proRM Userguide V1.0

Microsoft Dynamics CRM 2011 / 2013

CREATED BY
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1. INTRODUCTION AND GENERAL FACTS ABOUT proRM

Welcome to the proRM Userguide. Here you can find all the information about proRM in one Sheet.

This is your opportunity to get the most out of your projects with a single Business Solution for Projects and Resources.

The solution consists of 5 different parts. They are called Project Management, Resource Management, Activity Management, Invoice Management and proRM Settings including the License Manager.

You can use proRM, which is completely integrated into Microsoft Dynamics CRM, with all devices and applications you are using CRM with. You got the possibilities to work on your smart mobile-phone or via the tablet. You can use a Laptop or PC. There is a dedicated WindowsPhone8- and Windows8-App. You can use an integrated Outlook Add-IN to track your time and use the whole proRM product through the CRM-for-Outlook client, even offline. You are welcome to use proRM on all internet browsers, but be aware we only support the browser-versions from this matrix.

OS	IE 7~	IE 8	IE 9	IE 10 (Desktop)	IE 10 (Modern)	Firefox 16+	Safari 6+	Chrome 22+
Windows 8	N/A	N/A	N/A	2.0.2.105+	U	2.0.2.105+	M	M
Windows 7	N/A	N/A	2.0.2.105+		N/A		M	M
Mac OS (10.7)	N/A	N/A	N/A	N/A	N/A	M		M
Mac OS (10.8)	N/A	N/A	N/A	N/A	N/A	M	2.0.2.105+	M
iPad	N/A	N/A	N/A	N/A	N/A	N/A	LS	M

Short	Explanation
~	IE 7 is discontinued from UR 13 on for CRM2011 and CRM2013
M	Mobile form
N/A	Not available
LS	Limited support
U	Not supported

Now that you are ready to use proRM and its Silverlight-apps on one of your devices with any of the applications let us start with an overview on a General User Interface, which look similar over all apps.

Full Screen Mode and 'New Tab'

To activate the Full Screen Mode click the icon **Full Screen** with the arrows outward, which is located next to **Help** icon in the right corner of the application.
To open proRM Project Tree App in a new Tab click on the icon **Open in new tab** with a diagonal arrow, which is located next to **Help** and **Full Screen** icons in the right corner of the application.
Please be careful: When you open the application in a New Tab, it loads a blank page of the application without early selected data. When you open the application in a Full Screen, it opens with early selected data.

2. proRM PROJECT TREE APP

Overview

proRM Project Tree App is a special structure, which allows viewing of every project as hierarchy system. This application gives you the possibility to view all the projects, which are currently in progress or inactive ones, which are archived or just planed in one hierarchy structure. You are able to filter needed parameters by resources or project dates in order to overview all the processes.

Name	Start Date	End Date	Estimation	Actual effort	Time Unit	Type	Projectmanager	Location	Costcenter	Customer contact
Best Ever Consulting					Hours					
Enterprise System Development	12/1/2013	1/31/2015	0	0	Hours	Time and material	Chyrkov, Sergii			Dieter Schulz
Enterprise System Installatic	9/1/2014	1/1/2015	680	0	Hours	Time and material	Chyrkov, Sergii			Dieter Schulz
[Project Members] 2										
Meier, Heinz - Enterp	9/1/2014	1/1/2015	0	0	Hours					
Schneider, Horst - En	9/1/2014	1/1/2015	0	0	Hours					
Enterprise System Testing Pr	4/1/2014	1/15/2015	1500	272	Hours	Time and material	Chyrkov, Sergii			Dieter Schulz
Richter, Gabriele - Enterp	4/1/2014	1/15/2015	0	272	Hours					
Enterprise System Milestone	4/1/2014	4/1/2014	0	0	Days	Fixed price	Chyrkov, Sergii			Dieter Schulz
Chyrkov, Sergii - Enterpr	4/1/2014	4/1/2014	8	0	Hours					
Enterprise System UI Develc	2/2/2014	1/31/2015	2000	1200	Hours	Time and material	Chyrkov, Sergii			Dieter Schulz
[Project Members] 2										
Bauer, Matthias - Ent	2/2/2014	1/31/2015	0	600	Hours					
Klein, Gerhardt - Ente	2/2/2014	1/28/2015	0	600	Hours					
Enterprise System Server Si	1/31/2014	1/30/2015	2000	1348	Hours	Time and material	Chyrkov, Sergii			Dieter Schulz
[Project Members] 2										
Meier, Heinz - Enterp	1/1/2014	12/31/2014	0	784	Hours					
Schneider, Horst - En	1/1/2014	12/31/2014	0	564	Hours					
Enterprise System Synch	3/1/2014	12/31/2014	1800	220	Hours	Time and material	Chyrkov, Sergii			Dieter Schulz
Schneider, Horst - En	3/1/2014	12/31/2014	0	220	Hours					
Enterprise System UI Design	12/10/2013	1/31/2014	300	291	Hours	Fixed price	Chyrkov, Sergii			Dieter Schulz
Wagner, Gabriele - Enter	12/10/2013	1/31/2014	300	291	Hours					
Enterprise System SRS Deve	12/1/2013	1/31/2014	0	720	Hours	Fixed price	Chyrkov, Sergii			Dieter Schulz
[Project Members] 2										
Schröder, Rolf - Ente	12/1/2013	1/31/2014	150	360	Hours					
Schäfer, Manfred - Er	12/1/2013	1/31/2014	150	360	Hours					

How to Use proRM Project Tree App

In order to start using the application you should choose which projects you want to see displayed. For this go to the menu **Projects** and select the desired type of projects. Click on **Refresh** and the application will load the chosen type of projects.
If you want to see assigned for this project employees, click on the little arrow to open the tree structure. Now you can see proRM Project Tree with all its hierarchy levels. It consists of projects, subprojects and assigned resources. Thus, you can see a complete project structure in one glance.

Search for Projects

You have a possibility to find a required project within proRM Project Tree App. To do this, enter the name of the desired project in the search window in the right side corner of the application. As a result, you will see all the projects, which contains your search key words in the name.

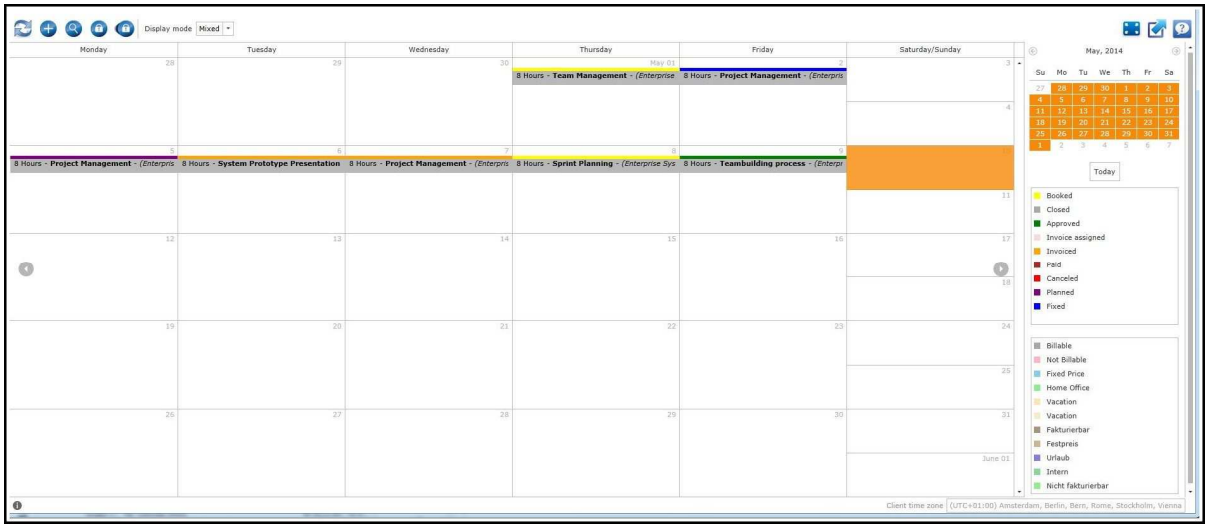
Start/End Date

The rows start/ end date show the start and end date of projects and subprojects.

3. proRM TRACKING APP

Overview

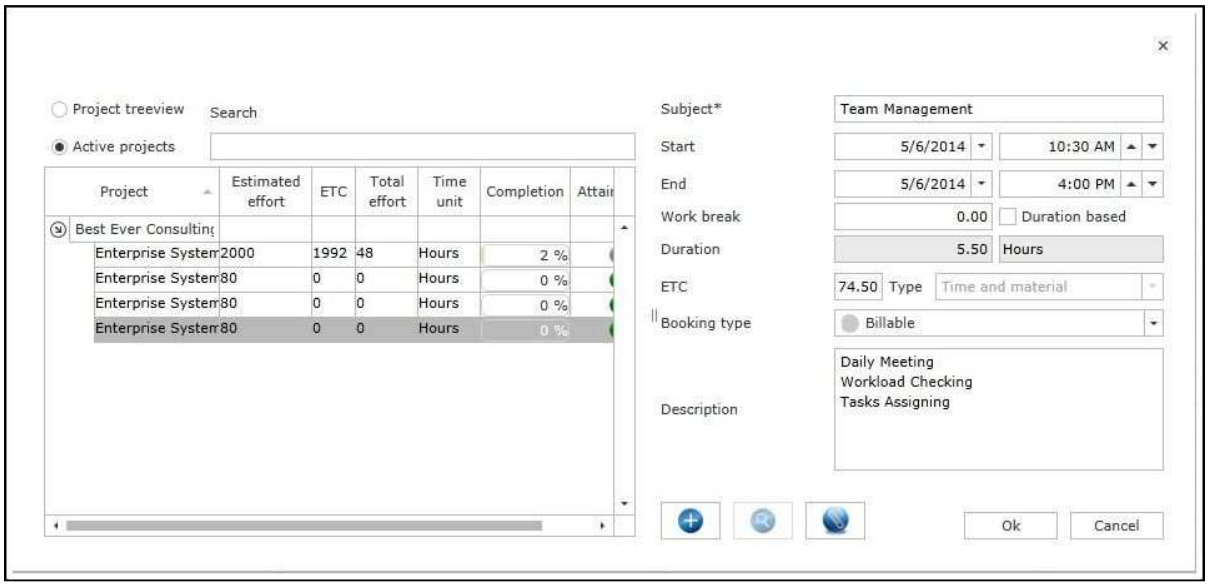
proRM Tracking App helps to make time- and expense tracking easy and very efficient. The application provides the user with a choice of different views so they can easily choose their preferred one. The application allows you and your employees to enter bookings with a better overview of project situation, link expenses, add reports and receipts.



How to Use proRM Tracking App?

How to Create a Booking?

To make a new entry, just select the period you want to book and right-click the selection. Go to **New Booking**. Now the booking window opens up.



Now the subject, the time period and the estimated time to complete the task (ETC) can be filled in.
On the left, all projects the user is assigned are shown in a project tree structure. After you filled all necessary

data and click **Ok**.
Now you can see the booking in your calendar.

How to Book a Whole Working Day?

There are several possibilities to book a whole working day.
You can click twice the highest line in your Calendar View and the window to book your time appears. Your daily working hours will be added by default. Fill in other data and clock **Ok**.
You can make a right click in your Calendar View as for creating normal bookings and in appeared window mark **Duration Based**. Fill in other data and clock **Ok**.
You can open your Month Calendar View and open a window for creating normal booking. You will see in the window that **Duration Based** status is marked. Fill in other data and click **Ok**.

How to Create Planned Bookings?

To plan a new entry, just select the period you want to plan and right-click the selection. Go to **Planned Booking**. Now the booking window opens. Choose the project for which you want to plan a time booking, check the date and click **Ok**. Now you can see the planned booking in your calendar.

How to Create Expenses?

There are two possibilities to create an expense. The first one, is to create an expense belonged to a booking. In order to do this, go to the **Blue Plus** button at the booking window of created booking or on creation.

Please note if the button is grey, you have not selected a project yet.
After clicking on the button, a new window displays. You can book your expense there. The new **Expense** includes the information about project resource and the booking. In order to book the Expense, fill in a **Description**, **Date** and **Amount**. Furthermore, you can upload a document or a picture, for example a picture of an evidence. If you entered all necessary data, click **Ok** to create the Expense and to assign it to the booking.
You have also the possibility to create a **Travel** instead of an Expense. In order to do this, go to the **Blue Plus** button at the booking window of created booking or on creation. Click in the checkbox **Travel**. Now you have a possibility ti fill all necessary for trips data such as Start and End Dates, Amount, Distance and Type.
The second opportunity to create an Expense is to select the **Blue Plus** button directly at the right side of proRM Tracking App. The only difference between this method and the first one is that you should choose a project by yourself. You are also able to book a travel using this method.

How to See Expenses?

If you want to see all your booked expenses, click **Blue magnifying glass** in the top menu. Now you can see all your booked expenses for current month.

How to Change the View?

You have a possibility to change a view to **Day View**, **Work Week View**, **Week View**, **Month View** and **Timeline View** within the application. To do this, make a right click on a calendar and you will see the option **Change View to**. Then click the view, which you need and the application view will be changed.
By default the calendar shows the current Week View.

How to Go to Current Date?

Any time you need to go back to the current day entries, not depending wherever you are in the application, you can click **Today** under the little calendar in the right side corner of the proRM Tracking App.

How to Close a Period?

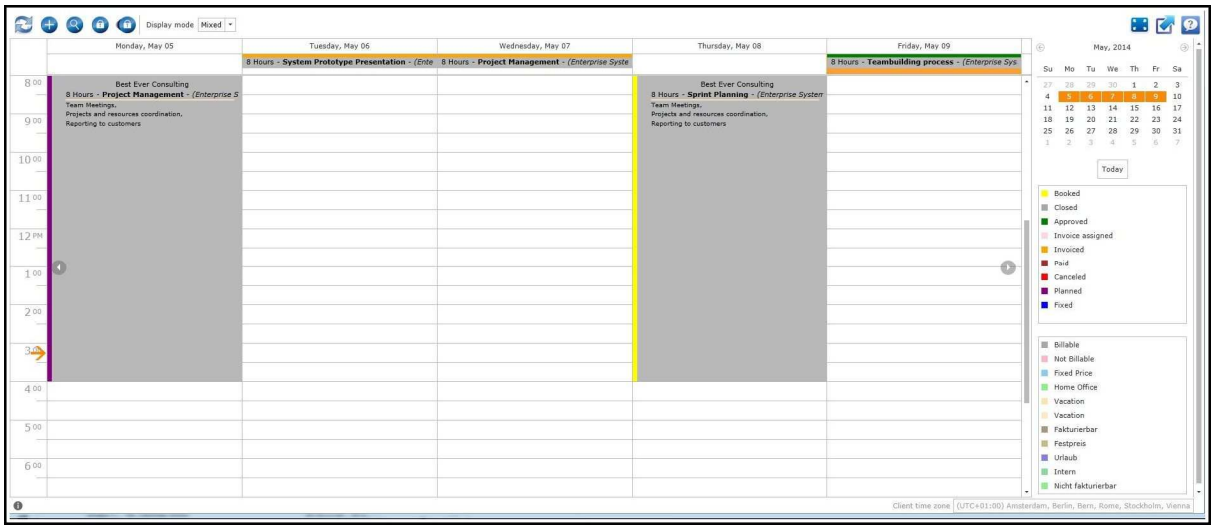
At proRM Tracking App it is possible to **close periods**. To create a closure select the icon **Close Period** at the right menu. Then enter a **Start** and **End Date** to close this period. Additionally you can leave a comment for this activity. Click **Close** to confirm your selection.

How to View Closed Period

To view the created closures, click **See Closed Periods** in the right menu. Now you can see all created closures, with start, end date and comment.

How to Change the View

You also can change the view to month or day by right-clicking on the calendar and going to “change view”. From here on you got several choices to change the view.



How to Change Display Mode

To change the **Display Mode**, choose it in the left top menu. You are able to see **Planned** bookings, **Booked** Bookings or both of them in a **Mixed** Mode.

4. proRM FAST TRACKING APP

Overview

proRM Fast Tracking App has a user-friendly interface and significant usability. It suites to the best execution of time tracking and expense tracking activity in the most effective way. This application gives its own benefits to users. It is useful in cases, when an **immediately booking** needs to be done. Due to suitable structure of projects within the application, it is really a fast way to add necessary booking to a certain project.
It is available **through CRM** and allows to make the entry, if an employee is assigned for the particular project. Despite this application is fast one and does not show the full overview of projects, it gives full options to make a complete booking. Moreover, it is possible to make changes in made entry, to correct the date or description of a certain booking.

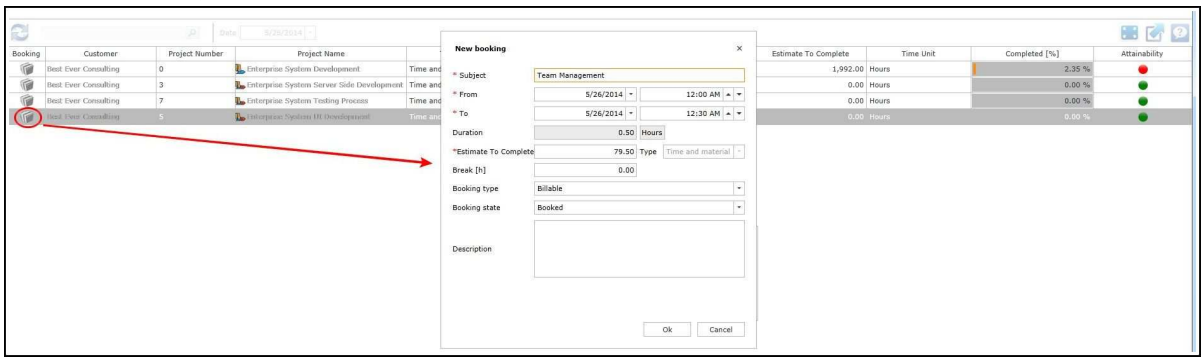
Date 5/26/2014

Booking	Customer	Project Number	Project Name	Type	Deadline	Estimated Time	Resource Effort	Estimate To Complete	Time Unit	Completed [%]	Attainability
	Best Ever Consulting	0	Enterprise System Development	Time and material	1/31/2015	2,000.00	48.00	1,992.00	Hours	2.35 %	
	Best Ever Consulting	3	Enterprise System Server Side Development	Time and material	1/30/2015	80.00	0.00	0.00	Hours	0.00 %	
	Best Ever Consulting	7	Enterprise System Testing Process	Time and material	1/15/2015	80.00	0.00	0.00	Hours	0.00 %	
	Best Ever Consulting	5	Enterprise System UI Development	Time and material	1/31/2015	80.00	0.00	0.00	Hours	0.00 %	

Fields Description

Field name	Description
Booking	allows to create a new booking for the project.
Customer	allows to specify the customer.
Project Number	shows the project number
Project Name	shows the project name
Deadline	is the end date of the project
Estimated Hours [h.]	are the effort, which has been estimated for the employee
Employee Effort [h.]	are the effort, which has already been booked by the employee
Estimate to Complete [h.]	is the estimated time for the employee to complete his task
Completed [%]	is the estimated time to complete the task (in percent)
Attainability	shows employee effort and estimate to complete, if the project is running according to plan or is in the escalation phase
Date	is a current automatically set date. If the employee would like to do his booking for another day, the date can be set manually.
Refresh	updates data.

New Booking Form Description



Field name	Description
Subject	describes the Task
From	is Start Date of the booking
To	End Date of the booking
Duration [H.]	is duration measured automatically according to start and end dates including breaks
Estimate to complete [h.]	defines the expected effort until the completion of the task
Break [h.]	is a break duration
Booking State	can be selected according to the defined booking types of the project
Description	defines the task in a more detailed way
Save	saves the booking
Cancel	cancels and closes the entry and the form

How to Create a Booking?

To make a fast booking, mark the project and click on the red symbol at the beginning of the line. Then book your time in a new window.

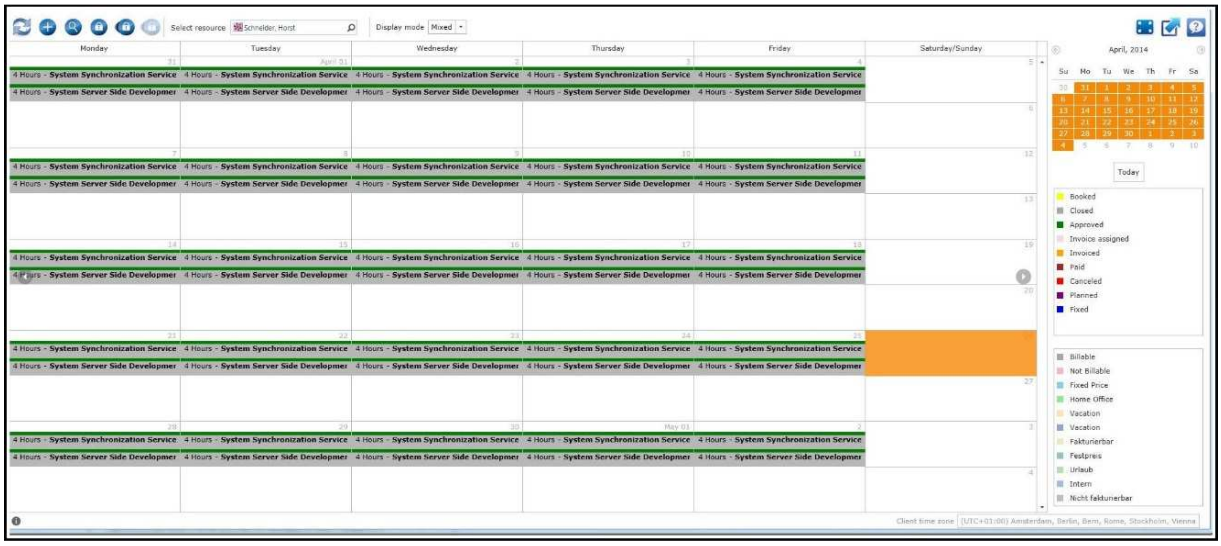
How to Change the Date?

To change the date of you booking, you can choose another one in the top menu in **Date** or in the **New Booking Form**.

5. proRM TRACKING MANAGER APP

Overview

The functions of **proRM Tracking Manager App** transform observational managerial role to an active one. Apart from controlling employees' workflow and current progress within the projects, it gives you a chance to make personal bookings as well as bookings for your employees. It allows you to create expenses and add them to the system along with reports and receipts. It is also possible to perform those operations for your employees' expenses.
It is extremely easy to correct mistakes in bookings, edit them and shift necessary bookings between projects and subprojects.

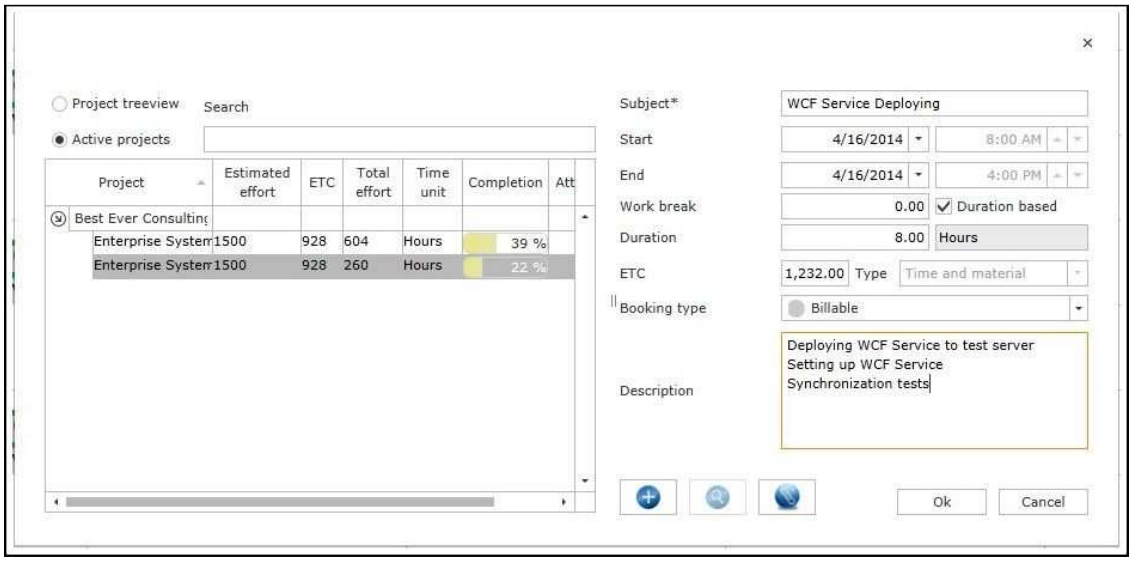


Fields Description

Field name	Description
Project Tree View	shows a tree structure of all projects
Active Projects	shows available projects
Subject	describes the task
Start	is a Start Date of booking
End	End Date of booking
Work Break	If you made a break, you can enter here the time (for 30 minutes enter 0,5).
Duration	is a calculated duration of a booking taking into account the sum of the Start- End and Break Time
ETC	is the estimated time for the employee to complete his task
Booking Type	defines the booking type
Description	defines the task in a more detailed way
Plus Button	adds an expense or a travel to booking.
Magnifying Glass Button	lists all booked expenses
Brace Button	lists all expenses and travels for this month
Ok	closes and saves the activity record
Cancel	cancels the activity record and closes the booking window.

How to Create a Booking?

To book time, first choose an employee for whom you would like to make a booking. Then select the period to book and right-click the selection. Click **New Appointment** and booking window opens. Choose the project for which you would like to make a time booking, check the date and click **Ok**. Now you can see the booking in your calendar.



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How to Close a Period?

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How to Change Display Mode?

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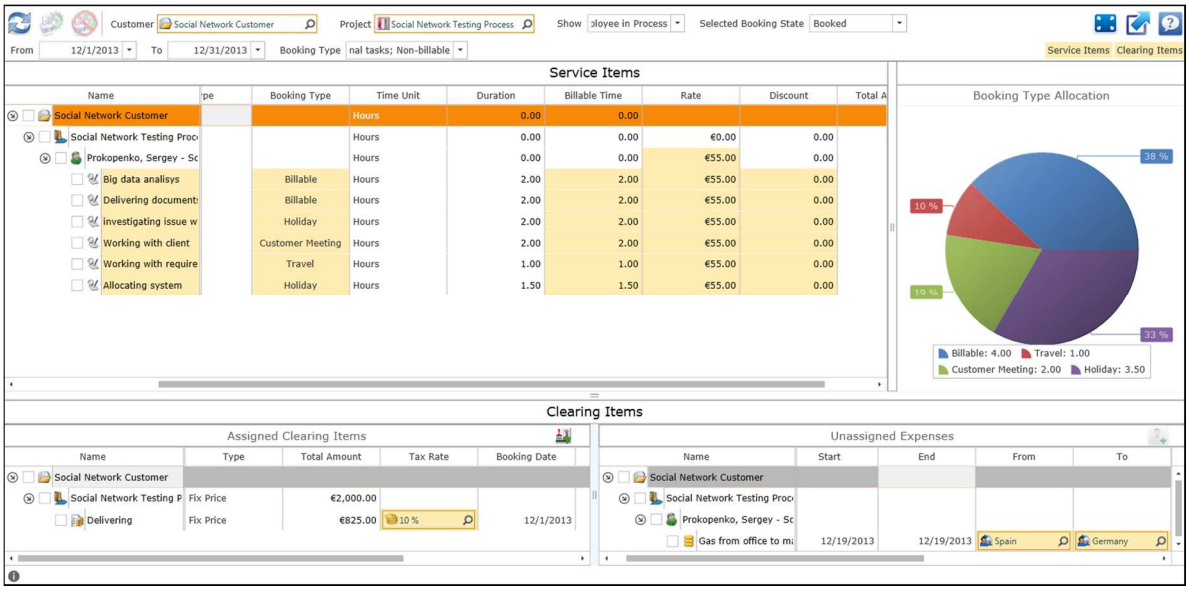
6. proRM APPROVAL MANAGER APP

Overview

Within **proRM Approval Manager App** you are able to create bookings, check and correct the entries of employees, and approve them. Afterwards it is possible to convert them into an invoice. The wide viewing area of the application shows you all possible kinds of items including assigned clearing items and unassigned expenses which should be managed. Moreover, this application is highly convenient to use and has a large amount of managing possibilities which are clearly visualized by three corresponding parts such as Service Items, Clearing Items (including Assigned Clearing Items), and Unassigned Expenses, which can be easily transformed into assigned ones. In addition, the colorful diagram displays shares of billable, non-billable, and internal tasks.



How to Use proRM Approval Manager App?

In order to overview all required bookings and clearing items it is necessary to choose a customer and click **Refresh**. Thus, all the projects, subprojects, resources and other entries will be displayed as a single structure.

Approve Bookings

To approve the bookings choose a customer and click on **Refresh**. Now all projects and bookings of this customer will be displayed. On the left hand you can see billable time. To approve one or more booking mark them and click **Approve**. Now the bookings are approved.

Approve Clearing Items

To approve a clearing item, select a customer and click **Refresh**. Now, all clearing items are displayed in a project tree view in the down sector of the screen. Select the clearing items and click **Approve**. Now the entries are approved.

How to Undo an Approval?

If you want to undo an approval, first search for the customer. Then in **Selected Booking State** choose: **Approved**. Now, all already approved but not invoiced activity records and clearing items are displayed. Select the item for which you want to undo the approval and press **Undo approval**. Now, the element is again in the view **Booked** and editable.

How to Assign an Unassigned Clearing Item?

To assign unassigned clearing items (unassigned expenses), choose the customer and click **Refresh**. Now, you will see **Unassigned Clearing Items** on the left side. Select one or more of them and drag & drop the additional items to the clearing items to which you want to assign the additional costs.

Filter Functions

You can filter activity records to find faster the right entries. You can use the date if you want to restrict the period of the booking. In addition, it is possible to search for the project and the booking type of the desired activity records.

Filter Activity Records by the Project

To filter performance entries by the project, select a customer and a project of the company. If necessary adjust the date and press **Refresh**. Now all performance entries that have been posted to the selected project are displayed.

Filter Activity Records by the Booking Type

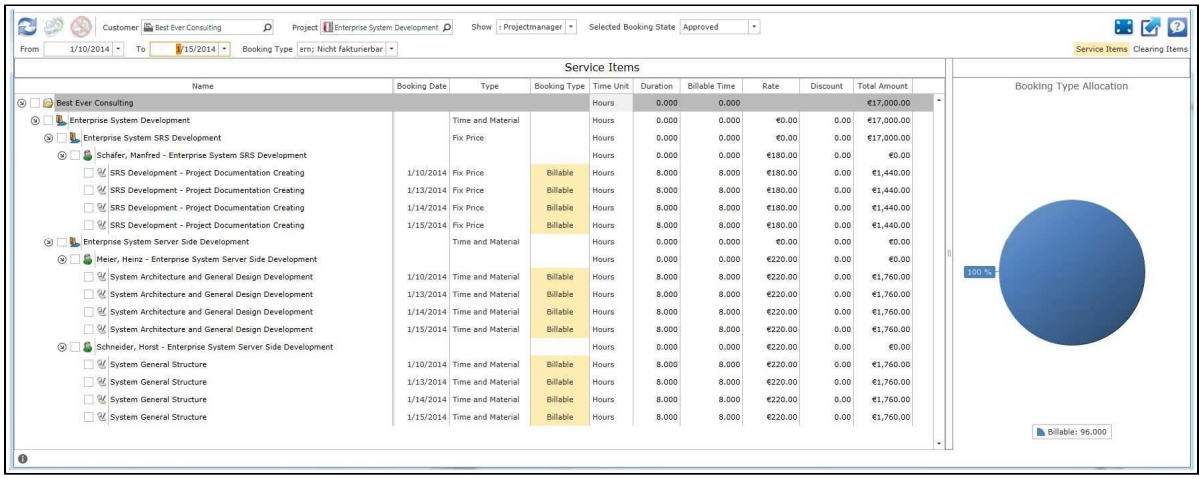
To filter performance entries by the booking type, choose whether you want to display only billable performance entries, holidays, support performance entries, etc. by a specific customer. Press **Refresh** to display the entries.

Show Approved Activity Records

You can modify the view proRM Approval Manager App in the way that only approved performance entries are visible. In order to do this choose **Approved** in **Selected Booking State** and click **Refresh**. All approved activity records and clearing items are now displayed.

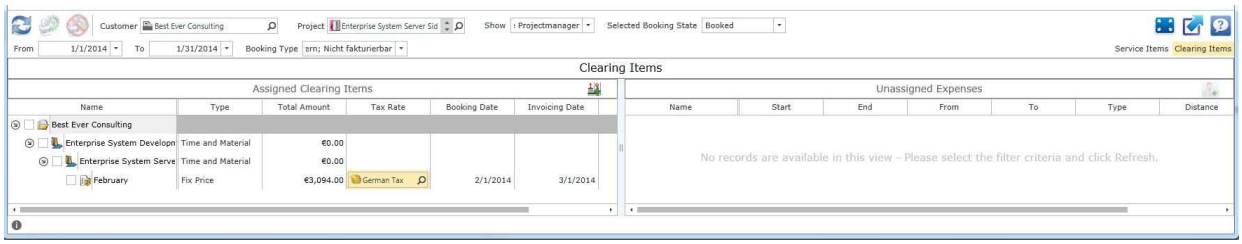
Show/Hide Clearing Items

To Show or hide clearing items, click on the Clearing Items button. If the button is clicked, items are not displayed.



Show/Hide Activity Records

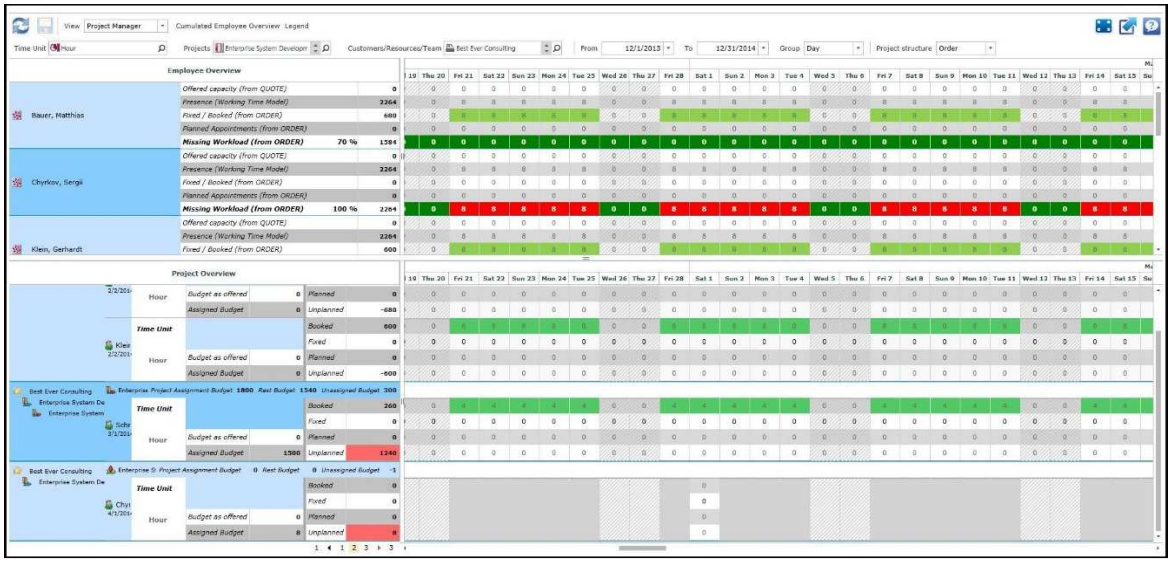
To Show or hide activity records, click on the Service Items button. If the button is clicked, items are not displayed.



7. proRM RESOURCE PLANNING APP

Overview

proRM Resource Planning App was developed to optimize planning options and to make the forecast view more precise and clear. It provides an opportunity to browse the **Working Time Model** for each employee. It shows the terms of validity of certain resources, normal working schedule, and annual vacation durations. The most important values for project management given by the application are the terms of certain assignments of a resource: Hourly Rate, Estimated Efforts, Total Efforts and ETC (Estimated Time to Complete) that can be considered to make an informed decision and provide for efficient project planning.



Views Description

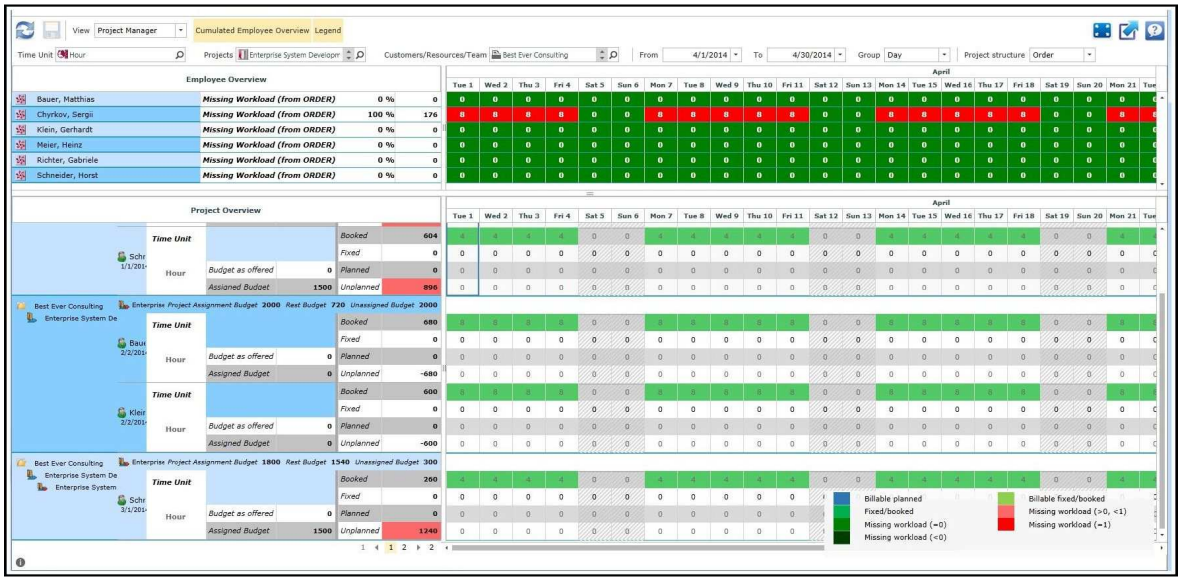
Usually managers and employees use the same forecasting systems, which allows all the participants to view the same information. But not everybody should have access to all the information. This problem concerns employees who are able to evaluate and compare workflow processes and workload of other resources. The important feature of proRM Recourse Planning App is functionality differentiation. It means that functions of the application are conditionally divided between managers and employees, thus managers receive a complete picture of the current and forecasting status, while each employee is only allowed to view information important to themselves.
The **Employee View** gives an overview of employee's projects for required customer in the specific period of time.
The **Project Manager View** gives you an overview of all projects for specified resources and customers in a chosen period of time.

The Structure of proRM Resource Planning App

The application consists of two areas: of **Employee Overview** and **Projects Overview**.

Employee Overview

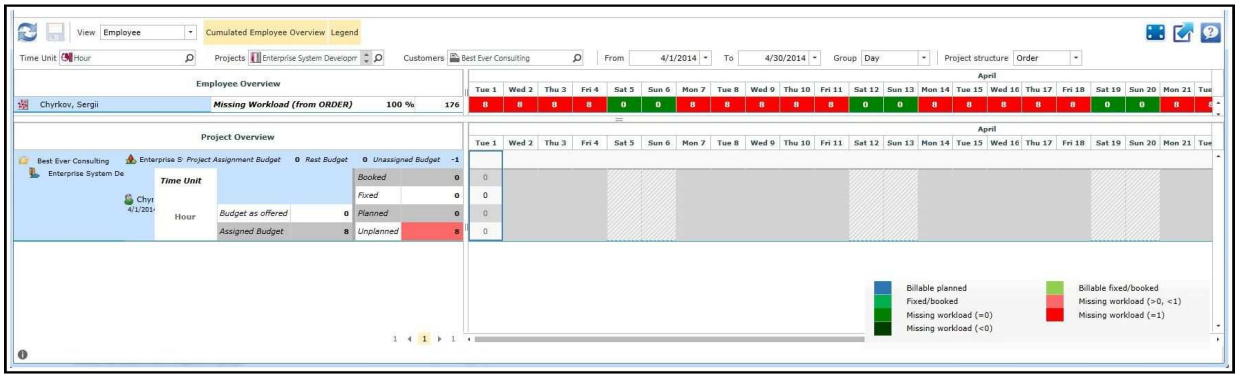
This area displays employees and their total **Working Days Presence**, **Fixed** and **Booked** bookings, **Planned Appointments** and their **Missing Workload** for the selected period.



Projects Overview

This area displays the following information:

Projects in which user is working as an Employee (for Employee view) and the projects and all the employees that are assigned to these ones (for Project Manager view);
Projects phases;
Working package;
Assigned Resource;
Time Unit for bookings;
Project Assignment Budget – the available and assignable time for selected project;
Rest Budget – the amount of time for the current project, which has not been fixed or planned by the assigned project resources;
Unassigned Budget – amount of time from the Project Assignment Budget which has not been assigned to any project resource yet;
Budget as offered – budget of Time Unit from the related Quote, which was planned for the project;
Assigned Budget – budget of Time Unit, which was assigned to this resource from the above Project Assignment Budget;
Totals for Booked, Fixed, Planned and Unplanned bookings.



Application Filters

Filters allow to decrease the amount of displayed information and to increase the performance of the application.
If there are no filters set except the mandatory Time Unit filter, the application will display all customers, projects and resources for the current user in specified period of time.

Time Unit Filter

With this filter a user can choose between Hour, Day and Week. This filter always affects the Employee Overview as well as the Project Overview.

Projects Filter

This filter allows user to select projects he/she wants to be shown in the Project Overview for the single resource in Employee View OR for all resources in Project Manager View. This filter always affects the Employee Overview as well as the Project Overview.

Customers/Resources/Team Filter

This filter allows user to select required customers/resource/team. These projects will be displayed in the Project Overview for the single resource in Employee View OR for all resources assigned to these projects in Project Manager View. This filter always affects the Employee Overview as well as the Project Overview.

From/To Filters

These filters allow user to select the period he wants to see in the Timeline area. This filter always affects the Employee Overview as well as the Project Overview.

Group Filter

This filter allows user to choose how to display and calculate Timeline / Time Unit. You can select between Day, Week and Month values. This affects the timeline for Employee Overview and as well as for Project Overview.
Please note, that Week and Month views are read-only and no bookings is allowed to apply.

Project Structure Filter

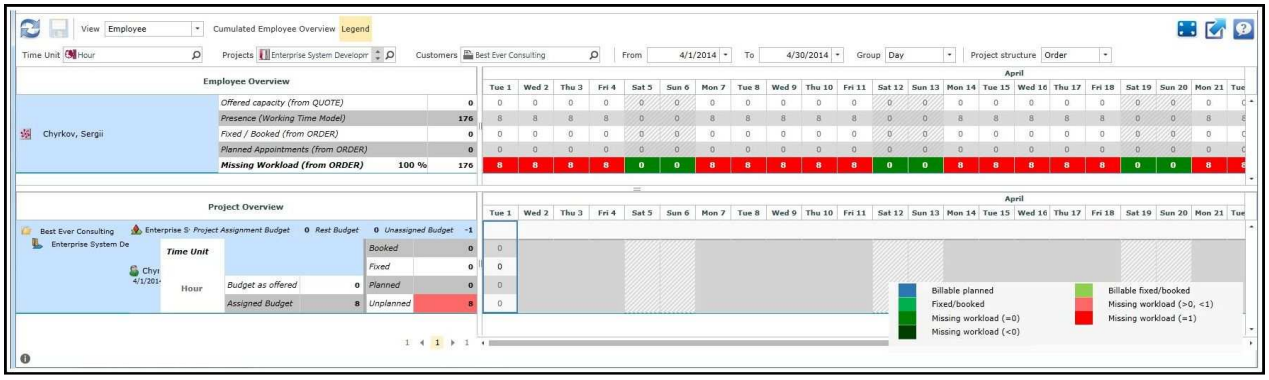
This filter allows to use such values as Order, Quote and All. It shows to user specified projects, which are coming from orders, quotes or both. This filter affects the Employee Overview as well as the Project Overview.

Please note, that projects from quotes do not affect the Employee Overview and bookings are allowed to put in into the “Planned” rows starting from today only.

Timeline

The **Timeline** for Employee Overview displays read-only detailed data for the employees working days. In the Timeline for Project Overview user can enter or edit any bookings just clicking on a corresponding cell and setting the value. In order to save changes, click **Save**.
Weekends are highlighted in grey and current day is marked yellow. For those days that do not match the project, timeframe cells are empty and cannot be changed.

Bookings

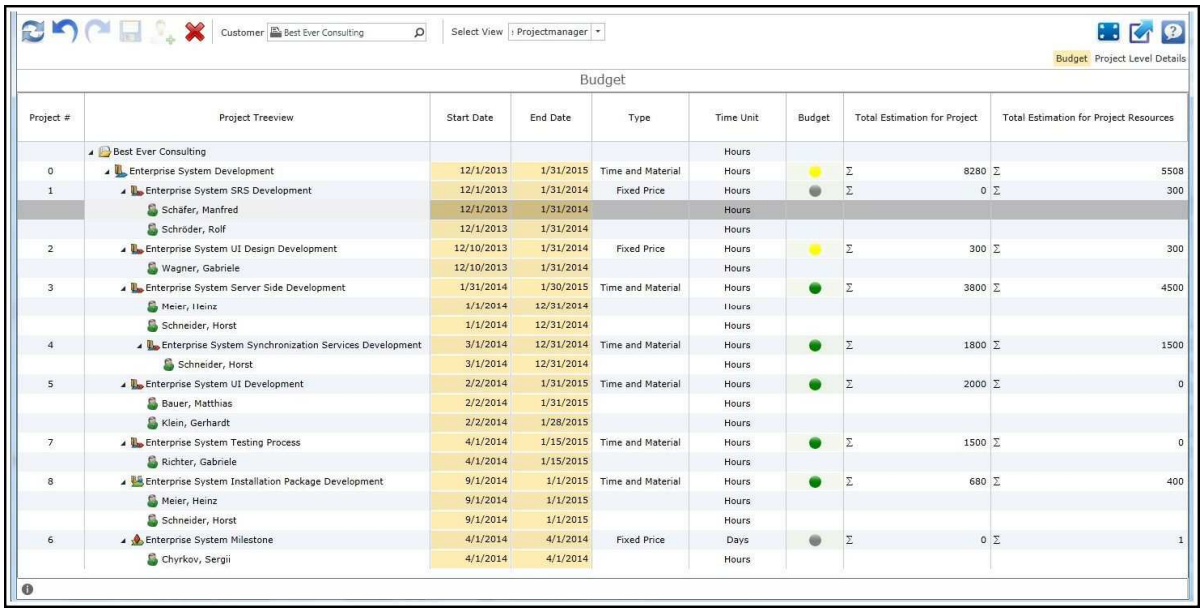


The **values range** from 0 to 2 for days and weeks, and from 0 to 16 for hours is allowed. For previous days user is allowed to create only **Booked** bookings. For today and for future user can create **Booked**, **Fixed** and **Planned** bookings. If there are already valid and saved bookings, user is not allowed to change them within the application.

8. proRM BUDGET PLANNING APP

Overview

proRM Budget Planning App gives you an overview of the current budget status of your project. You can see in a glance if you are still in budget, how many hours your employees still need to complete the task and what the total progress of the project is.



Project #	Project Treeview	Start Date	End Date	Type	Time Unit	Budget	Total Estimation for Project	Total Estimation for Project Resources
	Best Ever Consulting				Hours			
0	Enterprise System Development	12/1/2013	1/31/2015	Time and Material	Hours		Σ 8280	Σ 5508
1	Enterprise System SRS Development	12/1/2013	1/31/2014	Fixed Price	Hours		Σ 0	Σ 300
	Schäfer, Manfred	12/1/2013	1/31/2014		Hours			
	Schröder, Rolf	12/1/2013	1/31/2014		Hours			
2	Enterprise System UI Design Development	12/10/2013	1/31/2014	Fixed Price	Hours		Σ 300	Σ 300
	Wagner, Gabriele	12/10/2013	1/31/2014		Hours			
3	Enterprise System Server Side Development	1/31/2014	1/30/2015	Time and Material	Hours		Σ 3800	Σ 4500
	Meier, Heinz	1/1/2014	12/31/2014		Hours			
	Schneider, Horst	1/1/2014	12/31/2014		Hours			
4	Enterprise System Synchronization Services Development	3/1/2014	12/31/2014	Time and Material	Hours		Σ 1800	Σ 1500
	Schneider, Horst	3/1/2014	12/31/2014		Hours			
5	Enterprise System UI Development	2/2/2014	1/31/2015	Time and Material	Hours		Σ 2000	Σ 0
	Bauer, Matthias	2/2/2014	1/31/2015		Hours			
	Klein, Gerhardt	2/2/2014	1/28/2015		Hours			
7	Enterprise System Testing Process	4/1/2014	1/15/2015	Time and Material	Hours		Σ 1500	Σ 0
	Richter, Gabriele	4/1/2014	1/15/2015		Hours			
8	Enterprise System Installation Package Development	9/1/2014	1/1/2015	Time and Material	Hours		Σ 680	Σ 400
	Meier, Heinz	9/1/2014	1/1/2015		Hours			
	Schneider, Horst	9/1/2014	1/1/2015		Hours			
6	Enterprise System Milestone	4/1/2014	4/1/2014	Fixed Price	Days		Σ 0	Σ 1
	Chyrkov, Sergii	4/1/2014	4/1/2014		Hours			

Field name	Description
Refresh	Refreshes the selected time period and shows the corresponding data
Save	Saves all changes, made in the yellow fields
Select Customer	Selection of required customer
Select Display Mode	It can be displayed as Budget, or as Project Level Details, or both.
Select View	Here the projects can be selected according to their status
Budget	Shows the complete project information
Project	Shows the corresponding project number
Project Tree View	Shows a tree view structure of the projects and the respective subprojects
Start Date	Shows the start date of the projects
End Date	Shows the end date of the projects
Total Estimation for Project Resources	Shows the total estimated effort of a resource for the project (in hours)
Total Estimation for the Project	Shows the total estimated effort for the project (in hours)
Budget	Shows if the project is still within the budget
Project Level Details	Here the project information is shown in a more detailed way.
Project Budget	Shows if all parts of the project are still within the budget.
Estimation for Project	Shows the estimated effort for the respective project (in hours)

Total Estimation of Project Resources	Shows the total estimated efforts for the assignments
Estimation for Assignment	Shows the estimated effort for a particular assignment

Definitions

What does “Project Budget” mean?

Here you can see if the selected project is still within the budget. Its value may differ from the **Budget**.

What does “Estimation for Project” mean?

This is the sum of all estimated hours for the project. This value is specified by the project manager while creating the project.

What does “Total Estimation of Project Resources” mean?

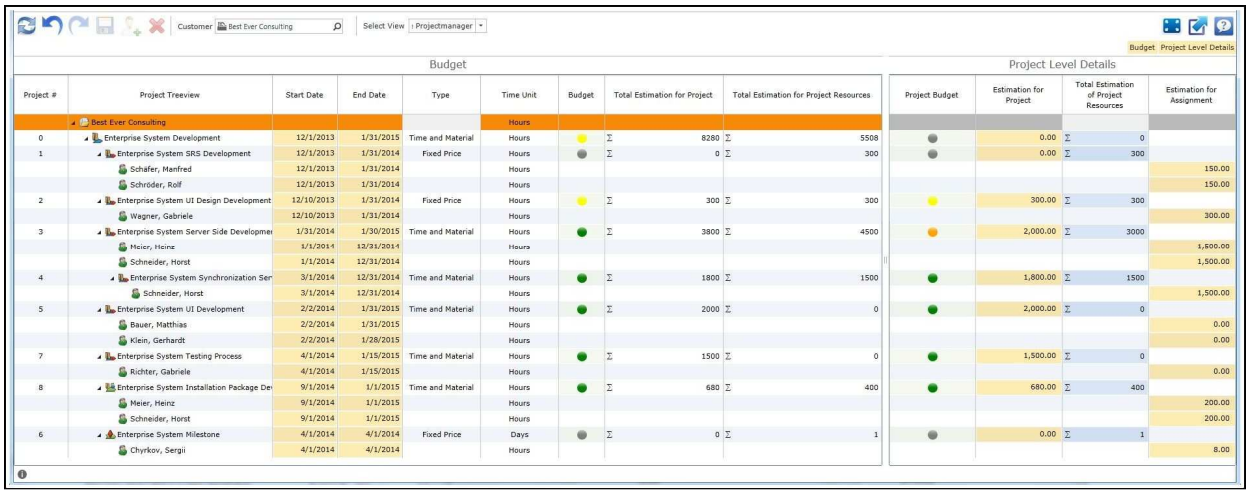
This is the total estimated hours, needed to finish the project including all assignments.

What does “Estimation for Assignment” mean?

This is the total estimated hours needed to finish the project.

How to Use proRM Budget Planning App

The application is divided into two distinctive elements. On the left side you can see the complete project including any sub-projects. Under **Budget** you can see whether, taking account of all sub-projects, you remain within budget. On the right-hand side, under **Project Level Details** you have a detailed breakdown of the current status of the individual projects including the real-time data provided by team members – at the respective project level.
Particularly helpful is the employee **ETC** (Estimated Time to Complete) for a given task. This enables you to identify potential bottlenecks in time, helping you to remain within budget.



How to Check if You Are Still in Budget?

It is incredibly easy to get an idea of whether your projects are within budget in just one glance. The budget status is displayed in the **Budget** column. If the budget status is green –the project is within the budget, if it is yellow – your costs are equal to your budget, if it is red – your costs exceed your budget and appropriate management steps should be taken.

How to Check if You Are Still in Budget with Your Subprojects?

Looking at the **Budget** in the Project Level Details section you can check whether your subprojects are within a budget. It is important to remember, that proRM Budget Planning App is able to distribute available resources within one project in case one subproject needs more assets allocated. It means that there is the possibility when one or more subprojects are out of budget (red status) while the main project is still within budget (green status). This situation can take place, if there is enough buffer in the total budget for all subprojects together.

Highlighted in Yellow Fields

The highlighted in yellow fields are changeable. For instance, if you have an initial planning of 10 hours for an employee to work on a particular project and the employee assumes in his/her booking by entering the ETC that it will take five more hours, you can change the field from 10 to 15h within the application.

Add Employee Assignment

To assign an employee for a certain project click **Add Assignment** and add necessary information.

Project Phase Filter

You can filter your projects in a way that only projects in a specific phase are displayed. By default it is **"In Progress"**, but you can choose every available project phase you require. Therefore, it is also possible to view archived projects.

Show/Hide the "Project Level Details" section

You can show or hide the **Project Level Details** section when you should enable/disable the button "Project Level Details". This section shows you detailed Information about every employee assigned for the project.

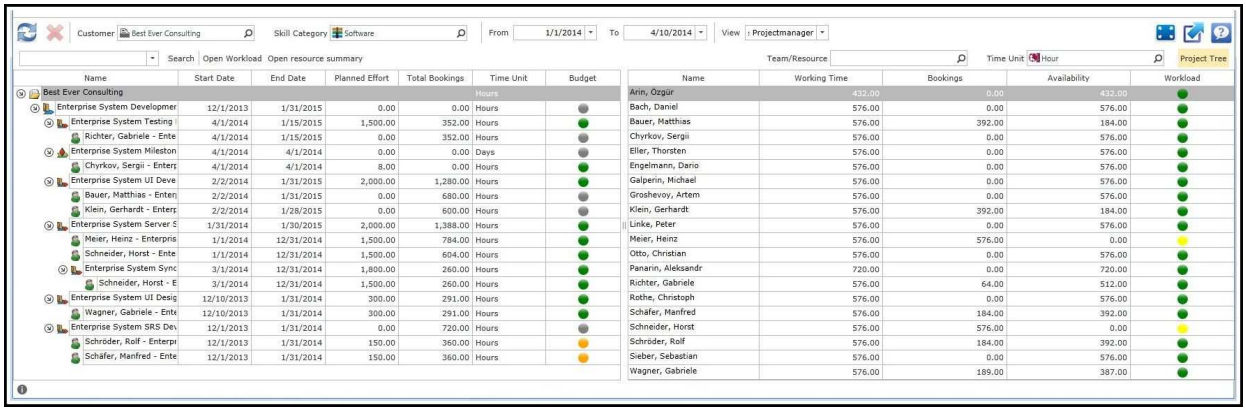
Show/Hide the "Budget" Columns

To show/ hide the "Budget" section enable/disable the button "Budget". The Budget section shows the summed up information about all projects and if you are still within a budget.

9. proRM RESOURCE ASSIGNMENT APP

Overview

With the help of **proRM Resource Assignment App**, you can view the expertise profiles of your employees in just a few clicks. The application allows you to be confident that you fully utilize the abilities of your employees and thereby provide clients with the highest levels of available services. As soon as you find an employee with required skills, you can assign him/her to a project within the application.



How to use proRM Resource Assignment App

To use proRM Resource Assignment App, first select a customer. You have the possibility to choose one or more of them by clicking **Add**. Then enter needed time period.
Please note, that the free capacities depend on the period.
Click **Refresh** after selecting needed criteria.
In the left part of the application, there is a list of resources with associated skills. In the right side all appropriate projects are displayed in a Project Tree.
For using proRM Resource Assignment App more efficiently, it is necessary and important to create Skill Categories and assign skills to the certain resources
Furthermore you see the **Working Time**, the **Planned Effort**, the **Availability**, the **Workload** and you can see if the resource is already assigned to the selected Project.

Working time

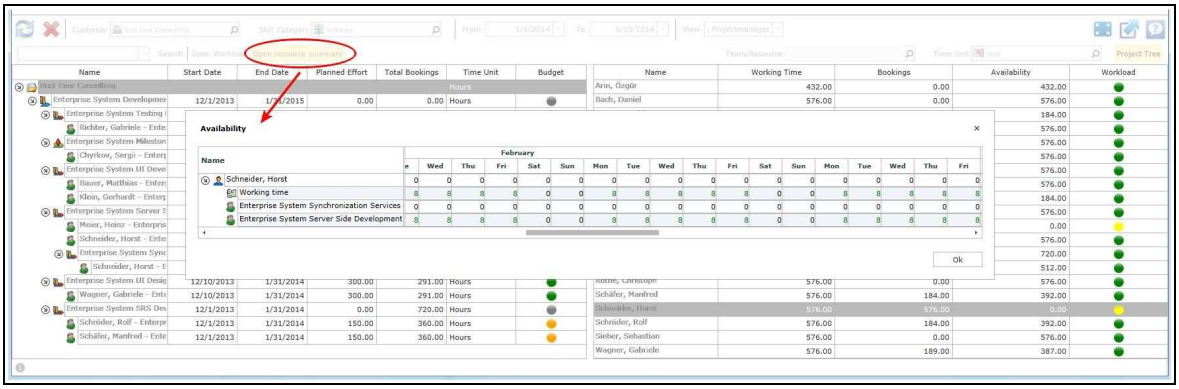
The **Working time** contains the created **Working Time Model** and **Selected Time Period**. It shows how many free hours the respective resource has for the selected period of time.

Planned Effort

The **Planned Effort** displays the effort of the particular resource spending for other projects.

Availability

The **Availability** shows the difference between the **Working Time** and the **Planned Effort** and displays how many free hours the resource contains at the selected time period for respective project.



Workload

With the help of the **Workload** due to color signals it is possible to see in a single glance, if the resource is available for needed hours for certain project. If **Workload** is green, the resource is available, if it is red – not available.

Create a Project Resource/ Assign Resource to a Project

To assign a resource to a project, select at first a customer and define a time period. You have also the possibility, to select desired skills via the **Skill Category** and the menu next to it. Click **Refresh**, if you have entered all the required data.
Now select a necessary resource and move it with the help of drag & drop function to the desired project. You have to define a time period, a planned effort and a hourly rate for the project resource, after you moved the resource to the project.
Fill in the desired data and click **Create** to assign the resource to the project and create the new project resource.

Filter and View

You have the possibility to make your search more precise by using **Skill Category** filtrating. The names of the categories are selectable as well as skills. If you have chosen a desired category, you can select with the help of the menu, which is located next to it, all assigned skills.
By default, all skills are selected. Click after the skill selection on **Refresh** to accept the changes. Now all resources, which have the desired skills, are displayed.
Due to proRM Resource Assignment App you are able to assign the most appropriate resource to every project.

Change the View

Additionally you have the opportunity to change the view. With the help of the button **Project Tree**, you can fade in/out the project to have a better overview about the displayed resources.

Skill Search

Additionally it is possible to search after resource skills, without loading customers' data.
In order to do this, at first choose a desired **Skill Category** or **Skill** at the menu. Further you can choose the **Experience** of the Skill. Select the desired Skill at the picking list and choose the knowledge, which you want to search for. Then click **Search** to filter the resources by the chosen Skills. The application now loads the list of required resources.
Afterwards it is also possible to load some customer' data, if you want to assign filtered resources to projects. In order to do this, select the desired customer or customers and click **Refresh**. The selected skills and the

associated resources continue remaining, thus you have the opportunity to assign resources to the projects. You have also the possibility to open the workload for a selected resource, if you do not want to create new project resources. For that, highlight the desired resource and click on **Show Workload** to open proRM Workload App in a new tab.

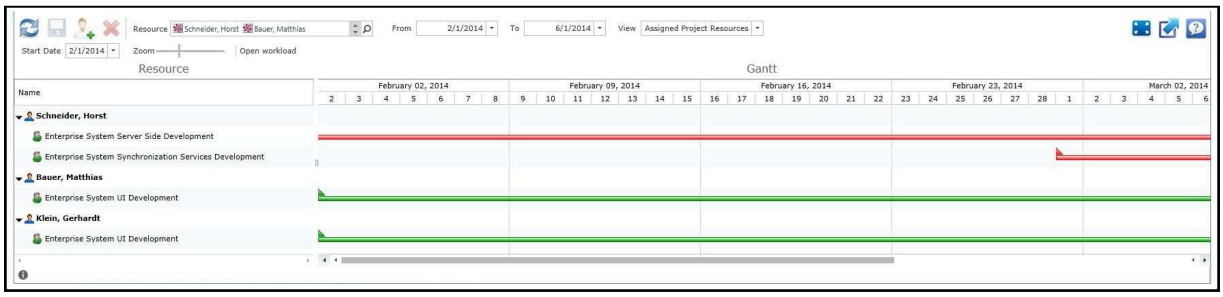
10. proRM RESOURCE GANTT APP

Overview

proRM Resource Gantt App is a solution, which allows to take over control all employees tasks, to manage the interconnections between them and make considered management decisions. This application looks like useful and well-known Gantt Chart, but showing the workflow of employees' tasks, their terms, simultaneity or non-simultaneity of them. Thus, it offers you a fast and uncomplicated overview of the capacities of your employees and other assets within the company.
This application makes it possible to look through necessary period of time, to choose one or several employees or even a team for analysis and to have a complete overview of employees' current state.

How to Use proRM Resource Gantt App?

To be able to use proRM Resource Gantt App, first select a required resource. In order to choose several resources at the same time, choose one of them resource and then click **Add**. To see needed data displayed, click on the **Refresh** button.



How to Save Changes?

To save any changes, click **Save** in a top menu.

How to Create a New Project Resource/to Assign a Resource to a Project

To assign a resource to a project, click on the button **Create new Project Resource** in the top menu. A new window will appear, where you are able to fill in all the required data, like **Start and End Date**, the **Hourly Rate**, the **Project** and the **Resource**.
Please note, you can choose only from the previously selected resources.
Now click on the **Create** and your new Project Resource will be created and assigned to the chosen Project.

How to Change a View

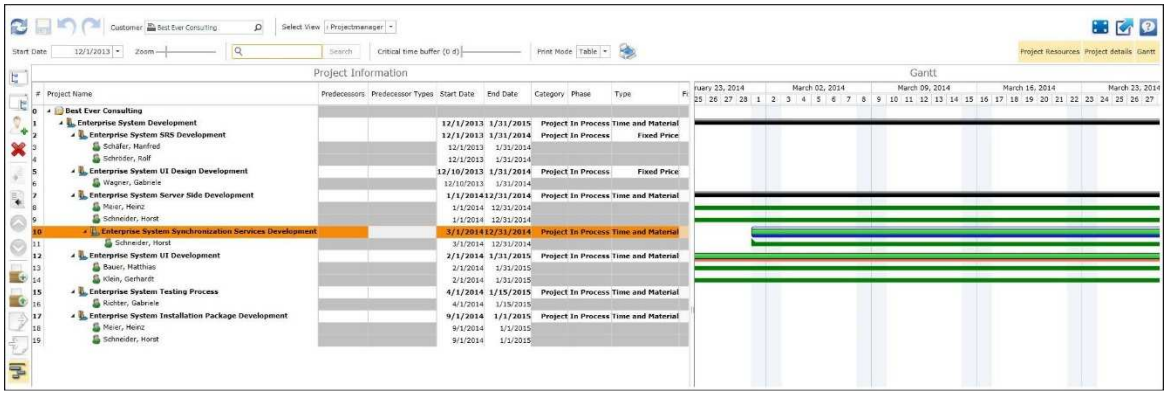
You have several options to change your view.
Via **Start Date** you can set the date when the view begins.
Via **Zoom** you can choose individually if days, weeks or months should be shown.

11. proRM PROJECT GANTT APP

Overview

Using proRM Project Gantt App you will be able to see all **projects**, **subprojects**, **work packages** and **milestones** in a colorful and understandable format, easily **make changes**, **creating new items**, **moving or deleting** them using the drag and drop facility or even **assign resources** just with a few clicks. Thus, proRM Project Gantt App allows having a transparent and holistic view over the progression of your projects, showing their status, whether for individual or multiple clients. Particularly valuable is the enabling of a visualization of complex **dependencies** at all levels in a single glance. Classically, this type of activity cause problems of tasks overlapping, however proRM Project Gantt App offers you an optimal solution by highlighting the ultimate and most efficient **Critical Path**. In this way, a complex project with multiple project-phases, that requires highly structured work-packages and milestones, becomes as straightforward to plan and maintain, as a flat project with few sub-projects.

Moreover, all frequently required project structures, created or imported, may be saved as **various templates** directly within proRM. It will save your time when you will need them next. If the standard display does not meet your requirements there are various display options to ensure you get the optimal display for your needs.

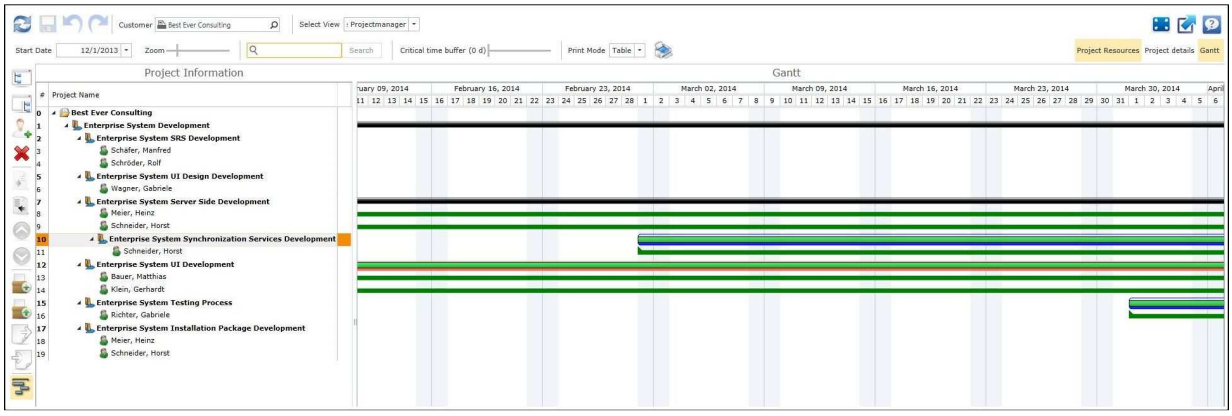


Left Navigation Bar	Using this button, you can create, delete and move projects and subproject. It is also possible to export the view as an *.xml file via the button export.
Select Customer	Select the company on whose behalf projects are executed. It is also possible to select multiple companies.
Chart Start Date	Start Date of the Project Gantt.
Zoom	The slider allows an individual adjustment of the size of the Project Gantt.
Resources	Project Resources can be turned on or hidden.
Detail Project Info	Project Details can be turned on or off.
Gantt View	Gantt View can be turned on or hidden.

First Steps

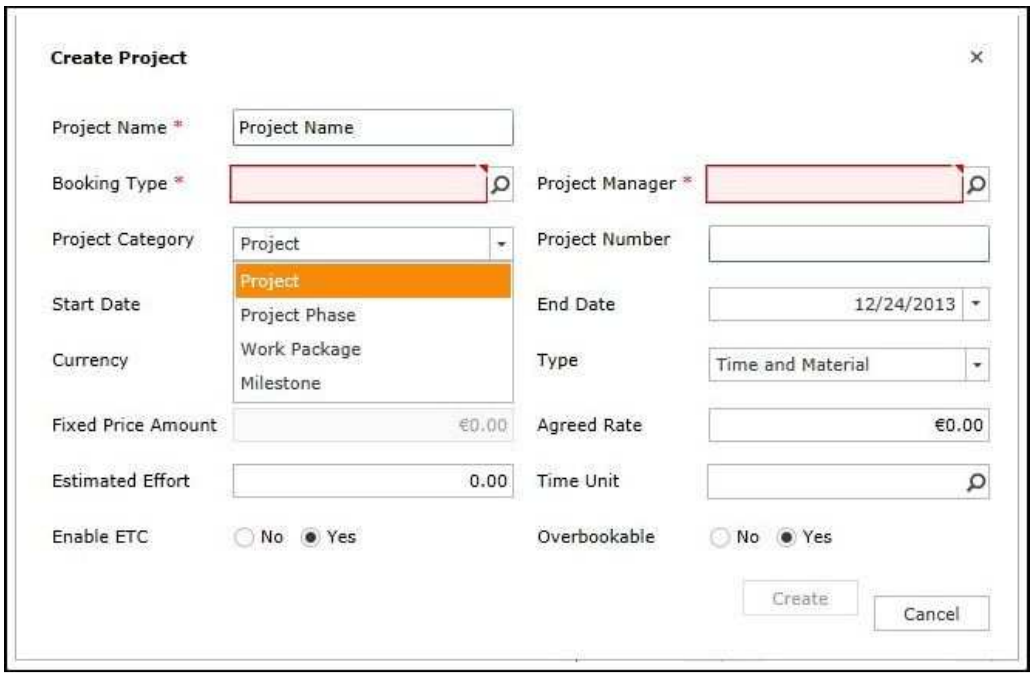
To be able to use the application, you should first select a customer. For this purpose, click **Select** in the bar **Select Customer** and type in the name of the customer or the names of the customers. It is also possible to open the look-up, where you are able to select your desired Account from the Account Look up View. To select multiple companies, select a company here and click the **Add** button. Once you have selected the company, press **OK** to close the window and to confirm your selection. If you click on **Refresh**, you will be shown the selected company and the underlying projects at the section **Project Information**. Existing projects are shown in the right section of Project Gantt as bar. Now you can view everything to the lowest level of the **Project**

Resource as at the Project Tree.



You can choose the view of the application anytime. All functions are activated by default.

If you open a project you can see the assigned resources. If your resources have already booked time on a project, you can see the progress in the project bar as green bar.



Create Subprojects

If you want to create a subproject, just select the button **Create Subproject**, it is located directly under the **Create Project** button. A similar form like in the preparation of a new project is opened now. Please note that the Gantt uses the selected project as a template and therefore it has already contained data, such as **Booking Type** and **Project Manager**.
You can also define afterwards a project as a subproject. To do this, click on the button **Indent** below the **Delete** button. You can undo this operation or define a **Subproject** as a **Main Project** by pressing the **Outdent** button. Note that the project above the selected Project is functioned as **Parent Project**. If another project serves as Parent project, you are able to move the subproject using the arrows up or down.

Invalid Project

If the newly created project is shown in red and is not visible on the grid view, the project is **invalid**. This happens if you leave one of the required fields such as **Project name**, **Booking Type** or **Project Manager** empty. To add the missing data, click on the project. The project form will be opened in a new tab, where you can make the required changes and customizations. After you have made all the necessary changes **Save** the project and click on **Refresh** in the Gantt. The Project Tree is now reloaded and the **invalid** project will be displayed as **valid** one.

How to Delete Projects

To delete a project, you can use the **Delete** button.
Please be careful: If you delete a project, all subprojects will be also deleted. The Project cannot be restored. The Projects, which contains bookings, cannot be deleted.

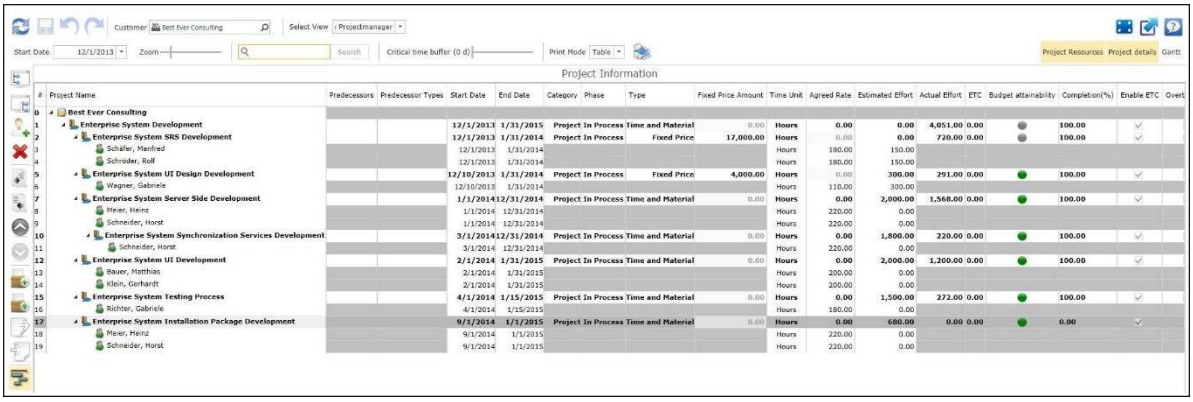
Create Project Resource

To assign a resource to a project, select the desired projects and click the button **Create Project Resource**. Then an input screen appears, you need to fill in the **Resource**. Furthermore, you can define the **Start and End Date**, the **Estimated effort (h)** and the **Hourly rate**. The **Project Name** and the **Currency** are already initialized in relation to the selected project.

Change the View

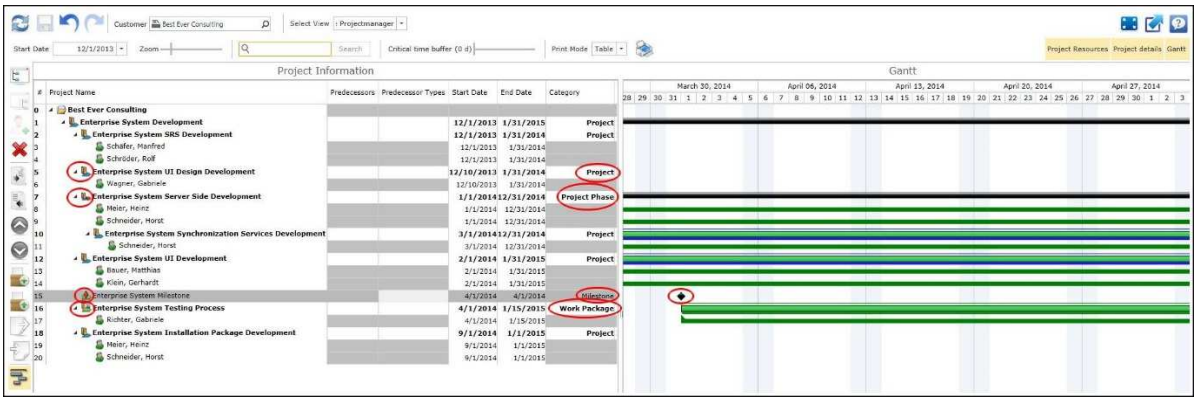
You have several options to change the view:

Via **Start Date** you can select the start date of the Gantt.
Via **Zoom** you can choose individually if you want days, weeks or months to be displayed.
Via **Resources** you can view or hide the Resources.
Via **Detail Project Info** you can view or hide details of the projects. If the details are hidden, a Project tree is being displayed.
Via **Gantt View** you can turn off the Gantt View.
The **Critical Time Buffer** allows you individually to adjust the date when an overlap of projects appears to be critical. This overlap can be displayed with the button **Show Critical Path** at the left navigation bar.



Project Category

When you create a project, you can define a project category. Moreover, you can change it anytime you need. The project category is assumed from MS Project to structure your project. If you do not want to work with different project categories, you can ignore the difference between categories altogether.



Each project category has its own icon and color. For more information about the purpose of each project category, please follow this link: [Project Management]

Project category	Explanation
Project	A project is a temporarily endeavor to create a product, e. g. a new software release.
Project Processes	A Process in a project is a defined phase; e. g. a concept of the new software development must be created.
Work Package	A Work Package is the tiniest piece of a project. A work package will be assigned to a person as a task, e. g. to write a report.
Milestone	A milestone is a special event that deserves special attention, e. g. an important decision about a project.

How to Import/Export a Template

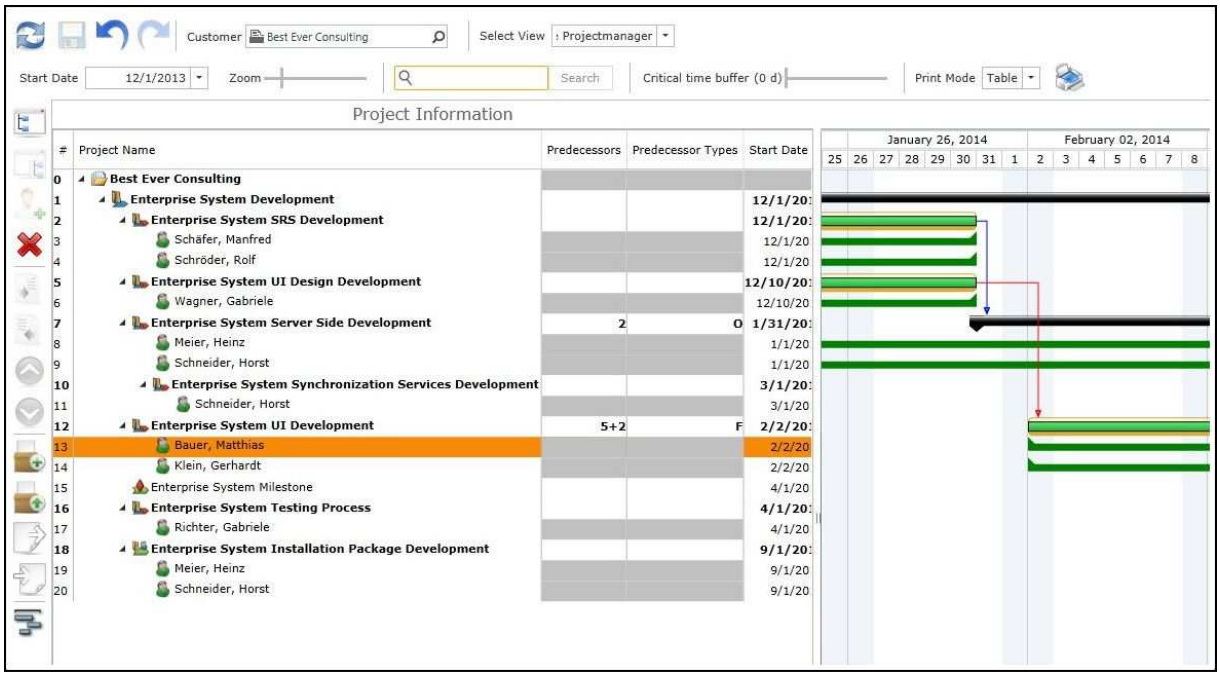
You can create a template from an existing project structure. Click on the button **Save Project as Template**, which is located in the left navigation bar. This template will be saved as an entity in CRM and can be reloaded anytime in the Gantt. Furthermore, you have the possibility to edit and manage the template at the **Project Template Editor**.
It is also possible to import templates, which you have created at the Project Template Editor within the Gantt. To do this, select the **Import Project Template** button. Now you have an access to all your stored templates in CRM. You should only to insert the **Project Type** and **Start Date** before you add the project structure to the company.

Export to MS Project

To export projects to MS Project, open the Customer in the Gantt and select the Project that you want to export. Click on the Button **Export Project to MS Project**. You will be prompted to save the file as **XML**. After the file is saved, you can open it in MS Project.
With the button **Import Project from MS Project** you are able to import all templates saved as XML-Files, from MS Project into your CRM system and your Gantt. Simply choose the XML-File, which you want to import.

How to Use Predecessors

The predecessor function acts to visualize a dependency between different Projects, Project Phases and Work Packages in a fast and easy way. With this function, you can choose how to set a **connection**.

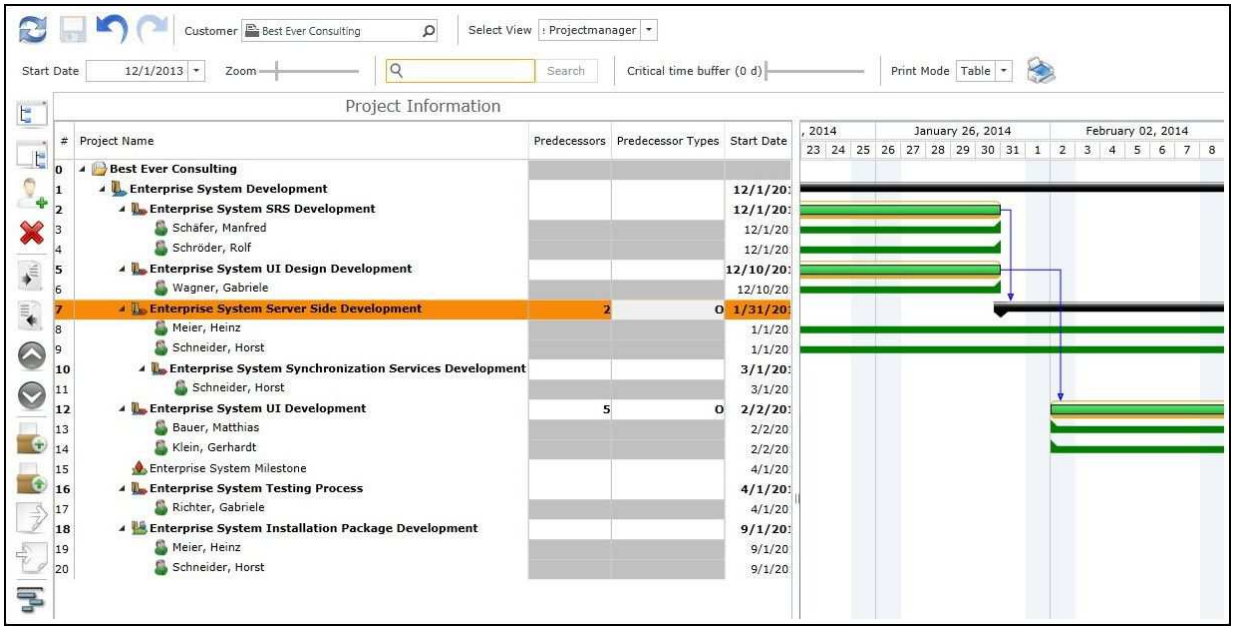


To establish a connection between two elements, first call the accountant of your projects. Then find the elements to be joined and enter the number of the element that is the predecessor of the second element under **Predecessor**.
Furthermore, you have the possibility to connect two projects directly in the Gantt view. To do this click with the left mouse button on the required **Previous Project** and hold the left mouse button. Now drag the arrow, by holding down the left mouse button pressed, to the desired **Successor Project** and release there the mouse button. This creates a new **Relation**. This Relation is defined as standard Finish-Start Relation.

There are various methods of connections between two elements:

Predecessor	Explanation
Finish to Start	It is the standard Relation between two projects and means that the following project starts as soon as the previous project ends. Token: **FS**
Start to Start	The start date of the successor project is dependent on the start date of the previous project. Token: **SS**
Start to Finish	It defines that the end of the successor Project depends on the Start of the previous project. Token: **SF**
Finish to Finish	Both end dates of the selected projects depend on each other. Token: **FF**

To determine the various predecessors of a Relation, you will have to fill in the corresponding **Token** in the **Predecessor column**. The Finish to Start Relation would do **without any Token** because it is set as Default value.



How to Fix an Existing Connection?

To fix an existing Relation between two projects, click at the Gantt view on the **Connection** with a right click and select **Fixed**. The connection is now fixed, this means that both projects are firmly connected and the distance between the respective data move not by changing a project. So you can **delete** the Relation or convert a **Fixed** into a **Normal** Relation again.
Another way to fix an existing Relation is to insert the Token **F** for fixed or the Token **O** for normal Relation into the **Predecessor Type** column.

The advantage of a fixed connection is that you can specify a value for the number of days between the two projects.

You can always individually determine the **number of days** between two projects by turn in the corresponding **Predecessor** column and there the relevant days are to attach a **+** behind.
Example: If the **start date** of a Project is **5 days after the start date** of the Predecessor Project (number 3), this would mean the following values for the column:**3SS+5**.

12. proRM WORKLOAD APP

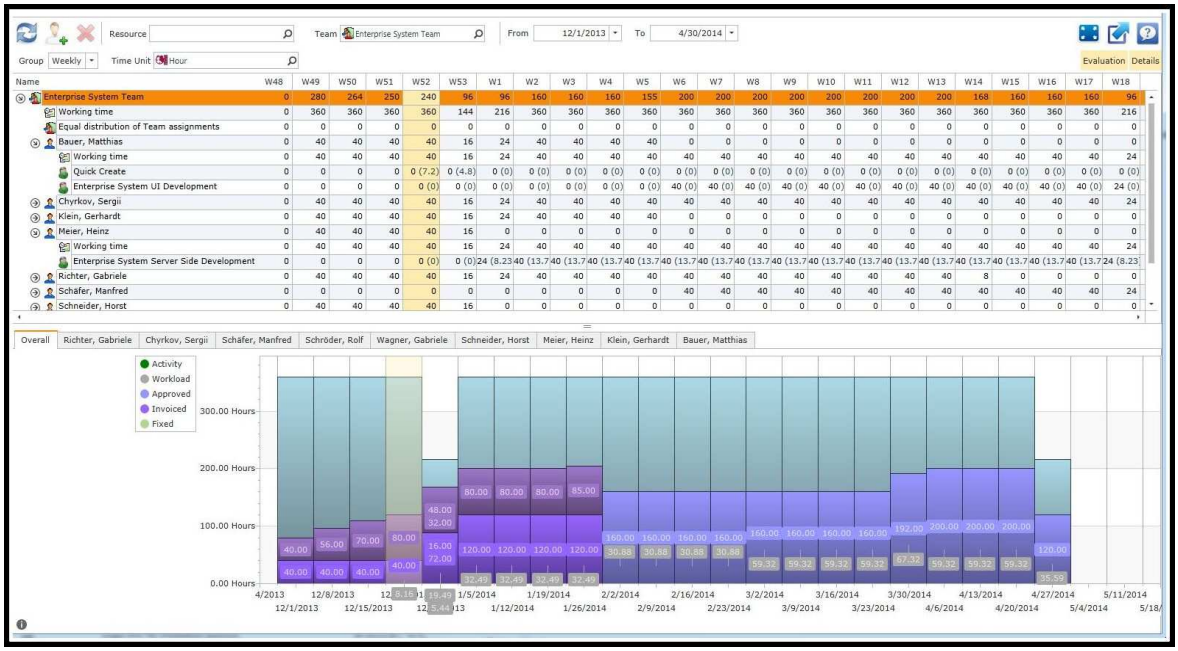
Overview

proRM Workload App gives you a great possibility to observe the availability of your employees and their current workflow in one suitable structure with user-friendly interface. Due to the application, it is much easier to receive the information about time spent by each employee or team to perform their tasks, observe whether they use this time in a productive way, and to get ideas about how to improve their working processes.

proRM Workload App gives you multiple variants of analyzing possibilities. The records of employees can be presented with detailed numerical values or in a graphically enhanced view. You are always able to choose which view suites you more or use both of them.

How to Use proRM Workload App

To use proRM Workload App, you should choose a **Resource** and specify a **Time Period**. Then click **Refresh** to see required data. You also have the option of selecting a complete **Team**.



Set Time Period

To set a time period, specify it in the top menu and click **Refresh**.

Add Resource/Team

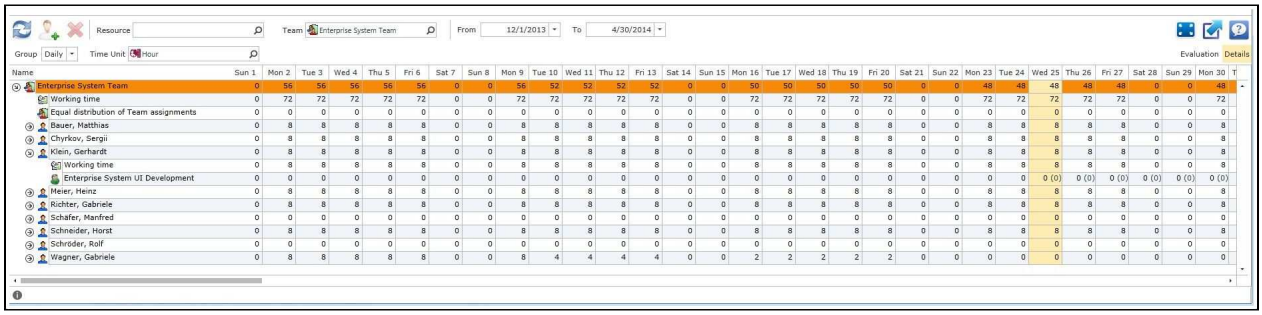
To add a resource, click **Resource**. In additionally appeared window, select the desired resource. It is also possible to select several resources. In order to do this, click **Add** and confirm your selection by clicking **Ok**.
If the required are related to certain team, you are also able to add a whole team by clicking **Team**.
Afterwards click **Refresh** to have data overview.

Application Views

proRM Workload App delivers every resource a graphical and tabular analysis of his records. If you prefer one of these two views, you are able to hide another one. Click on the Button **Evaluation** to hide the graphical descriptions or on **Details** to hide the tabular analysis.

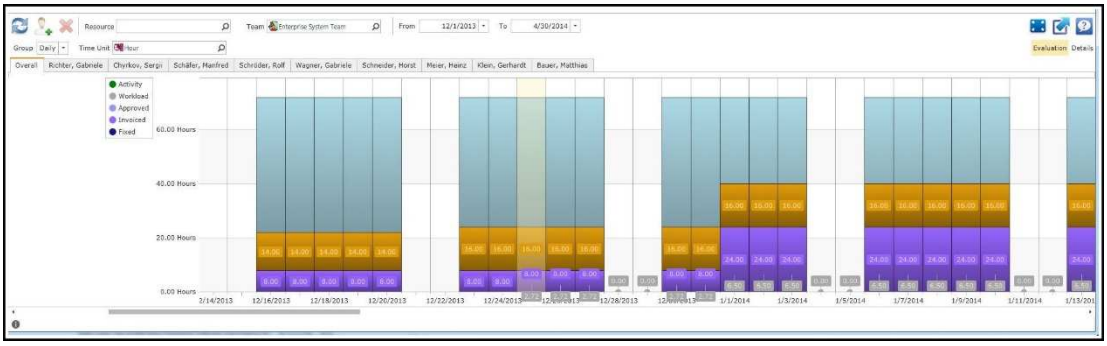
Details

Details View performs all needed data in a tabular way. It shows workload in hours. You are able to look through the data of a team or a particular employee and to get required information in any chosen time unit. Due to the application it is possible in this view to see every day of the selected time period, together with the hours defined in **Working Time Model**. If there is no assigned working model for the selected resource, the application loads default values such as 40 hours per week and 8 hours per day.
It is also possible to see whether you or your employees work too many hours or conversely too less. The color signals of application show this in a suitable way. If the color is green, there are free hours to continue working, if the color is red – this is the sign of overloaded resources.



Evaluation

In the graphical analysis you see each work week as a **bar chart**. These bars contain the bookings and the estimated effort in a colorful and visualized way. **Planned**, **Closed** and **Approved** bookings are also displayed in different colors.
In addition the various activities such as emails, tasks, fax, date etc. are also displayed and highlighted in this view.
It is possible only when the activities are assigned to the appropriate project resource



It is also a great possibility to understand, whether an employee works according to his Working Time Model or not. The Working Time Model is displayed as a background bar chart for main bar chart and visualize in a clear way if the employee work too much or not enough.
There is a possibility within the proRM Workload App to see personal Working Time Model for each employee.

In case you selected more than one resource, the Evaluation will display **Tabs** for every resource. The only exception is **Overall** tab, which displays all the bookings and activities of your chosen resources in one bar chat for one day.
Tip: To have more detailed overview of the resource, it is better to choose only his/her workload chart.

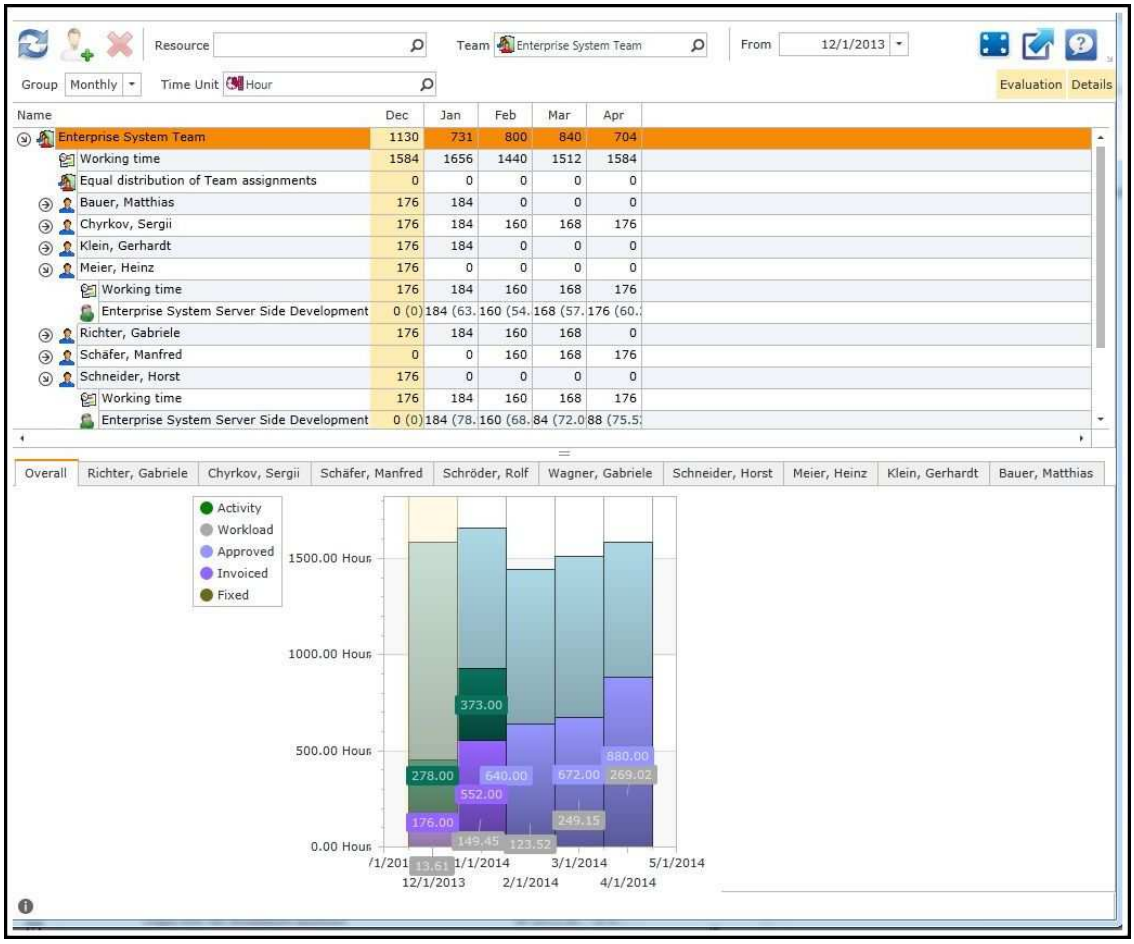


Chart View

Group option allows user to select a **View of Charts** in the Evaluation area. Available values are Daily, Weekly and Monthly that means corresponding grouping of bookings and workloads for every resource OR for all displayed resources if Overall tab is active.

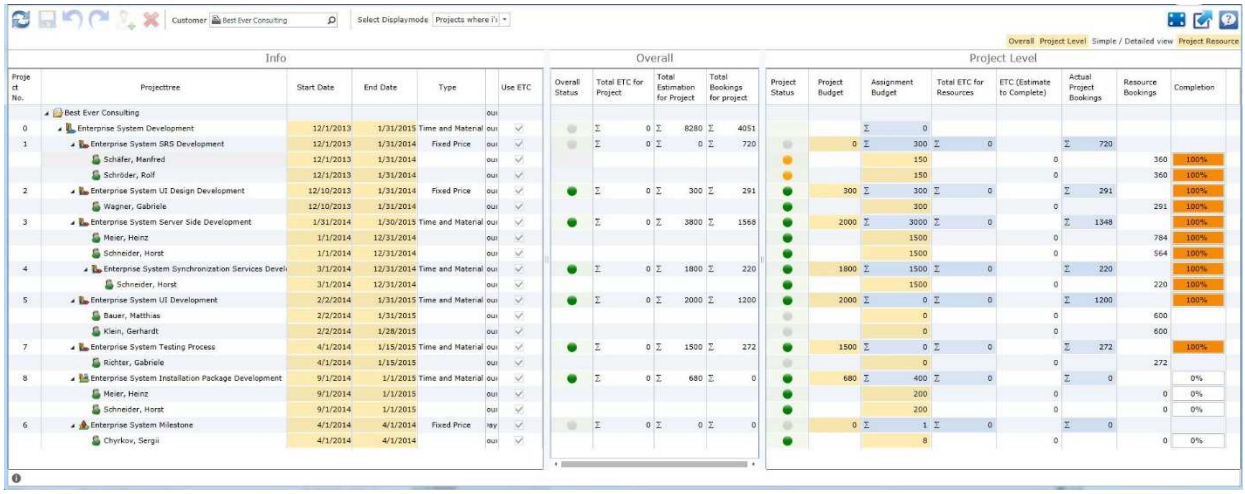
13. proRM CONTROLLING MANAGER APP

Overview

proRM Controlling Manager App allows you to have an overview of your projects' current status simultaneously. You can see whether you are staying on budget or have already gone over, the number of hours that your employees require for completing tasks, and how far along the projects have progressed.

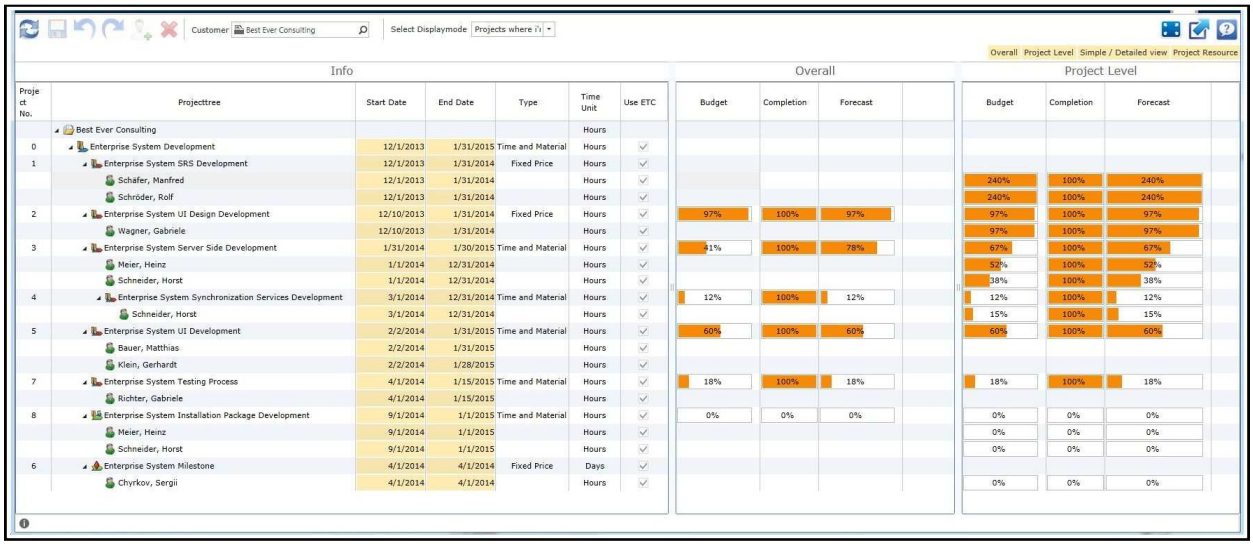
How to Use proRM Controlling Manager App?

proRM Controlling Manager App is subdivided into three sections. This ensures that you can keep a detailed overview over the entire project.
The left **Info** section includes a project tree with the structure of all projects, subprojects and assigned employees. The **Budget** column shows if the project including the sub-projects are still within a budget.
In the middle section **Overall** you see the sums of all displayed values.
On the right side **Project Level** you get a more detailed view of the current status of the projects, including real-time data coming from employee bookings. Especially helpful is the ETC (Estimate-to-Complete) of the employee for a specific task. The ETC helps you to evaluate your projects in a more accurate and realistic manner to identify potential problems before they occur.



Field name	Description
Refresh	Refreshes the selected time period and shows the corresponding data
Save	Saves all changes, made in the yellow fields
Select Customer	Selection of required customer
Select Display Mode	It can be displayed as Overall, or as Project Level, as Simple Detailed View, as Project Resource, or all of them
Select View	Here the projects can be selected according to their status
Overall	Shows the complete project information
Project #	Shows the corresponding project number
Project Tree	Shows a tree view structure of the projects and the respective subprojects
Start Date	Shows the start date of the projects
End Date	Shows the end date of the projects
Overall Status	Shows if the project is still within the budget
Total Estimation for the Project	Shows the total estimated effort for the project (in hours)

Total ETC for Project	Shows the total Estimation to Complete for the respective project
Total Bookings for Project	Shows a sum of all current bookings for the projects made by the employees.
Project Level	Here the project information is shown in a more detailed way.
Project Budget	Shows if all parts of the project are still within the budget.
Total Estimation for Assignments	Shows the total estimated efforts for the assignments
Estimation for Assignment	Shows the estimated effort for a particular assignment
Total ETC for Assignments	Shows the total estimated effort coming from the employees to complete the assignments
ETC (Estimate to Complete)	Shows the estimated effort coming from the employee to complete a particular assignment
Total Employee Bookings	Shows the total bookings that have been made by the employees for the respective project
Employee Bookings	Shows the bookings of the employee assigned to the task
Completion	Shows the completion stage of the project



Definitions

What does “Total Estimation for Project” mean?

This is the sum of all estimated hours for the project. This value is specified by the project manager while creating the project.

What does “Total ETC for Project“ mean?

This is the estimated sum of all estimated hours of the employee for all activities in the project, in other words it is the total estimate to complete the whole project.

What does “Total Bookings for Projects” mean?

The sum of all hours booked on the project by the employees.

What does “Project Budget“ mean?

Here you can see if the selected project is still within the budget. This may differ from the **Overall Status**.

What does “Total Estimation for Assignments” mean?

This is the total estimated hours needed to finish the project including all assignments.

What does “Estimation for Assignment” mean?

Here you can see how many hours the project manager estimated for each assignment.

What is “ETC”?

ETC (Estimated Time to Complete) shows how many hours each employee planned to complete the task.

What does “Total Employee Bookings” mean?

Here you can see how much time each employee has already booked on the project (and sub-projects).

What does „Employee Bookings” mean?

Here you can see the actual booked hours of each employee.

What does „Completion” mean?

This is the Progress status of the Project in percent. It can be calculated by dividing the booked time of the employee by the estimated hours, times 100. In short, how much time has been estimated for the task, how much time has been invested by the employee and the estimation to complete the task.

How to Check if You Are Still in Budget

It is incredibly easy to get an idea of whether your projects are within budget in just one glance. The budget status is displayed in the **Budget** column. If the budget status is green –the project is within the budget, if it is yellow – your costs are equal to your budget, if it is red – your costs exceed your budget and appropriate management steps should be taken.

How to Check If You Are Still in Budget with Your Subprojects?

Looking at the **Project Status** in the Project Level section you can check whether your subprojects are within a budget. It is important to remember, that proRM Controlling Manager App is able to distribute available resources within one project in case one subproject needs more assets allocated. It means that there is the possibility when one or more subprojects are out of budget (red status) while the main project is still within budget (green status). This situation can take place, if there is enough buffer in the total budget for all subprojects together.

Highlighted in Yellow Fields

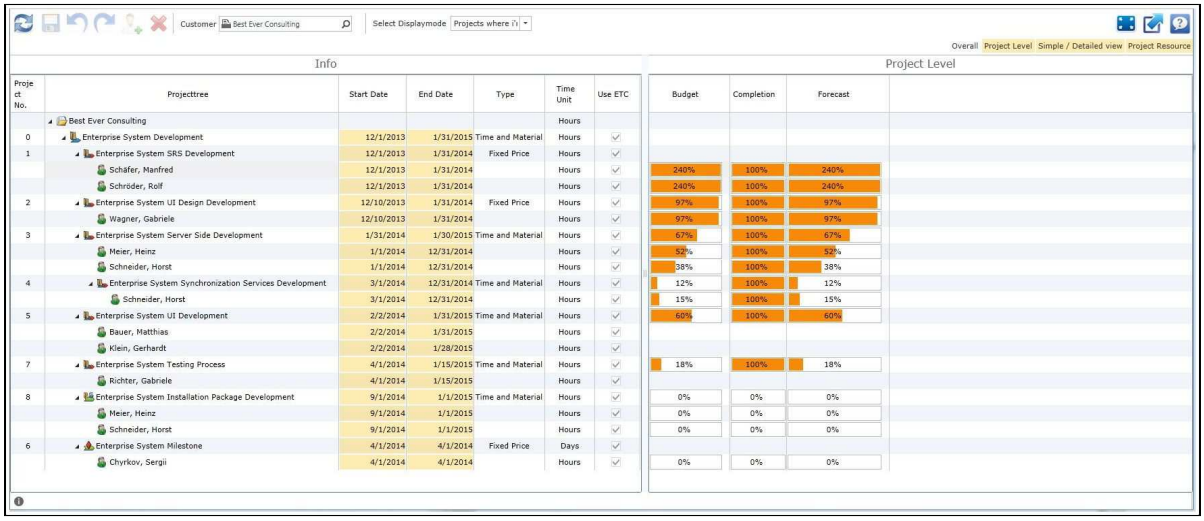
The highlighted in yellow fields are changeable. For instance, if you have an initial planning of 10 hours for an employee to work on a particular project and the employee assumes in his/her booking by entering the ETC that it will take five more hours, you can change the field from 10 to 15h within the application.

Simple/Detailed View

The **Simple** view is the default view. It allows to see if your projects are within the budget. For more detailed information click **Simple/Detailed View** box.

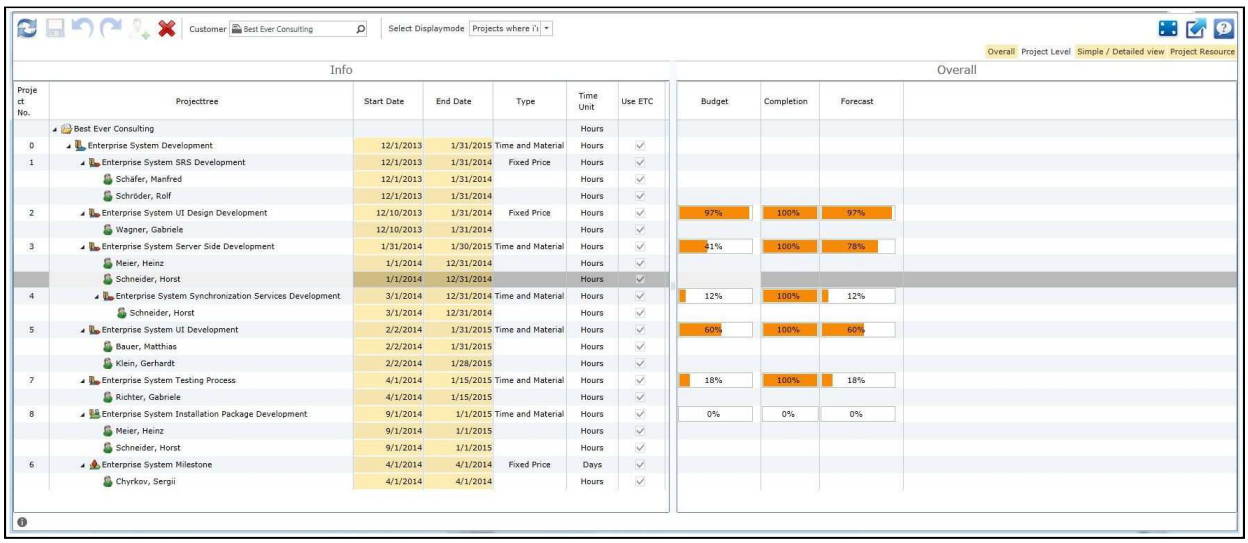
Show/Hide the Overall section

You can show or hide the **Overall** section when you should enable/disable the button “Overall “.



Show/Hide the “Project Level” section

You can show or hide the **Project Level** section when you should enable/disable the button “Project Level”. This section shows you detailed Information about every employee assigned for the project.



Show/Hide Employees

If you want to show or hide the assigned employees when you should enable/disable the button "Assignments".

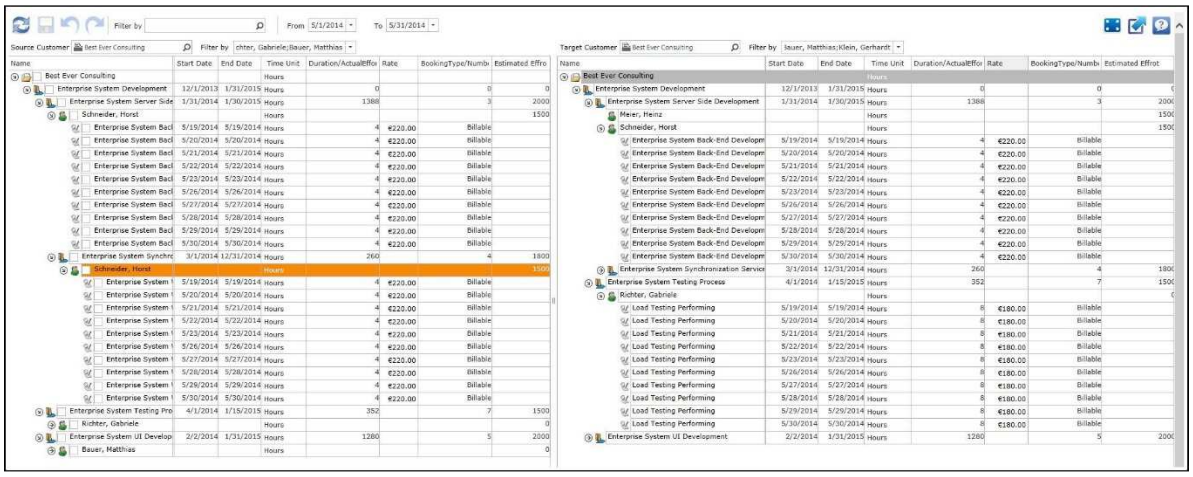
Project Phase Filter

You can filter your projects in a way that only projects in a specific phase are displayed. By default it is **"In Progress"**, but you can choose every available project phase you require. Therefore it is also possible to view archived projects.

14. proRM BULK BOOKING TRACKING APP

Overview

proRM Bulk Booking App allows you to rebook activity records in an easy and fast way.

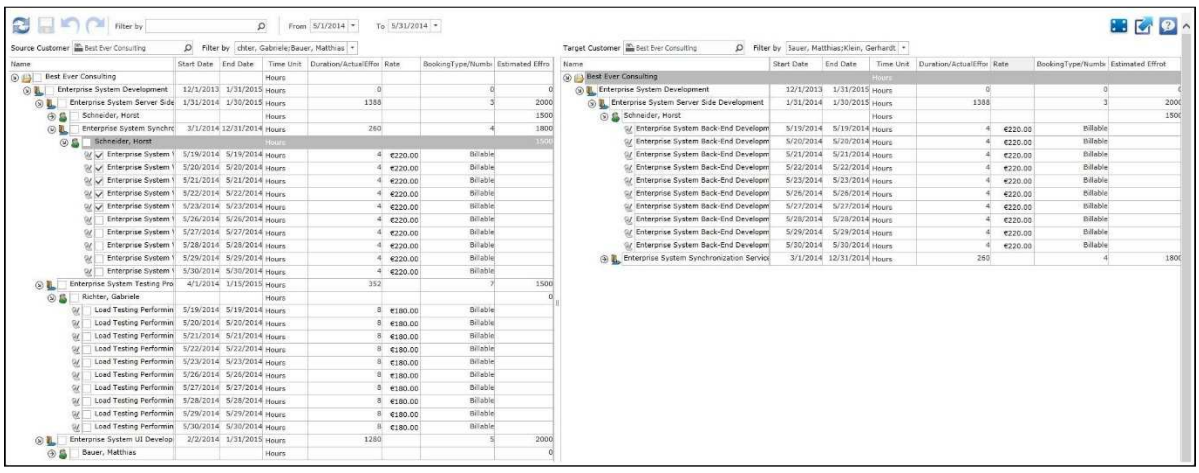


How to Use proRM Bulk Booking App

proRM Bulk Booking App helps you to rebook activity records form one project to another. You can switch one or several activity records to another project. Before you can rebook any activity records, you should choose a customer for each side. First select **Source Customer** - this is the one, who has necessary bookings for switching. Then select **Target Customer** - this is the one, who receives bookings. After these operations click **Refresh**. Now you can see a project tree with accountants and all their projects for both sides.

How to Rebook More than One Booking

First, you should choose the customer for the **Source** and **Target** sides and click **Refresh**. To rebook activity records, mark the desired bookings and drag them to the right side of the application using drag & drop function.
Please note, that activity records can be moved only from one project to another. The employee remains the same.
As soon as the booking is successfully moved, the activity records highlights in green on the **Target** page. Now press **Save** to save the changes.



What does Start Date and End Date mean?

The **Start** and **End Dates** define the Dates the activity record starts and ends.

What does Duration mean?

The column **Duration**/**Actual Effort** has two functions:
At the **Project Level** it shows the summarized **Effort** of all activity records that are booked to the project.
On the **Booking Level** you can see the **Duration** of the activity record.

What does Hourly Rate mean?

The column **Hourly Rate** shows the **Hourly Rate** of the employee in this project.

What does Booking Type/Number mean?

The column **Booking Type**/**Number** has two functions:
At the **Project Level** it shows the **Project Number**.
On the **Booking Level** you can see the **Booking Type** of the activity record.

What does Estimated Effort mean?

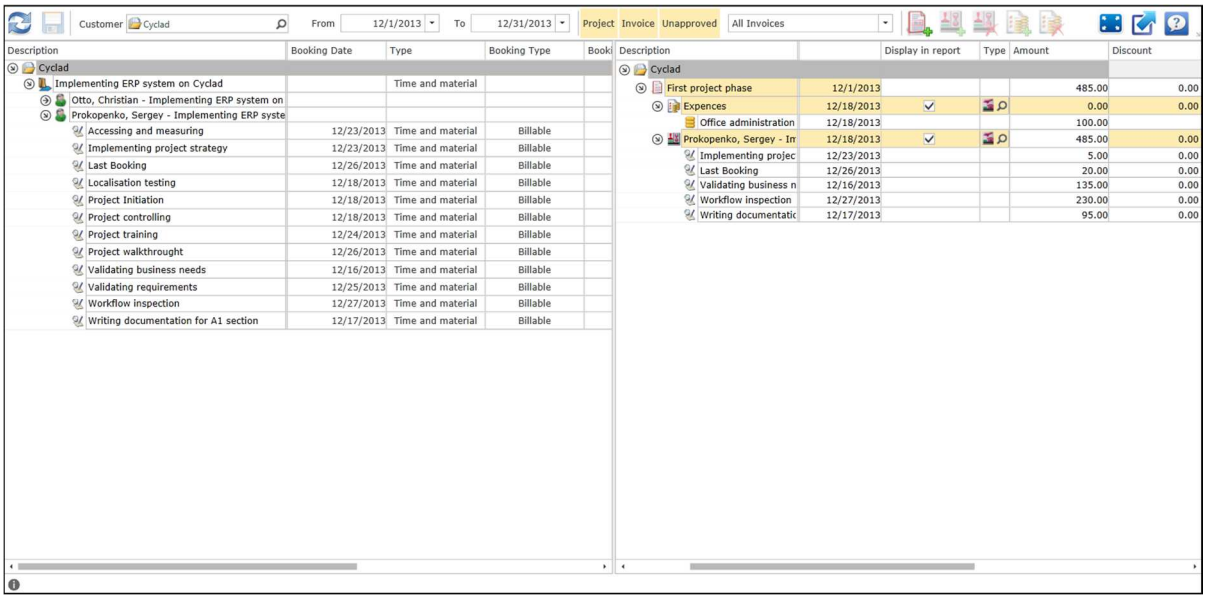
The **Estimated Effort** shows you the estimation of the project manager for this project.

15. proRM INVOICING MANAGER APP

Overview

proRM Invoicing Manager App allows you to create an invoice as soon as you approve bookings or other kinds of entries. The application shows only those items, which were checked and agreed by you. This you have a possibility to import all approved bookings as well as all performances and billing items. There are also several possibilities to make final changes before the information passes to the final version of the invoice. This allows you to make sure that the final invoice is absolutely correct.
Due to seamless integration between proRM and Microsoft Dynamics CRM the invoicing process is very clear and transparent. All changes, which were made within the CRM, are reflected in proRM Invoicing Manager App and vice versa. As a result you receive a completely integrated invoice.
It is possible to calculate all kinds of contracts including those with fixed pricing. The process of invoicing is divided into the following phases: Draft, Approved, Sent, Booked, Paid and Cancelled.

Please make sure that you have the security role **'RM - Invoicing'**.



How to Use proRM Invoicing Manager App

In order to start using the application, first select a customer to whom an invoice is to be sent (**Customer Field**) and a period for bookings and expenses to be added to invoice (**From** and **To** fields). After values above are set, click **Refresh** in order to apply selected conditions.

Application Views

There are several views available for user within the application:

Project
Invoice
Unapproved

Project

Project View shows a grid with the following fields:

Description	shows a project tree structure of the following view:
	Customer.
	Project.
	Project Resources.
	Bookings and Expenses.
Booking Date	shows dates for bookings and expenses.
Type	displays a project type.
Booking Type	displays a type of booking / expenses.
Booking State	displays a status of booking.
Amount	shows a booking amount based on resource rate and number of booked hours OR expense amount.

Invoice

Invoice View shows a grid with the following fields:

Description	shows a tree of the following items:
	Customer.
	Invoice.
	Service Item / Clearing item.
	Bookings / Expenses.
Booking Date	displays the date of bookings / expenses / clearing items / service items.
Display in Report	sets a checkbox that means a visibility of this item in a report.
Type	shows invoice item type.
Amount	shows a sum for every tree item.
Discount	shows where a discount for current invoice should be entered.
Tax Rate	displays a tax rate for a clearing item or a service item.
Total Amount	displays a final invoice amount including taxes and discounts.
Invoice State	shows a status of invoice.

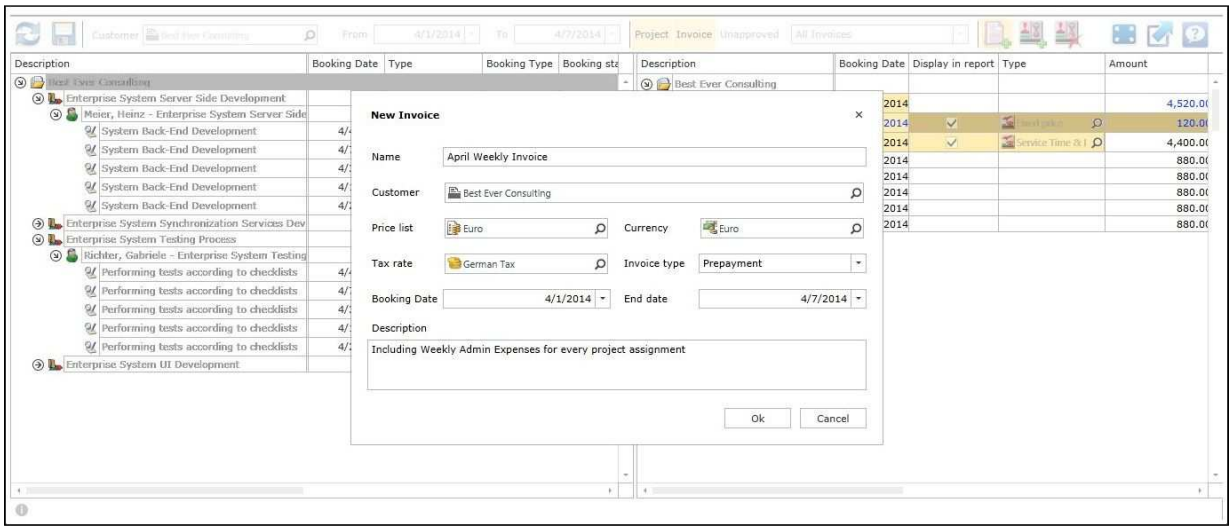
Unapproved

This view hides / shows unapproved bookings and expenses for Project View.

Create an Invoice

You can create an invoice using **Create Invoice** button. In order to complete creating you should set the following parameters:

Name	It is a mandatory field.
Customer	It is predefined with a value that user selected for a top menu filter.
Price list	that can be predefined with a value that is set for current customer.
Currency	can also be predefined as a property of selected customer.
Tax rate.	If there was no tax created in the **CRM System**, you can make following actions. Click the **Lookup** at the end of the line. A Search window pops up. It is searching for several tax rates within the system. Click **New** to open a new window where you should enter Name and the Tax Rate in percent. Then click **Save** and close this form. The needed Tax is now chosen and you can accept this choice by clicking **Ok**. The Tax will be automatically added to the sum of the service positions and to the total sum of the invoice.
Invoice type	allows selecting one of suggested types from a dropdown list.
Booking Start & End Date	copies values from **From** and **To** fields correspondingly.



Time Records

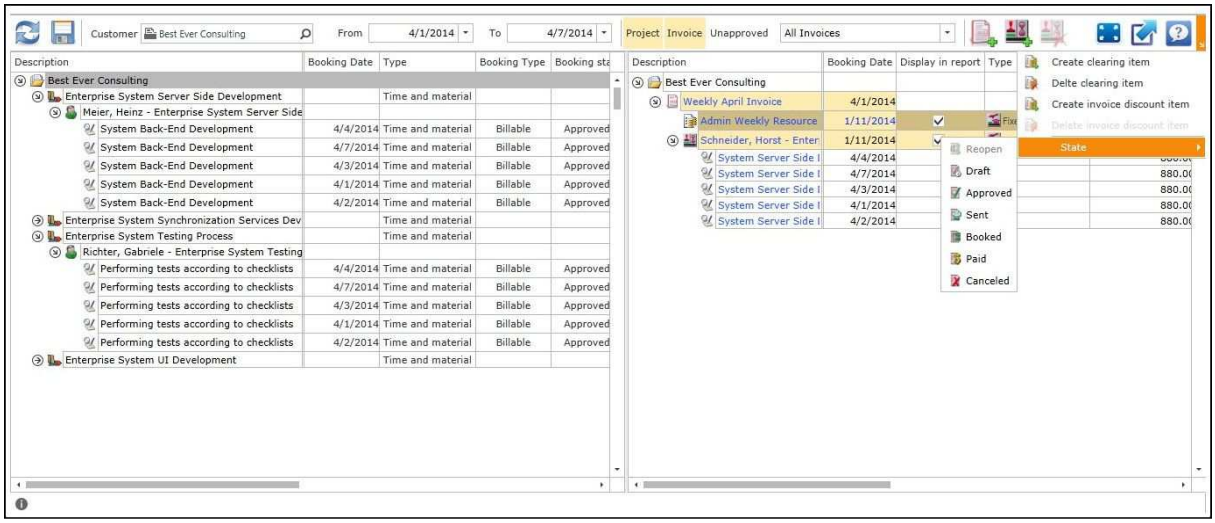
Time Records for invoicing are being shown in a project tree view. This project tree shows only the approved bookings of the project resources. Default period is always a current month. To see all projects just open up all ones, which you need. You will see the project resources that have upper-booked projects. Below you see all approved bookings of each project resource.

Adding Invoicing Positions

Invoicing Positions user can add using the menu above **Invoice View**:

Create and Delete Service item	
Create and Delete Clearing item	
Create and Delete invoice discount item All items have such properties as:	
	Name
	Date
	Display in Report Checkbox
Type	matches a project type
Amount	calculates automatically for Service Item type and is editable for Clearing Items and Discount Items.
Discount	is editable for Clearing and Service items and read-only for Discount Items.
Tax Rate	is predefined with the value that is assigned to current invoice, but can be changed for every position.

After positions are added, you should add approved bookings and expenses to the invoice using drag & drop function from Project View.
Click **Save** every time you want to apply your updates to invoicing application and use **Refresh** to display applied updates.



Complete an Invoice

After positions are added and saved, you can set one of the available statuses to an invoice using State menu. To complete the invoice, go back to the invoice form by clicking **Name**. Click **Run Report**. Choose the **proRM Basic Invoice Dialog**. Now you will see a listing. Now you can save the invoice in different formats or directly print it.

Mark Invoice as Paid or Cancelled

If customer paid the invoice you can also mark the invoice as paid using the dropdown list of **State** button. If you have to cancel the invoice just click **Cancel Invoice** button and the system will create a related record with the same name, but with negative values. This record will be linked to the original invoice, so that user will be able to trace negative invoice in details of original invoice. All bookings and expenses being contained in can be rolled back to unapproved status.

General Questions

What Does the Red Bar Mean?

The **Red Bar** shows user that there are bookings, billing positions, expenses that are not approved as well as not yet assigned expenses. To approve a billing position or a booking, user should click on the element he/she wants to approve and click on related entries. Now proRM Approval Manager App opens and he/she can assign or approve the expenses.

No Bookings Are Shown

There are several reasons:
bookings were not approved;
there are bookings that are not billable;
no bookings have been created in the selected period.

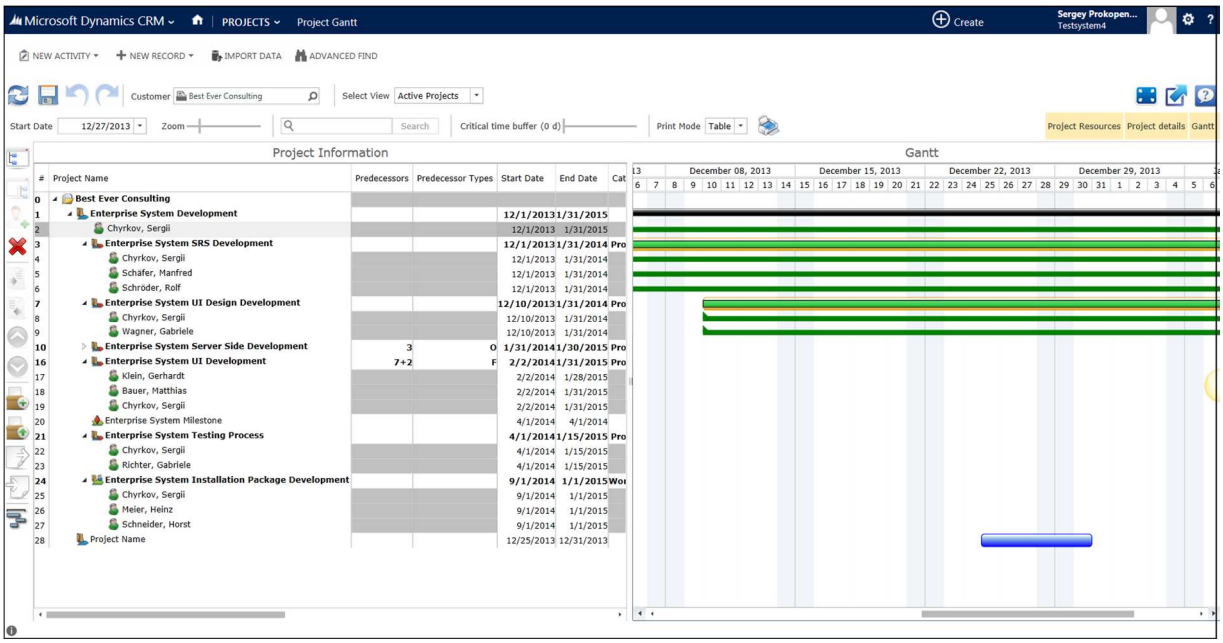
No Services Are Shown

If you add the approved bookings while creating an invoice by clicking the button **Booked Times**, go back to the general area of the invoice. Now you can add a tax. When you click
Recalculate, all amounts are calculated and appear on the invoice. For example,
Create a new invoice ->
Open the invoicing ->
Choose the bookings that you want to import into the invoice ->
Approve eventually not yet approved bookings ->
Choose the tax and the type ->
Create the invoice.

16. proRM TEMPLATE EDITOR APP

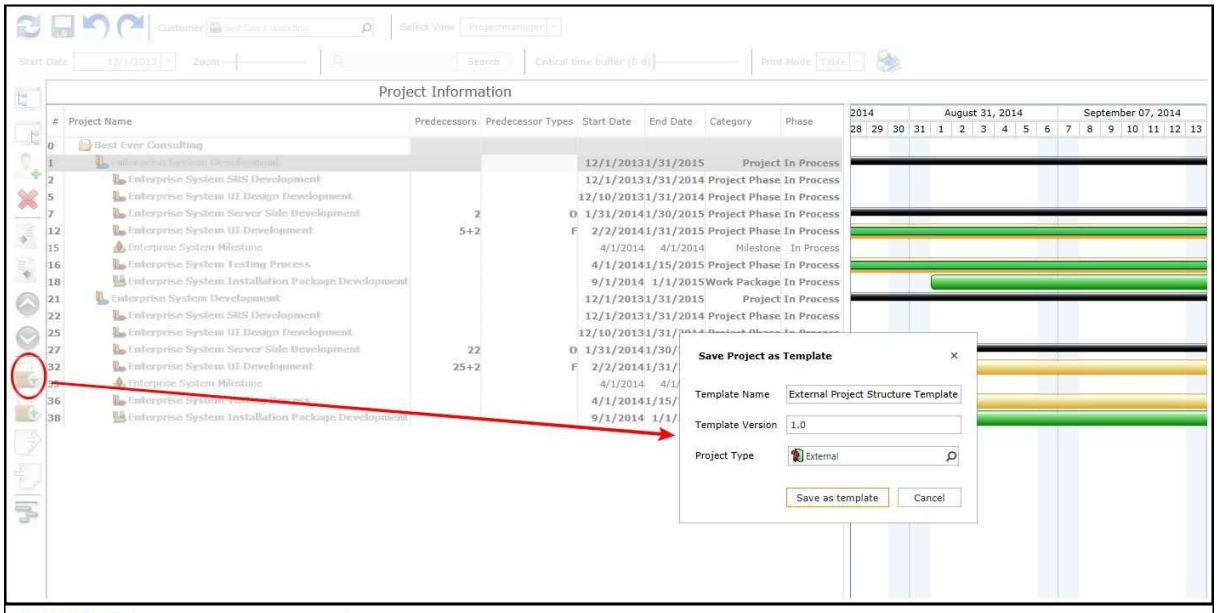
Overview

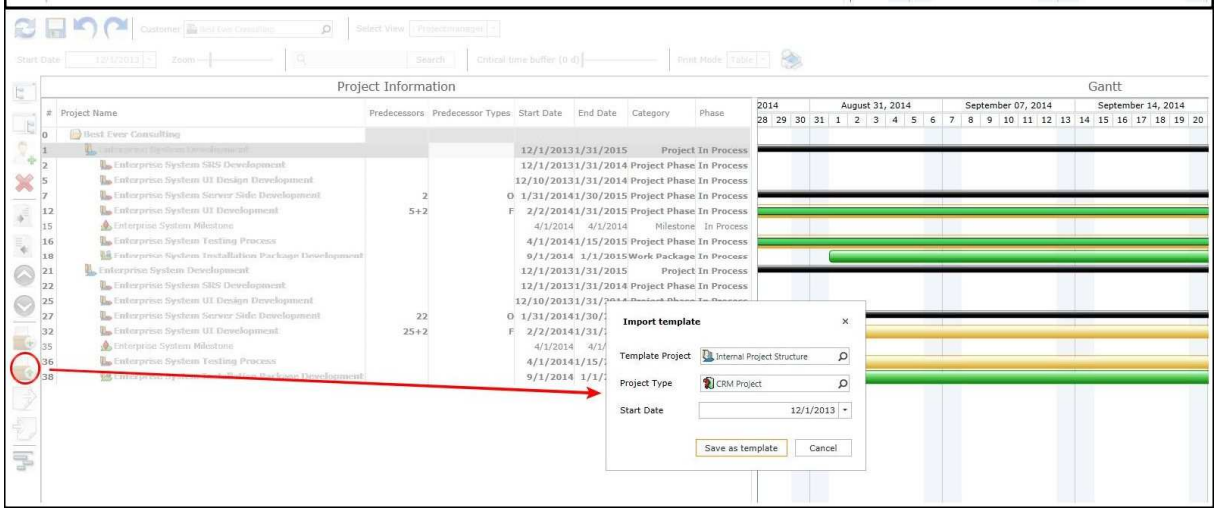
proRM Template Editor App enables you to save templates for frequently used project structures out of proRM Project Gantt App. All given project structure, the phases, work packages, milestones, allocated employees and dependencies are able to be saved as templates and can be re-used as often as you need. With a few simple clicks these templates can be edited to precisely meet current criteria and may then be re-imported.



How to Use proRM Template Editor App

To use proRM Template Editor App, first select a required template. If you want to edit multiple templates, select some templates and click “Add”. proRM Project Template Editor App has exactly the same options as proRM Project Gantt App. However, some settings for the naming of the templates in the first one is more functional.





Name/Rename Templates

In order to change the name of a template, first enter a new one in the field “Template Name” and then click “Save”. It is useful to specify a version number of the template.

How to Change the Version Number of a Template?

To change the version number of a template, open required template. Under “Template Version”, enter a new value and press “Save”.
Tip: It is useful to change a template version number making modifications of the template. In this case, you do not need to rename the template. Example: from Small Project 2.0 to Small Project 2.1.

How to Change the Project Type of a Template?

The project type can be changed by providing a new value in the “Project Type” box. To save required type, click “Save”.

Template Edition

It is possible to edit a template with the same functions you find in proRM Project Gantt App.

Create Project/Subproject

If you want to create a new project, click on “Add Project” in the left vertical navigation bar. To create a new subproject, click on a required project, and then on “Add Subproject” in the same navigation bar.
Please note, that marked project has its terms and that is why date for a new subproject will be already inserted.

Define an Existing Project as a Subproject

You can also anytime define a project as a subproject. To do this, click “Indent” in the left vertical navigation bar. You can also undo this process by clicking “Outdent” in the same navigation bar.
Please note, that the project above the selected project is the parent project. If another project should be the parent project, just move the project up or down, using the arrow.

Delete Projects/Subproject

You can delete a project by clicking the “Delete” in the left vertical navigation bar.
Please note, that if you have a project containing subprojects, all subprojects will be deleted as well. This cannot be disabled.

Add Project Resources

To add a Project Resource to a project, select a required project and click “Add Project Resource” in the left vertical navigation bar. The name of the project will be already initialized.

How to Use “Predecessors”?

The predecessor function allows visualizing dependencies between different projects, project phases and work packages in a fast and easy way. This function enables you to choose different ways of setting connections. For example, it is possible to set a predecessor with a meaning: if the first project ends, the second one starts. It is also possible to set the predecessor as Start to Start (SS) or End to End (FF) schemes.
To establish a connection between two elements, first chose a customer. Then, find the elements to be joined, and enter the number of the element that is the predecessor of the second element under “Predecessor”.
You can also fix an existing Predecessor. If the predecessor is fixed, you have a strong knot between the projects. That means, when you want to change date or duration of projects, you can simply drag & drop them and as a result, both projects will be dragged & dropped.

How to Set a Fixed “Predecessors”?

To fix a “Predecessors”, first you have to set a predecessors like it is described above. After that, make a right click on the existing knot between the projects and choose “Fix”. The connection does have red color now and is fixed.