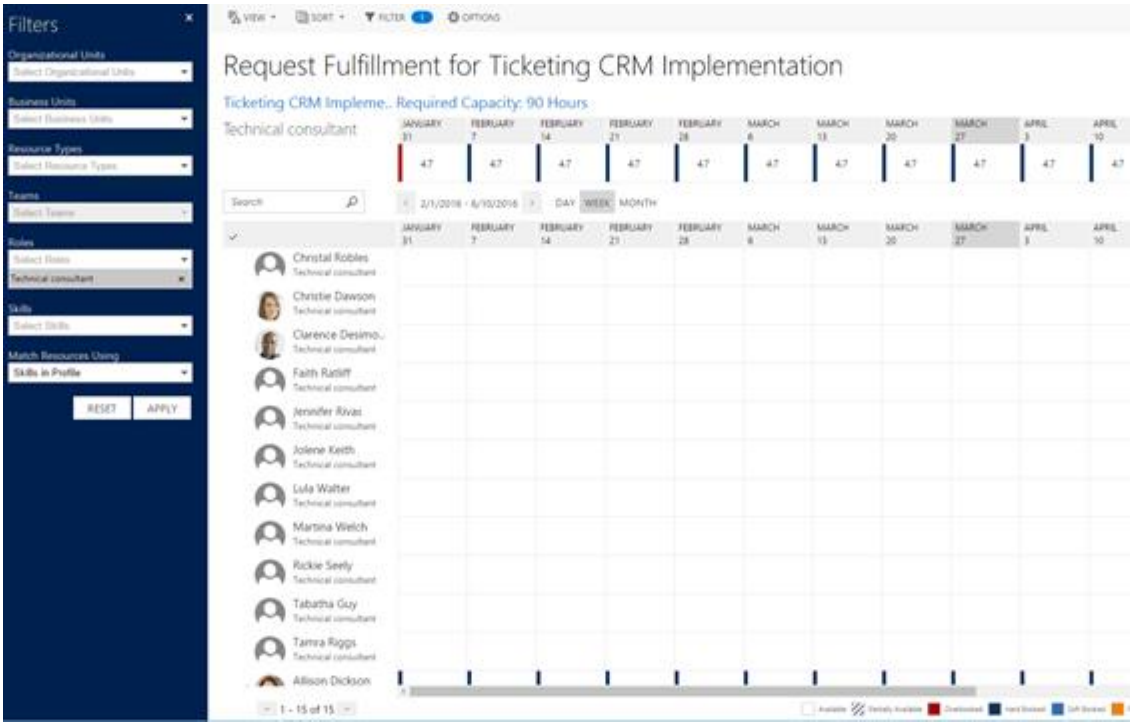
Manage resource requests

Account Managers and Project Managers regularly request resources for their projects. With the Project Service Automation capabilities in Microsoft Dynamics 365, you can find and match consultants who have the required skills and proficiencies to those resource requests.

1. Go to **Project Service > Resource Requests**.
2. Select a resource request and click **Find Resources**. This shows a calendar view of all resources and their availability, with color coding that provides a visual view of a resource's booking status.

   Do any of the following to optimize your search:

   - Select a view or sort order from the top of the screen. You can also select whether to show availability for the **Day**, **Week**, or **Month**, and use the arrows to view the previous or next time period. Use the search box to find a specific resource.
   - Click **Options** to change what displays. For example, you can show a legend that shows the color scheme for the different types of bookings, or you can choose to show only a certain type of booking (for example, hard booking or soft booking).
   - Click **Filter** to display the **Filter** pane, which lets you filter your results by organizational unit, role, skill, or other attributes.



3. In the calendar for the resource you want to book, select the time period to book the resource, and then either click **Book** to book the resource or **Propose Booking** to propose the booking and have the requestor approve it. When you book a resource, you can soft book or hard book.

Schedule resources for a project

You can check resource availability to get an overall view of how booked your resources are, or you can filter the view by skills, team, location, and other options.

The schedule board shows list of resources and their availability. Select a view mode to show availability by **Hours**, **Day**, **Week**, or **Month**.

Before you use the schedule board, it's important to set it up.

Note

This feature is supported in December 2016 Update for Microsoft Dynamics 365 (online). Interested in getting this feature? Find your Dynamics 365 administrator or support person at http://go.microsoft.com/fwlink/p/?LinkID=513070.

If you are using an older version, for resource availability see, [View resource availability (Project Service Automation)](#).

Important

To use the schedule board booking functionality, geocoding, and location services, you need to turn on maps.

1. From the main menu, click **Resource Scheduling** > **Administration**.
2. Click **Scheduling parameters**.
3. Open record and scroll down to the **Resource Scheduling Optimization** section.
4. On the **Connect to Maps** field, choose **Yes**.
5. Accept terms and save the record.

1. From the Main menu, click **Project Service** > **Schedule board**.
2. There are several ways to manually schedule a booking requirement:

Right-click on an unscheduled booking to find available resources

i. From the **Booking Requirement** list, right-click on an unscheduled booking and choose one of the following:
   1. Choose **Find availability - Current Resources** to find an available resource from the list on the schedule board.
   2. Choose **Find availability - All Resources**, to find an available resource from resources in the system

   Note

   When you do this, the filters will show options for the selected booking requirement.

   3. When you see an available slot right-click on the time slot on the schedule board and choose **Book Here**. Or, drag and drop the booking requirement to the available time slot.

Book a resource using the daily view and find who's under-booked

i. On the schedule board, click **View Mode** and select **Days**.

   This shows a grid view of how many hours a resource is booked per day and which days they are free.
ii. Click the name of the resource you want to book, and then click **Book**.
iii. On the **Resource booking (create)** dialog box, choose the project that you want to book the resource for along with booking method and start and end times.
iv. When you're done, click **Book**.

Drag an unscheduled booking requirement from the list view to the schedule board

i. Select an unscheduled booking requirement from the list at the bottom.
ii. Drag the booking requirement to an available resource/time slot on the schedule board.
iii. When you're done, cook **Book**.

View resource availability

You can check resource availability to get an overall view of how booked your resources are, or you can filter the view by skills, team, location, and other options.

Note

This feature is supported in Microsoft Dynamics CRM Online 2016 Update 1. Interested in getting this feature? Find your Dynamics 365 administrator or support person at http://go.microsoft.com/fwlink/p/?LinkID=513070.

If you are using an newer version, for resource availability see, Schedule resources for a project (Project Service Automation).

- Go to **Project Service > Resource Availability**.

This shows a calendar view of all resources and their availability. Select a view or sort order from the top of the screen. You can also select whether to show availability for the **Day**, **Week**, or **Month**, and use the arrows to view the previous or next time period. Use the search box to find a specific resource.

Click **Options** to change what displays. For example, you can show a legend that shows the color scheme for the different types of bookings, or you can choose to show only a certain type of booking (for example, hard booking or soft booking).

Click **Filter** to display the **Filter** pane, which lets you filter your results by organizational unit, role, skill, or other attributes.

View resource utilization

You can check resource utilization to determine utilization levels for your resources and help you make decisions about how to fully take advantage of your resources' time.

- Go to **Project Service > Resource Utilization**.

This shows a calendar view of all resources and their availability. Select a view or sort order from the top of the screen. You can also select whether to show availability for the **Day**, **Week**, or **Month**, and use the arrows to view the previous or next time period. Use the search box to find a specific resource.

Click **Options** to change what displays. For example, you can show a legend that shows the color scheme for the different types of bookings, or you can choose to show only a certain type of booking (for example, hard booking or soft booking).

Click **Filter** to display the **Filter** pane, which lets you filter your results by organizational unit, role, skill, or other attributes.

Project Manager's Guide - Dynamics 365 for Project Service Automation

Project Service Automation capabilities in Microsoft Dynamics 365 help you create project quotes and contracts, and create and manage projects for your clients after you've won the contract. They also provide analytics to help you ensure projects are feasible and profitable. You can set up projects on a time and materials or fixed-price basis.

Project management tools help you to:

- Effectively estimate work
- Forecast resource requirements when projects are in the pipeline
- Enable team members to collaborate on projects and maintain current and accurate project status at all times
- Proactively identify and resolve potential threats to the success of each and every engagement.

This guide helps you with performing the following tasks to create and manage projects:

- Provide work estimates for a project during the sales process (Project Service Automation)
- Create a project (Project Service Automation)
- Referenced topic 'd91db823-ab12-4e0f-bb41-954a5c009b1d' is not in the TOC.
- Schedule a project with a work breakdown structure (Project Service Automation)
- Determine project cost and revenue estimates (Project Service Automation)
- Track project progress and cost (Project Service Automation)
- Create a project template (Project Service Automation)
- Submit resource requests (Project Service Automation)
- Create an Office 365 Group for a project (Project Service Automation)
- Add documents to a project (Project Service Automation)
- Track a project's status (Project Service Automation)
- View project team members and manage bookings (Project Service Automation)
- View and edit project estimates (Project Service Automation)
- Approve time and expenses (Project Service Automation)
- Review project actuals (Project Service Automation)
- View and send invoices (Project Service Automation)
- View dashboards and reports (Project Service Automation)

Prerequisites

If you haven't already, you'll need to complete the following items before you can start creating projects:

- Create a work hours template (Project Service Automation). Set up a project calendar that defines the number of working hours to accommodate per day in the schedule and any business closures.
- Create a price list (Project Service Automation). Set cost and sales prices for resource roles in your organization, as well as for other categories like expenses and products.
- Add resource roles (Project Service Automation). Define roles to help determine resource requirements and project costs.

Provide work estimates for a project during the sales process

During the sales process, you can work out sales estimates from the ground up with quote lines. Project Service Automation capabilities in Microsoft Dynamics CRM Online 2016 Update 1 provide a more scientific and deterministic way of coming up with sales estimates by breaking down work items and associating relevant attributes that contribute toward the estimates for the project in the work breakdown structure.

Once you win the sale, you can use the associated work breakdown structure in your project plan, refining it as necessary for successful completion of your project.

Link a project to a quote line

When creating a project-based quote line, you can create a new project from the quote line. You can then use project templates, which are either pre-configured standard project plans and financial estimates common to your organization, or a copy of a project plan and estimates from a past project. When you create a project, choosing a project template provides a basis to refine the project plan, estimates, and role requirements. By creating your project from the quote, the project is automatically associated with the quote line.

Project estimate components

The work breakdown structure in a project provides a way to break down work into tasks, maintain a hierarchy of tasks, and assign an estimate of effort required to complete each task. You can also associate roles to a task to indicate an estimate of the type of resource required to complete a task and a schedule.

The work breakdown structure helps you determine work effort and schedule estimates. By default, the project uses default price lists that you defined earlier. The cost and sales prices defined in the price lists help determine financial estimates for the project's work breakdown.

If your project is associated with a quote, and the quote has a different price list from the default, the quote's price list is used for financial estimates.

Import estimates from a project into a quote

Once you have project estimates in the project, you can import these estimates into the quote line.

- In **Quote Line Details**, click **Import from estimates**. Select whether to import project estimates summarized by transaction type, role, or work breakdown structure node level.

Create a project (Project Service Automation)

Create a project using the Project Service Automation capabilities in Microsoft Dynamics 365 when you want to create an opportunity, quote, or contract for project-based services. The Project Service Automation capabilities help you manage your project from opportunity through completion. When you create a project, you'll also create a work breakdown structure, which affects your quotes, cost estimates, and resource management.

1. Go to **Project Service > Projects**.
2. Click **New Project**.
3. In the **Summary** area, enter a name for your project, and then fill in as many of the details as you can. Items marked with a red asterisk (*) are required.
4. Click **Save** to create your project so you can continue editing it.

Next, you'll create a work breakdown structure for your project to define the tasks, timing, and resource roles needed for the project.

Schedule a project with a work breakdown structure (Project Service Automation)

A project schedule communicates what work needs to be performed, which resources will perform the work, and the timeframe in which that work needs to be completed. The project schedule reflects all the work associated with delivering the project on time. One of the first steps in the initiation phase of the project is to come up with a project schedule. To establish a project schedule, you need to create a work breakdown structure.

Create a project structure with a work breakdown structure, which helps you:

- Break down work into manageable tasks
- Estimate the time required to complete a task
- Set task dependencies and task duration
- Determine the roles required to complete each task

The project schedule in the work breakdown structure has a familiar look and feel, complete with an interactive Gantt chart.

Create a work breakdown structure for a project

Create a work breakdown structure to represent the sequence of tasks in a project. The work breakdown structure includes tasks, requirements for each task, and revenue and cost information. In your work breakdown structure, you can add:

- The sequence of tasks in a hierarchy
- Other tasks, if any, that must be completed before a task can be started
- The starting date, ending date, and duration of a task
- The number of hours required for a task
- Any required worker skills and education
- The workers who are assigned to a task
- Estimated revenue and costs

Task attributes

You'll use the following types of tasks when creating your work breakdown structure:

- **Project root node**. The top-level summary task for the project. All other project tasks are created under it. The name of the root task is the project name. The effort, dates, and duration of the root node are based on the values on the hierarchy below it. You can't edit root node properties or delete the root node.
- **Summary or container tasks**. A summary task is a task that has sub-tasks under it. A summary task doesn't have any work effort or cost of its own. Its work effort and cost are a rollup of its sub-tasks. You can change the name of a summary task, but you can't change the effort, dates, or duration, because those are automatically calculated. Deleting a summary task deletes the task and all of its sub-tasks.
- **Leaf node tasks**. A leaf node task represents the most detailed work on the project. It has an estimated effort, a planned number of resources, planned start and end dates, and a duration.

Task hierarchy

You have the following options when creating a task hierarchy:

- **Add task**. You can add a task at a position you choose in the task hierarchy. If you don't select a position, your new task appears at the end.
- **Indent task**. Indent a task to make it a child of the task directly above it.
- **Outdent task**. Outdent a task to make it so it's no longer a sub-task of its original parent task.
- **Move up and Move down**. Move tasks up and down in the hierarchy of its parent task. Moving a task up or down has no effect on its effort, cost, dates, or duration.

Task attributes

A task's name describes the work that needs to be completed. You use various task attributes to describe the schedule and staffing requirements for the task.

- **Schedule attributes**. Assign values to **Effort hours**, **Number of resources**, **Start date**, **End date**, and **Duration** to determine the schedule for the task. **Effort** is an estimate of the hours it takes to complete the task. **Number of resources** is an estimate that the project manager puts in the task to help come up with the best possible schedule. **Duration** (in days) indicates the number of work days it will take to complete the task.
- **Staffing attributes**. **Role**, **Resource organizational unit**, **Number of resources**, and **Resources** describe the staffing requirements for the task. **Role** describes the type of resource needed to perform the task. **Resource organizational unit** indicates the organizational unit from which resources should be staffed for that task; this also impacts the cost and sales estimate of the task, since this is accounted for when determining the unit sales price for the resource. **Resources** holds a generic resource or a named resource when one is found.

Task dependencies

You can create predecessor relationships between one or more tasks in the work breakdown structure. You can set one or more values for the predecessor field on tasks to indicate the tasks that it will be dependent on. When you assign a predecessor value to a task, the task can only start when all the predecessor tasks have completed. Setting this dependency on a task will result in the recalculation of the planned start date of the task as the latest end of all of its predecessors. Predecessor-related impacts on a schedule are not limited by the task mode defined on the task.

Task mode

Task mode is one of the important factors that determine scheduling leaf node tasks. There are two task modes for every task: auto scheduling mode and manual scheduling mode.

- Auto scheduling   When you set the task mode to Automatically Scheduled, the task scheduling engine uses the scheduling rules on the following task attributes to determine the schedule for the task:
  - Predecessors
  - Effort
  - Number of resources
  - Start and end dates
- Scheduling rules   The start date of a leaf node task that does not have predecessors defaults to the project’s scheduling start date. The duration of a leaf node task is always calculated as the number of working days between its start and end dates. When a task is automatically scheduled, the scheduling engine follows the rules below:
  - Start and end dates of a task must always be working days according to the project’s scheduling calendar
  - The start date of a task that has predecessors defaults to the latest end date of its predecessors
  - Effort = Number of people * Duration * hours in a standard work day of the project calendar
  - Manual scheduling   In some cases, you might want to deviate from these rules. In these cases, you can set the task mode for the task to be manually scheduled. This stops the scheduling engine from calculating the values for other scheduling attributes. Setting predecessors on tasks always impacts the dependent task’s start date.

Create a work breakdown structure

1. Go to **Project Service > Projects**.
2. Click the project you want to work on.
3. In the bar across the top of the screen, select the down arrow next to the project name, and then click Work breakdown structure.
4. To add a task, click **Add Task**. Fill in the fields for the task, and then click **Save**.

5. Continue adding tasks until your work breakdown structure is complete. While creating your work breakdown structure, you can do the following to organize your tasks:
    - Select a task and click **Indent** to move it under another task or click Outdent to move it out a level.
    - Select a task and click **Move Up** or **Move Down** to move it up or down in the list.
    - Click **Hide Gantt** to hide the Gantt chart, and click **Show Gantt** to display it again.
    - Select a different period of time for the Gantt chart in **Time Scale**.
6. To add the roles you specified in your work breakdown structure to your project's team members, click **Generate Project Team**.
7. Click **Save** at the bottom right corner of the screen when you're done making changes.

Determine project cost and revenue estimates

Project estimates provide the financial view for the work estimated and scheduled in the project's work breakdown structure. The estimates view informs you of the cost and revenue impact of the planned work. The estimates view provides a tool to see the information on a number of pre-defined dimensions to best inform you of the financial impact of the project.

Cost and sales value of the project

Project Service Automation price lists define the cost and bill rates for roles projects use. Based on the roles associated with the tasks in the project's work breakdown structure, you can determine the cost and revenue impact of the work involved.

Cost price defaulting

Every project belongs to an organization (indicated in **Owning Unit** in the project). The price list associated with the owning organizational unit determines the unit cost price. The Microsoft Dynamics 365 for Project Service Automation determine cost prices for roles by searching for the combination of role, unit, and organizational unit in the cost price list to get the correct cost price for the date effective on estimate lines.

If the combination of role, unit. and organizational unit doesn't result in a cost price from the owning unit's price list, the unit is disregarded in favor of the combination of role and organizational unit. If there is a cost price, this price is converted to the unit you chose on the estimate line.

If the combination of role and organizational unit doesn't result in a cost price, the organizational unit is disregarded in favor of the role and unit combination, and the price is defaulted after applying any conversion, if required.

If there isn't a price for the role, then the cost price defaults to 0.00 on the estimate line.

All cost amounts on project cost estimate lines are in the currency of the owning organizational unit.

Sales price defaulting

The sales price list is based on the sales entity that the project is attached to. The sales price list associated with the quote or contract determines the unit sales price. If the quote or contract has a custom price list, this will be the default sales price list for project estimates. If there is no association to the sales entities, then the default sales price list configured in parameters settings will be the default sales price list for the project. Each estimate line has a resource organizational unit associated to indicate the organizational unit from which the resources will be booked for completing the task. The sales price for the associated roles is determined by searching for the combination of role, unit, and resource organizational unit in the sales price list to get the correct sales price for the date effective on the estimate lines.

If the combination of role, unit, and resource organizational unit doesn't result in a sales price from the sales price list, the system will disregard unit and search for the combination of role and resource organizational unit. If a sales price is found, this will be converted to the unit you chose on the sales estimate line.

If the system doesn't find a price for the role, then the sales price must default to 0.00 on the estimate line.

The estimates view has a grid view that displays a flat grid of estimate lines with unit and total cost and sales price.

Time-phased view of project estimates

In the time-phased view for project estimates, the estimates data from the grid view is pivoted by default by role, and shows a spread of estimate data across the timeline in the chosen timescale.

Effort estimate allocation based on task mode

In the time-phased view, total effort estimated for the task is distributed by allocating a certain number of effort hours per unit time period of the chosen timescale. In project service, the task mode determines how effort is allocated across the duration of the task. The two kinds of allocation are even allocation and work hours based allocation

Work hours based allocation

Auto scheduling task mode for a task governs that for the number of resources estimated on the task, they are estimated to be utilized for the full work hours per day. This applies when allocating the effort by splitting it across the duration of tasks in the time phased view as well. For instance, on a 'Day' timescale, for a task estimated to be completed by one resource, the effort allocated per day will not exceed work hours per day defined in the project's calendar. Therefore, the effort allocation always ensures that the resources are estimated to be utilized for the full day.

Even distribution

Manually scheduled task mode doesn't honor the work hours, project calendar, or number of resources defined on the task. The task schedule is based on user input. For such tasks, the effort allocation per unit time period of the chosen timescale doesn't have any limiting factors. The total effort on the task is equally split and allocated for each unit time period on the chosen timescale.

In this way, the task mode defined on the task determines the effort distribution or allocation of effort per unit time period in time-phased estimates.

Grouping and time-phasing options

This view helps you understand the distribution of the effort, cost, and sales estimates on a per day, week, month, or year basis. The Group By option allows pivoting the estimates data on two other dimensions: category and resource. On both the grid view and the time-phased view you can choose the fields to be displayed. Totals for each of the time blocks is displayed at the bottom indicating the total estimated effort, cost. and sales for the day, week, month, or year.

The cost and sales price defaulting takes is date effective—when the rates for the roles change it will be more transparent in the time-phased view when viewing estimate data pivoted on ‘Resource’ and time-phased by week.

Expense estimates

Any expense that will be incurred in the project that is not directly related to labor to be expended can be recorded in the project estimates in the grid view. Using the **Add expense estimate** option in the grid view, you can accomplish this. The expense estimates can be recorded for a specific task or for the entire project; you can choose expense categories on these lines and choose a tentative date when the expense is expected to be incurred. If the associated cost and sales price list have default prices, or markup percentages defined for expense categories, it will be defaulted on the estimate line on association.

Track project progress and cost

The need for tracking progress against a work breakdown structure varies across industry verticals. Some industries do it more diligently at a very granular level of the work breakdown structure, while others might track at a higher level of the work breakdown structure.

Effort tracking view

The effort tracking view shows the tracking of progress for tasks in the work breakdown structure. It compares the actual effort hours spent against a task till date to the planned effort hours on a task.

Sometimes you might need to revise the original estimates on a task. The task might be moving faster or slower than originally anticipated because of changes in scope or having less experienced people than originally planned for. We don't recommend changing your baseline numbers, because the project baseline is the published source for the project’s schedule and cost estimates that all stakeholders on the project have agreed to.

Create a project template

Project templates save you time if your company regularly bids on similar types of projects. They provide a standard set of roles and estimated hours for a type of project. Account managers and project managers can create projects based on a project template, or they can copy the template and make one of their own.

Components of project template

A project template consists of three components:

- **Work breakdown structure**: A work breakdown structure in a project template has the same set of elements as in the project. You can create a task hierarchy, associate roles to task, define schedule attributes, set dependencies and view all the data in the Gantt. The work breakdown structure in project templates also support task modes for each task. There is no difference between a project template and a project when creating work schedule.
- **Project estimates**: Project estimates in templates work the same way as they do in projects, except the price lists for defaulting the cost and sales prices are always the default cost and sales price lists defined in Project Service Automation parameters. The rest of the functionality is the same as in a project.
- **Project team formation**: When forming a project team for a project template, you can't book a named resource in a template. You can use **Generate Project Team** in the work breakdown structure to generate a set of generic resources. You can also specify required skills and proficiencies for generic resources. You can't substitute a generic resource with a bookable resource in project templates.

Create a project from a template

You can create a project from a template in these following ways:

- When creating a project from the quote, you can choose a project template in the project quick create form.
- When creating a project by clicking **New Project**, the project form displays before you save the record. From here, you can click **Pick a template** field to choose from the list of pre-defined project templates in your organization.
- Click **Create project from a template** on the **Project Template** page to create a project from the template.

Copying components of a template to a project

When you copy components of a template into a project, there are a few things you should know about.

Copying a work breakdown structure: When you copy the work breakdown structure from a project template, if the project has a different project calendar than the template, the work hours from the project's calendar will be applied to the schedule of tasks. This adjusts the schedule to the backing project calendar. Similarly, the first task on the work breakdown structure takes the project's start date, so the rest of the task hierarchy schedule is updated based on the duration and dependencies specified in the template's work breakdown structure.

Copying project estimates: When you copy across project estimate lines, price lists are updated based on the owning unit of the project for the cost price list and customer for the sales price list. The unit cost and sales prices are determined from these price lists on projects that are associated to a sales entity.

Copying a project team: When you copy the project team from the template to a project, the generic resources are copied across, along with the skills and proficiencies defined in the template. Generic resource assignments are also maintained as in the project template.

Submit resource requests

Once you've won a project contract, you'll need to staff your project. Your work breakdown structure already established the resource roles you need to complete the project, so now it's time to request the resources that match the requirements.

1. Go to **Project Service > Projects**.
2. Click the project you want to work on.
3. In the bar across the top of the screen, select the down arrow next to the project name, and then click **Resource Requirements**.
4. To submit resource requests, select the roles you want to request resources for, and then click **Submit Request**.
5. To hard book a resource instead, select the role, and then click **Hard Book**. This shows a calendar view of all resources and their availability, with color coding that provides a visual view of a resource's booking status. Do any of the following to optimize your search:
   - Select a view or sort order from the top of the screen. You can also select whether to show availability for the **Day**, **Week**, or **Month**, and use the arrows to view the previous or next time period. Use the search box to find a specific resource.
   - Click **Options** to change what displays. For example, you can show a legend that shows the color scheme for the different types of bookings, or you can choose to show only a certain type of booking (for example, hard booking or soft booking).
   - Click **Filter** to display the **Filter** pane, which lets you filter your results by organizational unit, role, skill, or other attributes.
   - In the calendar for the resource you want to book, select the time period to book the resource, and either click **Book** to book the resource, or **Propose Booking** to propose the booking and have the requestor approve it.
6. A resource manager needs to review and approve your resource requests.

Create an Office 365 Group for a project

Provide a space where team members for a project can collaborate on project documents, view the team's calendar, and have group conversations by creating an Office 365 Group for that project.

1. Go to **Project Service > Projects**.
2. Click the project you want to work on.

3. In the bar across the top of the screen, select the down arrow next to the project name, and then click **Office 365 Groups**.
4. Click **Create Office 365 Group**. You'll receive an email when your group is ready.

Add documents to a project

Keep project-related documents organized by adding them to your project.

1. Go to **Project Service > Projects**.
2. Click the project you want to work on.
3. In the bar across the top of the screen, select the down arrow next to the project name, and then click **Documents**.
4. Enter a name for the document in **Name**, and then copy the URL from the document's SharePoint location to **Document Location**.
5. Click **Save**.

Track a project's status

Use the Microsoft Dynamics 365 for Project Service Automation to track the progress of a client's project.

As the engagement progresses, the project stages update to reflect the stage of the engagement:

- **New**. When you create a project, the stage is set to **New**. If you created the project from a template, at this stage the project may have a schedule, estimates, and team data. Otherwise, it will be the outline of the project and you need to manually enter the rest of the project components.
- **Quote**. When you associate a project to a quote or create it from a quote, the project stage is set to **Quote**, and the estimated start and end dates are updated as well. When the project is in the quote stage, details on the quote display on the **Sales** tab on the **Project** page.
- **Plan**. When you win a quote associated with a project, and when the engagement progresses to the contract stage, the project stage updates to **Plan**. Contract details display on the **Sales** tab on the **Project** page.
- **Deliver**. When the project plan is complete and when it's time to kick off the project, you should manually switch the project stage to **Deliver**. This indicates the project has started delivery.
- **Complete**. When the project work is complete, you can flip the stage to **Complete**. When the project stage is set to complete, it's understood that the work is 100% complete but the project is kept open for any pending time or expense entries to be recorded.
- **Close**. When all transactions have been recorded on the project and you don't expect any more to be logged, you can manually set the stage to **Close**. When the project is set to **Close**, you can't log any more transactions on the project and the project will be read only.

To track a project’s status

1. Go to **Project Service > Projects**.
2. Click the project you want to work on.
3. In the bar across the top of the screen, select the down arrow next to the project name, and then click **Project Tracking**.
4. Select **Effort Tracking** or **Cost Tracking** in the drop-down list above the task list.
5. Double-click any task to edit it. You can also move or resize the bars in the Gantt chart to change the time and progress for a task.

View project team members and manage bookings

You can view a list of your project’s team members, and from there you can maintain bookings and submit resource requests.

1. Go to **Project Service > Projects**.
2. Click the project you want to work on.
3. In the bar across the top of the screen, select the down arrow next to the project name, and then click **Project Team Members**.
4. To submit resource requests, select the roles you want to request resources for, and then click **Submit Request**.
5. To hard book a resource instead, select the role, and then click **Hard Book**. This shows a calendar view of all resources and their availability, with color coding that provides a visual view of a resource’s booking status. Do any of the following to optimize your search:
   - Select a view or sort order from the top of the screen. You can also select whether to show availability for the **Day**, **Week**, or **Month**, and use the arrows to view the previous or next time period. Use the search box to find a specific resource.
   - Click **Options** to change what displays. For example, you can show a legend that shows the color scheme for the different types of bookings, or you can choose to show only a certain type of booking (for example, hard booking or soft booking).
   - Click **Filter** to display the **Filter** pane, which lets you filter your results by organizational unit, role, skill, or other attributes.
   - In the calendar for the resource you want to book, select the time period to book the resource, and then either click **Book** to book the resource or **Propose Booking** to propose the booking and have the requestor approve it.
6. To manage the resource bookings for this project, select the resources you want, and then click **Maintain Bookings**.
7. A resource manager needs to review and approve your resource requests.

View and edit project estimates

With the Project Service Automation capabilities in Microsoft Dynamics 365, you can view estimates for a project, including estimates by cost, sales, or effort.

1. Go to **Project Service > Projects**.
2. Click the project you want to work on.
3. In the bar across the top of the screen, select the down arrow next to the project name, and then click **Project Estimates**.
4. In **Time-phase By**, select **Effort**, **Cost**, or **Sales** to change which project estimates to display.
5. To add or delete expenses, click **Show Grid View**. To create a new expense, click **New Expense**. To delete an expense, select it from the list, and then click **Delete Expense**. When you're done adding or deleting expenses, click **Save**.

Approve time and expenses

After consultants enter their time and expenses for a project, you need to approve them so they are properly billed or costed to projects.

1. Go to **Project Service > Approvals**.
2. Click the item to approve.
3. In the **Time Entries**, **Expense Entries**, and **Absence/Vacation** tabs, review each item and make changes as necessary.
4. To approve an item, select it and click **Approve**. You can select and approve multiple items at once.
5. To reject an item, select it and click **Reject**. You can select and reject multiple items at once.
6. To view charts of time and expenses by project, click **Dashboard**.

Review project actuals

Navigate to project actuals and make sure that cost and unbilled sales for time are logged for the correct sales and cost prices and that the **Contracting** and **Resourcing Units** are recorded correctly on the actuals.

View and send invoices

When you create a project, you set the frequency to generate invoices. You can view and review invoices before you send them to your customers.

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

2. Click the invoice you want to review.
3. Make any changes as necessary. When you're done making changes, click **Recalculate**.
4. When you're ready to send the invoice, click **Send to Customer**.
5. Once the customer has paid the invoice, click **Mark Invoice as Paid**.

Manually invoice a contract

You can manually invoice a project instead of invoicing it automatically.

1. Go to **Project Service > Projects**.
2. Click the project you want to invoice.
3. Click **Sales** and then click **Invoice**.
4. Select the parameters for the transactions you want to invoice, including cutoff date, type of item to invoice, unit, and milestone. When you're done selecting the parameters, click **Next**.
5. Click **Finish**.

View dashboards and reports

Dashboards and reports give you an understanding of where your business stands. The Practice Management dashboard gives you an all-up view of your costs, gross margin, and role utilization. You can also track your sales numbers with the Sales Activity Social dashboard.

To view dashboards that provide an all-up view of your project sales and resource utilization:

1. Go to **Project Service > Dashboards**.
2. In the bar across the top of the screen, select the down arrow next to **Dashboards** and select the dashboard you want to see.

To view Project Service Automation reports:

1. Go to **Project Service > Reports**.
2. Click the report you want to see.
3. Select a date range and click **View Report**.

Use the Project Service Automation Add-in to plan your work in Microsoft Project

Project Service Automation makes it easier for you to do your project planning including estimates. You can define the work so that costs, effort, and sales value are clear as the final proposal is submitted.

Now you can install the Microsoft Dynamics 365 Project Service Automation Add-in for Microsoft Project and do your planning work in the familiar environment of Microsoft Project. Use the robust planning and management capabilities of Microsoft Project and then update your project plan in Project Service Automation.

Important

- This feature is supported in December 2016 Update for Microsoft Dynamics 365 (online). Interested in getting this feature? Find your Dynamics 365 administrator or support person at http://go.microsoft.com/fwlink/p/?LinkID=513070.
- To use the SharePoint document management feature in Dynamics 365 to store your Microsoft Project files for Project Service Automation projects, your Dynamics 365 admin will need to turn on document management.
- The Microsoft Dynamics 365 Project Service Automation Add-in for Microsoft Project is only compatible with Microsoft Project 2016 Professional Edition.

Download and install the add-in

Have your Project Service Automation sign-in information ready. You will need this information to connect from Microsoft Project to Project Service Automation.

1. Go here to download the add-in (https://go.microsoft.com/fwlink/?linkid=828268).
2. Click the download link.
3. Once the download is complete, click **Yes** to install the add-in.

Configure the add-in

1. Open Microsoft Project and click the **Project Service** tab.
2. Click **Connect**.
3. Enter your sign-in information and then click **Sign in**.

Now you can start using the add-in.

Read from a template

Read from a template that you created in Project Service Automation and copied into Microsoft Project to start your project planning. More information: Create a project template (Project Service Automation)

1. From the **Project Service** tab, click **Read** > **Project Service Automation Project Template**.
2. Choose a project template from the list and then click **Open**.

Note

By default, the tasks that are copied from the template into Project are set as manually scheduled.

Assign Project Service Automation roles to project resources

1. Open a project and click the **Task** ribbon.

2. Click the **Gantt Chart** menu and then choose **Resource Sheet**.
3. On the Resource Sheet, click the **Project Service Resource Role** drop-down menu and choose a Project Service Automation role.

Staff your project with resources

1. From the Project Service tab, select a row and click **Find Resources**.
2. On the **Book Resource** screen, select the resource that you want to use for the project.
3. Click **Book** and then click **OK**.

Publish your project

When your project planning is complete, the next step is to import and publish the project in to Project Service Automation.

The project will import into Project Service Automation. The pricing and team generation process are applied. Open the project in Project Service Automation to see that the team, project estimates, and work breakdown structure has been generated.

- Microsoft Project **Gantt Chart** info imports into the Project Service Automation **Work Breakdown Structure** screen.
- Microsoft Project **Resource Sheet** info imports into the Project Service Automation **Project Team Members** screen.
- Microsoft Project **Use Usage** info imports into the Project Service Automation **Project Estimates** screen.

1. From the **Project Service** tab, click **Publish** > **New Project Service Automation Project**.
2. On **Publish to a new project in Project Service** dialog box, enter the **Project Name** and select the **Customer**.
3. Optionally check the **Link project plan to Project Service Automation** to link the plan Project file to Project Service Automation.
4. Click **Publish**.

Linking the Project file to Project Service Automation makes the Project file the master and sets the work breakdown structure in Project Service Automation to read-only. In order to make changes to the project plan, you need to make them in Microsoft Project and publish them as updates to Project Service Automation.

Edit a project that’s been imported

To make changes to a project plan that's been imported into Project Service Automation, you have two options:

- Open the master file and edit it in Microsoft Project
- Unlink the file and edit it directly in Project Service. By default, a project that’s been uploaded from Microsoft Project is locked and can only be edited in Project. To edit the file in Project Service Automation, the file has to been unlinked.

Edit in Microsoft Project

1. From the main menu, click **Project Service** > **Projects**.
2. From the list of projects, open the one you created in Microsoft Project.
3. Click **Open in MS Project** from the ribbon. This will open the linked master file in Microsoft Project.

Unlink a file and edit in Microsoft Project Service

1. From the main menu, click **Project Service** > **Projects**.
2. From the list of projects, open the one you created in Microsoft Project.
3. Click **Unlink from MS Project** from the ribbon.

Upload a Project file to SharePoint or Office Groups

You can upload your Project file to SharePoint and find it under the Associated Documents for your Project Service Automation project. You need to have your administrator configure SharePoint document management for Dynamics 365 and turn it on for the Project entity.

You can also upload your Project file to OneDrive for Business if you have Office Groups set up.

Upload a file for SharePoint

1. From the main menu, click **Project Service** > **Upload**.
2. Select **To Project Service Automation Project Documents**.
3. On the **Enable Open in Microsoft Project** dialog select **Yes** or **No**.
   - When you click **Yes** you'll be able click on the **Open in Microsoft Project** button in Project Service Automation and launch Microsoft Project and load the Project file from the SharePoint document library.
   - When you click **No** the link for the Open in Microsoft Project button won't work.
4. The Microsoft Project file can be found in Project Service Automation under **Documents** for the specific Project Service Automation project.

Upload a file for Office Groups

1. From the main menu, click **Project Service** > **Upload**.
2. Select **To Project Service Automation Project Documents**.
3. On the **Enable Open in Microsoft Project** dialog select **Yes** or **No**.
   - When you click **Yes** you'll be able click on the **Open in Microsoft Project button in Project Service Automation** and launch Microsoft Project and load the Project file from the SharePoint document library.
   - When you click **No** the link for the Open in Microsoft Project button won't work.
4. The Microsoft Project file can be found in Project Service Automation under **Documents** for the specific Project Service Automation project.

Publish your project as a template

You can save your project and reuse it by saving it as a project template in Project Service Automation. Project templates are reusable project plans in Project Service Automation. More information: Create a project template (Project Service Automation)

1. From the **Project Service** tab, click **Publish** > **New Project Service Automation Project Template**.
2. On the **Publish to a new project in Project Service template** dialog box, enter the **Project template name**.
3. Optionally, check the **Link project plan to Project Service Automation** to link the plan Project file to Project Service Automation.
4. Click **Publish**.

Linking the Project file to Project Service Automation makes the Project file the master and sets the work breakdown structure in the Project Service Automation template to read-only. In order to make changes to the project plan, you need to make them in Microsoft Project and publish them as updates to Project Service Automation.

Account Manager's Guide - Dynamics 365 for Project Service Automation

Project Service Automation capabilities in Microsoft Dynamics 365 guide you through the sales and contracts process for project-based accounts. In addition to creating accounts, this guide takes you through the sales process, including:

- Create a customer account (Project Service Automation)
- Create a project opportunity (Project Service Automation)
- Create a project quote (Project Service Automation)
- Create a project contract (Project Service Automation)

Note

The capabilities in this solution require Microsoft Dynamics CRM Online 2016 Update 1.

Create a customer account

Create an account for each client you're working with, whether you're quoting a project or actively working on an existing project for them.

1. Go to **Project Service > Customers**.
2. Click **New**.

3. In the **Summary** area, enter a name for your new account in **Name**, and then fill in the other fields as necessary.
4. Click **Save** to create the record so you can continue editing it.
5. In the **Project Price Lists** area, click + to add a price list. You can add more than one price list for this account.
6. When you're done, click **Save** at the bottom right corner of the screen.

Create a project opportunity

Opportunities are warm leads from customers who are interested in contracting your services. Project Service Automation capabilities in Microsoft Dynamics CRM Online 2016 Update 1 guide you through the steps for opening an opportunity for one of your accounts, preparing a project quote, and working out a project contract with your customer. Start by adding an opportunity. You can add estimates for services and products to the opportunity, as well. When you add an opportunity, you're in the **Qualify** phase of your project.

1. Go to **Project Service > Opportunities**.
2. Click **New**.
3. In the **Summary** area, enter your opportunity's company and other information.
4. Add any notes and activities (for example, phone calls or emails) related to this lead.
5. To add stakeholders, in the **Stakeholders** area, click **+**.
6. To add sales team members, in the **Sales Team** area, click **+**.
7. To add competitors, in the **Competitors** area, click **+**.
8. To add a product to the opportunity, click **New** under **Product-based Lines** in the **Opportunity Lines** area. Select an item under **Product Name**, and then specify the quantity, sales price, and customer budget.
9. To add a project estimate to the opportunity, click **+** under **Project-based Lines** in the **Opportunity Lines** area. Enter the name, budget amount, and project, if available. If you need to create a project with a work breakdown structure to come up with an estimate, see Create a project (Project Service Automation).
10. When you're done editing, click the **Save** button at the bottom right of the screen.

Create a project quote

Creating a quote is similar to creating an opportunity. While an opportunity is for internal information, a quote is what you send out to your potential customers. You can create one or more quotes for each opportunity. When you're creating a quote to send to your potential customer, you're in the **Propose** stage of your project.

1. To create a quote from an opportunity, go to **Project Service > Opportunities**, and then click the opportunity you want to create a quote for.

2. Click **Next Stage** on the right side of the process bar, and then either select an existing quote or click **Create** to create a new quote.
3. In the **Summary** area, change any information as necessary.
4. Click **Save** to create the quote so you can continue editing it.
5. To add a product to the quote, click **New** under **Product-based Lines** in the **Quote Lines** area. Select an item under **Product Name**, and then specify the quantity, sales price, and quoted amount.
6. To add a project estimate to the quote, click **+** under **Project-based Lines** in the **Quote Lines** area. Enter the name, budget amount, and project, if available. If you need to create a project with a work breakdown structure to come up with an estimate, see Create a project (Project Service Automation).
7. When you're done editing, click the **Save** button at the bottom right of the screen.
8. When you're ready to send the quote to your customer, click **More** (…), click **Run Report**, and then click **Quote**. Save the report as a Word document, edit as necessary, and send the quote to your customer.
9. If your customer accepts your quote, click **Close as Won** at the top of the **Quote** screen. If your customer wants you to change some items, follow this entire process again to create a new quote. If your customer decides not to use your services at this time, click **Close as Lost** at the top of the **Quote** screen.

When you close a quote as won, your project moves on to the **Contract** stage, and the **Project Contract** screen prompts you to create a contract for this project.

Create a project contract

Now that you've won the quote for your project, it's time to create a contract with your customer and make it official. You can create one or more contracts for each quote. When you're creating a contract, you're in the **Contract** phase of your project.

1. In the **Project Contract** screen from the previous step, change any information as necessary in the **Summary** area.
2. To add a product to the contract, click **New** under **Product-based Lines** in the **Contract Lines** area. Select an item under **Product Name**, and then specify the quantity, sales price, and contracted amount.
3. To add a project-based line to the contract, click **+** under **Project-based Lines** in the **Contract Lines** area. Enter the name, budget amount, and project, if available. If you need to create a project with a work breakdown structure to come up with an estimate, see Create a project (Project Service Automation).
4. When you're done editing, click the **Save** button at the bottom right of the screen.

5. When you're ready to send the quote to your customer, click **More** (…), click **Run Report**, and then click **Order**. Save the report as a Word document, edit as necessary, and then send the contract to your customer.
6. If your customer confirms your contract, click **Confirm** at the top of the **Project Contract** screen. If your customer wants you to change some items, create a new contract. If your customer decides not to use your services at this time, click **Close as Lost** at the top of the **Project Contract** screen.

Time, Expense, and Collaboration Guide - Dynamics 365 for Project Service Automation

Welcome to the Microsoft Dynamics 365 for Project Service Automation app, which helps companies manage their project-based sales. Dynamics 365 stands for customer relationship management, which your company uses to manage relationships with your clients.

This guides you through entering your time and expenses for the projects you're working on. Stay on top of your time and expense entry to make sure:

- Your clients are billed properly
- You get credit for the work you've done
- Your managers know the status of your projects

You can also collaborate with your fellow team members by sharing documents and starting conversations through Office 365 Groups associated with your projects.

You can enter time and expenses through the web app (browser-based app), or with the Dynamics 365 for phones and tablets app on your mobile device. When you're ready for your next project, you can use the Project Finder Mobile app.

Click on a link below to learn more about what you can do with Microsoft Dynamics 365 for Project Service Automation:

- Get the apps (Project Service Automation)
- Sign in (Project Service Automation)
- View your schedule (Project Service Automation)
- Manage projects and bookings in your Office 365 calendar
- Enter time (Project Service Automation)
- Enter expenses (Project Service Automation)
- Allow someone else to enter your time entry or expense (Project Service Automation)
- Schedule time off (Project Service Automation)
- Collaborate with your project team members with Office 365 Groups (Project Service Automation)
- Find your next project with the Project Finder Mobile app (Project Service Automation)

Get the apps

If you want to enter your time and expenses on your mobile device, see *Install Dynamics 365 for phones and tablets* at http://www.microsoft.com/en-us/dynamics/crm-customer-center/install-dynamics-365-for-phones-and-tablets.aspx.

You can also use the Project Finder Mobile app on your phone to find a new project to work on and apply for it.

Sign in

When you sign in to Microsoft Dynamics 365, you need to have the following information from your Dynamics 365 administrator:

- URL for your organization's Dynamics 365 system
- Your user name
- Your password

You probably received this information in an email from your admin. If you don't have all this info, or if you have issues signing in, see Find your Dynamics 365 administrator or support person at http://go.microsoft.com/fwlink/p/?LinkID=513070.

Set your personal options to allow email

You need to configure your email settings to allow others to send email on your behalf, so Project Service Automation can send email notifications for you when you have time and expenses to approve or sign up for projects.

1. Click the gear button in the top right corner of the screen.
2. Click the **Options**.
3. Click the **Email** tab.
4. Select **Allow other Microsoft Dynamics 365 users to send email on your behalf**.
5. Click **OK**.

View your schedule

When you want to see what you're working on for the week, take a look at your schedule.

If you're using the web app:

1. Go to **Project Service > Bookings and Tasks**. This brings up a calendar view of your schedule.
2. Click **Previous** or **Next** to see your schedule for the previous or next week. Click **Today** to get back to the current week. You can click a task to update it, if needed.
3. If you'd rather see a list of what you're working on, click **Grid**. You can edit tasks inline, if needed.

4. To see tasks that you've already completed, click **Show Completed Tasks**.

Manage projects and bookings in your Office 365 calendar

View personal appointments, project-work bookings, and field service work order assignments using the Office 365 calendar.

With everything in one place, it's easy to manage your day. Your meetings, appointments, bookings, and tasks are all available in your O365 calendar.

If you're using Microsoft Dynamics 365 for Project Service Automation, you can also enter your personal appointments in the Project Service time entry view. This lets project and resource managers know your availability for projects. It also saves you time, because you don't have to enter info about your personal appointments twice. You can simply import your personal appointments from your calendar to Project Service time entry view.

Your calendar will sync project and work order bookings from today to upcoming four weeks. This setting can't be changed.

Syncing is only supported one way, from Dynamics 365 to your Office 365 calendar. If you update a field service or project service booking in your Office 365 calendar, it will not sync and update in Dynamics 365. If you want to update or modify a booking, make sure you do it in Dynamics 365 – so that the booking syncs with your calendar.

To learn how to use your Office 365 calendar, see Calendar in Outlook on the web for business.

Note

This feature is supported in December 2016 Update for Microsoft Dynamics 365 (online). Interested in getting this feature? Find your Dynamics 365 administrator or support person.

Set-up

Before you can see and manage your bookings on your Office 365 calendar, you need to set a few things up.

- You will need to have O365 Global Administrator or Dynamics 365 System Administrator credentials.
- You Microsoft Dynamics 365 Admin will need to configure the email server profile and each user will need to configure their mailbox. More information: Set up email processing through server-side synchronization at https://www.microsoft.com/en-us/dynamics/crm-customer-center/set-up-email-processing-through-server-side-synchronization.aspx.

Turn on synchronization for your Dynamics 365 organization (admin task)

1. From the main menu, click **Settings** -> **Administration**.

2. Click **System Settings**.
3. Click the **Synchronization** tab.
4. Under **Select whether to enable syncing of resource booking with**, check the **Synchronize resource booking with Outlook**.

Turn on synchronization for your user profile (user task)

1. Click the **Settings** button in the upper-right corner of the screen.
2. Click **Options**.
3. Click the **Synchronization** tab.
4. Under **Resource booking sync with Outlook**, check the **Synchronization resource booking with Outlook**.

Import your personal appointments (user task)

You can import your personal appointments from your calendar to Project Service Automation time entry view.

1. Open Office 365 calendar and click **Import Data**.
2. On the Filters screen, select **Appointments from Exchange** and then click **Apply**.
3. The system will pull appointments into time entry view as suggested entries from the current week. To add entries for another week, click **Previous** or **Next**.
4. Select the appointment that you want to add to Project Service Automation time entry view.
5. On the **Time Entry** popup box, select the appropriate options to convert the appointment to a Project Service Automation time entry view.
6. Click **Save**.

Enter time (Project Service Automation)

Enter your hours at least weekly—or at the frequency requested by your managers—to ensure your clients are invoiced and you're credited correctly.

If you're using the web app:

1. Go to **Project Service > Time Entries**. This brings up your calendar.
2. To see your calendar for the previous or next week, click **Previous** or **Next**. Click **Today** to get back to the current week.
3. To enter your time, either click **New** or double-click in the calendar under the day you want to enter time for.

4. Fill in the fields in the **Time Entry** form and click **Save**.
5. Continue entering time for the week. When you're done and everything looks correct, click **Submit**. A manager will review and approve your time entries.
6. If you want to change an entry that you already submitted, select the entry in your calendar and then click **Recall**.
7. If you want to copy all the entries from a previous week to the current week, click **Copy From** and select the timesheet week you want to copy.
8. If you'd rather see a list of what you're working on, click **Grid**.

If you're using the mobile app:

1. From the menu, go to **Time Entries**. You can switch to **Day**, **Week**, or **Month** view, or navigate to the previous or next time period.
2. Tap **…** and tap **New**.
3. Fill in the details as necessary and tap **Save**.

Enter expenses (Project Service Automation)

Enter your expenses at least weekly—or at the frequency requested by your managers—to ensure your clients are invoiced and you're credited correctly.

If you're using the web app:

1. Go to **Project Service > Expenses**. This brings up your calendar.
2. To see your calendar for the previous or next week, click **Previous** or **Next**. Click **Today** to get back to the current week.
3. To enter an expense, either click **New** or double-click in the calendar under the day you want to enter time for.
4. Fill in the fields in the **New Expense** form, and then click **Save**.
5. Continue entering your expenses for the week. When you're done and everything looks correct, click **Submit**. A manager will review and approve your expenses.
6. If you want to change an entry that you already submitted, select the entry in your calendar, and then click **Recall**.
7. If you'd rather see a list of what you're working on, click **Grid**.

If you're using the mobile app:

1. From the menu, go to **Expenses**. You can switch to **Day**, **Week**, or **Month** view, or go to the previous or next time period.
2. Tap **…** and tap **New**.
3. Fill in the details as necessary, and then tap **Save**.

Allow someone else to enter your time entry or expense (Project Service Automation)

Set up a delegate to let someone else make time or expense entries on your behalf in Microsoft Dynamics 365 for Project Service Automation.

Note

This feature is supported in December 2016 Update for Microsoft Dynamics 365 (online). Interested in getting this feature? Find your Dynamics 365 administrator or support person

Create a delegate

1. From the main menu, click **Project Service** > **Delegations**.
2. On the command bar, click **New**.
3. **Name**: Enter a name for the record.
4. **Type**: Select whether the delegate can enter time or expense entries on your behalf.
5. **Delegate**: Select the name of the person you want to be the delegate.
6. **Start and end dates**: Choose dates when delegation starts and ends.
7. When you're done, click **Save & Close**.

Turn off delegation

1. From the main menu, click **Project Service** > **Delegations**.
2. Select the delegation record you want to turn off.
3. On the command bar, click **Deactivate**.
4. On the **Confirm Deactivation** dialog box, click **Deactivate**.

Enter time for someone else

1. From the main menu, click **Project Service** > **Time Entries**.
2. On the command bar, select the **RESOURCE NAME** drop-down menu, and select the name of the person who you're entering time for.
3. Click **OK**.
4. This brings up the calendar. To see the calendar for the previous or next week, click **Previous** or **Next**. Click **Today** to get back to the current week.

5. To enter your time, either click **New** or double-click in the calendar under the day you want to enter time for.
6. Fill in the fields in the **Time Entry** form and click **Save**.
7. Continue entering time for the week. When you're done and everything looks correct, click **Submit**.

Enter expenses for someone else

1. From the main menu, click **Project Service** > **Expenses**.
2. On the command bar, select the **RESOURCE NAME** drop-down menu, and select the name of the person who you're entering expenses for.
3. Click **OK**.
4. To see the calendar for the previous or next week, click **Previous** or **Next**. Click **Today** to get back to the current week.
5. To enter an expense, either click **New**
6. Fill in the fields in the **New Expense** form. You can also add receipts.
7. When you're done, click **Save**.

Schedule time off

Schedule your vacation time or leave of absence in much the same way as you enter time for a project.

If you're using the web app:

1. Go to **Project Service > Time Entries**. This brings up your calendar.
2. To see your calendar for the previous or next week, click **Previous** or **Next**. Click **Today** to get back to the current week.
3. To enter your time, either click **New** or double-click in the calendar under the day you want to enter time for.
4. Fill in the fields in the **Time Entry** form.
5. In **Type**, select **Vacation** or **Absence**.
6. Click **Save**.
7. Continue entering time for the week. When you're done and everything looks correct, click **Submit**. A manager will review and approve your time off.
8. If you want to change an entry that you already submitted, select the entry in your calendar, and then click **Recall**.
9. If you want to copy all the entries from a previous week to the current week, click **Copy From** and select the timesheet week you want to copy.
10. If you'd rather see a list of what you're working on, click **Grid**.

Collaborate with your project team members with Office 365 Groups

With Microsoft Dynamics 365, you can collaborate with your team members on project documents, view your team's calendar, and have group conversations.

1. Go to **Project Service > Projects**.
2. Click the project you're working on.
3. In the bar across the top of the screen, select the down arrow next to the project name, and then click **Office 365 Groups**. This displays your project, along with items shared with your group.
4. To open your team's workspace in Office 365 Groups, click **Open Calendar**, **Open Conversations**, **Open Notebook**, **Open Documents**, or **Open People**.

Find your next project with the Project Finder Mobile app

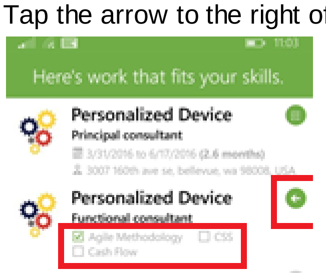
With the Project Finder Mobile app on your iPhone, Android phone, or Windows Phone, you can look up projects and sign up for ones that best meet your skill set and interests. You can also update your skills and proficiency levels with the app.

When you first start the app, you'll need to enter the URL for your Dynamics 365 system, your user ID, and your password. If you don't have this information, contact your Dynamics 365 administrator.

Find a project

The Project Finder Mobile app shows a list of projects ranked according to how well your skills and proficiency levels match the required skills and proficiency levels for the project. The projects that are the best fit for you appear at the top of the list. A checked box under the project title indicates your skills meet or exceed the requirements for the project.

Tap the arrow to the right of the project you're interested in to see more details and sign up for it.



Update your skills

Tap the profile button on the bottom right of the screen to update your skills and proficiency levels.

White papers - Dynamics 365 for Project Service Automation

These white papers are designed to provide in-depth information for Dynamics 365 project service automation.

- External system integration for project service
- Basic guide to quoting, pricing, and billing for project service
- Advanced guide to quoting, pricing, and billing for project service
- Guide to project planning and tracking for project service
- Reporting for project service
- Resource management for project service

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