Project Management for Dynamics CRM– User Guide

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Install and Configure PM App

Once PM Solution is successfully installed on the CRM Online environment, System Administrator must configure the solution before it can be used for managing projects and using all the features offered by the solution.

Steps to configure PM solution:

1. Open Solution: Settings→ Solutions → ProjectManagement. This will open the Configuration page of the solution. You need to complete the configuration form to get started.
2. Configuration form has 2 Tabs/ sections:
   i. *Profile*
      - Kindly enter the Company and Contact details, which will be stored with us once you submit profile.
      - There is an option for Try/ Buy on the top (by default set to "Try"). When you submit the profile, it will activate a 1-Month FREE trial for the CRM Online environment.
      - You can see the Status and expiry date on the top right of the Form.

   ii. *Setup*
   Once Profile is setup and Trial is activated, move to the Setup page. Fill in the project management details – Organization working time, hours, Invoice address, etc.

3. Billing Code Setup
   - Billing Codes tells the project of the rates to be charged per role in the project. For e.g. In a project we need a Solution Architect, 2 developers, 1 technical Lead and a project manager, and the rates of each role may differ. Billing Codes help in assigning rates to each role in the project.
     Also, when time entries are entered by Resources, they must select the billing code. And this billing code will be used for calculation of Actual revenue on the project.
   - For adding Billing codes, Navigate to Project Management → Billing Codes. Create billing codes with name and rate. These billing codes will be available for selection when you create projects.

4. Skillset Setup
   - You can add list of Skillsets applicable for Resources in your Organization. For e.g. Project Management, C#, CRM Online, MSBI, Solution Architect, Sales Management, Tech Lead, etc.
   - Navigate to Project Management → Skillsets to add these.
   - Once Skillsets are setup, these skillsets can be assigned to user with their proficiency and experience. You can do this by navigating to Project Management → User Skillsets
   - This data will help the project manager to select proper team when creating a new project.

Refer Skillset selection and team selection to see how these will be used.

- Unlike Billing code setup, Skillset setup is Optional, but it is recommended for enabling Project managers to select the project team appropriately and based on the skills required for the project.

5. Security Role Setup
   - Assign relevant security roles to all the Project Management Users.
   - There are 3 types of users in CRM, and specific security roles need to be assigned to the users for them to access relevant sections and features of project management. Following table shows the Security Roles needed for each user:

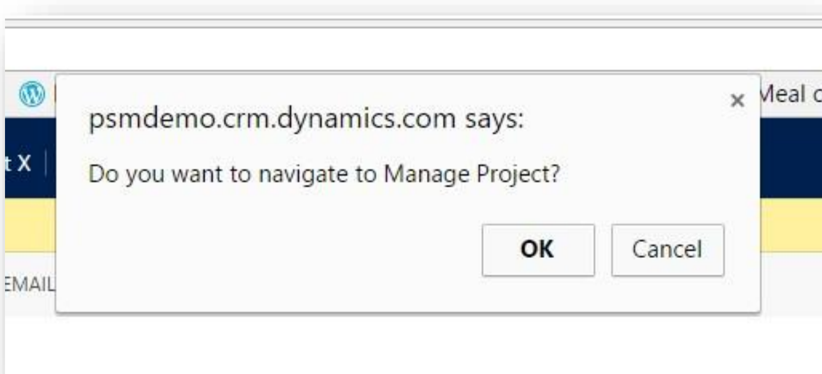
	SECURITY ROLES			
User Type	**PSM Core Role**	**PSM Project Team Member**	**PSM Project Manager**	**PSM Billing Administrator**
Project Manager	✓		✓	
Billing Administrator	✓			✓
Project Team member	✓	✓		

6. After completing the above steps, Project Management solution is now ready for use.

How To:

1. Create Projects

- Projects can be created by Project Managers by Navigating to Project Management → Projects.
- The New project form has basic details of the project like Project Name, Client Name, Description, Start and End dates. Once this form is saved, the user will be shown a pop-up asking to navigate to Manage project section.



- Details of the Manage Project can be seen in the next section.

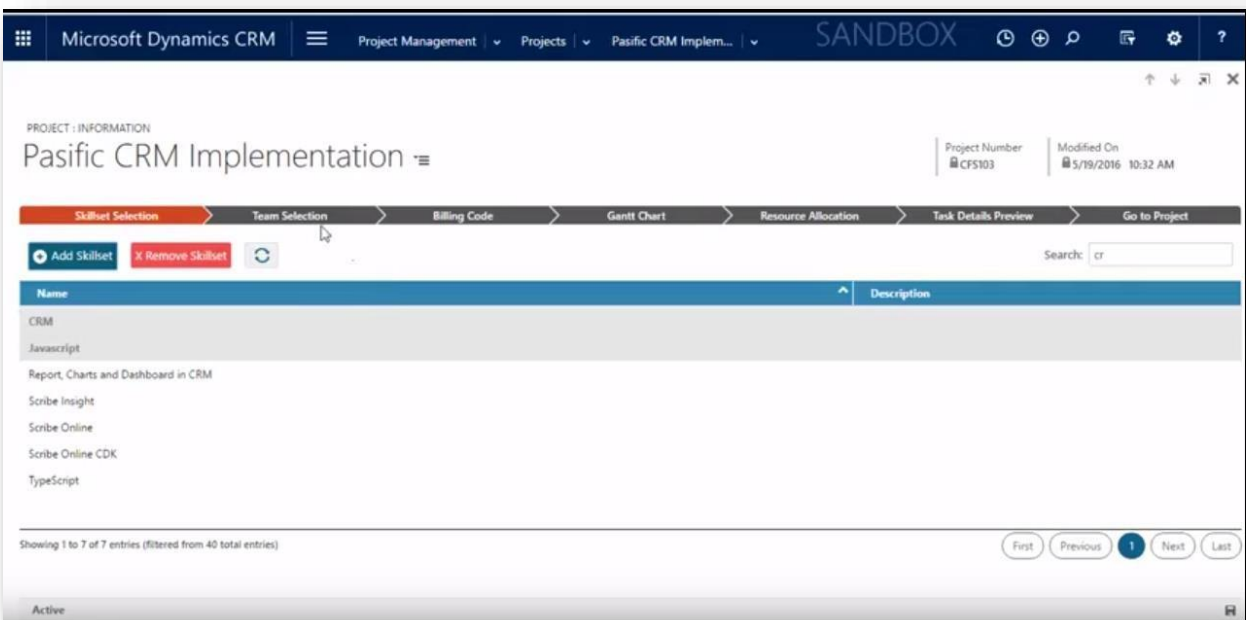
2. Manage Projects

The Manage project section allows Project Managers to efficiently create and manage projects. It helps Project Manager to select right team members based on project skills requirements, create hierarchical tasks using Gantt chart. This enables Project Managers to derive the project timeline and budget efficiently.

It is a step by step process as below:

2.1. Skillset Selection

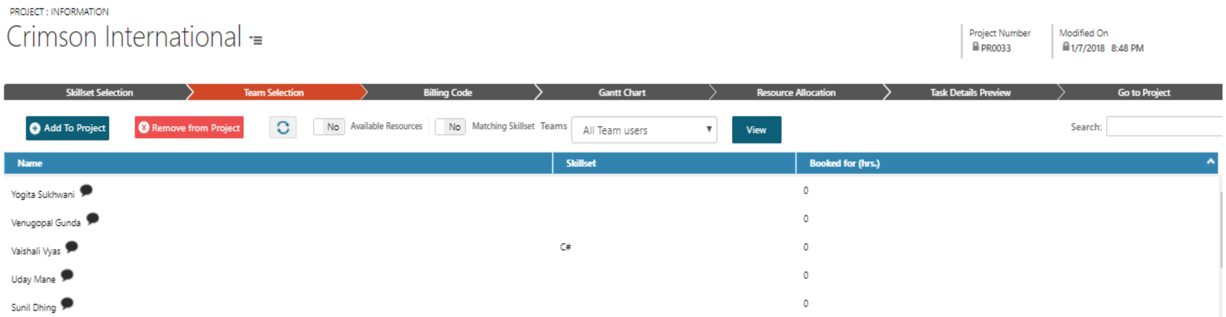
- Select the skills required for the project. For e.g. project requires skills like CRM Development, JavaScript, Project Management, Power BI; you can select these and add them to the project.
- This skillset data will be helpful in Team selection in the next step.



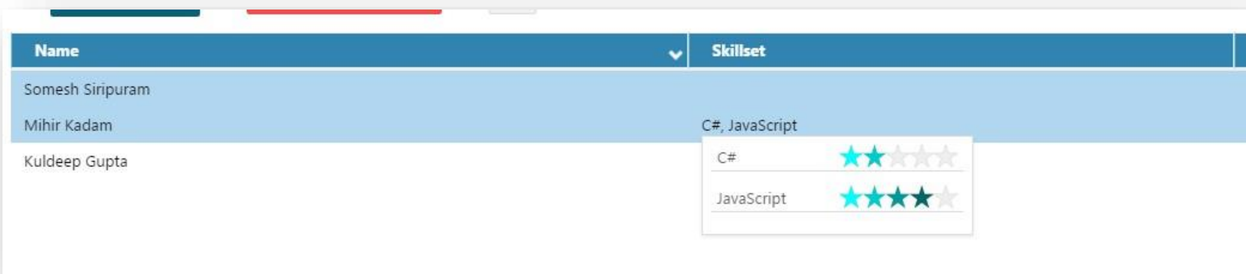
2.2. Team Selection

- The team selection grid shows all the CRM users. You can select users and click "Add to Project". This will add the users as team members to project. Add automatically provide access for them to perform time and expense entries against the project.
- The users can be filtered by availability, skillsets and by the organizations team of which they are a part of.

  Note: The Users should have "PM project team member" security role for the manager to be able to add to Project Team



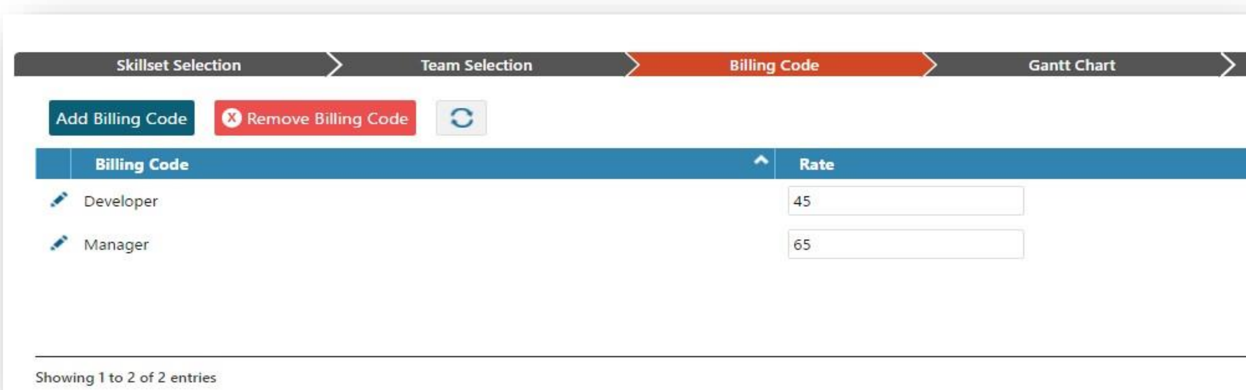
- The grid shows resource name, Skillset for the resource and No. of booked hours during the current project duration.
- On hover of skillset, you can see the proficiency of the user on the skillset. This visual will help the PM to make decision on whether to select the Resource for the project.



- On top of the grid, you can see filters for Matching skillset and Available resources. If you enable matching skillset, only the resources with the skillset specified for the project will be visible.

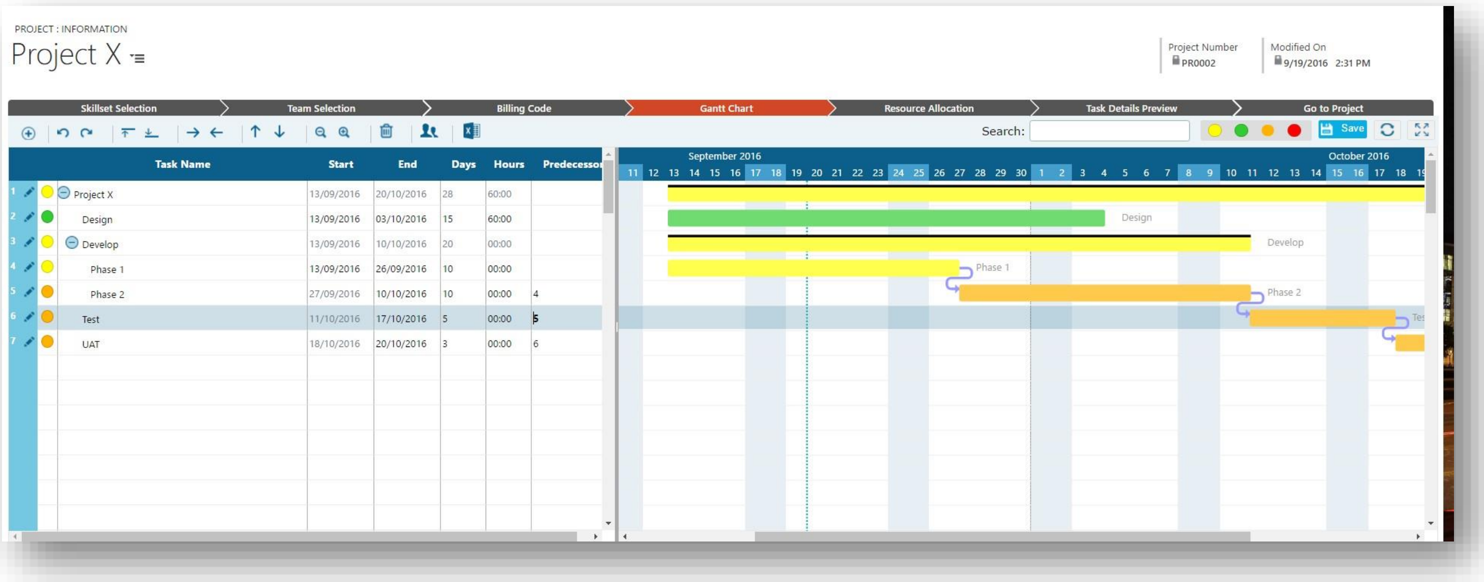
2.3. Billing Codes

- The billing codes grid will show all the billing codes created during setup. You can select the billing code applicable for the project and click “Add Billing Code”, and edit the billing code rates for the project.



2.4. Gantt Chart/ Task and Timeline management

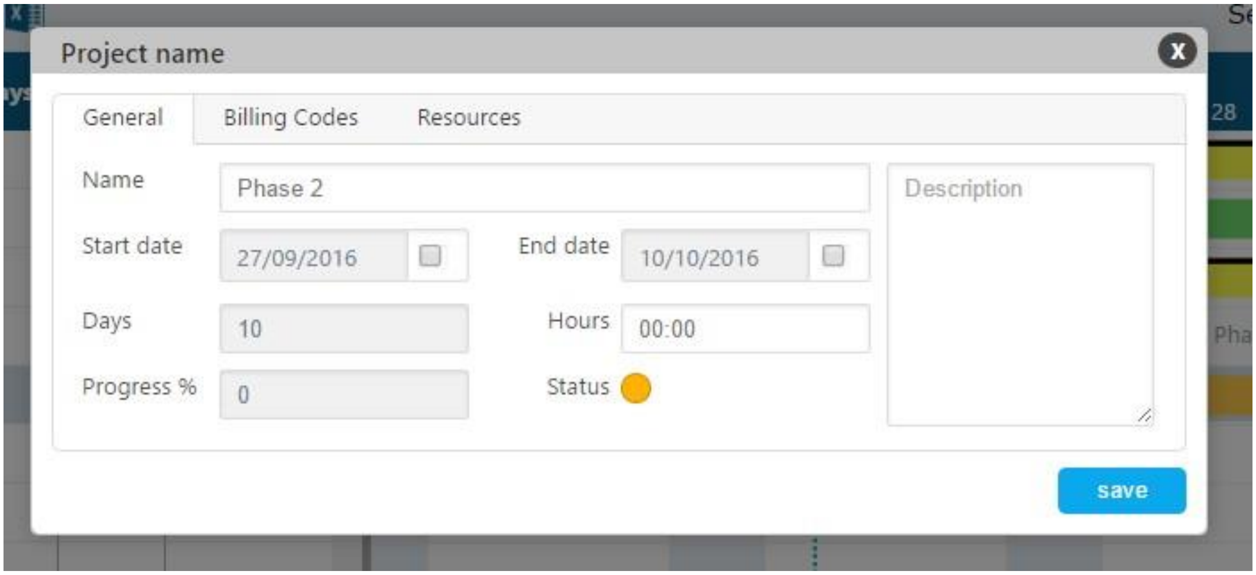
- Gantt Chart allows PM to create tasks and subtasks for the project.



- It contains 2 views:
  a. Task Editor view to see tasks
  b. Gantt chart view to visualize tasks dependencies, status and timeline.
- The task editor row has following columns:
  a. Task Sequence Number
  b. Task Name
  c. Start Date
  d. End Date
  e. Duration in days
  f. Estimated Hrs. for task
  g. Predecessor/ Dependencies: You can use sequence number of the dependent tasks.

Refer screenshot below.

- On double click of the task, or by clicking Edit icon on the left side of a task row, you can add more details to the task using an inline popup. Note: You can only edit leaf level tasks.



- The popup has 3 tabs:

  a. General: General task information like Name, status, Estimated hours, Duration etc.

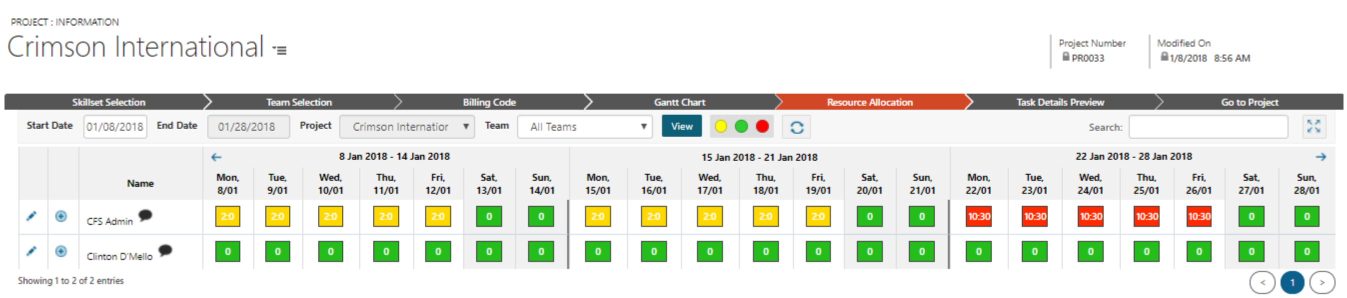
  b. Billing Codes: Add one or more billing codes applicable for this task.

  c. Resources: Add Resources who should have access to the Task. Once all the information is entered, click Save on the top right to save all the tasks and their relevant information.

- You can learn more on Gantt chart by watching the [Video demo].

2.5. Resource Allocation

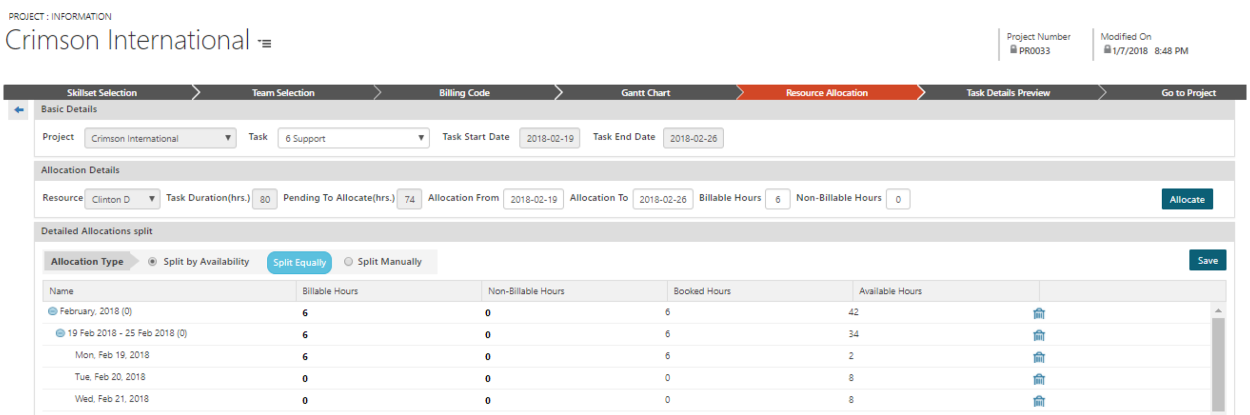
- Once tasks and hours are entered, you can do detailed resource allocations for each, task analyse resource availability and perform resource planning. Each Resource name has Edit Button on the left, which will open Resource editor window as below.



- The Resource Editor allows allocation a Resource to Project Task with options for selected start and end date with a very easy to understand interface.
- When you click Allocate, allocations will be done based on Availability of the Resource. You can then choose to split the hours in the date range using options:

1. Split by Availability (default)
2. Split Equally has two options
   a. Split Equally by Months>Weeks>Days: As the name says the allocations will first be split by month, then by weeks and finally by days.
   b. Split Equally by Days: This will split the hours directly by the number of days.
3. Split manually – Manager will manually enter hours for each day for the date range not exceeding the total no. of hours to be allocated.

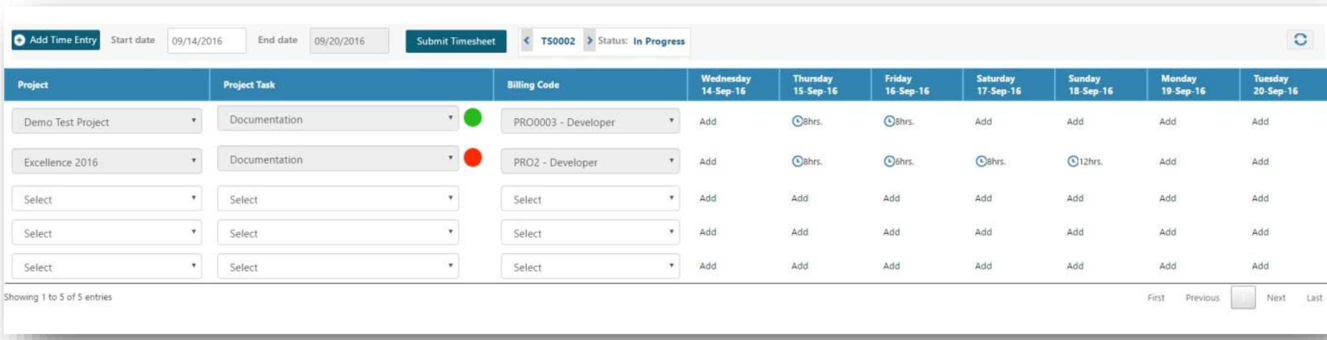
- After any resource is allocated and the task dates are changed in the Gantt Chart depending on the configuration data the allocations outside the task date range will be removed and added to pending hours or the allocations outside the dates will be kept as they are.

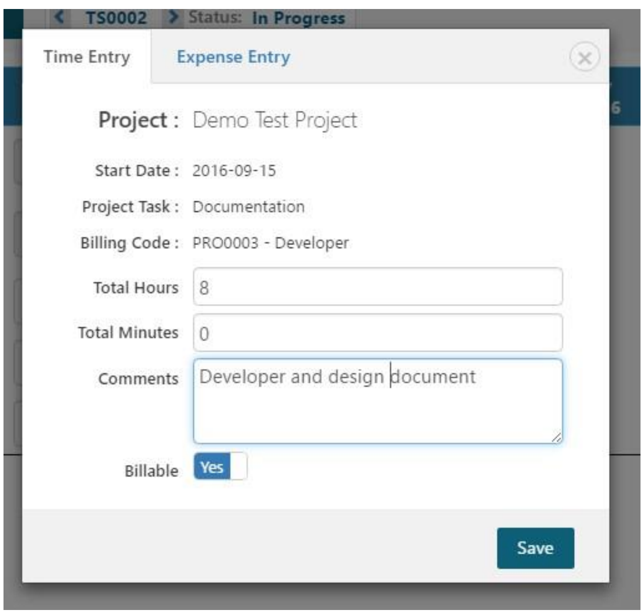


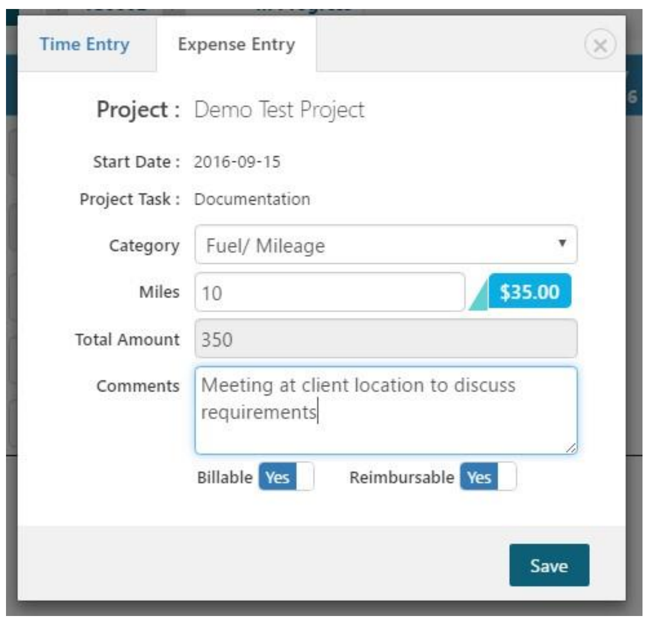
3. Time and Expense Entries

- Project Team members and managers can enter time and expense against project and tasks using simple and time saving interface.
- Timesheet allows entering Time and Expenses for a week. It allows easy navigation to access Other Timesheets, and once all the time entries are done for a week, user can submit the time entries.
- Time Entered by User (when marked as billable) will be tracked on Project and the selected Project task. At the same time project actual revenue is calculated using the Time and the rate specified by the Manager on the project billing codes. This allows Managers to easily track project progress using the Billable and Non-billable hours on the Project and task.
- Similarly, expenses entered on the project are also tracked on the project in the field “Actual Expenses”.

- <u>Reference Screenshots below:</u>







Useful Links:

1. Product Link:
   http://www.cloudfronts.com/project-management-for-dynamics-crm/

2. FAQ:
   http://www.cloudfronts.com/project-management-for-dynamics-crm/faq/

3. PM Solution Demo Video:
   https://youtu.be/5VX_wTVrdJ8

4. PM App New features:
   https://www.youtube.com/watch?v=pG1smxAKFqE