Microsoft Dynamics®

Business Portal for Microsoft Dynamics® GP 2010
Project Time and Expense Administrator's Guide

Contents

Introduction

Welcome to Project Time and Expense, a time and expense tracking tool for employees, supervisors, and project managers.

Project Time and Expense is an application accessible in Business Portal for Microsoft Dynamics® GP, and consists of web pages for entering and approving timesheets and expense reports. When timesheets and expense reports are approved in Project Time and Expense, they are automatically transferred to Microsoft Dynamics GP for posting.

Check for updated instructions

This information was current as of March 13, 2010. The documentation may be updated as new information becomes available. Check the Microsoft Dynamics GP documentation Web site (http://go.microsoft.com/fwlink/?LinkId=185513) for the most current documentation.

This introduction includes the following sections:

- *What's in this manual*
- *Symbols and conventions*
- *Additional resources*
- *Technical support*
- *Send us your documentation comments*

What's in this manual

This manual will help you install and set up Project Time and Expense.

This documentation is divided into the following chapters:

- Chapter 1, "Overview," explains what Project Time and Expense is and how it is used.

- Chapter 2, "Back office integration," describes how Project Time and Expense integrates with the Microsoft Dynamics GP Project Accounting and Personal Data Keeper (PDK) modules.

- Chapter 3, "Installation," provides instructions for installing Project Time and Expense on your Business Portal web server.

- Chapter 4, "Setup," explains how to set up users and configure Project Time and Expense.

- Chapter 5, "Default group and role permissions," lists the default permissions associated with the groups and roles that are installed with Project Time and Expense.

Symbols and conventions

This manual uses the following symbols to make specific types of information stand out.

Symbol	Description
(light bulb symbol)	The light bulb symbol indicates helpful tips, shortcuts, and suggestions.
(warning symbol)	The warning symbol indicates situations you should be especially aware of when completing tasks. Typically, this includes cautions about performing steps in their proper order, or important reminders about how other information in Business Portal or Microsoft Dynamics GP might be affected.

This manual uses the following conventions to refer to sections, navigation, and other information.

Convention	Description
Create a timesheet	Italic type indicates the name of a section or procedure.
File > **Print**	The (>) symbol indicates a sequence of actions, such as clicking items on a menu or a toolbar or clicking buttons in a window. This example directs you to go to the **File** menu and click **Print**.
Bold	Bold type indicates the names of fields, tabs, menus, commands, and buttons, and text you should type.

Additional resources

In addition to this manual, the following documentation is included with this release of Business Portal for Microsoft Dynamics GP.

Manuals

The following PDF manuals are included in the Documentation folder on the Business Portal installation media.

Business Portal Installation Guide   The Installation Guide (BusinessPortalInstallation.pdf) provides step-by-step instructions for installing Business Portal.

Business Portal Administrator's Guide   The Administrator's Guide (BusinessPortalAdminGuide.pdf) explains how to set up and configure Business Portal.

Business Portal User's Guide   The User's Guide (BusinessPortalUsersGuide.pdf) helps users complete day-to-day tasks in Business Portal.

Application manuals   User and Administrator manuals for each application installed in Business Portal are available in the Documentation folder.

Help

Help is available by clicking the Help icon button, located in the upper-right corner of any page. The help that is displayed depends on whether you open help from a Business Portal page, a Microsoft® Windows® SharePoint® Services page, or a

Microsoft Office SharePoint Server 2007 page or Microsoft SharePoint Server 2010 page.

Business Portal help When you click the Help icon button on a Business Portal page, the relevant help topic for that page is displayed. You can use the search field on the help page to search for information. You also can click the Home icon button to browse the contents of the help.

SharePoint help Many of the features included in Business Portal—such as document libraries, lists, announcements, links, and alerts—are provided by Windows SharePoint Services. General information about these features is provided in the Administering Business Portal help. For more detailed information, refer to the Windows SharePoint Services help, which can be accessed by clicking the Help icon button in the upper-right corner of any Windows SharePoint Services page. If you're using Office SharePoint Server 2007 or Microsoft SharePoint Server 2010, additional help related to SharePoint Server features also will be available.

Technical support

You can contact Microsoft Dynamics technical support online or by telephone. Go to www.microsoft.com/dynamics and click the CustomerSource link or call 888-477-7877 (in the U.S. and Canada) or 701-281-0555.

Send us your documentation comments

We welcome comments regarding the usefulness of the Microsoft Dynamics GP documentation. If you have specific suggestions or find any errors in this manual, send your comments by e-mail to the following address: bizdoc@microsoft.com.

Note: By offering any suggestions to Microsoft, you give Microsoft full permission to use them freely.

Chapter 1: Overview

The following information explains what Project Time and Expense is and how it is used.

- *What is Project Time and Expense?*
- *Who can use Project Time and Expense?*

What is Project Time and Expense?

Project Time and Expense is a web-based time and expense tracking tool for employees, supervisors, and project managers. Project Time and Expense is accessible in Business Portal for Microsoft Dynamics GP, and consists of web pages for entering and approving timesheets and expense reports. When timesheets and expense reports are approved in Project Time and Expense, they are automatically transferred to Microsoft Dynamics GP for posting.

Who can use Project Time and Expense?

Project Time and Expense can be used by the following groups of people.

Employees

Employees can use Project Time and Expense to submit timesheets and expense reports, and to check each document's status.

Employees can enter and submit timesheets and expense reports.

Managers and supervisors

Managers and supervisors can use Project Time and Expense to review and approve timesheets and expense reports submitted by their employees.

Managers and supervisors approve timesheets and expense reports.

Project mangers or business managers

Project managers and business managers can use Project Time and Expense to monitor and track project information. For example, a project manager can view a project's costs and estimated profits.

Project managers and business managers can monitor and track project data.

Chapter 2: Back office integration

Project Time and Expense is tightly integrated with the Microsoft Dynamics GP Project Accounting and Personal Data Keeper (PDK) modules. The following sections describe the main integration points.

Back office setup

Project Time and Expense integrates with the Microsoft Dynamics GP Project Accounting and Personal Data Keeper (PDK) modules. These modules must be installed, registered, and set up before you can use Project Time and Expense.

⚠️ *Project Time and Expense does not support Microsoft Dynamics GP employee IDs that contain special characters. Be sure that special characters are not used in the IDs for employees that will use Project Time and Expense in Business Portal.*

Project Accounting

The project information set up in Project Accounting determines the projects, tasks, and expense items that will appear when your employees work in Project Time and Expense.

This documentation assumes that you've completed the following tasks in Project Accounting:

- Set up projects and assigned them to employees.

- Set up cost categories and assigned them to projects. (Cost categories, which appear in Project Time and Expense as *tasks* and *items*, must have a status of Open or Completed to appear on timesheets and expense reports.)

- Set up default document numbers, payment methods, and billing information for expense reports.

See the Project Accounting documentation for more information about these setup tasks.

Personal Data Keeper (PDK)

The user records in PDK define which users are managers and supervisors, and who must approve each employee's timesheets and expense reports.

This documentation assumes that you've set up user records for all of your employees in PDK. For detailed information about setting up PDK, see the PDK documentation.

Timesheet entry

The options in the Timesheet Settings window in PDK control which options are available to users when they create timesheets in Project Time and Expense.

For example, if the **Allow Billing Notes Entry** option is selected in the Timesheet Settings window for Adam Barr, then Adam will be able to add billing notes to timesheets he creates in Project Time and Expense.

We recommend you review the options in the Timesheet Settings window for each employee who will be submitting timesheets.

These options control how users enter timesheets in the back office and in Project Time and Expense.

The **Delegates** functionality is not supported in Project Time and Expense.

Expense report entry

In order for users to submit expense reports, there are options that must be selected in Project Accounting and PDK.

In Project Accounting   Be sure the **Files Employee Expense** option is selected in the PA Employee Options window for each user who needs to submit expense reports.

Be sure this option is selected for each user who needs to submit expense reports.

In PDK   The options in the Expense Settings window control which options are available to users when they create expense reports in Project Time and Expense.

For example, if the **Allow Billing Notes Entry** option is selected in the Expense Settings window for Adam Barr, then Adam will be able to add billing notes to expense reports he creates in Project Time and Expense.

We recommend you review the options in the Expense Settings window for each user who will be submitting expense reports.

These options control how users enter expense reports in the back office and in Project Time and Expense.

The **Delegates** functionality is not supported in Project Time and Expense.

Document approval

When an employee submits an expense report or timesheet, the document is automatically routed to the employee's manager or supervisor for approval. Once the document is approved, it is transferred to the back office for posting.

The following information provides details about the document approval process.

Who must approve expense reports and timesheets

Expense reports and timesheets don't have to be approved by the same people. When an employee submits an expense report, it will be routed according to the options selected in the **Expense Reports Approvals** area of the User Setup window in PDK. Similarly, when the employee submits a timesheet, it will be routed according to the options selected in the **Timesheets Approvals** area of the User Setup window.

For example, consider the following screen illustration. In this example, Pilar Ackerman's expense reports will be routed to her manager. Pilar's timesheets will be routed to both her manager and supervisor.

These options determine who must approve Pilar's expense reports.

These options determine who must approve Pilar's timesheets.
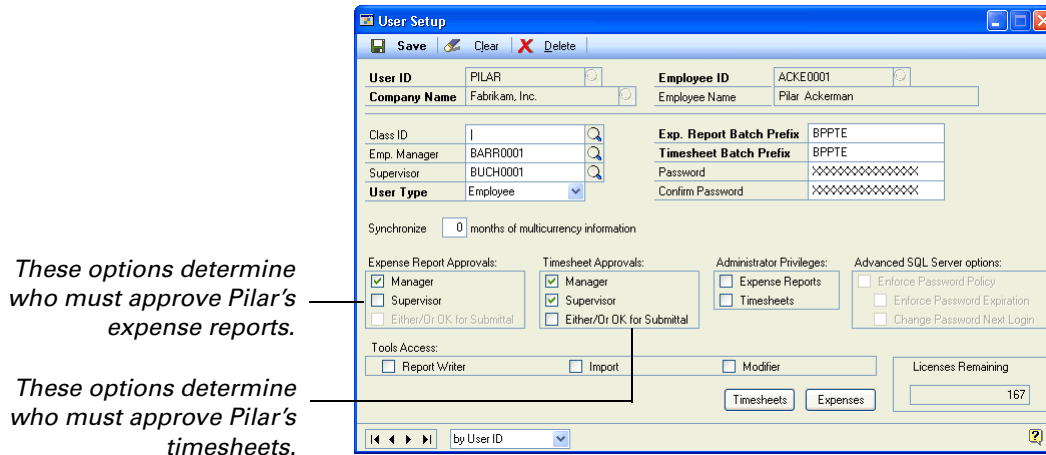
Number of approvals required

The options you select in the **Expense Report Approvals** and **Timesheet Approvals** areas of the User Setup window in PDK determine how many people must approve an employee's expense reports and timesheets.

If this is selected...	Then...
Manager	The document is routed to the employee's manager. The manager is the only person required to approve the document.
Supervisor	The document is routed to the employee's supervisor. The supervisor is the only person required to approve the document.
Manager and Supervisor	The document is simultaneously routed to the employee's manager and supervisor. Both the manager and supervisor are required to approve the document.
Manager, Supervisor, and Either/Or OK for Submittal	The document is routed to the employee's manager and supervisor. Only one person—the manager or the supervisor—is required to approve the document.

Posting

Once a timesheet or expense report is approved in Project Time and Expense, you must open PDK and transfer the document to Project Accounting for posting.

⚠ *Project Time and Expense does not calculate taxes for expense reports. If your employees submit expense reports in Project Time and Expense that require tax calculations, you must add tax information to these documents in PDK. After the taxes have been added, the documents can be transferred to Project Accounting for posting.*

Timesheets and expense reports are posted in employee-specific batches. A batch ID is formed from the batch prefix—specified on the employee's record in the User Setup window in PDK—followed by the current date in MM/DD/YY format.

For example, assume the **Timesheet Batch Prefix** field on Pilar Ackerman's employee record is set to **BP-ACKE-**. When Pilar's timesheet is approved on March 15, 2009, the timesheet will be included in the **BP-ACKE-031509** batch.

Chapter 3:   Installation

Use the following information to install Project Time and Expense:

- *User rights for installation*
- *Before you install*
- *Install Project Time and Expense*

User rights for installation

To install Project Time and Expense, you must log on to the Business Portal web server as a user with the following access rights:

Administrators group   You must be a member of the Administrators group on the server.

Administrator rights for SQL Server   During the installation, you will be prompted to enter Microsoft SQL Server® connection information.

- If you want to connect to SQL Server using Windows Trusted Authentication, you must log on to the Business Portal web server with a Windows logon ID that has administrative rights to SQL Server.

- If you want to connect to SQL Server using SQL Server Authentication, you'll need to enter a SQL Server administrator logon ID and password during the installation.

Before you install

Before you can install Project Time and Expense, you must:

- Install, register, and set up Project Accounting. For more information, see the Project Accounting documentation.

- Install, register, and set up Personal Data Keeper. For more information, see your Personal Data Keeper (PDK) documentation.

- Enter registration keys for Project Time and Expense in Microsoft Dynamics GP. For more information about entering registration keys, see the Microsoft Dynamics GP documentation.

Install Project Time and Expense

If you did not install Project Time and Expense when running the Business Portal installation wizard, use the Setup Wizard to add it to your Business Portal installation. If you've installed Business Portal on multiple web servers, you must add Project Time and Expense to each of the web servers.

To install Project Time and Expense, you must run the Setup Wizard.

1. From the Business Portal installation media, double-click the **CDSetup.exe** file.

2. Under **Install**, click **Business Portal for Microsoft Dynamics GP**.

For detailed instructions, refer to the Business Portal Installation Guide.

Chapter 4: Setup

To set up Project Time and Expense, complete the following tasks:

- *Assign users to SharePoint groups and MBF roles*
- *Specify which module timesheets and expense reports will be transferred to*
- *Configure the Edit Task Details page*
- *Display confirmation messages*
- *Display the Action Notes page*

Assign users to SharePoint groups and MBF roles

To use Business Portal, all users must be assigned to both SharePoint groups and Microsoft Business Framework (MBF) roles. SharePoint groups determine the access users have to sites and pages, while MBF roles determine the access that users have to data.

For more detailed information about roles and groups, see the Business Portal Administrator's Guide.

The following table lists the SharePoint groups and MBF roles that are used with Project Time and Expense. Users must be assigned to both groups and roles so they have the necessary access to the pages and data they need to complete their tasks.

SharePoint group	MBF role	Assign to
BP Employee	Employee	All employees
BP Project Timesheet Creator	Project Timesheet Creator	Employees who need to submit timesheets
BP Project Expense Report Creator	Project Expense Report Creator	Employees who need to submit expense reports
BP Project Approver	Project Approver	Managers and supervisors who approve timesheets and expense reports
BP Project Manager	Project Manager	Users who are specified as project managers in the PA Employee Options window in Microsoft Dynamics GP
BP Business Manager	Business Manager	Users who are specified as business managers in the PA Employee Options window in Microsoft Dynamics GP

See Chapter 5, "Default group and role permissions" for information about the default site and page permissions associated with the SharePoint groups, and the default data permissions associated with the MBF roles.

Only the Business Portal administrator can assign users to MBF roles and SharePoint groups, so you'll need to work with that user. See the Business Portal Administrator's Guide for step-by-step instructions for completing these tasks.

Specify which module timesheets and expense reports will be transferred to

Once a timesheet or expense report is approved in Project Time and Expense, you must open PDK and transfer the document to Project Accounting for posting. However, you can configure Project Time and Expense so that approved timesheets and expense reports are automatically transferred to Project Accounting for posting.

Project Time and Expense does not calculate taxes for expense reports. If your employees submit expense reports in Project Time and Expense that require tax calculations, you must add tax information to these documents in PDK. After the taxes have been added, the documents can be transferred to Project Accounting for posting.

Use the following steps to specify which module—Project Accounting or PDK— timesheets and expense reports are transferred to.

1. Open SQL Server Management Studio by clicking **Start** > **All Programs** > **Microsoft SQL Server 2005** > **SQL Server Management Studio**. Enter connection information to connect to your Microsoft Dynamics GP databases. Click **Connect**.

2. Open PmaTimesheetConfig table, located in your company database.

3. If you want timesheets transferred to Project Accounting, enter **1** in the **AutomaticProcessing** column.

   If you want timesheets transferred to PDK, enter **0** in the **Automatic Processing** column.

4. Save your changes and close the table.

5. Open the PmaExpenseReportConfig table, located in your company database.

6. Repeat steps 3-4 to specify which module expense reports will be transferred to.

Configure the Edit Task Details page

The Edit Task Details page is used by employees when they enter timesheets in Project Time and Expense. By default, the **Department**, **Position**, and **Pay Code** fields appear on this page. If you don't want employees to use these fields, you can hide them.

You can control whether or not these fields are displayed.

Use the following steps to show or hide the **Department**, **Position**, and **Pay Code** fields on the Edit Task Details page.

1. Open SQL Server Management Studio by clicking **Start** > **All Programs** > **Microsoft SQL Server 2005** > **SQL Server Management Studio**. Enter connection information to connect to your Microsoft Dynamics GP databases. Click **Connect**.

2. Open the PmaTimesheetConfig table, located in your company database.

3. Indicate which fields you want to display on the Edit Task Details page.

   • To display the **Department** field, enter **1** in the **DisplayDepartment** column.

   • To display the **Position** field, enter **1** in the **DisplayPosition** column.

   • To display the **Pay Code** field, enter **1** in the **DisplayPayCode** column.

   If a column contains a **0** value, the corresponding field will not be displayed on the Edit Task Details page.

4. Save your changes and close the table.

Display confirmation messages

By default, when a user deletes a line item or billing note from a timesheet or expense report, the line item or billing note is immediately deleted.

You can configure Project Time and Expense to display a confirmation message when a user chooses to delete a line item or billing note. This helps ensure that the user does indeed want to delete the line item or billing note.
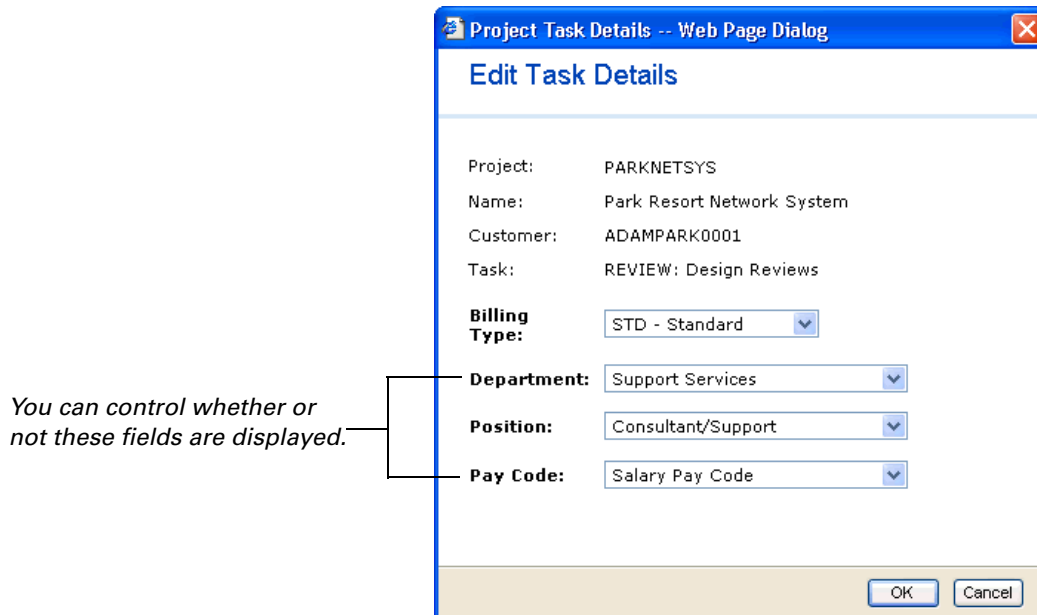
1. Open SQL Server Management Studio by clicking **Start** > **All Programs** > **Microsoft SQL Server 2005** > **SQL Server Management Studio**. Enter connection information to connect to your Microsoft Dynamics GP databases. Click **Connect**.

2. Open the PmaTimesheetConfig table, located in your company database.

3. Indicate whether you want to display confirmation messages to users who are deleting line items or billing notes from timesheets.

   • To display a confirmation message when a user deletes a line item, enter **1** in the **ConfirmDeleteEntryLine** column.

   • To display a confirmation message when a user deletes a billing note, enter **1** in the **ConfirmDeleteBillingNote** column.

   If these columns contain a **0** value, users will not be prompted to confirm the removal of line items or billing notes.

4. Save your changes and close the table.

5. Open the PmaExpenseReportConfig table, located in your company database.

6. Repeat steps 3-4 to indicate whether confirmation messages should be displayed to users who are deleting line items or billing notes from expense reports.

Display the Action Notes page

The Action Notes page enables users to enter comments about timesheets and expense reports. For example, an employee may want to explain why he or she is submitting an expense report. A manager may want to explain why he or she is rejecting a timecard.

Use the following steps to specify when the Action Notes page is displayed to users.

1. Open SQL Server Management Studio by clicking **Start** > **All Programs** > **Microsoft SQL Server 2005** > **SQL Server Management Studio**. Enter connection information to connect to your Microsoft Dynamics GP databases. Click **Connect**.

2. Open the PmaTimesheetConfig table, located in your company database.

3. Enter a **1** or **0** in the following columns.

The following table describes each column.

Column	Description
ApprovalNoteSubmit	If this column contains a **1**, the Action Notes page will be displayed to employees when they submit timesheets. If this column contains a **0**, the Action Notes page will not be displayed to employees when they submit timesheets.
ApprovalNoteApprove	If this column contains a **1**, the Action Notes page will be displayed to managers and supervisors when they approve timesheets. If this column contains a **0**, the Action Notes page will not be displayed to managers and supervisors when they approve timesheets.
ApprovalNoteReturn	If this column contains a **1**, the Action Notes page will be displayed to managers and supervisors when they reject timesheets. If this column contains a **0**, the Action Notes page will not be displayed to managers and supervisors when they reject timesheets.
ApprovalNoteTerminate	If this column contains a **1**, the Action Notes page will be displayed to managers and supervisors when they terminate timesheets. If this column contains a **0**, the Action Notes page will not be displayed to managers and supervisors when they terminate timesheets.
ApprovalNoteResubmit	If this column contains a **1**, the Action Notes page will be displayed to employees when they resubmit timesheets. If this column contains a **0**, the Action Notes page will not be displayed to employees when they resubmit timesheets.

4. Save your changes and close the table.

5. Open the PmaExpenseReportConfig table, located in your company database.

6. Repeat steps 3-4 specify when the Action Notes page is displayed to users who are working with expense reports.

Chapter 5: Default group and role permissions

This information lists the default permissions associated with the SharePoint groups and MBF roles that are installed with Project Time and Expense.

For more information about SharePoint groups and MBF roles, see the Business Portal Administrator's Guide.

This information is divided into the following sections:

- *SharePoint groups*
- *MBF roles*
- *Advanced MBF roles*

SharePoint groups

SharePoint groups are used to grant access to Business Portal sites and pages. The permission levels associated with each group define the level of control users have over the securable items on those pages, such as web parts.

SharePoint permission levels control whether users can modify SharePoint content, such as pages and document libraries. For example, a user who has the Read permission level for a page can't modify the page or the web parts on it. Permission levels do not affect a user's access to Microsoft Dynamics GP data. This means that a user with the Read permission level for a page still may be able to create transactions, modify records, or delete entries using that page.

The following table lists the SharePoint groups that are installed with Project Time and Expense, and includes the default pages and permission levels associated with each group.

Group	Site	Page library	Page	Permission level
BP Project Timesheet Creator	Project Center	Project Center Common Pages	Project Center Home	Read
		Project Time and Expense Pages	Timesheet Entry	Read
			Timesheets - Submitted by Me	Read
			Timesheet List	Read
		Project Center Pages	Project Queries	Read
BP Project Expense Report Creator	Project Center	Project Center Common Pages	Project Center Home	Read
		Project Time and Expense Pages	Expense Report Entry	Read
			Expense Reports - Submitted by Me	Read
			Expense Report List	Read
		Project Center Pages	Project Queries	Read
BP Project Approver	Project Center	Project Center Common Pages	Project Center Home	Read
		Project Time and Expense Pages	Project Document Approval	Read
		Project Center Pages	Project Queries	Read

Group	Site	Page library	Page	Permission level
BP Project Manager	Project Center	Project Center Common Pages	Project Center Home	Contribute
		Project Time and Expense Pages	Project Management	Read
			Project History	Read
			Project Employees	Read
		Project Center Pages	Project List	Read
			Project Contract List	Read
			Project Queries	Read
BP Business Manager	Project Center	Project Center Common Pages	Project Center Home	Contribute
		Project Time and Expense Pages	Business Management	Read
			Project History	Read
			Project Employees	Read
		Project Center Pages	Project List	Read
			Project Contract List	Read
			Project Queries	Read

MBF roles

MBF roles are used to grant access to Business Portal data. The data permissions associated with each role control access to the back office data that can be displayed in Business Portal.

The following table lists the MBF roles that are installed with Project Time and Expense, and includes the default data permissions associated with each role.

Role	Data permissions
Project Timesheet Creator	Cost Category Project Customer Project Timesheet Line Items - My Timesheet Lines Project Timesheets - My Timesheets Projects - Employee
Project Expense Report Creator	Cost Category Project Customer Project Expense Line Items - My Expense Lines Project Expense Reports - My Expense Reports Projects - Employee
Project Approver	Cost Category Project Customer Project Expense Line Items - Approver Project Expense Reports - Approver Project Timesheet Line Items - Approver Project Timesheets - Approver

Role	Data permissions
Project Manager	Combined Transaction History - Project Manager Customer Periodic Totals - Project Manager Employee - Project Manager Employee Pay Code Project Budget - Project Manager Project Budget Periodics - Project Manager Project Contracts - Project Manager Project Customers - Project Manager Project Employee Details - Proj/Business Manager Project Equipment - Project Manager Project Equipment Line Items - Project Manager Project Expense Line Items - Project Manager Project Expense Reports - Project Manager Project Misc Line Items - Project Manager Project Miscellaneous - Project Manager Project Timesheet Line Items - Project Manager Project Timesheets - Project Manager Projects - Project Manager
Business Manager	Combined Transaction History - Business Manager Customer Periodic Totals - Business Manager Employee - Business Manager Employee Pay Code Project Budget - Business Manager Project Budget Periodics - Business Manager Project Contracts - Business Manager Project Customers - Business Manager Project Employee Details - Proj/Business Manager Project Equipment - Business Manager Project Equipment Line Items - Business Manager Project Expense Line Items - Business Manager Project Expense Reports - Business Manager Project Misc Line Items - Business Manager Project Miscellaneous - Business Manager Project Timesheet Line Items - Business Manager Project Timesheets - Business Manager Projects - Business Manager

Advanced MBF roles

Advanced MBF roles identify specific Microsoft Dynamics GP users, such as employees, salespeople, customers, or vendors. Users in advanced roles are mapped to Microsoft Dynamics GP IDs, which provides access to specific information such as employee paystubs and available time off. The data permissions associated with each advanced role control access to the back office data that can be displayed in Business Portal.

The following table lists the advanced role that is used with Project Time and Expense.

Role	Data permissions
Employee	This role is installed with Business Portal. For a list of data permissions associated with this advanced role, see the Business Portal Administrator's Guide.

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