



## Professional project management:

Dynamics 365 apps  
by proMX

WHITE PAPER



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# Introduction

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For nearly 20 years, proMX has developed apps that extend the functionalities of Microsoft Dynamics 365. Since then we have grown our expertise and learnt valuable lessons from experience. Today, our products are the result of years of consulting companies of different sizes and industries, and of collaborating closely with Microsoft.



**Whenever a high level of organization as well as an exact overview over progress and costs are needed – in short: in complex situations –, digital tools are particularly valuable. In this white paper we'll therefore introduce you to solutions that complement Dynamics 365 Project Operations and make the management of all kinds of projects much easier.**



## Our add-ons for Microsoft Dynamics 365 Project Operations

These **seven apps** fill the gaps in project management functionalities of Dynamics 365 Project Operations:



**Project Gantt:**  
never lose track of your projects



**Time Tracking:**  
click, click, tracked



**Mobile Time Tracking:**  
simple time tracking from anywhere



**Approval Manager:**  
neat approval management



**Holiday Management:**  
a well-deserved (tracked) vacation



**Travel Expenses:**  
travel and payback



**proMX 365 Base:**  
Project Operations your way



## Project Gantt: never lose track of your projects

DISCOVER PROJECT GANTT >>



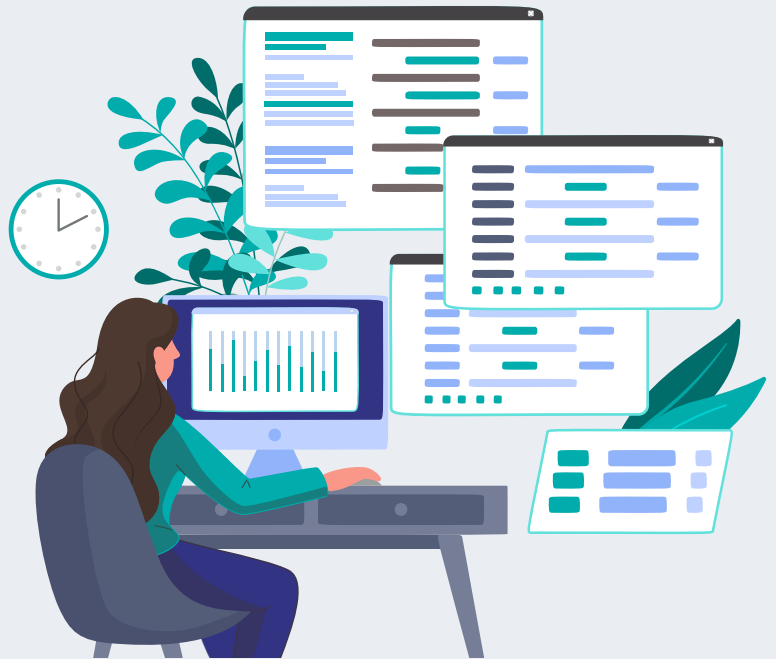
comprehensive overview  
of all (custom) projects at  
once



project structures can be  
displayed realistically



more opportunities for  
project managers



### What is it?

Project Gantt is an app for Dynamics 365 Project Operations that helps you plan your projects better, more realistically and with better visuals as well as adapt them more flexibly. The app starts where Dynamics 365 Project Operations' standard functionalities end. The multi-project/ multi-customer Gantt charts view helps project managers to keep an overview over all current and upcoming tasks.

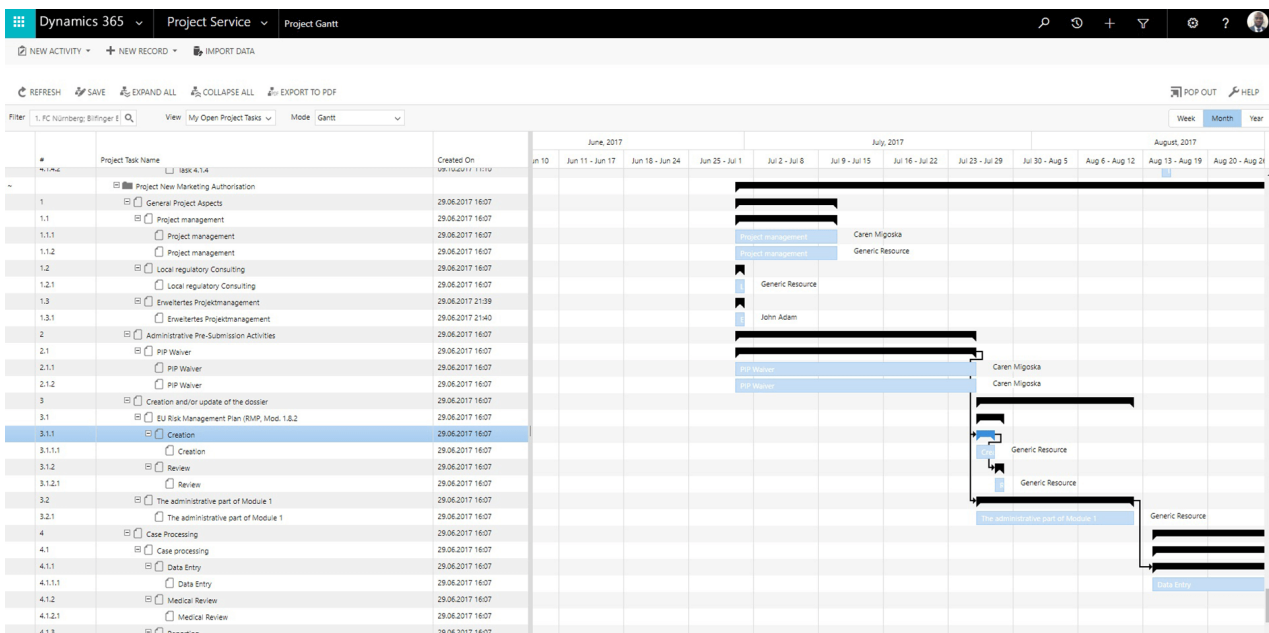
### What can you do with it?

The functionalities of Project Gantt that extend Dynamics 365 Project Operations are:



## Multi-project view:

In Project Gantt you can view the whole of your project business. That includes all ongoing, planned and finished projects for all customers. There are various options to filter your view so you can take a look at exactly what you're interested in, e.g. projects in a specific time frame or for specific customers. New customer projects can be created there directly or the existing project structure edited (for example by adding work packages, durations, changing dependencies or assigning resources).



*Structure your projects by adding project tasks, changing task duration or adding an entirely new project – and more.*

## Project controlling:

You can swap your multi-Gantt view for the controlling mode with just one click. There you can track your KPIs and analyze precisely how many hours have been worked on the project so far or how the actual costs compare to your estimated costs. Indicators in different colors that tell you what you need to know are great for a quick summary: is everything going according to plan or does the course of the project need to be corrected?

## Quotes:

Create a quote first, plan the project second? With the help of Project Gantt, the other way round is possible. Start by planning a potential customer project with all work packages, dependencies and milestones. Then generate a quote based on this project structure. Don't worry: before sending out the quote, you have the chance to adjust it at any time.



## Time Tracking: click, click, tracked

DISCOVER TIME TRACKING >>



easy and fast time and  
expense tracking



precise start and end  
times of tasks can be  
documented



fewer mistakes in bills  
and reports



### What is it?

Time Tracking is an app that extends Dynamics 365 Project Operations with time and expense tracking functionalities. The app helps project managers document their working times, tasks and expenses for projects more easily, faster and less complicated – from anywhere at any time.

### What can you do with it?

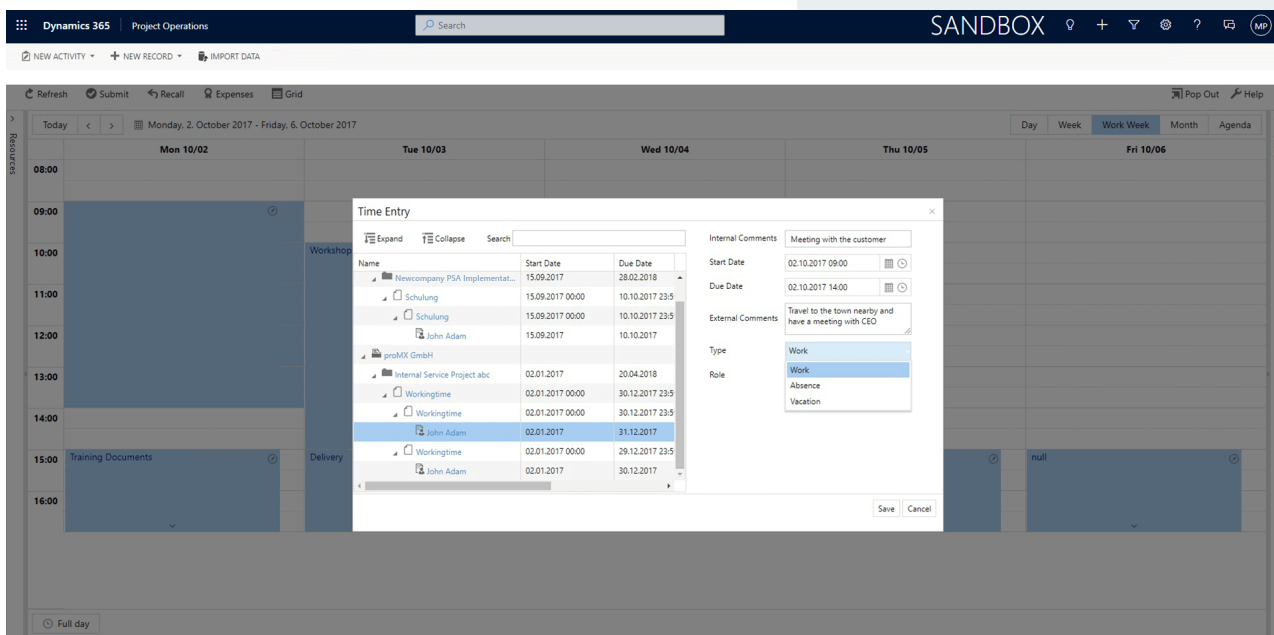
App functionalities include:



## Time tracking:

Create time entries to track the date and duration of your work effort. You may as well add a description and choose if your work is billable or not. You can not only track your working times, but also your vacation and bank holidays. In the calendar view the booking categories are displayed in different colors to give you a quick overview.

*Create time entries, add a description and note or track your absences and vacations.*



## Expense tracking:

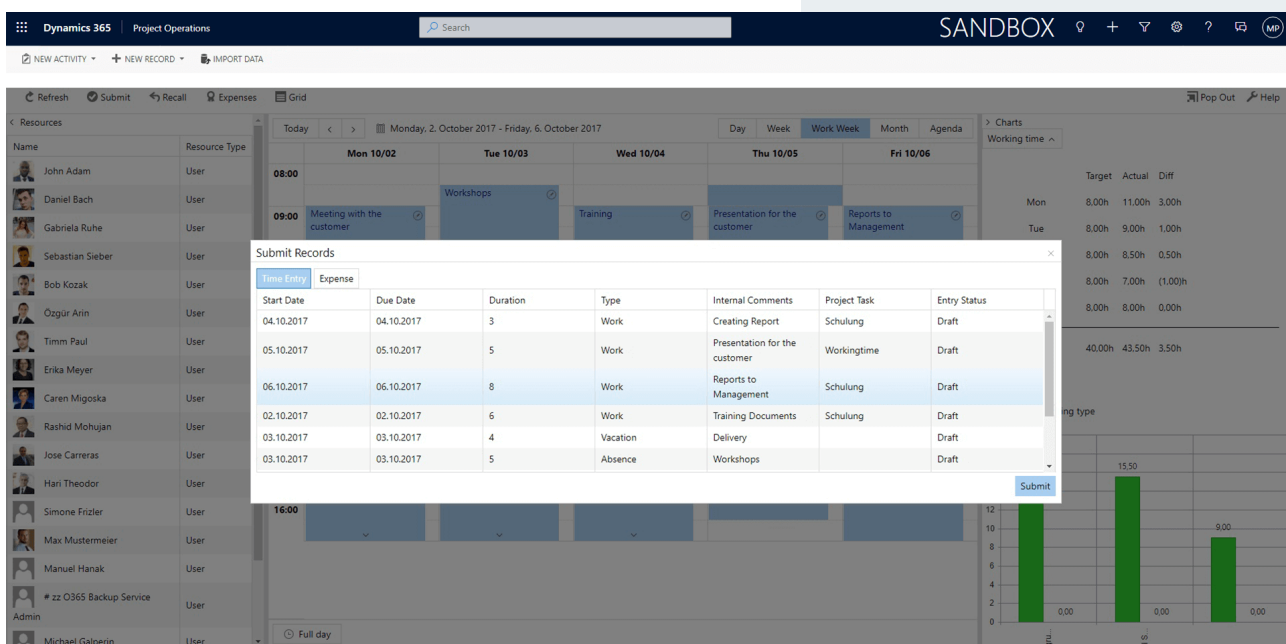
You can track any expenses that come up in a work package easily and quickly with the help of Time Tracking. You have the opportunity to choose between different types of expenses and pick the payment date. By assigning the correct name and adding a description to your expenses the project lead or accounting department won't have to get back to you with too many time-consuming questions.



## Submission:

All bookings – whether it's working time, vacation time or expenses – will always be created as a draft that you can edit until you decide to submit them. Submitting your working times only takes one click. In order to save time, you can submit more than one entry at the same time. Oops, you found a mistake? No worries, you can also withdraw your bookings.

*You can submit multiple entries at once and recall submitted bookings should you have made a mistake.*



## Summary:

Time Tracking also helps you to keep an overview over your submitted times. You'll be able to instantly access analyses of your bookings created within a set time frame (day, week, working week, month). From the charts you'll be able to see whether you reached your goal and to view time entries and expenses sorted by type.



## Mobile Time Tracking: simple time tracking from anywhere

DISCOVER  
MOBILE TIME TRACKING >>



quick time tracking thanks to synchronization with Outlook calendar



overview of current projects



Microsoft To Do lists at hand at all times



### What is it?

Mobile Time Tracking is an app for smartphones, tablet and desktop, that lets you record your working times from anywhere. But it is more than just a mobile application to track your times. Mobile Time Tracking is synchronized with the Microsoft app To Do and with your Outlook calendar. The latter helps particularly employees with busy schedules to track their working times faster and more precisely.

### What can you do with it?

Mobile Time Tracking not only allows you to track your times more efficiently, but also to keep track of current projects:



### Outlook synchronization:

The app shows you all entries from your Outlook calendar. Appointments that you haven't accepted yet are marked with a blue and white line. With just a few clicks you can book them as time entries. Date, time, duration and title of the booking are imported from Outlook automatically. Simply select the right project and task, add a comment if you like, and your time entry is ready.

### Project overview:

Besides all your appointments, Mobile Time Tracking also shows you a list of all projects you are involved in. An overview tells you who else is part of the project team, how many hours you have already booked on a certain project and when you will reach the next milestone. Furthermore, you see how many hours you have already saved as time entry drafts for the current week and how many you have already submitted.

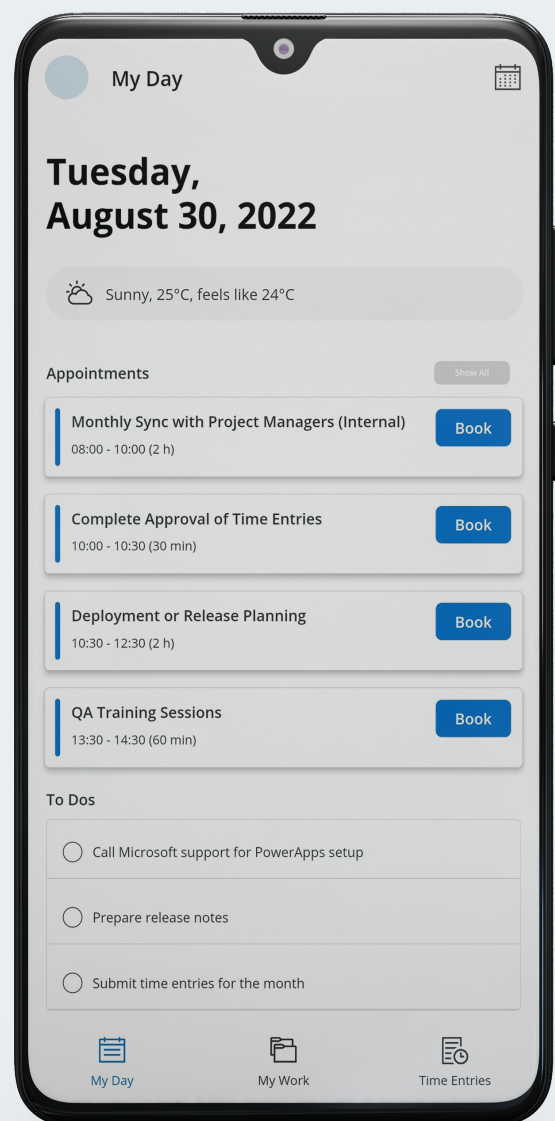
### Editing:

As long as bookings are in draft state you can correct them anytime. Even submitted entries you can recall. Of course, you can also create time entries from scratch that are not based on Outlook appointments.

### Connection with Microsoft To Do:

Do you use the Microsoft app To Do to create and manage to-do lists? In that case you can see your notes from there in Mobile Time Tracking, too. Tasks that you tick off here are marked as done in To Do. The other way around, you will only see your open tasks in the mobile app.

*The app shows you a daily overview of appointments and to-dos.*





## Approval Manager: neat approval management

DISCOVER APPROVAL MANAGER >>



faster and easier approval process



higher quality customer billing



overview of submitted bookings



### What is it?

Approval Manager for Dynamics 365 Project Operations eliminates the chaos caused by the approval process for working times and expenses. The app helps you approve or deny bookings with more structure, which provides you with a better overview of the actual work and costs. At the same time it reduces the effort for unpopular, unproductive tasks.

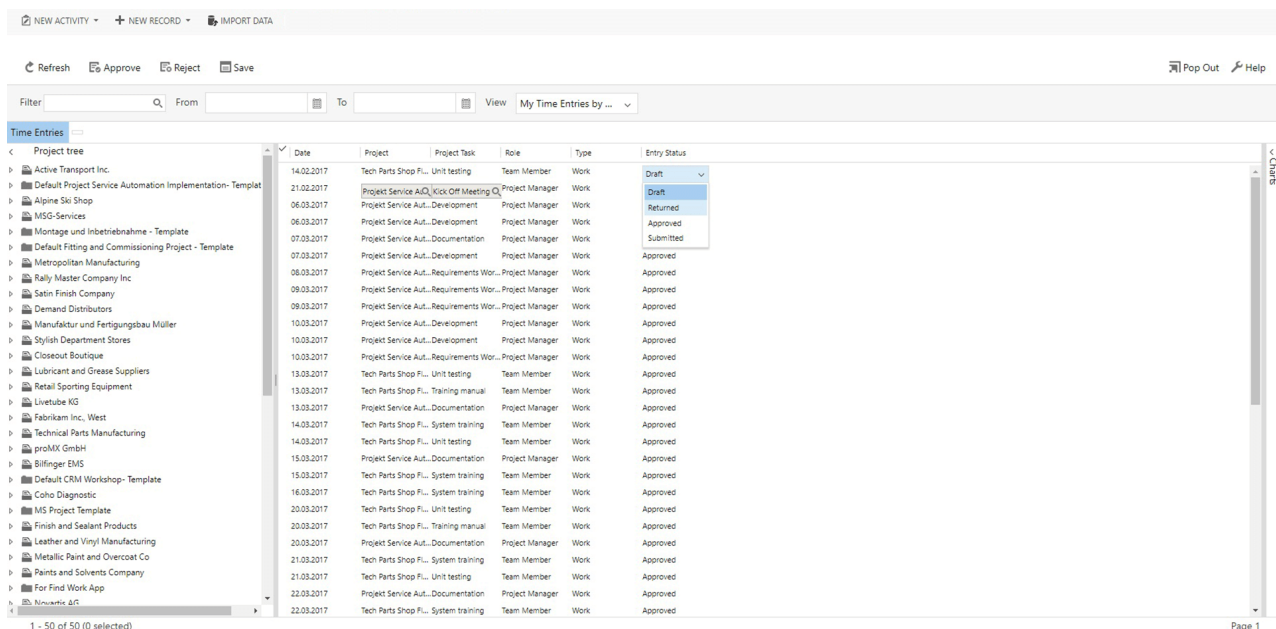
### What can you do with it?

It is the details that make Approval Manager a solution for the approval process that you won't want to miss anymore. They include:



## Inline editing:

When project managers can correct bookings by themselves, it saves a lot of time for everyone involved. With Approval Manager's inline editing functionality, they can fix small mistakes or inaccuracies quickly.



*An inline-edit function eliminates the need to redirect bookings to employees.*

## Filters:

Everyone has their own method of approving bookings. In Approval Manager there is room for each of these methods. A project tree filter helps you filter bookings and work through them systematically – project by project, work package by work package or any way you choose to. You can also use the search bar to find the data sets you're looking for.

## Mass approvals:

There is no need to approve bookings individually. Instead, choose several time or expense entries at once and save time by approving all of them with just one click. In case you approved a booking that you didn't mean to approve, you can easily withdraw it with a built-in functionality.



## Holiday Management: a well-deserved (tracked) vacation

**DISCOVER  
HOLIDAY MANAGEMENT >>**



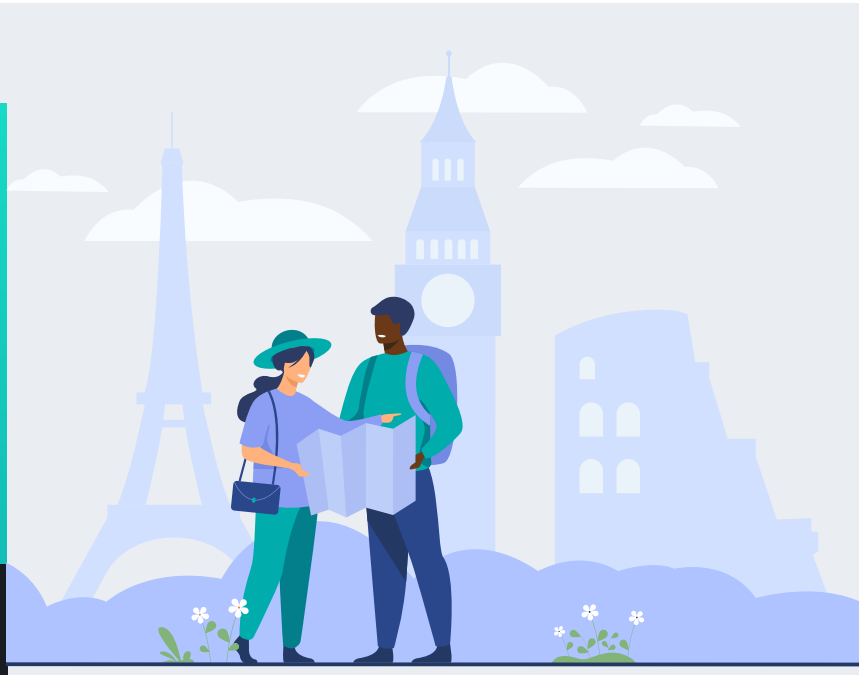
simple overview of  
entitled vacation days,  
vacation planning and  
leftover vacation days



calendars no longer  
need to be managed  
manually



different vacation day  
models can be applied



### What is it?

Holiday management is a resource management app for Dynamics 365 Project Operations that supports you in requesting and managing vacation times effortlessly – across the whole company, no matter which country or region your employees are in or how many vacation days they are entitled to. The app keeps an overview of bank holidays and vacation days and makes your planning easier.

### What can you do with it?

Vacation time is the best time. However, the process of approving vacations is often less pleasant. The functionalities of Holiday Management solve this struggle:



## Holiday entitlement:

After you have defined your employees' holiday entitlement, Holiday Management takes over. You'll be able to view how many vacation days a person has available, when they plan to take them and how many they have left.

## Holiday requests:

Employees can request their days off via the app. As soon as a holiday has been approved, they'll be marked unavailable in their calendar. That way the resource manager can't assign them any tasks for this period of time.

**Holidaymaker on Statutory Holiday from 20.04.2020**  
Submitted By: PRO-MX-ADMIN, # | Submitted On: 16.04.2020 17:49 | Approved Status Reason: | Last Changed By: PRO-MX-ADMIN, #

**General** | Related

**Request**  
Resource: \* Holidaymaker | Holiday Type: \* Statutory Holiday | Holiday Information: One week holiday

**Allowance (with total numbers of vacation days per allowance)**  
Klemps 2.020

Allowed	Approved	Remaining (Allowed - Approved)	Requested
30,00	5,00	25,00	0,00

**Duration**  
Duration: \* Multiple days | From: \* 20.04.2020 | To: \* 24.04.2020 | Requested (this request only): 5,00

**Approval**  
Manual Approver: PRO-MX-ADMIN, # | Approve or Reject: Approve | Approval Comment: Approved | Status Reason: Approved

**Tracking**  
Submitted By: PRO-MX-ADMIN, # | Last Approval Used: Manual | Last Changed By: PRO-MX-ADMIN, # | Last Changed On: 16.04.2020 17:52

*All approved absences are locked in the calendar, preventing tasks from being assigned during this time.*

## Bank holidays:

Each country has different bank holidays, sometimes they even differ from region to region. Without technical support, it is nearly impossible for a national or international company to keep track of all these bank holidays. Luckily, Holiday Management exists. There you define a list of bank holidays per region once and apply it to the employees that work in the respective region.



## Travel Expenses: travel and payback

DISCOVER TRAVEL EXPENSES >>



shorter reimbursement  
cycles and better cashflow



improved employee  
satisfaction thanks to  
quicker reimbursement



simple expense billing  
for employees



### What is it?

When project members need to manage their expenses after a business trip, Travel Expenses for Dynamics 365 Project Operations supports them perfectly. Even before you start your travels, the app offers you useful functionalities and speeds up reimbursement.

### What can you do with it?

Travel Expenses covers all aspects of tracking expenses:





## Planning:

If you go on a business trip, there is usually something to reimburse. Something that is clear even before the trip starts. In the app, you can therefore save information beforehand, for example project, customer, reason for the trip, country and duration. That way you won't have to save the same data repeatedly.

## Tracking:

After your trip, you can add all expenses and assign it to the respective business trip. Date, expense type, sum, VAT (automatic) will be documented. You can also upload a copy of the receipt to the system.

## Reimbursement:

As soon as you have received your money, the expenses will be marked as “reimbursed” and the process is finished.

The screenshot displays the Dynamics 365 PMO interface for a 'Trip to customer site' record. The record is marked as 'Reimbursed' and includes the following details:

- Travel-No.: 2020-1134
- Title: Trip to customer site
- Resource: PRO-MX-ADMIN
- Expense only: No
- Internally Caused Travel: Nein
- Customer: 4care
- Country of Travel: Germany
- Project: 4care project
- Owner: PRO-MX-ADMIN, #
- Start: 04.05.2020 15:00
- End: 08.05.2020 17:00
- Duration: 4.08 days
- Status Reason: Reimbursed

The right sidebar shows summary tables for Total Travel Costs and Reimbursement:

Total Travel Costs	
Total Expenses	264,20 €
Total Per Diems	112,00 €
Total Travel Costs	376,20 €

Reimbursement	
Expenses (privately paid)	264,20 €
Per Diems	112,00 €
Reimbursement Amount	376,20 €

The bottom section shows the approval process:

Approval	
Submitted on	19.05.2020 18:14
Submitted by	PRO-MX-ADMIN, #
Approver	PRO-MX-ADMIN, #
Approved on	19.05.2020 18:14
Approved by	PRO-MX-ADMIN, #

*Expenses can be marked as reimbursed once private expenses have been repaid to employees.*



## proMX 365 Base: Project Operations your way

**DISCOVER proMX 365 BASE >>**



individualization of Project  
Operations possible



creates a customized  
project management  
solution



comprehensive detailed  
project controlling



### What is it?

In case you wish for additional features for Microsoft Dynamics 365 Project Operations proMX 365 Base is what you need. It is a kind of toolbox with tools to extend Project Operations. That way you can complement and individualize the software as you see fit.

### What can you do with it?

The features of proMX 365 Base for Project Operations cover the entire process from planning to management and controlling of projects. They include, but are not limited to:



## Project management:

The multi-project and multi-customer view with Gantt diagrams help you to monitor project progress and never lose sight of milestones. To make sure that the representation reflects reality, you can effortlessly set up different types of dependencies between project tasks.

## Resource planning:

The app for resource planning gives you an overview of the capacities of your team members across projects. This helps you to plan better and more sustainably.

## Time and expense tracking:

Create time entries with exact start and end times. Furthermore, you can record all expenses incurred during the execution of a project task. Thanks to the Outlook integration you can conveniently create bookings from the e-mail program.

Project PO implementation - Saved  
Project · proMX Project

1/26/2022 4:00 PM Due Date 41.73 Total Cost Consumption % 0.54 Progress %

Project Active for 4 months

Opening (4 Mo) Detailed Planning Execution Acceptance Closure

Summary Tasks Team Resource Planning Controlling Estimates Risks Status Settings Task Billing Setup Related

Start Date 11/11/2021 View Mode Weeks APPLY

Resource Planning		Total Project	Total Period	CW 45/21	CW 46/21	CW 47/21	CW 48/21	CW 49/21	CW 50/21	CW 51/21	CW 52/21	CW 1/22	CW 2/22	CW 3/22
>	David Hill	756.13	622.17	2.67	4.67	4.67	1.33	0	0	0	117.08	163.92	163.92	163.92
>	Manuel Hanak	0	0	0	0	0	0	0	0	0	0	0	0	0
>	Mason Baker	0	0	0	0	0	0	0	0	0	0	0	0	0
Total hours for page		756.13	622.17	2.67	4.67	4.67	1.33	0	0	0	117.08	163.92	163.92	163.92
Total hours overall		756.13	364.60	0	2	4.67	4.67	2	0	0	0	23.42	163.92	163.92

< > 1-3 of 3

*Overview of your resources' workload across all projects*

## Project controlling:

Various features support you with always staying on top of the most important numbers to avoid negative developments continuing unnoticed. For example, there are additional fields within the project entities for project KPIs and statistics (different project types, customer satisfaction, etc.). proMX 365 Base also provides you with detailed real-time data regarding budgets, time tracking, resources and pipeline data.



## The alternative to Project Operations: **proRM Fast Start**

**DISCOVER proRM FAST START >>**



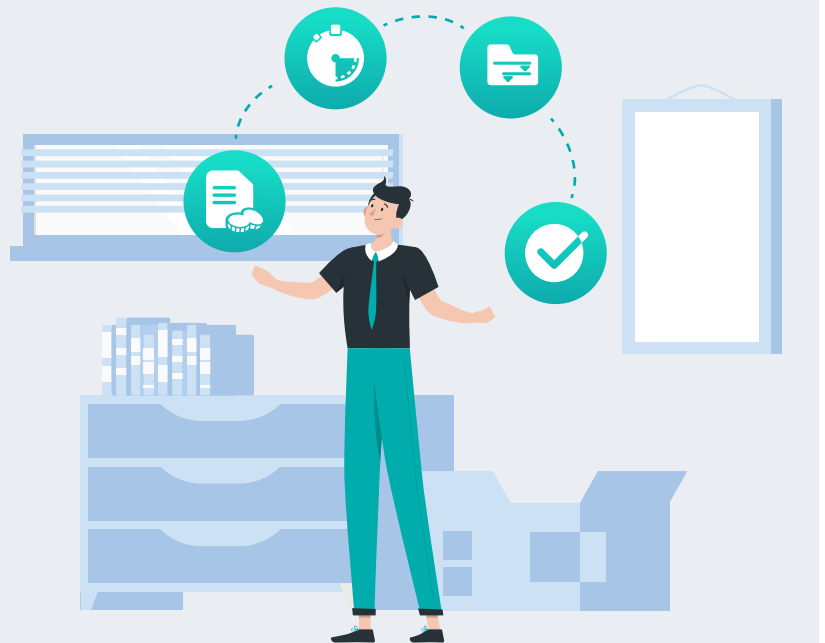
sales and project  
management in one  
seamless solution



efficient processes for  
project managers and  
team members



quick, inexpensive  
professionalization of  
project management



### What is it?

proRM Fast Start is an app that enables you to quickly and easily professionalize your project management within Microsoft Dynamics 365. proRM Fast Start is a great fit for small and medium-sized businesses that would like to quit using Excel for their project management. Because such a makeshift solution will become confusing sooner or later, also it can only reflect the reality and complexity of project business insufficiently. With proRM Fast Start you can add professional project management to Dynamics 365 in only a few days.

### What can you do with it?

This proMX app includes the most important project management features – from project planning and controlling to time tracking, approval management and invoicing. They are what makes it an inexpensive and quickly implemented alternative to Microsoft Dynamics 365 Project Operations.

proRM Fast Start can also be the first step towards a Professional Services Automation solution since it is fully compatible with Dynamics 365 Project Operations. In case you outgrow Fast Start you can effortlessly switch to the Microsoft solution.

**The app comprises four functions for project managers and team members:**

**Project Gantt:**

It is a valuable application for project managers. Here they can create project structures (for example via a project template) and immediately assign suitable resources to work packages. The multi-project and multi-customer view allow you to keep an eye on all current and future tasks, their progress and their dependencies. In this view, you can also easily modify the project structure. It hardly gets any clearer or more flexible than that.

**Time Tracking:**

Team members who are assigned to a work package can record their work times and expenditures for this particular task accurately and easily. A template asks you to fill in everything important: start and end time of the activity, a description, notes, and whether it is billable or not. You can not only track your working hours this way, but also bank holidays, vacations or absences. The application also lets you record and submit expenses belonging to certain work packages.

**Approval Manager:**

Once project members have tracked their working times, it is their managers' turn again. In the Approval Manager application, they find all submitted bookings and can filter them as desired. If there is anything they don't approve of, they can either return the booking to the team member with just one click or use the editing function to correct the mistake themselves. That way no inaccurate bookings will enter the invoicing process.

**Invoicing Manager:**

At the end of every invoicing period there should be a flawless invoice. The Invoicing Manager simplifies this process. Bookings approved by project managers land here and accounting can create an invoice that is ready to be sent out via simple drag & drop.

</

*Easily create invoices via drag & drop in the Invoicing Manager.*



## Project management with funds: **proMX 365 Smart Funding**

**GET TO KNOW  
PROMX 365 SMART FUNDING >>**



central, clearly structured  
administration of all funds



proof of correct usage of  
funding money quickly  
and without gaps



customizable according  
to organization structure  
and requirements



### **What is it?**

Companies often opt for a professional project management solution when they have been granted funds to realize certain measures. The reason is that such funding is often tied to conditions. When you are unable to fulfil them or cannot provide evidence that the money is spent as intended your company risks back payments.

That won't happen with proMX 365 Smart Funding. It helps you to realize funded projects efficiently, keep complete control of all costs and not lose sight of important details.

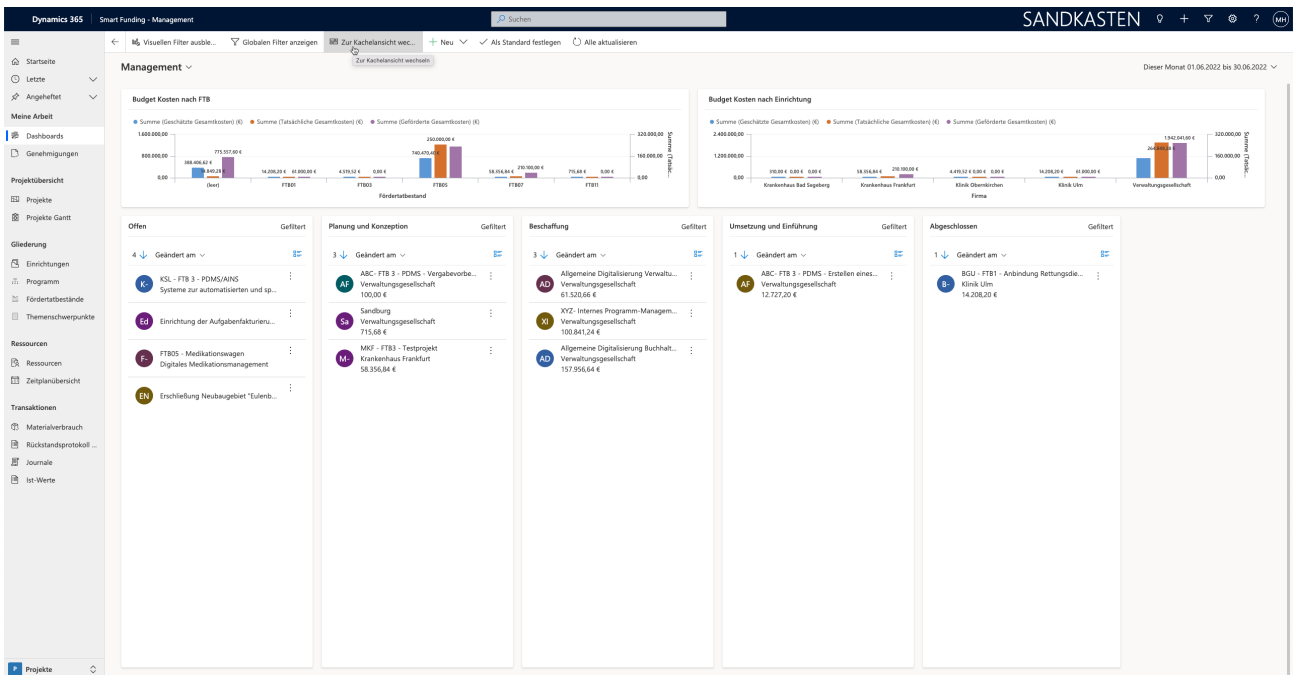
### **What can you do with it?**

The following features of Smart Funding support you with efficient project management and full control of costs:



## Project management:

The project plan is the heart of proMX 365 Smart Funding. That is where you can visualize basic project management tasks in an understandable and optically appealing manner. Such tasks may be planning and structuring projects, creating project tasks and bringing them in the right order, defining dependencies between tasks, assigning resources, and establishing or editing project duration. Further, you can check details to timings and efforts: from when until when does the project run, what is the progress of the project, how high are the current costs for personnel and materials, is the project still within the financial limits, etc.



*The management dashboard displays an overview of the status of all ongoing projects.*

## Resource management:

If it is not clear yet which team member is supposed to work on which task, project managers can provisionally plan with a generic resource. Instead of an actual person, you just set up a role like a developer or a consultant. The system then calculates with the hourly rate of that particular role.

## Project controlling:

The calculatory result of the project planning you can see in the tab “planning costs.” Here the system continually calculates the current costs of a project. That means there is no need to insert or update numbers manually. The system rather uses existing information, for example, hourly rates set for resources.



**Time tracking:**

If employees were assigned to a task within a project, they can record their working times for it fast and easily. The start and end times of the activity are documented as well as a task description and the type of time entry (work, vacation or absence). You can also leave a comment.

**Integration with Outlook and Teams:**

A lot of communication regarding projects takes place via e-mail or collaboration platforms nowadays. In order to store all important information centrally in Smart Funding and to make sure it is available for everyone involved, the solution can be integrated with Outlook and Teams. Instead of just storing them in inboxes unsorted, you can save incoming and outgoing e-mails to the respective projects in proMX 365 Smart Funding. In Microsoft's collaboration platform Teams, you can create a corresponding team and include the project overview from Smart Funding as a tab. Additionally, it is possible to synchronize tasks from the system in Teams.

# We offer a helping hand in your digital transformation

The ideal digital transformation partner is not only an expert in theory and technology but also in its customer's industry. Our consultants are familiar with the processes, priorities and challenges of different sectors. Contact us!

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