



## **User Guide**

Version 1.1

June 2024

# Table of Contents

INTRODUCTION.....	4
USER LOGIN.....	5
USER ROLES AND LEVELS.....	6
BASIC SETTINGS.....	9
Admin Settings.....	9
User Settings.....	15
USER MANUAL - BY SECTIONS.....	16
1. Home (Landing Page).....	16
2. Projects.....	17
Project Creation.....	18
Project Details.....	19
Resource Assignment.....	20
Phase.....	21
Project Status Change.....	22
3. Project Tasks.....	23
Project Task Creation.....	23
Project Task Details.....	24
Waterfall/Agile Approach.....	25
Task Assignment.....	26
Milestone.....	27
Project Task Overview.....	27
4. Registered Hours.....	30
Registered Hours Details.....	30
Reported Hours.....	31
Billable Flag Change.....	32
5. Reports.....	36
Reporting Details and Options.....	36
New Report Creation.....	38
Sharing A Report/Folder.....	40
6. Dashboards.....	42
7. Time Tracking.....	44
Submitted/Approved Hours Change.....	47
Switching Tracked Hours to A Different Task.....	47
8. Absences.....	48

Approve Absence .....	49
Absence Calendar .....	49
9. Personal Resource Planner .....	54
10. Accounts .....	55
11. Employees.....	56
Employee details.....	56
12. Approve Time .....	57
13. Absence Balances .....	58
14. Resource Planner .....	59
15. Confirmation of Work .....	61
Acceptance Protocol.....	61
Activity Report .....	61
16. Transactions .....	63
17. Budget Control .....	64
Project Health Indicator.....	64
Actual End Date.....	64
Time Elapsed %.....	64
Completion Rate Auto-Calculated.....	65
Completion Rate Manual.....	65
Completion Rate Estimated On .....	65
Delivery Index.....	65
Timeline Index.....	66
Cost Index .....	66
Added Value Index.....	66
Personnel Section .....	67
Project Finances Section.....	67
Project Status Report.....	67
Useful Links.....	69
Troubleshooting / Haven't found what you were looking for? .....	69

# INTRODUCTION

Dear User,

Welcome on board PROXIUSS PROJECT+!

The following user manual will walk you through each feature of the app with all the relevant information in one place so that you have a pleasant experience using our product. We recommend that you read it carefully before starting the app or returning to it if you still require assistance. The application offers various functions, and while some are obvious at first glance, some might not be. Hence, this manual serves as a resource to ensure you maximize the app's benefits.

For better understanding, you can also find the video manual on our website [www.proxiuss.com](http://www.proxiuss.com)

Should you have any questions, please visit the FAQ section on our website [www.proxiuss.com](http://www.proxiuss.com) and if you find yourself lost, please contact our helpdesk at [support@proxiuss.com](mailto:support@proxiuss.com).

However, if you come across any error in terms of the app's functionality, please drop us a note on the helpdesk – we will appreciate any feedback from your side, as it will help us in making relevant changes to improve your experience and the overall quality of the app.

PROXIUSS PROJECT+ is ready at your service, and we hope you will enjoy it!

*The PROXIUSS PROJECT+ Team*



## USER LOGIN

PROXIUSS PROJECT+ is a powerful native Salesforce application that leverages the benefits of Salesforce's Software-as-a-Service (SaaS) solution. To access the platform, you simply need a valid and active Salesforce account with an active subscription to PROXIUSS PROJECT+. The beauty of this approach is that you don't need to go through the time-consuming process of engaging in any additional installations or setups.

If you are an administrator responsible for the initial setup within your organization, please navigate to the [Admin Settings](#) chapter and follow the provided instructions.

Please ensure that you have a stable internet connection before proceeding with the login process. Having an uninterrupted connection will ensure a smooth experience while using PROXIUSS PROJECT+. As previously mentioned, if you encounter any issues during the login process, don't hesitate to refer to the troubleshooting section of this user manual for additional help.

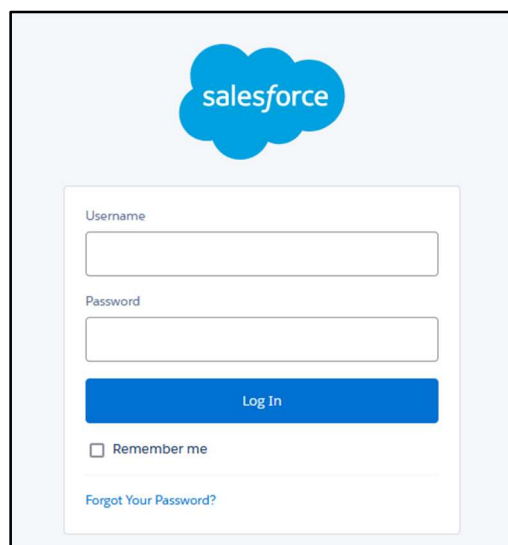
Once you click the provided link, you will be redirected to the PROXIUSS PROJECT+ login page. Here, you will need to enter your Salesforce credentials, including your username and password. Make sure to double-check the accuracy of your credentials to avoid any login errors.

After entering your credentials, click on the 'Log In' button to proceed. If your credentials are correct and your subscription is active, you will be granted access to the PROXIUSS PROJECT+ platform. Congratulations!

In the event that you need help logging in or if you need to remember your Salesforce account credentials, please refer to the 'Forgot Your Password?' option available on the login page. This option will guide you through the necessary steps to regain access to your account.

With this, we conclude the Login chapter of the PROXIUSS PROJECT+ user manual. If you have any further questions or require additional assistance, please refer to the relevant sections of this manual or reach out to our dedicated support team.

Thank you for choosing PROXIUSS PROJECT+! We are confident that this software will enhance your project management experience and help you achieve outstanding results.



The image shows a screenshot of the Salesforce login interface. At the top center is the Salesforce logo, which consists of a blue cloud shape with the word 'salesforce' in white lowercase letters. Below the logo is a white rectangular login form with a thin blue border. Inside the form, there are two input fields: the first is labeled 'Username' and the second is labeled 'Password'. Below these fields is a prominent blue button with the text 'Log In' in white. Underneath the button is a checkbox labeled 'Remember me'. At the bottom of the form is a link that says 'Forgot Your Password?' in blue text.

## USER ROLES AND LEVELS

PROXIUSS PROJECT+ has been designed to align with the natural division of roles within a project team. This means that different user roles in the application are granted varying levels of access to individual functionalities, along with distinct scopes of access and permissions. By tailoring the access levels according to user roles, PROXIUSS PROJECT+ ensures that team members can focus on their specific responsibilities while maintaining appropriate data privacy and security.

Each user role in PROXIUSS PROJECT+ comes with a default setup that outlines the predefined access and permissions. However, the application provides the flexibility for administrators to customize these setups to meet the unique requirements of each user. This customization empowers administrators to fine-tune the access levels and permissions assigned to different user roles, thereby aligning the application precisely with the specific needs of your project team.

The ability to customize user roles allows administrators to optimize the user experience and ensure that each team member has access to the necessary tools and data. By tailoring the setups, administrators can create a more efficient and streamlined workflow, enhancing collaboration and productivity.

In the sections below, we delve into the various user roles available within PROXIUSS PROJECT+ and provide detailed instructions on how administrators can customize the access and permissions for each role. This will enable you to establish a secure and tailored environment that facilitates seamless collaboration among team members.

**Admin** – As an administrator, you have complete control over the system and can perform a wide range of tasks to manage the app and its users. One of the key features available to administrators is the ability to start and manage user profiles and accounts. This enables you to create new user accounts, modify existing accounts, and delete user accounts as necessary. In addition, the app allows you to manage permissions and access levels for individual users and groups, ensuring that sensitive information is protected and that users only have access to the information and functionality they need to perform their jobs.

**Standard User** – Employees have basic access to a range of useful features that can help them manage their time and work more efficiently. The Time Tracking feature allows employees to track their work time on projects with comments. The Personal Resource Planner feature allows employees to plan their time on projects for the future, making it easier to manage their workload and prioritize their tasks. The app also provides employees with reports that offer detailed information about their work on projects, including which projects they have been working on, the number of hours spent on each project, and any relevant comments added.

**Project Manager** – One of the key features available to project managers is access to assigned projects, including a project team overview, project finances, and project progress. This enables project managers to monitor project performance, track project expenses, and keep their team on track to meet project objectives. Additionally, the app provides project managers with the ability to create and assign tasks to project team members and set project milestones and deadlines. The project management app also provides project managers with comprehensive reporting features, enabling them to generate detailed reports on project performance, budget, and resource allocation. By leveraging the app's powerful features, project managers can streamline their project management workflows and ensure that their projects are completed on time and within budget.

**Employee Manager** – As an employee manager, you have access to a range of features that enable you to manage all employees within your organization. One of the key features available to employee managers is the ability to view all employees within the organization, including their roles, department, and contact information. This allows you to keep track of employee information and ensure that your team is adequately staffed. In addition, the app provides you with the ability to edit employee information, enabling you to update employee records, add new employees, and remove employees who are no longer with the organization.

**Portfolio Manager** – As a portfolio manager, you have access to a comprehensive view of all projects and all employees within your portfolio. This allows you to monitor the progress of all projects in real-time, track resource allocation, and ensure that projects are aligned with your organization's overall goals and objectives. In addition, the app provides detailed reports on project performance, enabling you to identify areas for improvement and make informed decisions about resource allocation and project prioritization. Portfolio managers can gain a deep understanding of their project portfolio and make data-driven decisions to ensure their organization achieves its strategic goals and objectives.

Below is an overview of the permission sets you can find within the application:

	<i>PM - Employee</i>	<i>PM - Employee Manager</i>	<i>PM - Project manager</i>	<i>PM - Project Portfolio Manager</i>	<i>PM - Admin</i>
Employees	Read/Write*	RW All	Read*	Read All	RW All
Absences	Read/Write*	RW All	Read*	Read All	RW All
Absence Balances	Read/Write*	RW All	Read*	Read All	RW All
Projects	Read/Write*	X	Read/Write*	RW All	RW All
Resource Assignment	RW All	X	RW All	RW All	RW All
Phases	X	X	Read/Write*	RW All	RW All
Project Tasks	Read/Write*	X	Read/Write*	RW All	RW All
Task Assignment	RW All	X	Read/Write*	RW All	RW All
Milestones	Read/Write*	X	Read/Write*	RW All	RW All
Registered Hours	Read/Write*	X	Read/Write*	RW All	RW All
Time Tracking	Read/Write*	X	X	X	RW All
Approve Time	X	X	Read/Write*	Read/Write*	Read/Write*
Personal Resource Planner	Read/Write*	X	Read/Write*	Read/Write*	Read/Write*
Resource Planner	X	X	RW All	RW All	RW All
Acceptance Protocol	X	X	Read/Write*	RW All	RW All
Activity Report	X	X	Read/Write*	RW All	RW All
Approve Absences	X	X	Read/Write*	RW All	RW All
Absence Type Assignments	X	X	X	X	RW All

\* Partial access to the objects - not all fields are readable or editable

Additionally, there are 4 more Permission sets to choose from:

- PM - Personal Resource Planner → grants Partial Access to the Personal Resource Planner
- PM - Approve Absences → grants Partial Access to the Approve Absences
- PM - Invoice Management → grants Full Access to the Acceptance Protocol and Activity Report
- PM - Resource Planner → grants Partial Access to the Resource Planner



## BASIC SETTINGS

PROXIUSS PROJECT+ is an application built on the robust Salesforce platform. This means that it can effortlessly connect with other tools and applications developed within the Salesforce ecosystem. The integration capabilities of PROXIUSS PROJECT+ enable you to enhance your project management experience by leveraging the power of complementary Salesforce tools.

To ensure a successful connection with other Salesforce tools, users must have an Essential (or higher) Salesforce license. This license level grants you the necessary permissions and access rights to utilize PROXIUSS PROJECT+ and connect it seamlessly to other Salesforce tools.

If you're unsure regarding your Salesforce license level or need assistance in upgrading your license to the Essential (or higher) tier, we recommend reaching out to your Salesforce administrator or referring to Salesforce's official documentation for guidance.

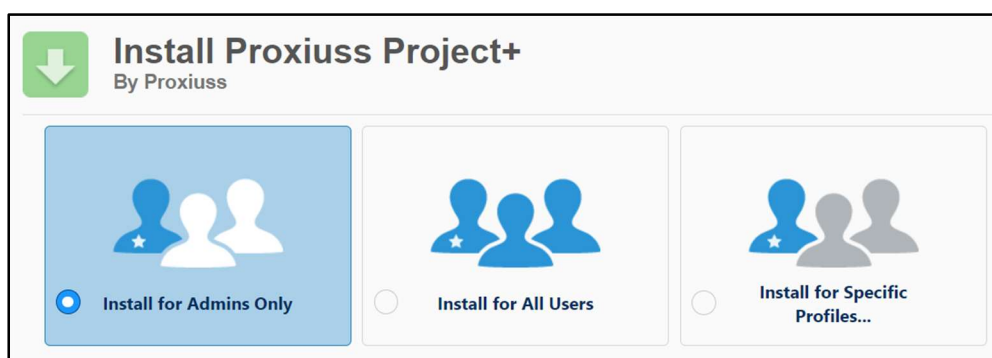
By having the Essential (or higher) Salesforce license and a subscription to PROXIUSS PROJECT+, you unlock the full potential of PROXIUSS PROJECT+ and enable a cohesive workflow with other Salesforce tools. This interconnectedness empowers you to streamline your project management processes and maximize productivity.

### Steps to Install PROXIUSS PROJECT+

1. **Select your product package** at <https://www.proxiuss.com/pricing/>.
2. **Click on the link sent to the email address** you provided during Stripe registration.

### Admin Settings

During the installation of the ProxiussProject+ app into your organization, it's important to note the following step. Once you've chosen the appropriate environment (sandbox/production), you will encounter a table labeled "Confirm Installation Details." If everything appears satisfactory, proceed by selecting the "Confirm and Install" button. Following this, you will be prompted to specify the installation scope: admins, all users, or specific profiles. Opt for the **"Install for Admins only"** and then click the "Install" button.

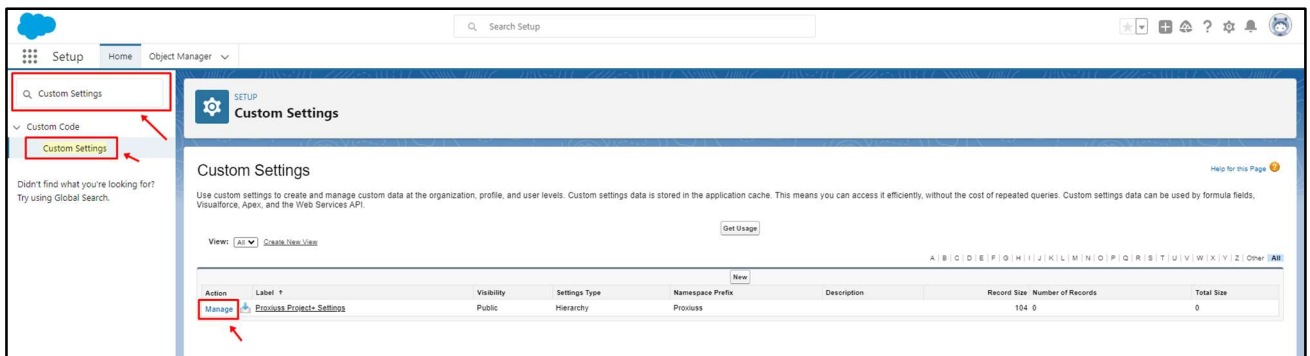


## Steps in your ORG:

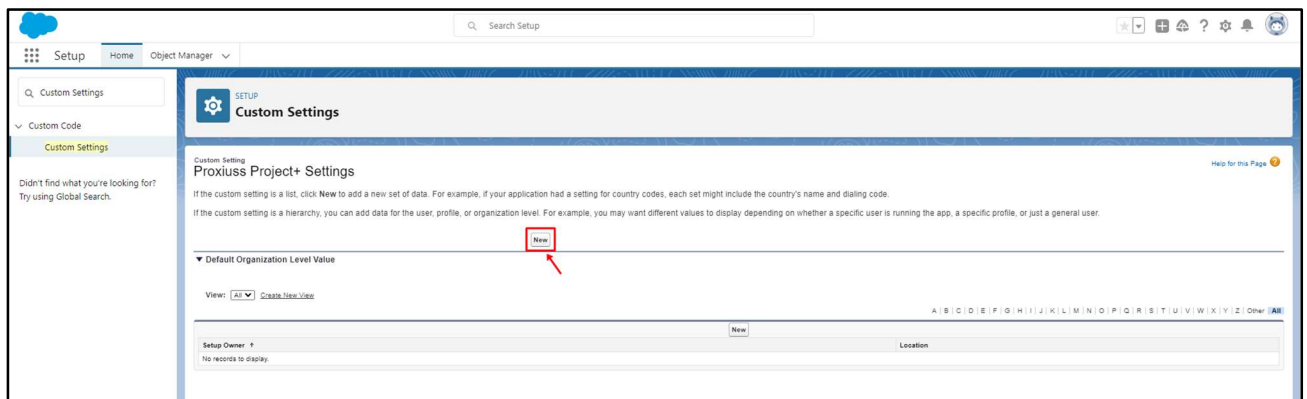
In this section, we will walk you through configuring the essential attributes to facilitate a seamless user experience within the application. The responsibility for the initial setup primarily lies with the Admin, but there is also an option to grant standalone admin rights to specific user roles.

For instance, the Project Manager role may not have the default privilege to create projects. However, the Admin can establish a custom rule that enables the Project Manager role to develop projects. Evidently, the user rights within the application's environment are highly adaptable and flexible.

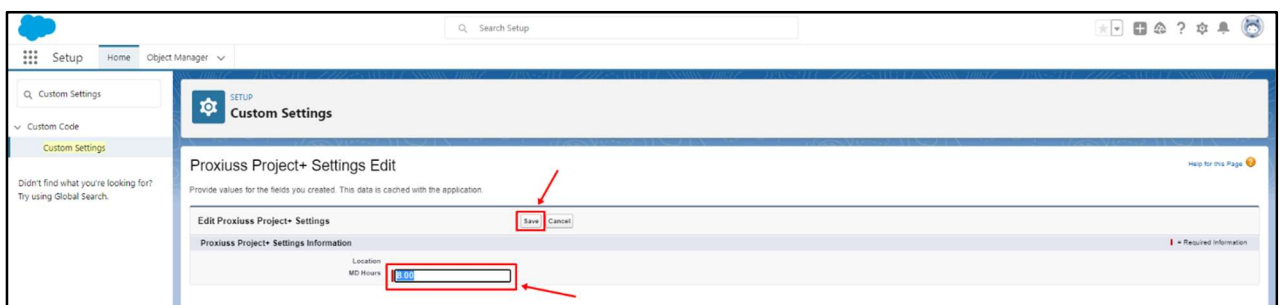
1. In Setup, type "Custom Settings" in the Quick Find box on the left and click on *Custom Settings*. Next to Proxiuss Project+ Settings, click on *Manage*.



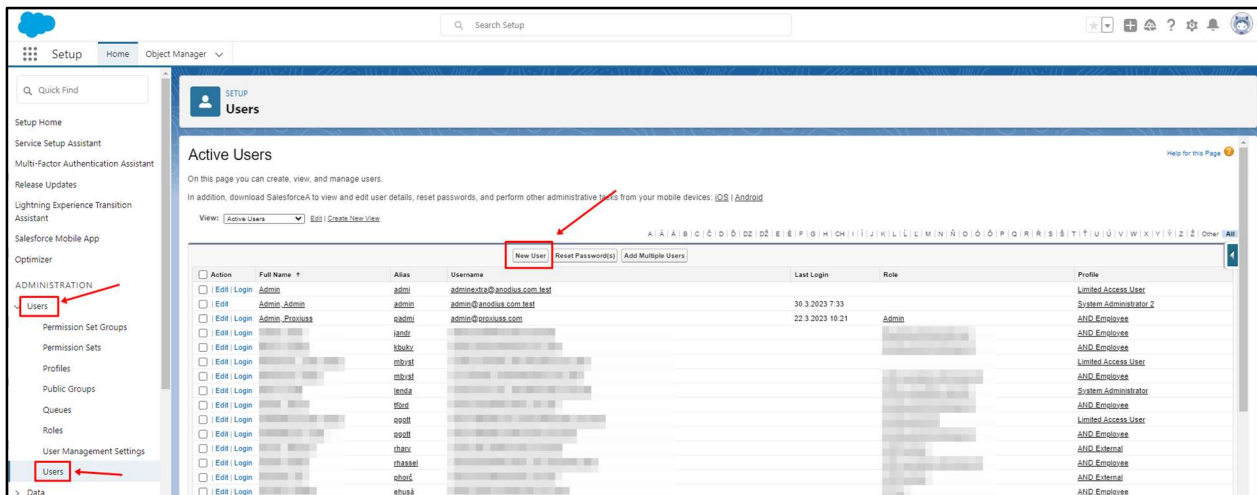
2. Click on the upper button *New*.



3. Insert number of hours per man-day in the field *MD Hours* and click *Save*.

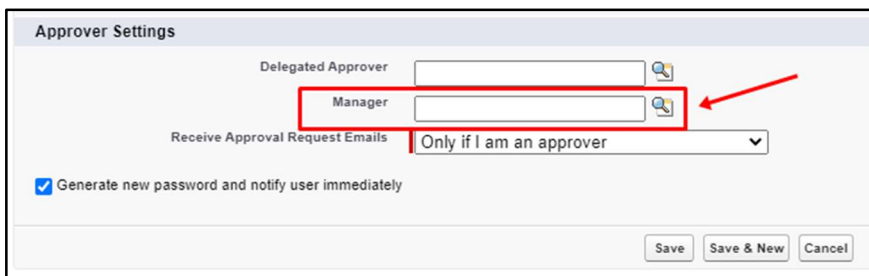


4. Create the user account in *Setup -> Users -> Users* and click on the *New User* button.



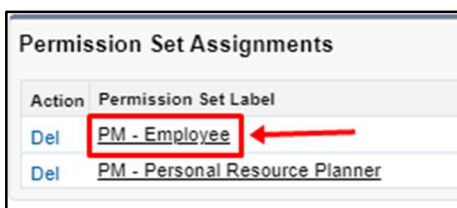
5. Fill in the required information (such as, First Name, Last Name, Email, and Role).

6. Fill in the *Manager* field. Insert the name of the manager who will be approving absences (for the correct function of *Absence Approvals*).



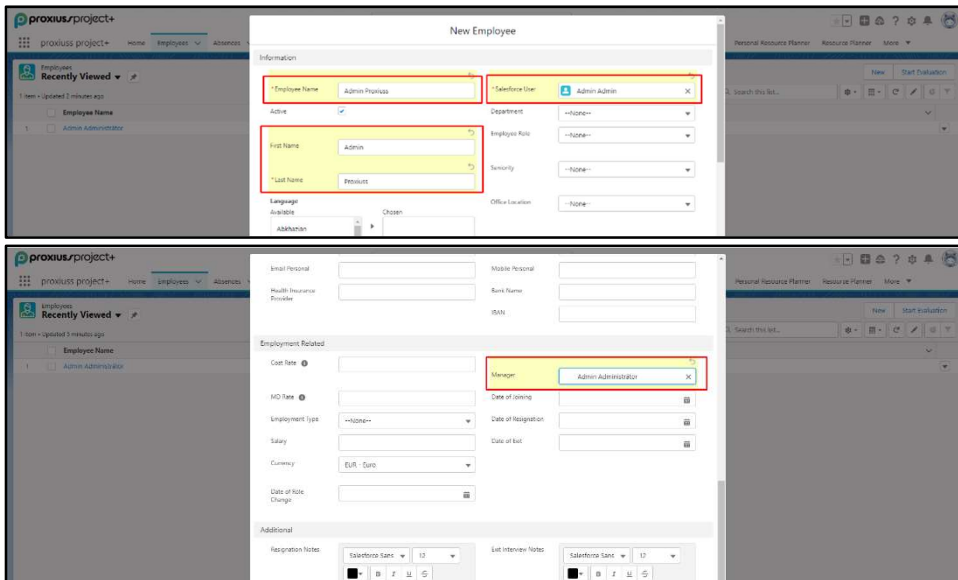
7. When user information is set, click on the *Save* button.

8. Open user and add *Permission Sets* based on user role in the company. "PM - Employee" is the standard permission set for everyone who will be tracking their time on projects (*Time Tracking*).

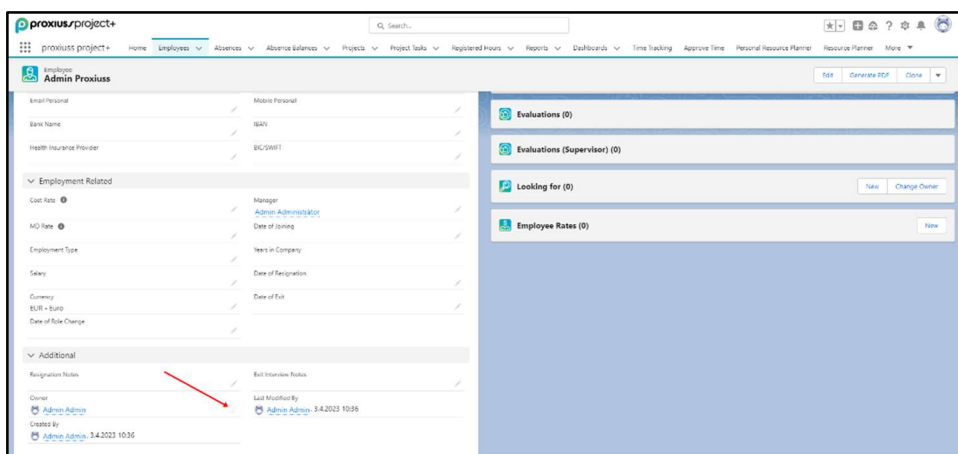


9. Create an employee record for every user:

- i. Insert the *Salesforce User* field, *Last Name*, *Manager* (in case the user has one for approving work activity), and change *Owner* to the same user as *Salesforce User* (you can do that after the user verifies their Salesforce account).



- ii. "Change Owner" is required for the correct functionality of *Personal Resource Planner*. It can be found at the bottom of the employee record and changed via button next to the field *Owner*.



- iii. We highly recommend filling in the *Business Hours* attribute. This setting allows Time Tracking to distinguish working days from non-working days, which are indicated with a yellow box. Although weekends and holidays are marked with a yellow box, you can still report work on these days if needed. To ensure accurate tracking, it is also advisable to set up holidays in the *Business Hours* attribute.

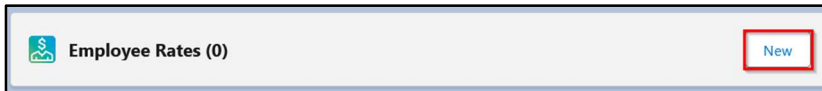


If you consider the steps onward to be done, for example, by employees with Project Manager and Portfolio Manager, you have to ask the Admin to provide rights to:

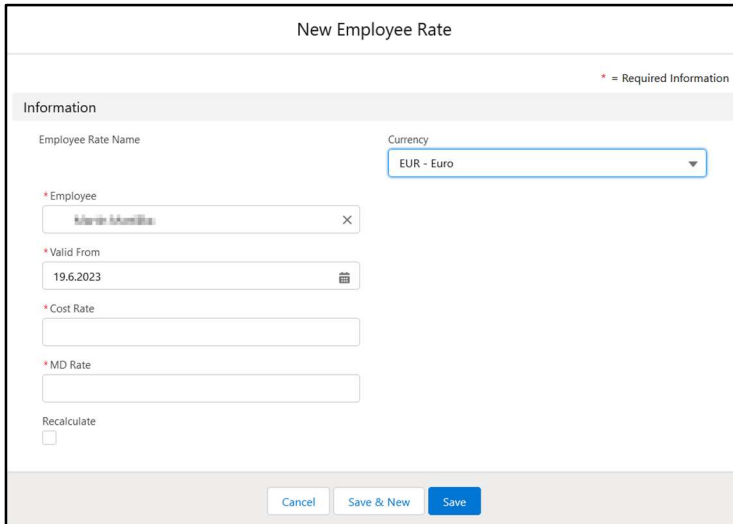
10. Create [Projects](#) and [Project Tasks](#). On *Project Tasks*, create *Task Assignments* – add employee who is appointed to work on that task. After being added to the task, employee(s) can start tracking hours in the *Time Tracking* tab in the relevant project task.

11. [Optional] Enable the counting of Revenue and Cost by assigning a rate for each employee:

- i. Enter the Employee profile and scroll down to find the *Employee Rates* attribute.



- ii. By clicking on *New*, fill in the required information.

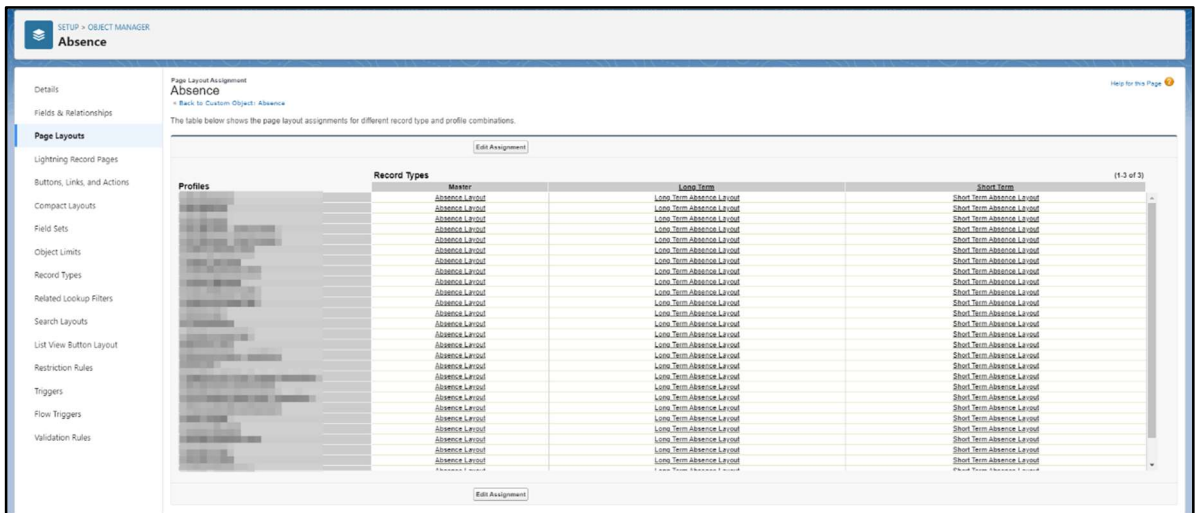
A screenshot of a "New Employee Rate" form. The form has a title bar "New Employee Rate" and a legend "\* = Required Information". The form is divided into an "Information" section with the following fields: "Employee Rate Name" (text input), "Currency" (dropdown menu showing "EUR - Euro"), "\* Employee" (text input with a search icon and a close button), "\* Valid From" (date picker showing "19.6.2023"), "\* Cost Rate" (text input), "\* MD Rate" (text input), and "Recalculate" (checkbox). At the bottom of the form are three buttons: "Cancel", "Save & New", and "Save".

- iii. If there has been a time gap between a rate change and the actual update in the application, you can ensure accurate cost and revenue information by checking the *Recalculate* box. This option triggers a recalculation of the tracked hours during the time difference using the new rate. By doing so, you'll have correct and up-to-date cost and revenue data.

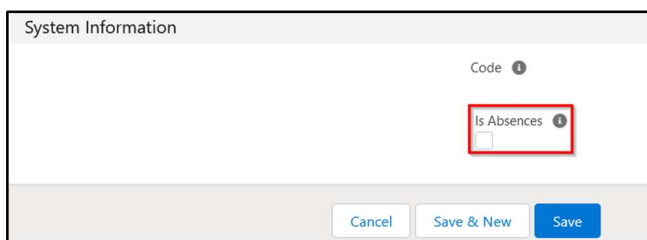
**IMPORTANT:** The standard rate for employees is set by entering the MD Rate in their *Employee* profile. However, it's important to note that the rate can vary for different projects or project tasks. In such cases, you can specify a specific MD Rate for the task, as explained in the chapter [Task assignment](#).

12. [Optional] For reporting absences:


- i. On the *Object Manager Absences Page Layout* click on button *Page Layout Assignment*. Click on the button *Edit Assignment* and set *Long-Term Absence Layout* for Long-Term record type and *Short-Term Absence Layout* for Short-Term record type. Do it for all *Profiles*.



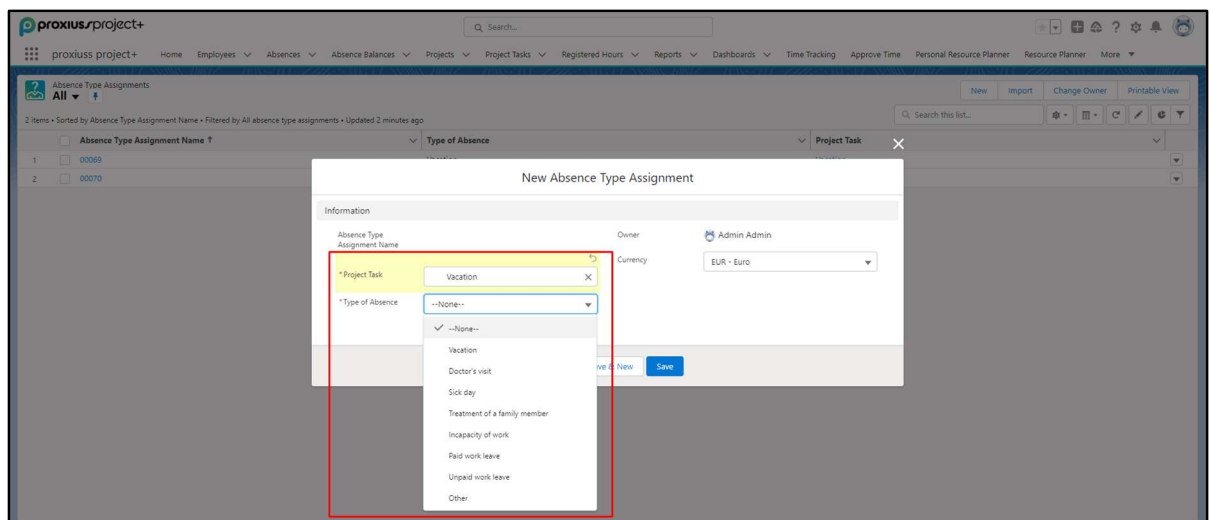
ii. Create Project and check field Absences.



iii. Create Project Tasks for absences (e.g., Vacation, Illness, Doctor visit).

iv. Open App Launcher by clicking on  icon, choose *Absence Type Assignments*, and click on the button *New*.

v. Assign Project Tasks to *Type of Absence*.




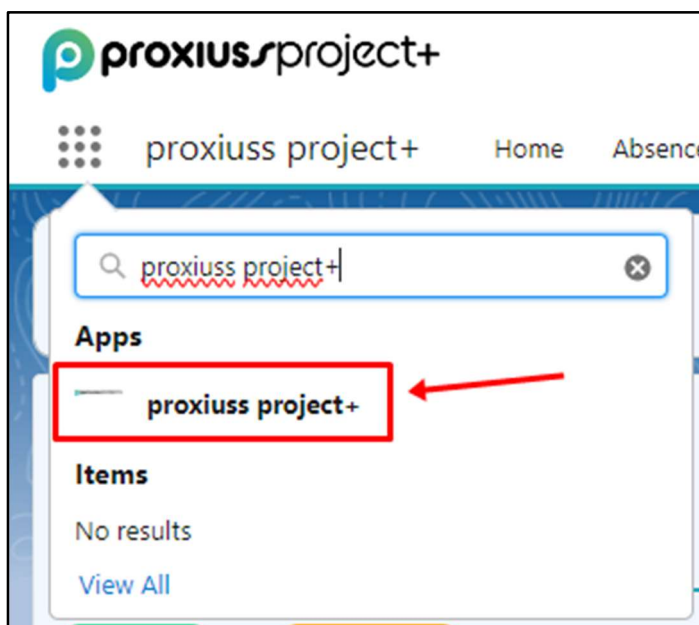
## User Settings

Since PROXIUSS PROJECT+ runs on the Salesforce platform, it is essential for users to have a Salesforce account. To use PROXIUSS PROJECT+ effectively, a minimal user license level of Essential is required. The Essential license provides you with the necessary permissions and access rights to fully leverage the capabilities of Proxiuss Project+. If you're unsure about the license level associated with your Salesforce account, we recommend reaching out to your manager, mentor, or Salesforce administrator for further information.

In the event that you don't currently possess the Essential license, please request assistance from your manager, mentor, or Salesforce administrator. They will guide you through the necessary steps to obtain the required license. Having the Essential license ensures that you have the optimal user experience with Proxiuss Project+ and can make the most out of its powerful project management features.

The following step-by-step instructions provides information on how to acquire PROXIUSS PROJECT+ once you register for the Salesforce account:

1. You will receive an e-mail to verify your account by clicking on the received link.
2. You will be directed to the Salesforce register site, where you create a new password for your account.
3. After that, you must log onto the Salesforce platform (usually with your e-mail address and the new password).
4. Click on App Launcher icon  on the left side, type "proxius project+," and click on its name that appears on the screen.



5. Now, you can see the **proxius project+** application in the offer list.

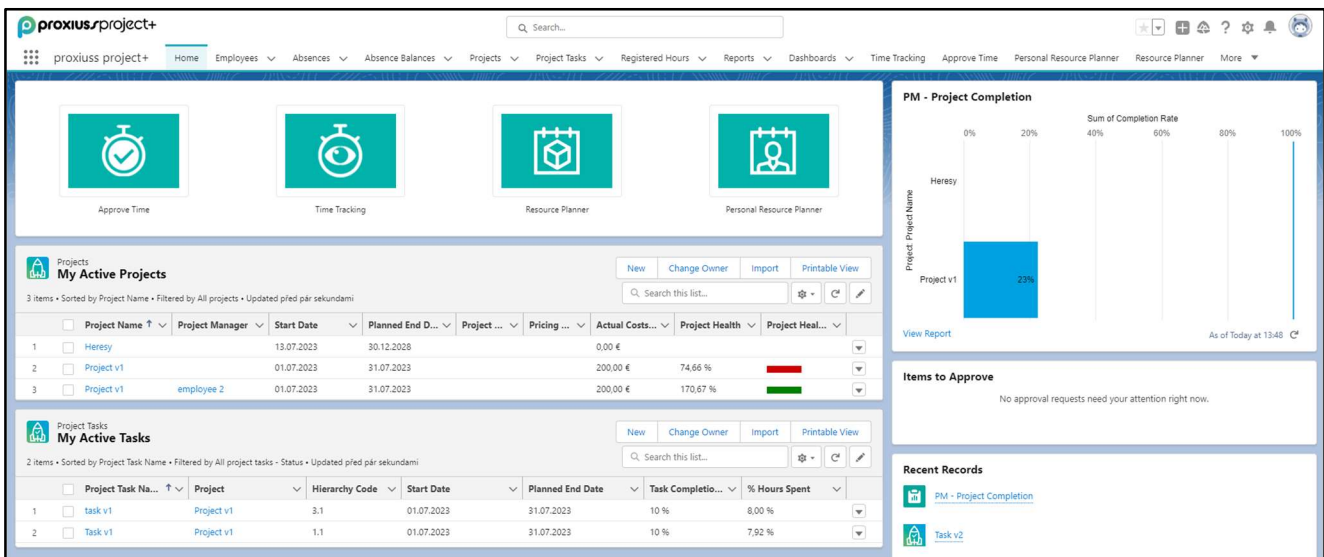
# 1. Home (Landing Page)

The Home screen view in PROXIUSS PROJECT+ may vary for different users depending on the permissions assigned to them by the administrator. This ensures that each user has a personalized experience tailored to their specific role and responsibilities within the project team.

More broadly, the Home screen serves as a hub of information and actions for users. For instance, it displays reminders for events that require user action or recently opened records, allowing users to stay updated and manage their tasks effectively. This feature ensures that critical events or pending actions are easily accessible, keeping users informed and enabling timely responses.

Additionally, the Home screen features a launchpad that simplifies navigation for users. The launchpad acts as a centralized gateway, providing shortcuts to commonly used tabs or sections within the application. It streamlines the user experience by offering quick access to frequently accessed features, thus saving time and effort.

As shown in the screen below, you can see the launchpad with four shortcuts to tabs, providing direct access to specific areas of the application that users frequently interact with.



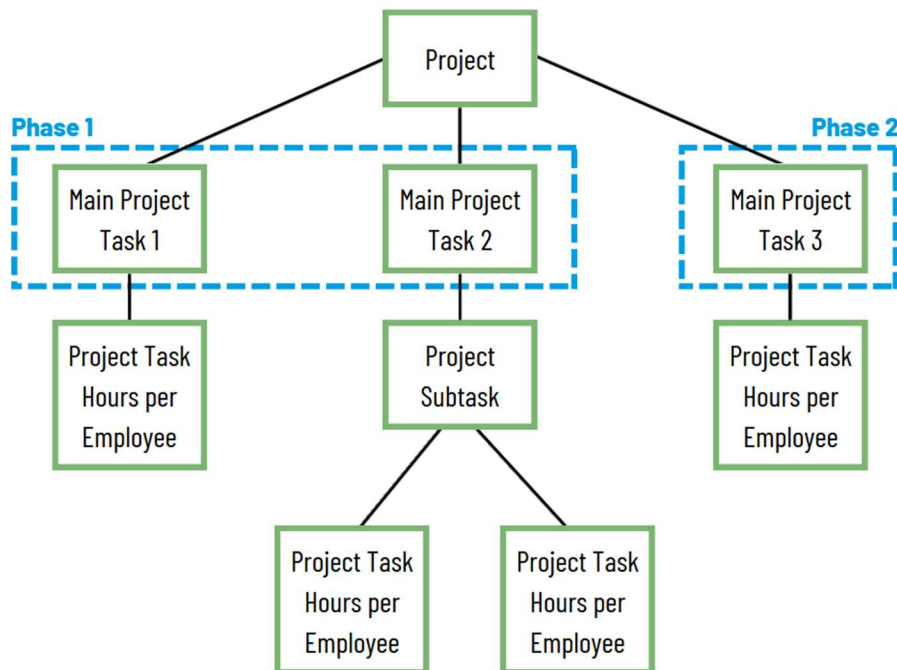
By customizing the Home screen view and offering a launchpad with convenient shortcuts, PROXIUSS PROJECT+ aims to enhance user productivity and streamline navigation within the application.



## 2. Projects

The *Project* object in our project management app is a powerful tool that helps users manage their projects more efficiently and effectively. It contains essential fields for project budget, standard project information, project status summary, indexes, and project finances. It is closely connected to other key components of project management, such as resources, tasks, and phases. By using the *Project* object, users can centralize project-related information, plan and track project progress, and generate comprehensive reports based on project performance.

Each project consists of project tasks (and subtasks) that have linked project task hours (from time tracking). Please see the example of project hierarchy below:




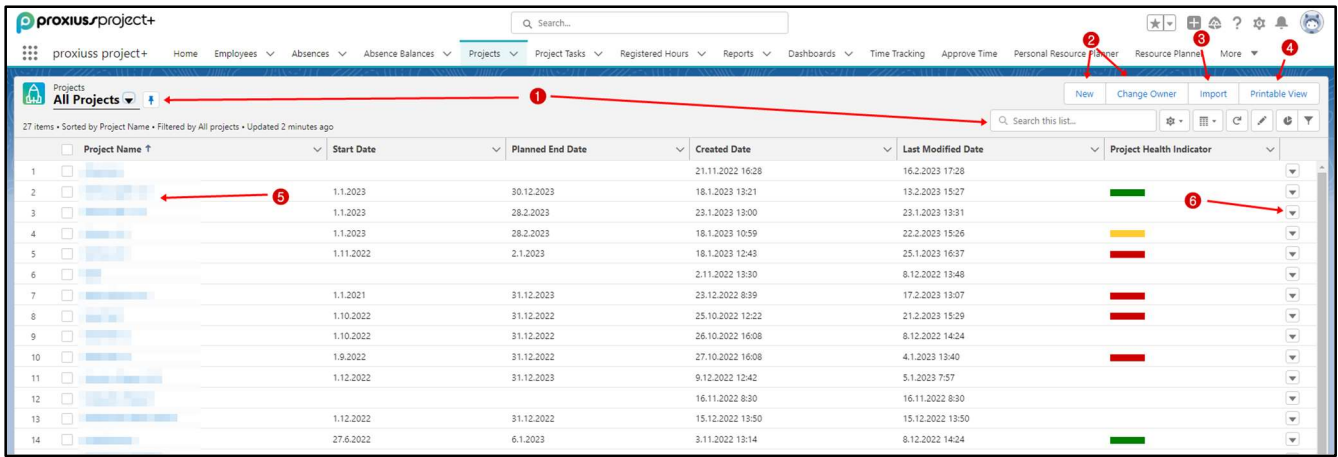
To view the complete projects list overview in the application, click on the *Projects* tab.

For searching, use the filter and a search list (1). With the tabs in the upper right corner, you can create a new project (2), change the owner of the current project (2), or create a new project by importing a CSV file (3). For more information about importing data into Salesforce, visit the [following link](#).

To see the printable view, click on the *Printable View* button (4).

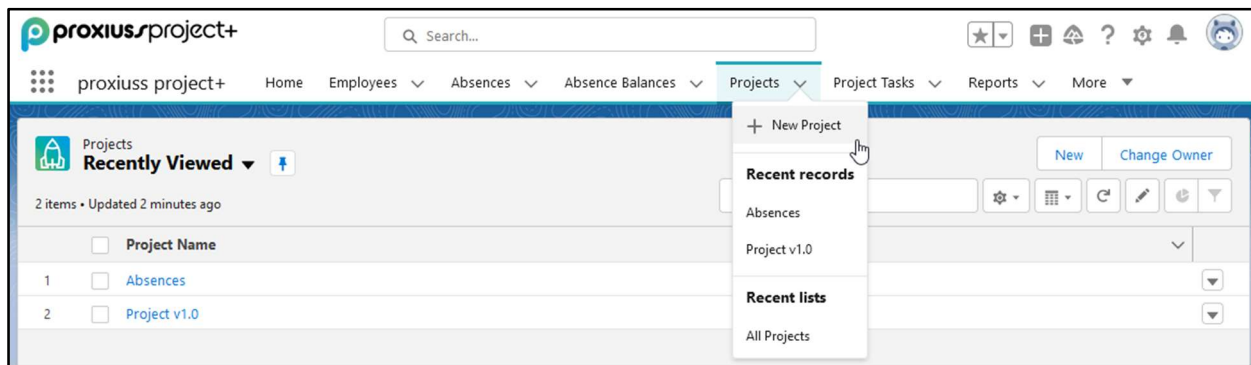
To see the project details, click on *Project Name* (5).

There is a quick actions button  (6) on the right side of the project line next to each project for editing, deleting, or changing the owner.

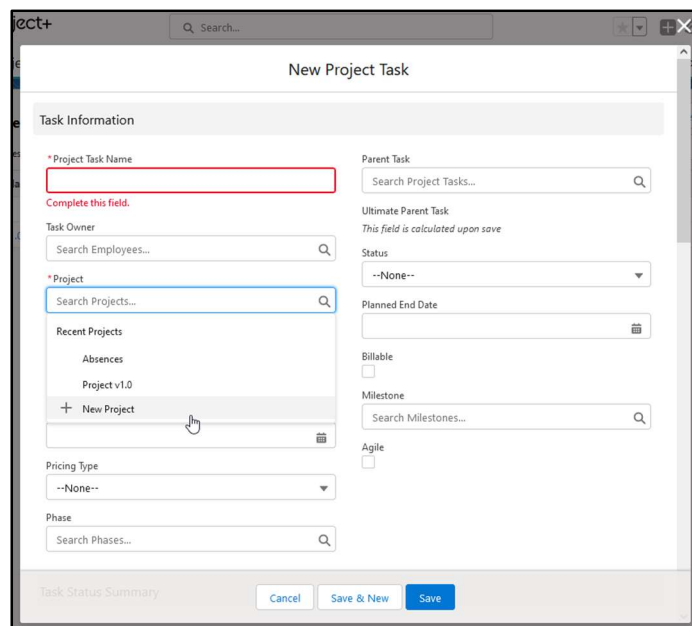


## Project Creation

Projects could be created by clicking on a *New Project* within the tab *Projects*:



Additionally, you will be asked to create a new project in case you try to create a *New Project Task* by using the tab *Project Task*:



Depending on the path you choose, you will either be shown your new [project's details](#) or [project task details](#).

## Project Details

Click on the name of the project to see the project details, including project tasks (1), phases (2), and assigned employees (3).

Below in the Files section (4), you have the flexibility to upload your own files or find previously uploaded documents, such as project files, deliverables, invoices, and any other relevant records. This feature ensures easy access to crucial documents and serves as evidence for documentation and invoicing purposes.

Here, you can edit the project, clone, or delete it (5), change the owner of the project, create a new Acceptance Protocol or a new Activity report (6).

The quick actions buttons (7) on the right-side help with creating, editing, or deleting the project tasks and resource assignments (employees who are assigned to the project).

The screenshot displays the Proxius Project+ interface for a project named 'Proxius Project+'. The interface is divided into several sections:

- Project Information:** Displays project details such as Project Name, Project Manager, Priority, Standard, Objectives, Start Date, Project Type, Pricing Type, Fix Price, Customer, Project Owner, Status, and Description.
- Project Schedule:** A Gantt chart showing the project timeline from 2023 to 2024, with a red arrow pointing to a specific task.
- Main Project Tasks (2):** A table with columns for Project Task, Hierarchy, Total Summary Pla..., Total Summary Act..., Total Remaining Cost, and Task Comp... It lists tasks like 'Implementation' and 'Realization'.
- All Project Tasks (2):** A table with columns for Project Task, Hierarchy, Total Plan..., Total Act..., Remaining..., Task Comp..., Start Date, and Plan... It lists tasks like 'Implementation' and 'Realization'.
- Resource Assignments (1):** A table with columns for Resource Assignment, Resource, Role, Start Date, and End Date. It shows an assignment for 'Employee One'.
- Phases (1):** A table with columns for Phase Name, Status, Start Date, End Date, Billable, and SubSumm... It shows a phase named 'Phase One'.
- Acceptance Protocols (1):** A table with columns for Acceptance Protocol, Subject of de..., Contract C..., As of the d..., Date of Issue, and Reported S... It shows an acceptance protocol for 'Subject of delivery'.
- Activity Reports (0):** A section with a 'New' button.
- Files (0):** A section with an 'Add Files' button and an 'Upload Files' button.

Red arrows and numbers 1-7 highlight specific features: 1 points to the 'Main Project Tasks' table, 2 points to the 'Phases' table, 3 points to the 'Resource Assignments' table, 4 points to the 'Files' section, 5 points to the 'Edit', 'Clone', and 'Delete' buttons, 6 points to the 'New Acceptance Protocol' and 'New Activity Report' buttons, and 7 points to the quick actions menu icon.

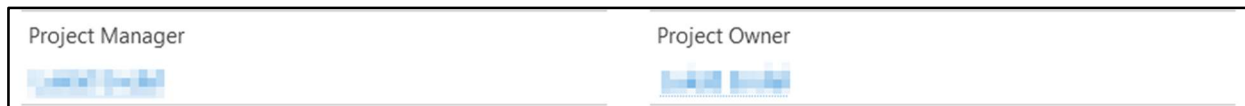
In terms of time tracking, you have the flexibility to record time on tasks at all levels of the hierarchy. To enhance clarity, we suggest organizing the tasks by hierarchy in the Gantt Chart. You can achieve this by simply clicking on the column headers in the Main Project Tasks / All Project Tasks table:

Project Task	Hierarchy	Total Sum	Total Actual	Total Rema...	Task Comp...	Start Date
1 Implementation	5.1	3 350,00 €	2 475,00 €	875,00 €	93,00 %	1. 1. 2023
2 Realization	5.2	2 100,00 €	0,00 €	2 100,00 €	10,00 %	1. 7. 2023

Project Task Name	Hierarchy	Total Planned C...	Total Actual ...	Remaining Cost	Task Comp...
1 Implementation	5.1	3 350,00 €	2 475,00 €	875,00 €	93,00 %
2 Realization	5.2	2 100,00 €	0,00 €	2 100,00 €	10,00 %


By now, you may have observed two distinct attributes: *Project Owner* and *Project Manager*. Both roles provide an overview of the project and possess the ability to create project tasks. However, there is a fundamental difference between these roles.



The *Project Manager* role is automatically assigned as the owner of tasks created within the project – it's a pre-fill and could be changed within the task creation window or task details. This individual holds direct responsibility for managing and overseeing the project's execution. On the other hand, the *Project Owner* role is intended for an employee who serves as the primary stakeholder, monitoring the project's development and progress.

## Resource Assignment

Within Resource Assignment, you can view the details about a resource (employee) who is assigned to a certain project. Additionally, in this section, you can edit, clone, or delete the resource assignment (1).

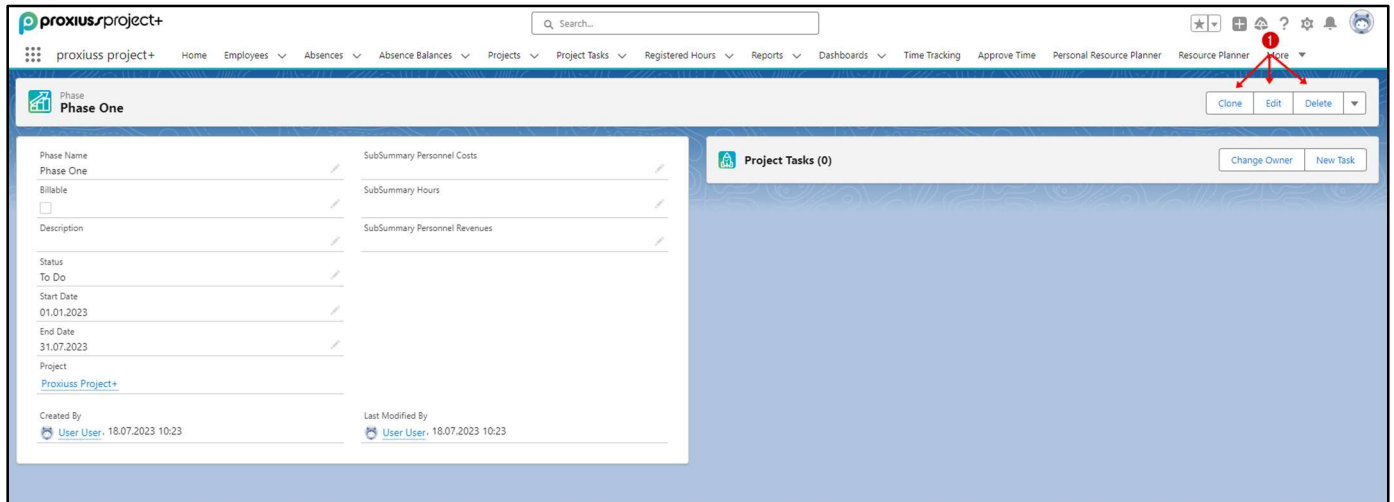
By clicking on the quick actions button  (2), you can change the owner of the resource assignment, or open the printable view.

**IMPORTANT:** To ensure efficient tracking of work within the project, it is crucial to assign employees to each relevant task utilizing [Task assignment](#). When employees are assigned to a project as *Resource*, they will not be able to track any work within the individual project tasks created under that project. It will only allow the manager to allocate their hours in the *Resource Planner*.

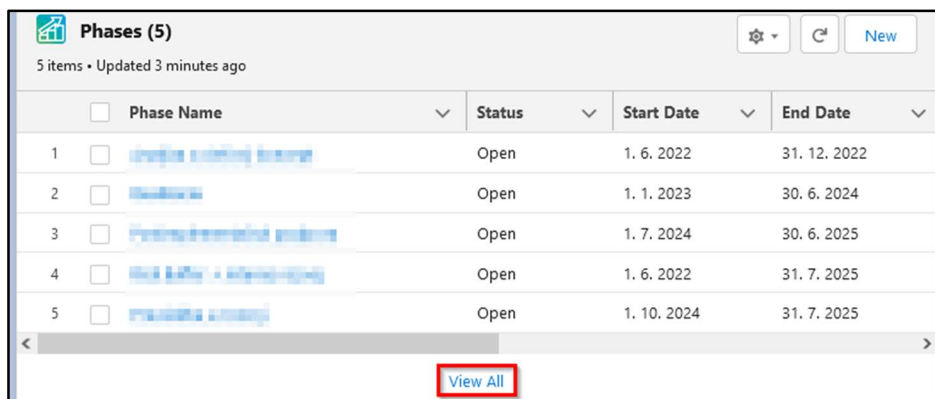
## Phase

Phase serves for grouping the project tasks that start at the same time for a certain project. In this section, you can edit, clone, or delete phase (1). From the related list for project tasks, you can create a new project task for the actual phase. In order to do that, you need to go to the app launcher (☰ icon).

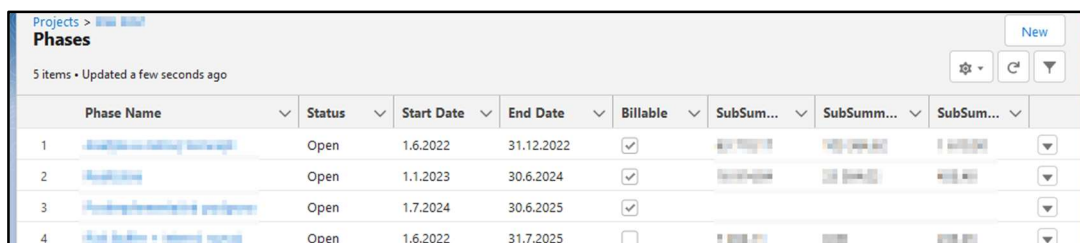
The Gantt chart represents phases with a default black color, which cannot be customized to any other color.



Created phases could be edited or deleted from project details, where you have to click on *View All*, which will list all phases per given project.

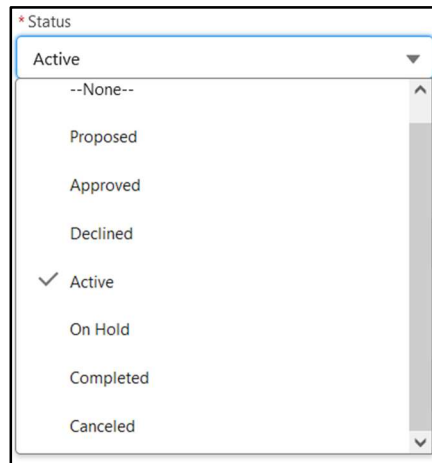


Clicking on any of the column's phase names will display the view from the first screenshot in this subchapter.



## Project Status Change


In the PROXIUSS PROJECT+ application, it is possible to choose one of the following statuses for the project:



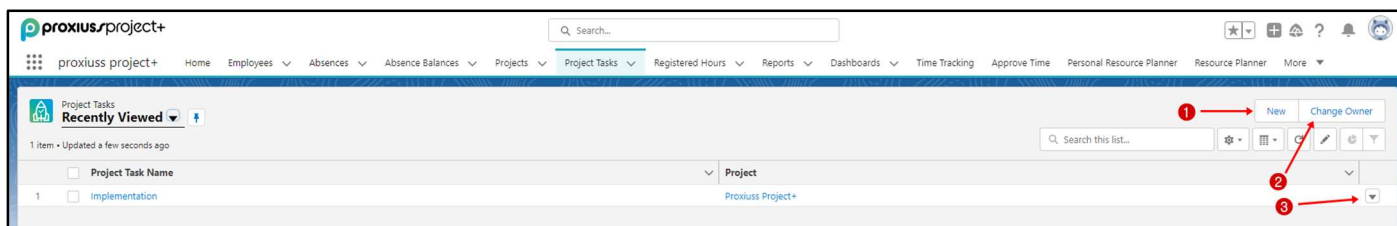
When the project status is marked as *Proposed*, *Approved*, or *Active*, assigned team members retain the ability to record their time for the respective project. However, if the project status is indicated as *Declined*, *On Hold*, *Completed*, or *Canceled*, time tracking within the project is not permitted.

### 3. Project Tasks

Once you click on *Project Task*, you will see the overview of project tasks that belong to a given project. In this section, you can create a new project task manually (1), or you can change the owner of the task (2).

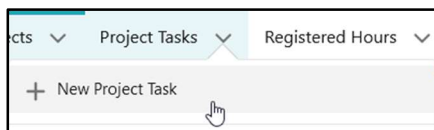
There is also a quick action button  available which can be used for editing/deleting the selected project task (3).

You can also filter the data based on a specific criterion to gain a better view of all the assignments that belong to you or your team members.



#### Project Task Creation

Project tasks can be created in two ways: either from the *Project details* overview or by navigating to the *Project Tasks* tab and clicking on the relevant option.



Regardless of the method you choose, a new window will open to create a task. The essential information required to create a task includes filling in the *Project Task Name* (1), selecting a *Project* from the provided list (2), and clicking *Save* (3). Additional details can be modified at a later stage, as explained in the [Project Task details](#) chapter.

**New Project Task**

**Task Information**

\* Project Task Name **1**

Task Owner

\* Project **2**

Hierarchy Name

Hierarchy Code

Start Date

Parent Task

Ultimate Parent Task

Status

Planned End Date

Billable


Milestone


Agile

Cancel Save & New Save **3**

## Project Task Details

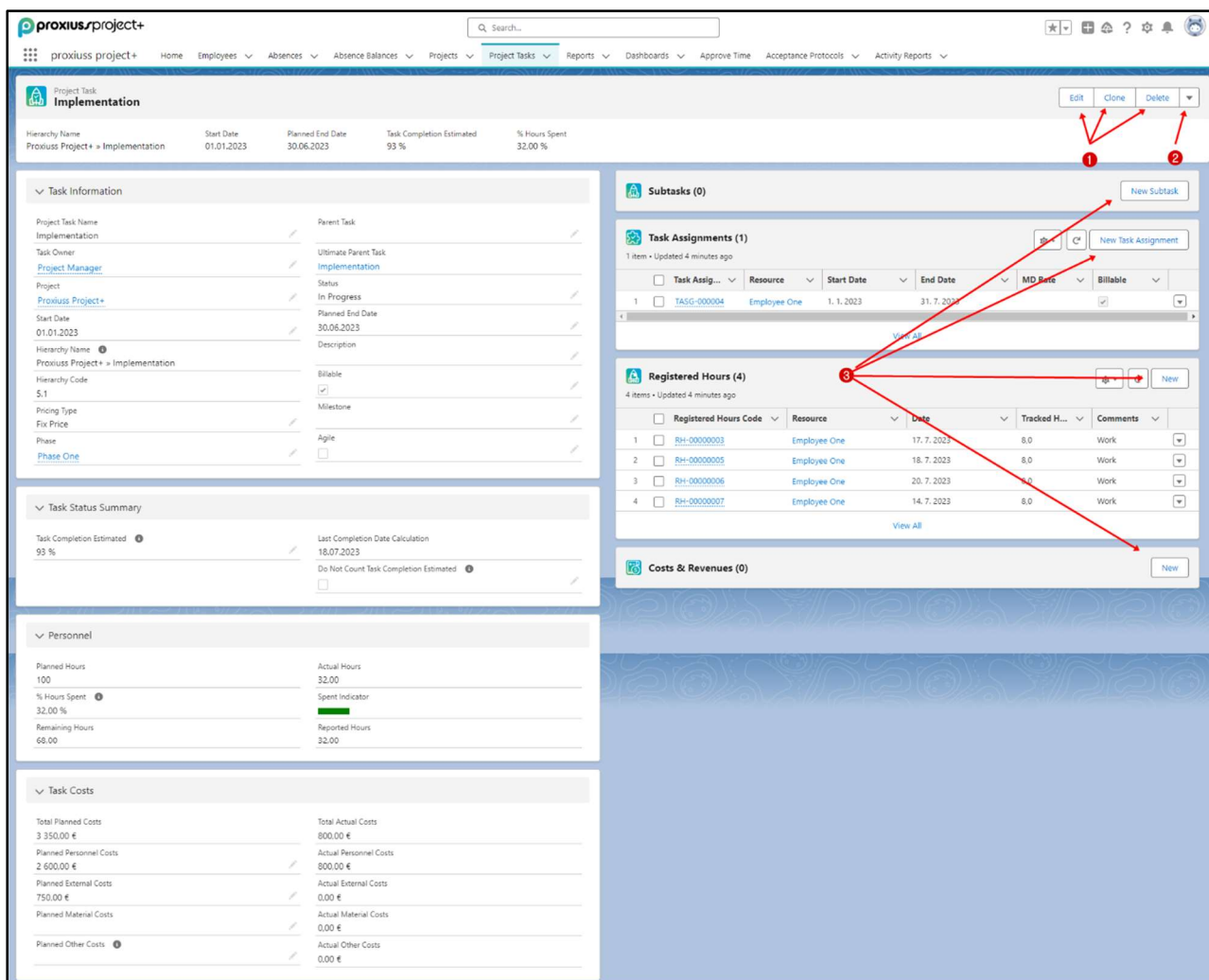
By clicking on a project task name, you can see the project task details, including assigned employees in *Task Assignments* table, *Subtasks*, and *Project Task Hours*.

In this section, you can edit the project task, clone or delete it (1), or obtain the printable view by clicking on the  icon (2).

Click on the quick actions button  at the end of the line in order to edit or delete the entry, or, additionally, click on the button *New* on the *Subtasks*, *Task Assignment* (employees which are assigned to the project), *Costs & Revenues* or *Registered Hours* (3) to create a new entry.

In the *Task Information* section, there is a *Billable* checkbox. If the *Billable* checkbox is checked on the task, all registered hours that are reported under it will have a calculated revenue amount based on the MD rate of person(s) reporting their hours for the task. If *Billable* is unchecked on the task, then the registered hours will have only the cost rate calculated.

Additionally, please note that when the *Task Status* attribute is set to 'Done,' assigned employees will no longer retain the ability to track time for that specific task. Shall the task have assigned status 'To Do' or 'In Progress,' employees are able to track their work within the task.





**IMPORTANT:** To ensure efficient tracking of work within the project, it is crucial to assign employees to each relevant task. When employees are assigned at the project level, as demonstrated below, they cannot track any work within the individual project tasks created under that project.

The *New Project Assignment* button enables the assignment of a reservation for a specific employee. This reservation is made for a task or project where the employee is currently out of work. As a result, the employee cannot directly track their time for the assigned task. However, the Project Manager can allocate the employee's hours in the *Resource Planning* section. This serves as a backup plan in case of a sudden loss of a regular employee working on the project, reducing the likelihood of resource constraints impacting the project's progress.

The screenshot displays the Proxiuss Project+ web application interface. The top navigation bar includes 'proxius project+', 'Home', 'Employees', 'Absences', 'Absence Balances', 'Projects', 'Project Tasks', 'Reports', 'Dashboards', 'Approve Time', 'Acceptance Protocols', and 'Activity Reports'. The main content area is divided into several sections:

- Project Information:** Displays details for 'Proxiuss Project+' including Project ID (5), Start Date (01.01.2023), Planned End Date (31.12.2023), Project Health Indicator (Active), and Status (Active).
- Project Schedule:** A Gantt chart showing the project timeline from 2023, with a red vertical line indicating the current date.
- Project Tasks (2):** A table listing tasks:
 

Project Task Name	Hierarchy	Total Planned C...	Total Actual ...	Remaining Cost	Task Com
Implementation	5.1	3 350,00 €	800,00 €	2 550,00 €	93 %
Realization	5.2	2 100,00 €	0,00 €	2 100,00 €	10 %
- Resource Assignments (1):** A table showing one resource assignment:
 

Resource Assignme...	Resource	Role	Start Date	End Date
B4SG-00003	Employee One		1.1.2023	31.12.2023

## Waterfall/Agile Approach

With PROXIUSS PROJECT+, you have the flexibility to assign a project approach per task, allowing for a Hybrid type project. By default, each project task is created as a Waterfall type (if the box is unchecked). However, you also have the option to apply the Agile approach by checking the Agile option either during task creation or within the task details section.

This screenshot shows the 'New Project Assignment' form. The 'Agile' checkbox is highlighted with a red box, indicating that the Agile approach can be selected for a task. Other fields include 'Project', 'Hierarchy Name', 'Start Date', 'Pricing Type', 'Currency', and 'Phase'.

This screenshot shows the 'Test SubTask' details form. The 'Agile' checkbox is checked and highlighted with a red box, demonstrating how the Agile approach is applied to a specific task. Other fields include 'Pricing Type', 'Currency', and 'Phase'.

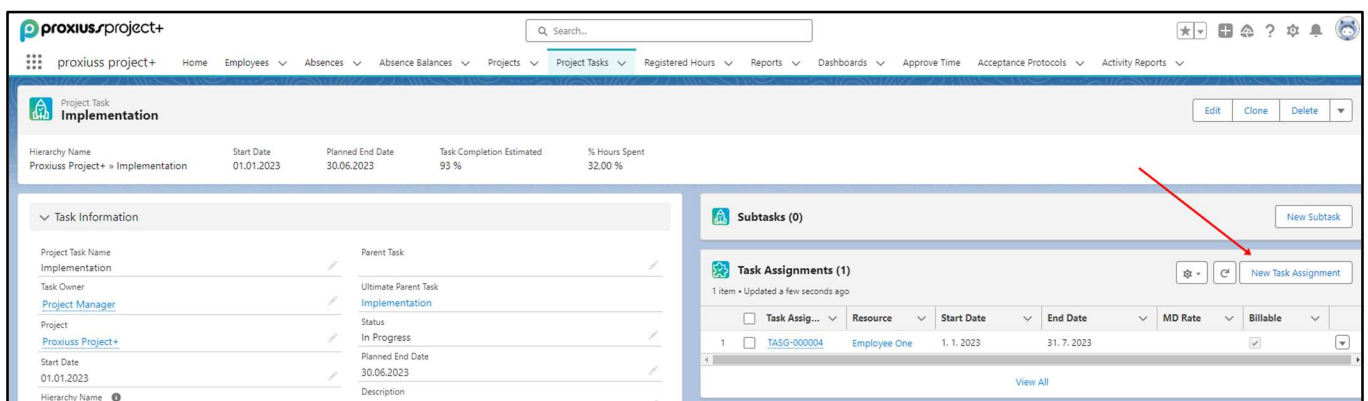
When applying the Agile approach, several attributes within the task details are modified:

- The *Start Date* field is hidden, and the *Planned End Date* is replaced with *Due Date*.
- The *Milestone* field is hidden, and *Story Points* are introduced as a replacement.

This distinction allows you to tailor the project approach and utilize the appropriate attributes based on your requirements.

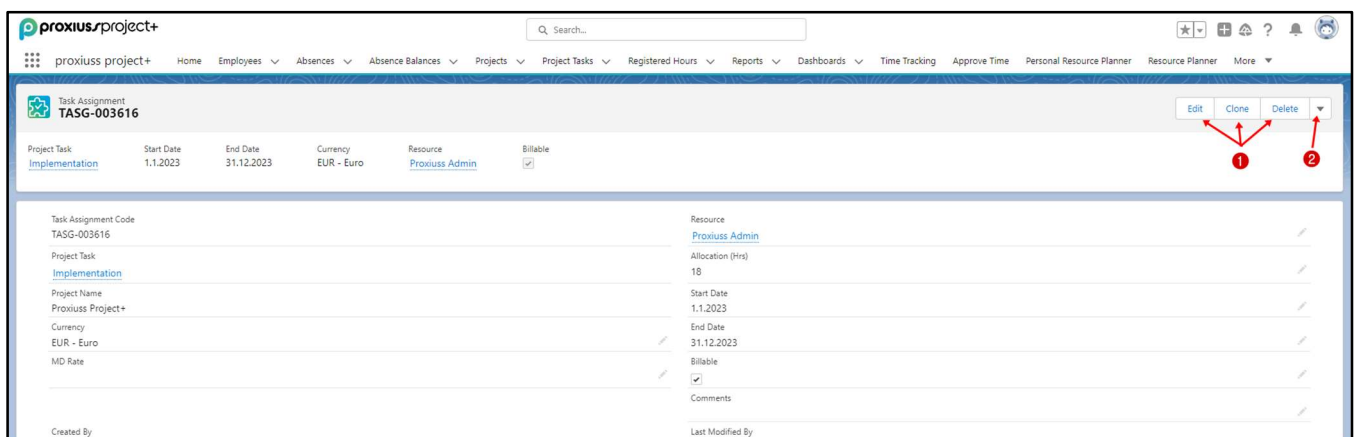
## Task Assignment

Click on the name in *Task Assignments* to see the details of an assignment assigned to a particular employee working on the given task. This also enables employees to track their time within the [Time Tracking](#) tab.



Here, you can edit, clone, or delete the *Task Assignment (1)*.

Click on a quick actions button (2) to change the owner of the project task or to open the printable view.



Additionally, it is worth noting that the *MD rate*, which stands for Man-Day rate, can differ from the standard rate per employee and can be customized on a task basis. However, if the *MD rate* is modified after employees have already tracked their time, the reported hours must be manually adjusted to ensure accurate cost and revenue calculations. The process for making this adjustment is thoroughly explained in the [Billable flag change](#) chapter.

To illustrate, here is an example showcasing different *MD rates* per employee for a specific task. The blank field represents the standard employee rate recorded in their [Employee details](#).

**Task Assignments (7)** New Task Assignment URL

7 items • Sorted by Resource • Updated a few seconds ago

	<input type="checkbox"/> Task Assignme...	Resource ↑	Start Date	End Date	MD Rate	Billable	
1	<input type="checkbox"/> <a href="#">TASG-004218</a>	<a href="#">Employee One</a>	1. 3. 2023	31. 12. 2023		<input checked="" type="checkbox"/>	▼
2	<input type="checkbox"/> <a href="#">TASG-003657</a>	<a href="#">Employee One</a>	1. 3. 2023	31. 12. 2023	30,00	<input checked="" type="checkbox"/>	▼
3	<input type="checkbox"/> <a href="#">TASG-003656</a>	<a href="#">Employee One</a>	1. 3. 2023	31. 12. 2023	70,00	<input checked="" type="checkbox"/>	▼
4	<input type="checkbox"/> <a href="#">TASG-003655</a>	<a href="#">Employee One</a>	1. 3. 2023	31. 12. 2023	50,00	<input checked="" type="checkbox"/>	▼
5	<input type="checkbox"/> <a href="#">TASG-003658</a>	<a href="#">Employee One</a>	1. 3. 2023	31. 12. 2023	30,00	<input checked="" type="checkbox"/>	▼
6	<input type="checkbox"/> <a href="#">TASG-003853</a>	<a href="#">Employee One</a>	1. 3. 2023	31. 12. 2023	20,00	<input checked="" type="checkbox"/>	▼
7	<input type="checkbox"/> <a href="#">TASG-004079</a>	<a href="#">Employee One</a>	1. 3. 2023	31. 12. 2023	20,00	<input checked="" type="checkbox"/>	▼

## Milestone

A project milestone is a significant event or achievement that marks a specific point in the timeline of a project. It represents a critical stage, the completion of a major deliverable, or the attainment of an important objective within the project. Milestones serve as reference points to track progress and evaluate the project's overall success.

Under *Milestone*, you can add multiple tasks which have to be completed in a certain time (have a specific End Date).

When a project task is set as waterfall (Agile field is unchecked)(1), it can be mapped under a milestone through the field *Milestone* (2). If you want to see all milestones, you can also search for them through the App Launcher (3).

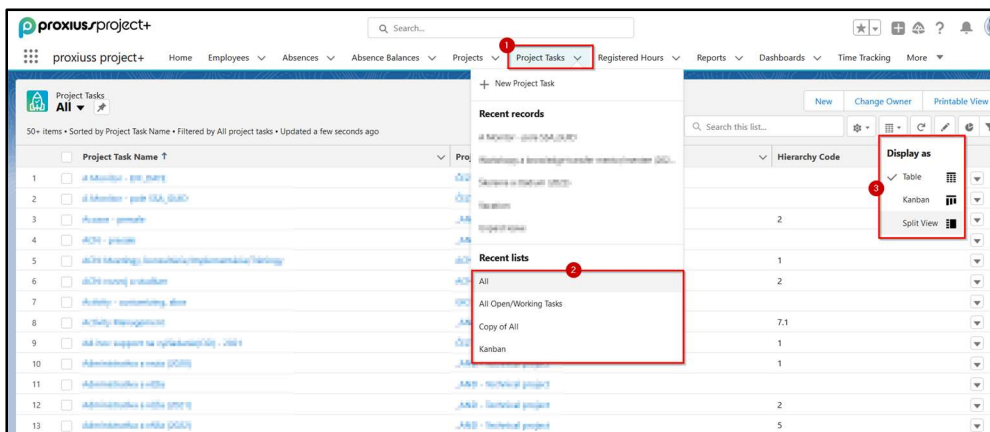
The screenshot shows the 'Implementation' task overview in Proxiuss Project+. Key elements include:

- Task Information:** A list of fields for the task, including 'Milestone' (set to 'M1') and 'Agile' (unchecked). Red arrows point to these fields with labels 1 and 2.
- Subtasks (0):** A section for adding subtasks.
- Task Assignments (1):** A table showing one assignment for 'Employee One' with start and end dates.
- Registered Hours (4):** A table showing four hours logged by 'Employee One' on various dates.

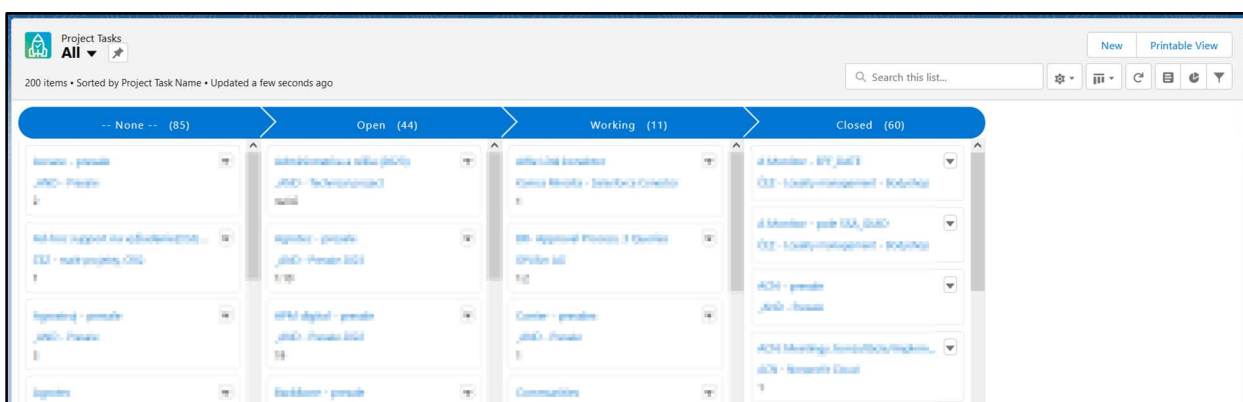
## Project Task Overview

While the *Project task overview* is a standard feature in Salesforce platform applications, we would like to highlight its importance in enhancing your work efficiency. You can access the overview by navigating to the *Project Tasks* tab (1) and selecting a list from the *Recent lists* (2). To customize the display, simply click on the table icon and choose your preferred option.

The *Display* button offers three view options: *Table*, *Kanban*, and *Split View* (3). By default, the project tasks list will typically open in the *Table* view, as shown in the screenshot below.

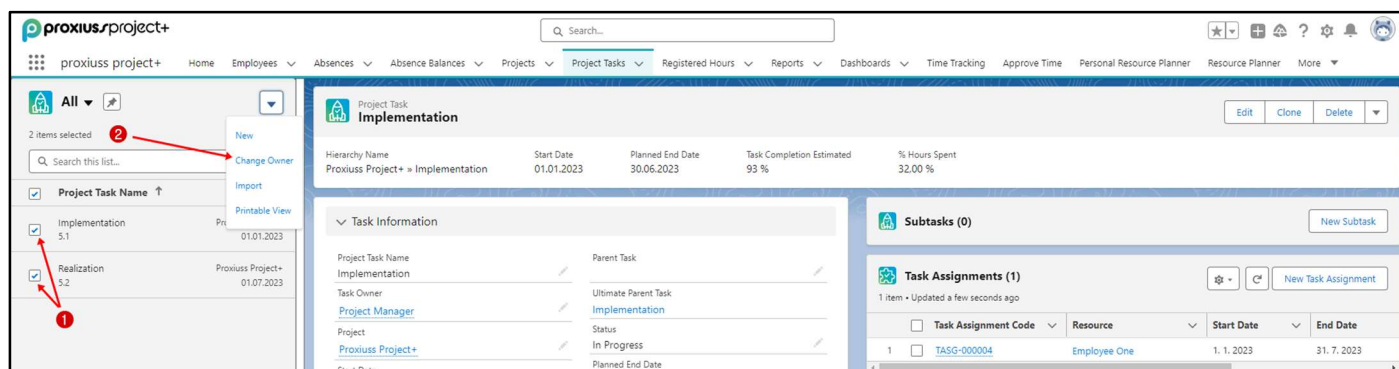


*Kanban* display shows the tasks based on their status:

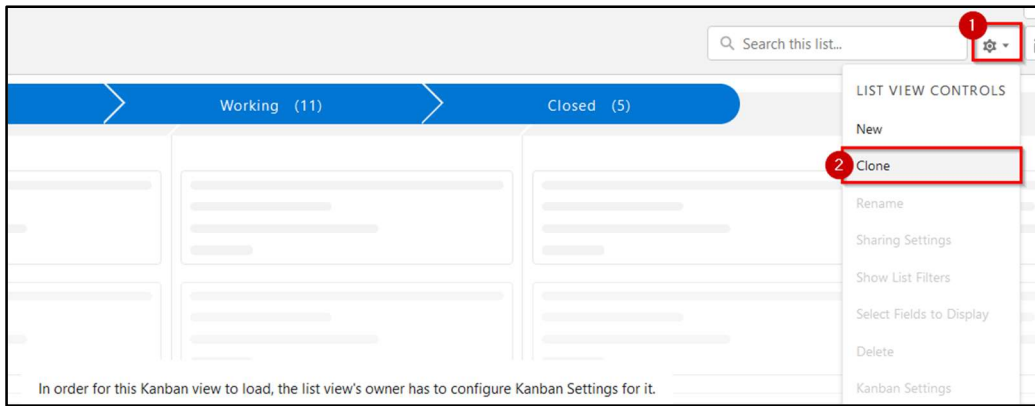


The *Split View* feature provides a convenient way to navigate tasks while accessing *Project Details* information. By clicking on any task in the list, the corresponding details will be displayed on the right side, as depicted in the screenshot below.

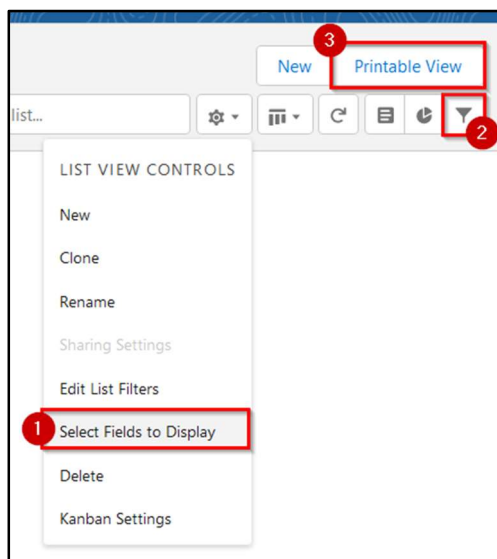
Furthermore, *Split View* allows you to select specific projects by checking the boxes (1) and, if your user rights permit, change the assigned tasks' owner. This enables you to manage ownership responsibilities within the project tasks efficiently.



If you encounter any issues where displaying a Kanban view is not feasible, or if you wish to customize the existing view, you can utilize the *List View Controls* button (1) and access the *Clone* option (2) from the provided list.




As the owner of your personalized overview, you have the flexibility to modify the displayed fields (1) according to your preferences, refine the data by applying filters (2) to streamline the information, and even print the view, if necessary (3).

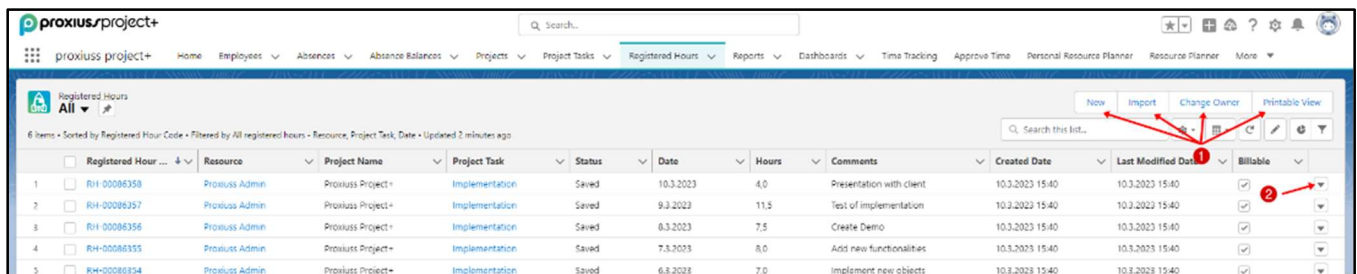


## 4. Registered Hours

The *Registered Hours* tab provides a comprehensive overview of project task hours entered by assigned resources (employees) for relevant project tasks. This tab serves as a centralized hub, enabling you to conveniently view all completed tasks in one place, as recorded in the *Time Tracking* feature. The Registered Hours tab also offers filtering options, allowing you to refine the displayed tasks based on your chosen criteria.

**It is important to note that project task hours data is directly connected to the *Time Tracking* feature. For optimal accuracy and consistency, it is recommended to utilize the *Time Tracking* tab for entering project task hours based on the actual time spent on each task.**

In this section, you can manually create a new project task manually (1), change the owner, and download a printable view of this list (1). Click on the quick actions icon  (2) for editing or deleting selected project task hours.

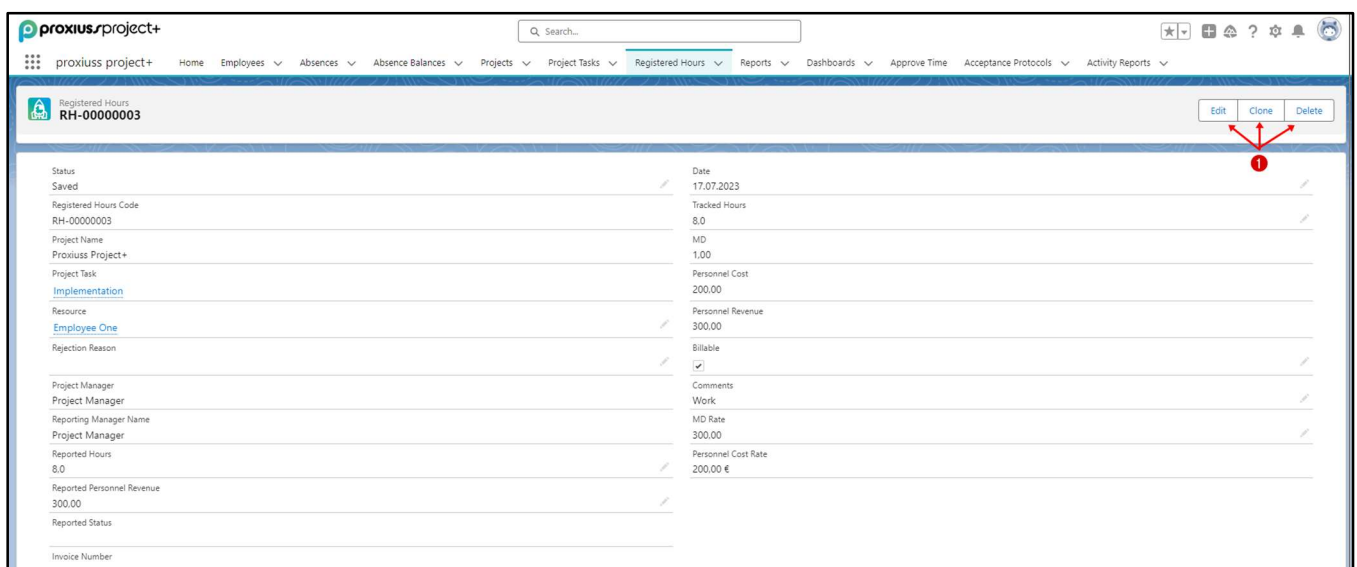


Registered Hour ...	Resource	Project Name	Project Task	Status	Date	Hours	Comments	Created Date	Last Modified Date	Billable
1 RH-0008358	Proxiuss Admin	Proxiuss Project+	Implementation	Saved	10.3.2023	4.0	Presentation with client	10.3.2023 15:40	10.3.2023 15:40	<input checked="" type="checkbox"/>
2 RH-0008357	Proxiuss Admin	Proxiuss Project+	Implementation	Saved	9.3.2023	11.5	Test of implementation	10.3.2023 15:40	10.3.2023 15:40	<input checked="" type="checkbox"/>
3 RH-0008356	Proxiuss Admin	Proxiuss Project+	Implementation	Saved	8.3.2023	7.5	Create Demo	10.3.2023 15:40	10.3.2023 15:40	<input checked="" type="checkbox"/>
4 RH-0008355	Proxiuss Admin	Proxiuss Project+	Implementation	Saved	7.3.2023	8.0	Add new functionalities	10.3.2023 15:40	10.3.2023 15:40	<input checked="" type="checkbox"/>
5 RH-0008354	Proxiuss Admin	Proxiuss Project+	Implementation	Saved	6.3.2023	7.0	Implement new objects	10.3.2023 15:40	10.3.2023 15:40	<input checked="" type="checkbox"/>

### Registered Hours Details

To access detailed information about registered project task hours, simply click on the name of the respective project task. This will provide a comprehensive overview of registered project task hours details, including approval status, costs, revenues, and more. In this section, you can edit, clone, and delete project task hours as needed (1).

**It is important to note that project task hours data is interconnected with the *Time Tracking* feature. For optimal efficiency and accuracy, it is recommended to utilize the *Time Tracking* functionality for logging, editing, and submitting registered project task hours.**

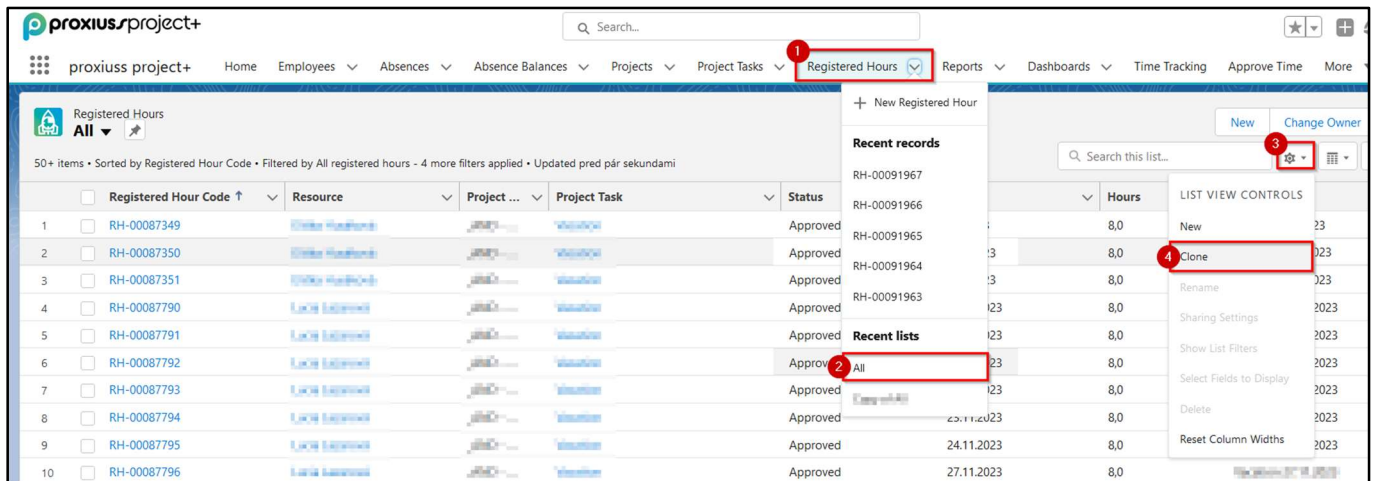


Status	Saved	Date	17.07.2023
Registered Hours Code	RH-00000003	Tracked Hours	8.0
Project Name	Proxiuss Project+	MD	1.00
Project Task	Implementation	Personnel Cost	200,00
Resource	Employee One	Personnel Revenue	300,00
Rejection Reason		Billable	<input checked="" type="checkbox"/>
Project Manager	Project Manager	Comments	Work
Reporting Manager Name	Project Manager	MD Rate	300,00
Reported Hours	8.0	Personnel Cost Rate	200,00 €
Reported Personnel Revenue	300,00		
Reported Status			
Invoice Number			

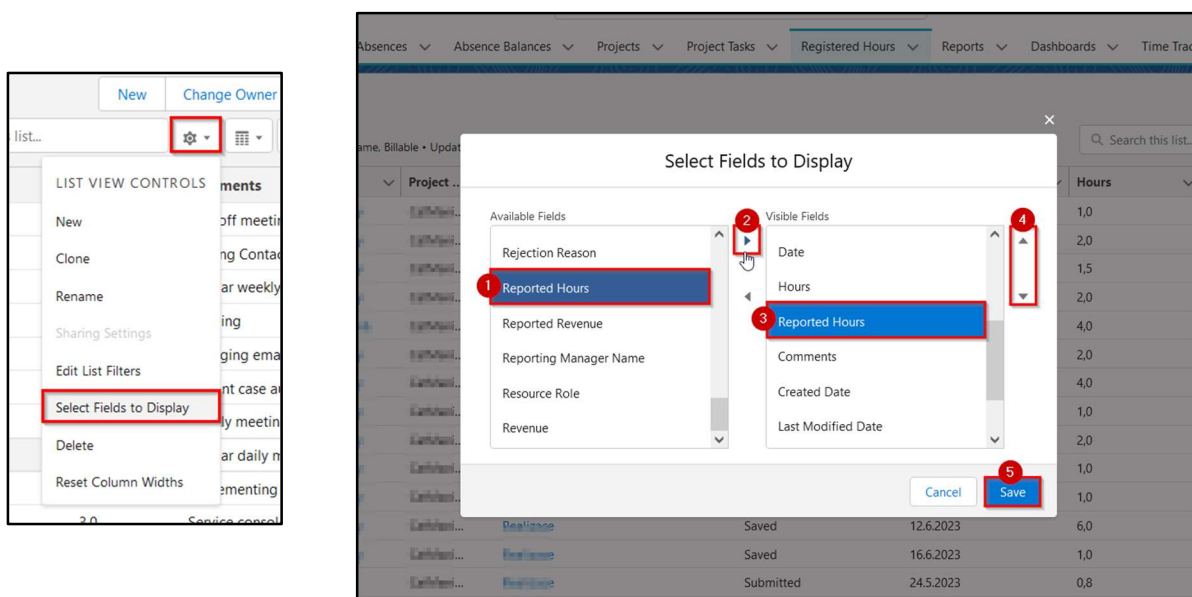
## Reported Hours

*Reported Hours* is complementary to *Registered Hours*, with a key distinction, which is that *Registered Hours* capture the actual work logged by employees. In contrast, *Reported Hours* track the number of hours entered in the [Activity Report](#). This value provides a more precise overview of costs and revenue from a business perspective.

To access this attribute, navigate to the *Registered Hours* tab (1) and select *All* from the *Recent lists* (2). The main overview cannot be edited directly, so you must create a copy by clicking the *List View Controls* button (3) and choosing the *Clone* option (4).



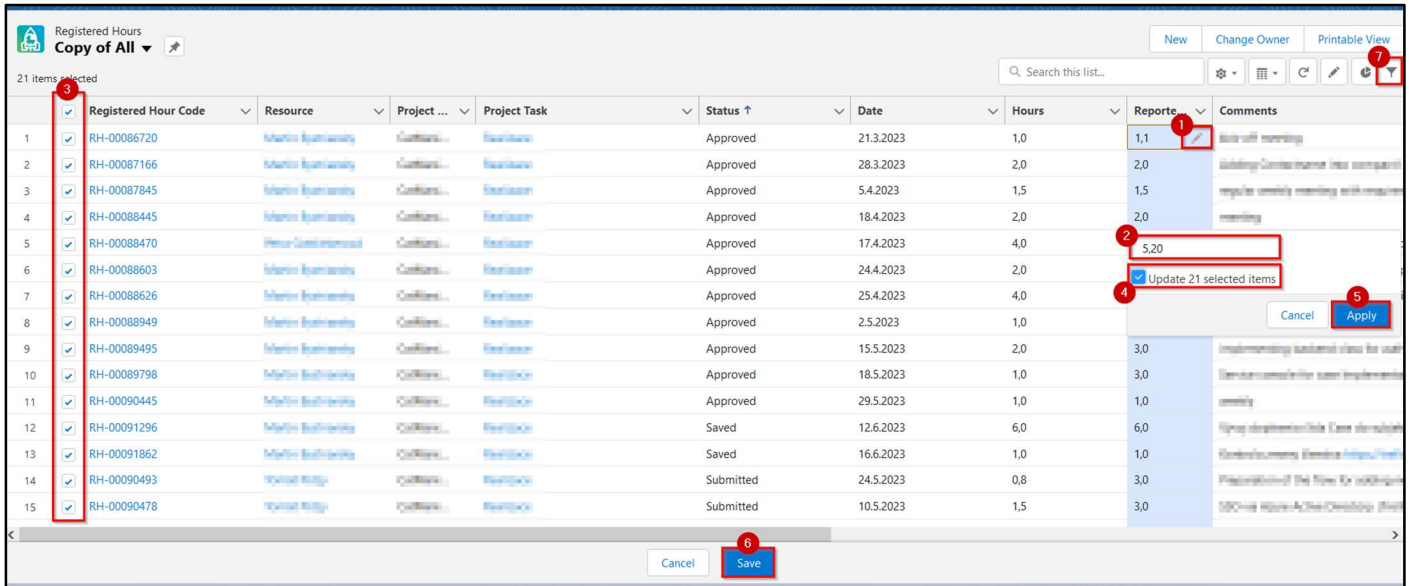
In your newly cloned overview, click the *List View Controls* button again and choose *Selected Fields to Display*. A new window will appear, displaying the available fields for your overview. Locate the *Reported Hours Attribute* in the left column (1) and use the arrow (2) to move it to the right column (3). You can also use the left-oriented arrow to remove attributes from the right column. To customize the order, use the arrows (4) to move the attribute up or down within the overview. More importantly, remember to click *Save* (5) to apply the changes.



After saving, a revised overview, including the *Reported Hours* attribute, will be displayed. To edit an entry, hover over the attribute's value and click on the pen icon (1) that appears. Enter the new value (2) and utilize the checkboxes (3) to select multiple entries if they share the same value. To apply the

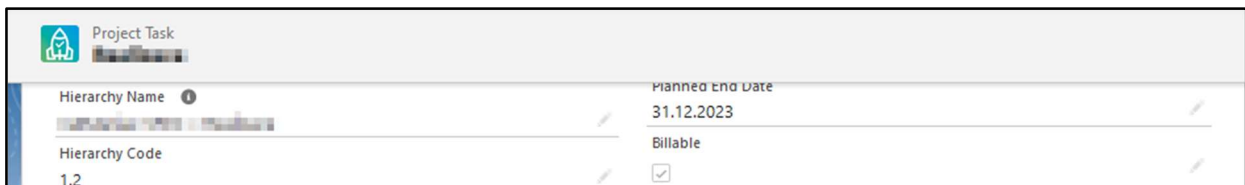
changes to the selected entries, check the relevant checkbox (4) and click the *Apply* button (5). Once you are satisfied with the modifications, click *Save* (6). You can also refine the entries by using the filtering option (7).

**IMPORTANT:** It is crucial to note that changes made to *Reported Hours* are only retained if the status of the corresponding *Registered Hour* is either 'Submitted' or 'Approved.' If the status is 'Saved,' the value will remain the same as the *Hours* attribute.



### Billable Flag Change

As mentioned earlier in the [Project Task Details chapter](#), when the *Billable* flag is checked, it indicates that revenue is being generated by employees tracking time within the specified project task based on their MD rate.

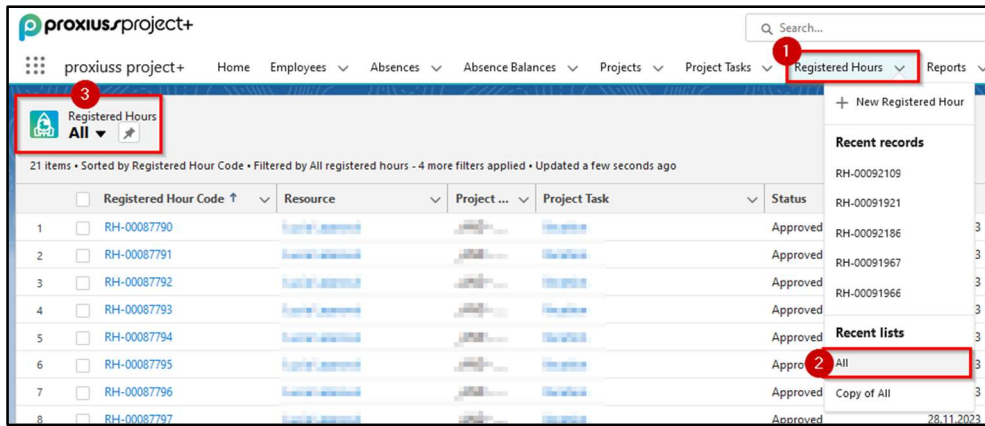


However, if the flag is accidentally left unchecked, or there is a change where a billable task needs to be marked as non-billable or vice versa, a special workaround must be followed to ensure accurate cost and revenue reflection. To accomplish this, follow the steps below:

1. Go to the *Registered Hours* tab (1).
2. Select the 'All' option (2) from the Recent Lists.
3. After the page refreshes automatically, the *Registered Hours* overview (3) will be displayed.

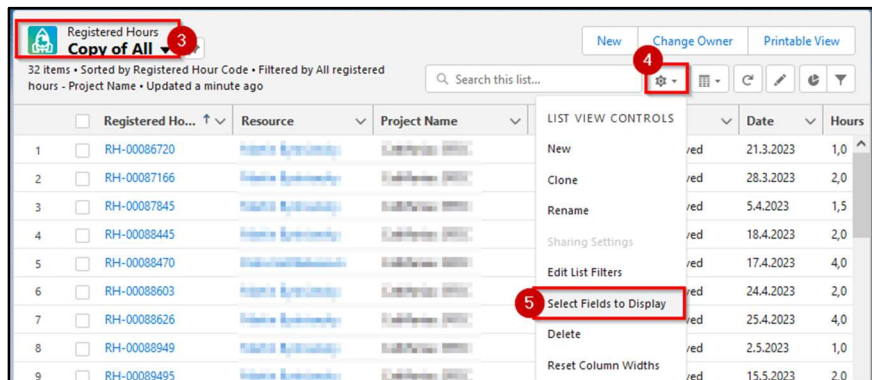
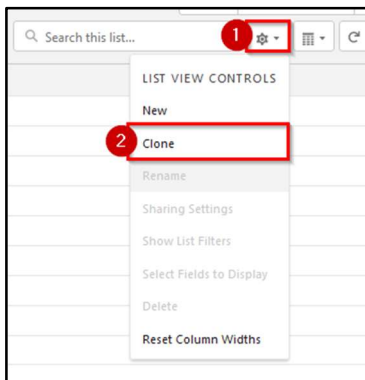
By accessing the *Registered Hours* tab and reviewing the overview, you can ensure that the cost and revenue are accurately reflected based on the *Billable* flag status.





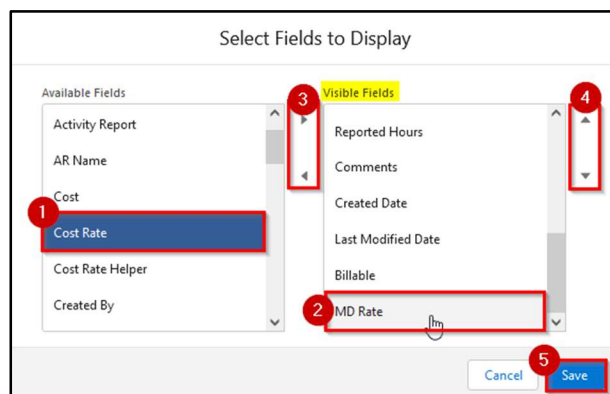
The *Registered Hours* overview is designed as a read-only display, meaning you cannot directly edit or modify the shown attributes. However, if you wish to create a copy of the overview, follow these steps: click on the *List View Controls* button (1) and select the *Clone* option (2) from the menu. This action will generate a copy of all *Registered Hours* entries, denoted as 'Copy of All Registered Hours' (3).

To refine the attributes shown in the copied overview, navigate back to the *List View Controls* menu (4) and choose the 'Select Fields to Display' option (5). This will open a window where you can customize the attributes displayed within the overview.



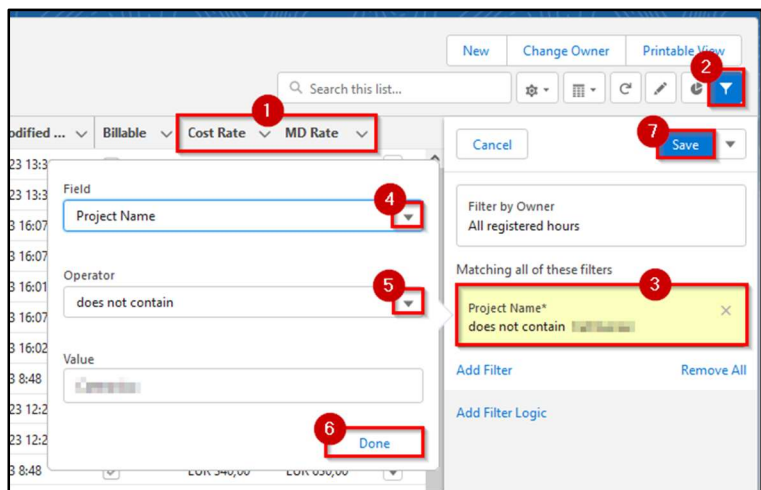
To ensure that both *Cost Rate* (1) and *MD Rate* (2) are displayed in the 'Visible Fields' column, follow these steps:

1. In the 'Available Fields' column, locate *Cost Rate* and *MD Rate* (1).
2. Click on each field to select them (1), and then use the arrow buttons (3) to move them to the 'Visible Fields' column (2).
3. If desired, use the up and down arrows (4) to adjust the positioning of the fields within the overview. Click on *Save* (5) afterward to reflect the changes.



Ensure that *Cost Rate* and *MD Rate* (1) are included in your overview. They should appear as the two rightmost columns if they were at the bottom of the 'Visible Field' list. To work specifically with the relevant *Registered Hours* entries, it is crucial to refine the displayed records by applying filters. Click on the filtering option (2) to access this functionality.

Additionally, you can add additional filters within the filtering options by selecting the 'matching filter' (3) button. In the provided example, the *Project Name* field (4) is chosen with the operator 'does not contain' (5) based on the value specified. It's worth noting that the value does not need to be an exact match. For instance, if your project is named 'RandomThought FXS,' entering 'Rand,' 'thoug,' or 'FXS' as the Value will still result in a match. After configuring the desired filter, click *Done* (6) and *Save* (7) to apply the filter.



Your *Registered Hours* overview may now resemble the example shown below. If you find some attributes missing, please refer to the earlier step in this subchapter to select the desired fields for display.

Now, let's discuss how to handle the *Billable* flag and *MD Rate* within the *Registered Hours* entries. When the *Billable* box is checked, the *MD Rate* will be listed for that specific entry. Conversely, the *MD Rate* should be left empty when the *Billable* box is unchecked. This distinction is crucial for accurately tracking billable and non-billable tasks.

Registered Hour Code	Resource	Project Name	Project Task	Status	Date	Hours	Reported Hours	Comments	Created Date	Last Mod...	Billable	Cost Rate	MD Rate
142	RH-00088903	Confidence (PDC)	Workflows	Approved	24.4.2023	2,0	2,0		24.4.2023 17:48	22.2.2023 1...	<input checked="" type="checkbox"/>	EUR 340,00	EUR 630,00
143	RH-00088626	Confidence (PDC)	Workflows	Approved	25.4.2023	4,0	5,0		25.4.2023 13:56	6.6.2023 1...	<input checked="" type="checkbox"/>	EUR 340,00	EUR 630,00
144	RH-00088949	Confidence (PDC)	Workflows	Approved	2.5.2023	1,0	1,0		2.5.2023 16:31	9.6.2023 8...	<input checked="" type="checkbox"/>	EUR 340,00	EUR 630,00
145	RH-00088495	Confidence (PDC)	Workflows	Approved	15.5.2023	2,0	3,0		15.5.2023 15:15	19.6.2023 ...	<input checked="" type="checkbox"/>	EUR 340,00	EUR 630,00
146	RH-00089798	Confidence (PDC)	Workflows	Approved	18.5.2023	1,0	3,0		18.5.2023 15:42	19.6.2023 ...	<input checked="" type="checkbox"/>	EUR 340,00	EUR 630,00
147	RH-00090445	Confidence (PDC)	Workflows	Approved	29.5.2023	1,0	1,0		29.5.2023 18:20	9.6.2023 8...	<input checked="" type="checkbox"/>	EUR 340,00	EUR 630,00
148	RH-00090476	Confidence (PDC)	Workflows	Submitted	9.5.2023	0,5	0,5		30.5.2023 10:33	9.6.2023 9...	<input type="checkbox"/>	EUR 250,00	
149	RH-00090477	Confidence (PDC)	Workflows	Submitted	10.5.2023	0,8	0,8		30.5.2023 10:33	9.6.2023 9...	<input type="checkbox"/>	EUR 250,00	
150	RH-00090478	Confidence (PDC)	Workflows	Submitted	10.5.2023	1,5	3,0		30.5.2023 10:33	19.6.2023 ...	<input checked="" type="checkbox"/>	EUR 250,00	EUR 520,00
151	RH-00090479	Confidence (PDC)	Workflows	Submitted	12.5.2023	1,0	2,0		30.5.2023 10:34	19.6.2023 ...	<input checked="" type="checkbox"/>	EUR 250,00	EUR 520,00

To make changes to the *Billable* flag or *MD Rate*, simply hover over the respective attribute (1) to reveal a pen icon. Click on the icon to edit the value (2). Additionally, you can utilize the checkboxes on the left (3) to select multiple entries and apply the same value for all by checking the *Update selected items* checkbox (4). This ensures uniformity across the chosen records. Finally, click *Save* (5) to save the changes.

150	<input checked="" type="checkbox"/>	RH-00090478	Submitted	10.5.2023	1,5	3,0	30.5.2023 10:33	22.6.2023 ...	<input checked="" type="checkbox"/>	EUR	
151	<input checked="" type="checkbox"/>	RH-00090479	Submitted	12.5.2023	1,0	2,0	30.5.2023 10:34	19.6.2023 ...	<input checked="" type="checkbox"/>	EUR	
152	<input checked="" type="checkbox"/>	RH-00090480	Submitted	15.5.2023	0,5	0,5	30.5.2023 10:37	9.6.2023 9...	<input type="checkbox"/>	EUR	
153	<input checked="" type="checkbox"/>	RH-00090481	Submitted	15.5.2023	0,5	1,0	30.5.2023 10:37	19.6.2023 ...	<input checked="" type="checkbox"/>	EUR	
154	<input type="checkbox"/>	RH-00090482	Submitted	18.5.2023	2,0	2,0	30.5.2023 10:39	9.6.2023 9...	<input type="checkbox"/>	EUR	

**IMPORTANT:** It's important to note that this workaround for changing the *MD Rate* can also be applied in situations where the actual *MD rate* for a specific project task differs from an employee's standard rate listed in their *Employee details*. If an employee has already tracked their time for the task and a different *MD rate* is applied later, the revenue and cost information won't be adjusted automatically. Therefore, a manual correction is required to ensure accurate calculations.

## 5. Reports


The *Reports* tab provides a comprehensive list of all available reports within PROXIUSS PROJECT+. Reports are designed as spreadsheet-like tools that enable users to access and analyze the required data in a format that suits their needs. With reports, you have the flexibility to rearrange and manipulate data based on project types, specific periods, employees, and other relevant criteria.

By leveraging reports, you can gain valuable insights into various aspects of your projects and effectively track and analyze key metrics. These reports offer a user-friendly interface allowing you to efficiently navigate and extract the desired information.

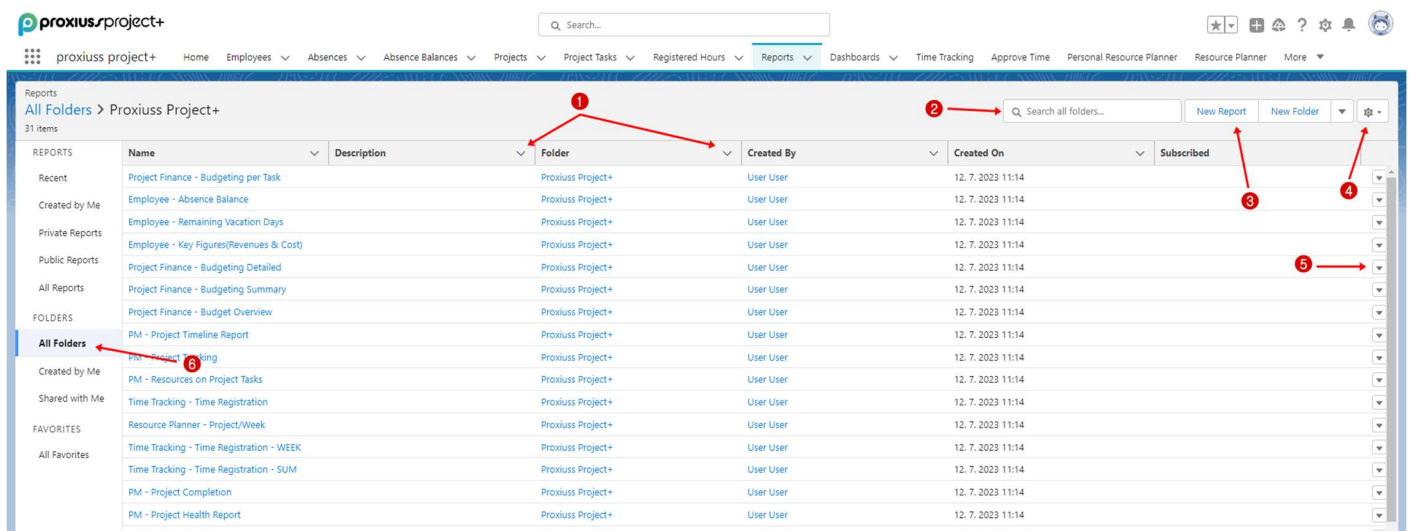
To find reports, use filters (1) or search lines (2).

To create a new report, click on *New Report* (3). The creation of a new report is described below as a standalone subchapter.

You can select the requested fields to be displayed in the report or reset the column width when clicking on a gear icon (4).

Click on the  icon (quick actions button) to mark the selected report as a favorite or check which employees can see/edit the report (5).

You can find all available folders in this view (6) – folder access rights can be managed by the admin and/or project manager only.

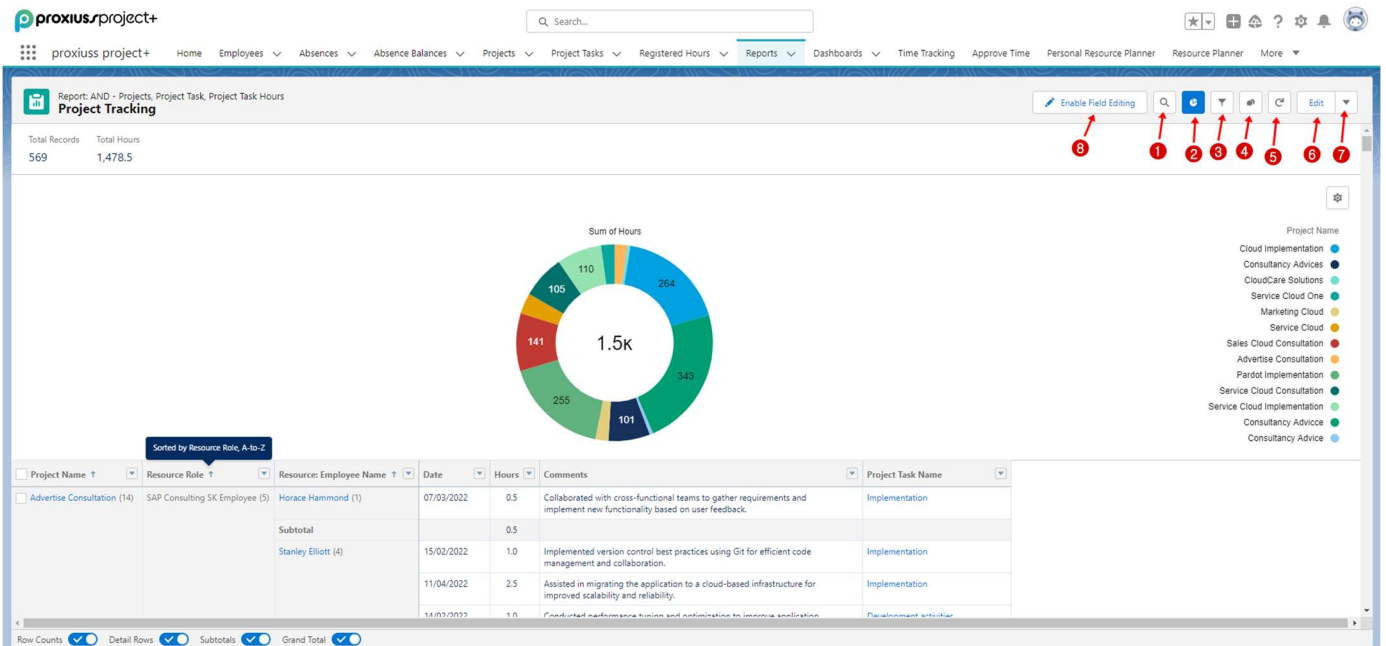


The screenshot shows the 'Reports' section of the Proxiuss Project+ application. The interface includes a navigation menu at the top with options like Home, Employees, Absences, Absence Balances, Projects, Project Tasks, Registered Hours, Reports, Dashboards, Time Tracking, Approve Time, Personal Resource Planner, Resource Planner, and More. A search bar is located at the top right. The main content area displays a list of reports and folders. Red callouts are placed over the interface to highlight specific features: (1) points to the 'Folder' column header; (2) points to the search bar; (3) points to the 'New Report' button; (4) points to the gear icon for column settings; (5) points to the quick actions button (dropdown arrow) in the right-hand column; and (6) points to the 'All Folders' link in the left-hand sidebar.







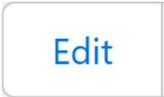
REPORTS	Name	Description	Folder	Created By	Created On	Subscribed
Recent	Project Finance - Budgeting per Task		Proxiuss Project+	User User	12. 7. 2023 11:14	
Created by Me	Employee - Absence Balance		Proxiuss Project+	User User	12. 7. 2023 11:14	
Private Reports	Employee - Remaining Vacation Days		Proxiuss Project+	User User	12. 7. 2023 11:14	
Public Reports	Employee - Key Figures(Revenues & Cost)		Proxiuss Project+	User User	12. 7. 2023 11:14	
All Reports	Project Finance - Budgeting Detailed		Proxiuss Project+	User User	12. 7. 2023 11:14	
	Project Finance - Budgeting Summary		Proxiuss Project+	User User	12. 7. 2023 11:14	
	Project Finance - Budget Overview		Proxiuss Project+	User User	12. 7. 2023 11:14	
FOLDERS	PM - Project Timeline Report		Proxiuss Project+	User User	12. 7. 2023 11:14	
	PM - Project Tracking		Proxiuss Project+	User User	12. 7. 2023 11:14	
Created by Me	PM - Resources on Project Tasks		Proxiuss Project+	User User	12. 7. 2023 11:14	
Shared with Me	Time Tracking - Time Registration		Proxiuss Project+	User User	12. 7. 2023 11:14	
Resource Planner - Project/Week			Proxiuss Project+	User User	12. 7. 2023 11:14	
FAVORITES	Time Tracking - Time Registration - WEEK		Proxiuss Project+	User User	12. 7. 2023 11:14	
All Favorites	Time Tracking - Time Registration - SUM		Proxiuss Project+	User User	12. 7. 2023 11:14	
	PM - Project Completion		Proxiuss Project+	User User	12. 7. 2023 11:14	
	PM - Project Health Report		Proxiuss Project+	User User	12. 7. 2023 11:14	



### Reporting Details and Options

To access a report, simply click on its name, and a report window will open below, displaying the report's contents.



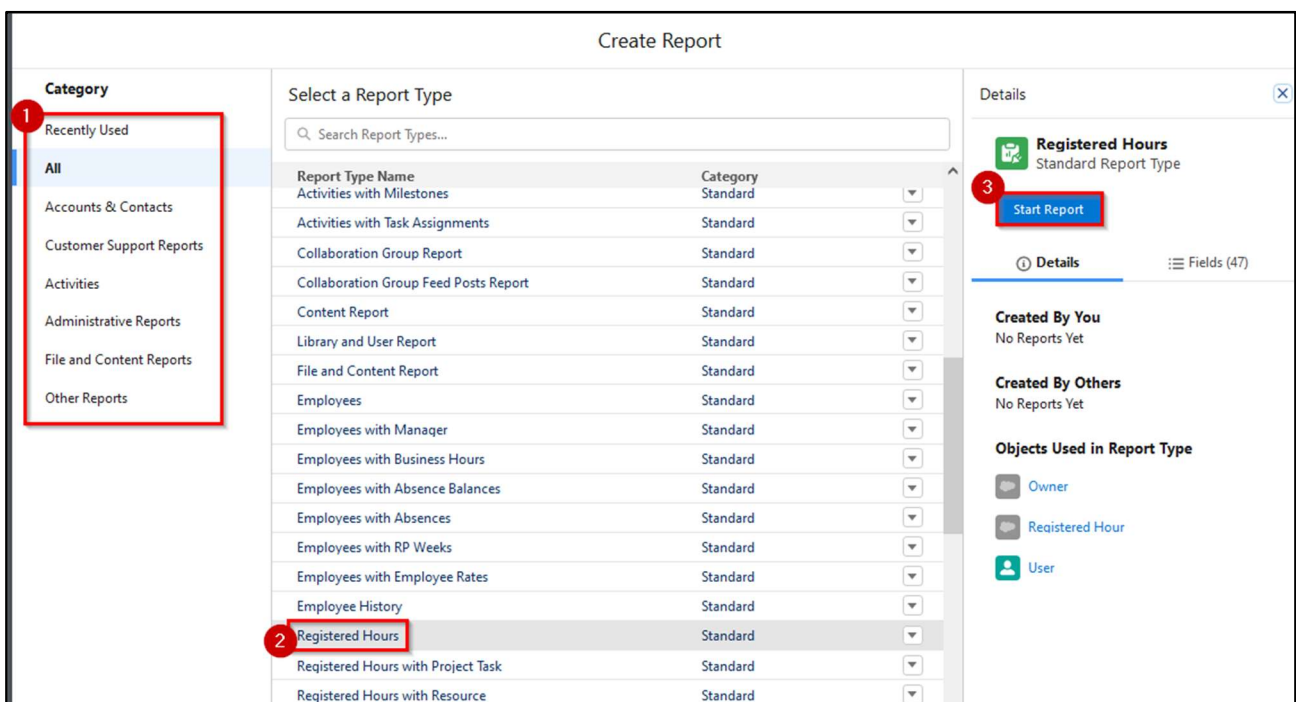
### Buttons description:


	<p>Search button (1) for full-text search in open report.</p>
	<p>Chart view button (2).</p>
	<p>Change the chart view and/or properties.</p>
	<p>Filter section button (3).</p>
	<p>Collaborate function button (4) opens internal app, that you can use for chatting and for sharing information across your team.</p>
	<p>Refresh button (5).</p>
	<p>Edit button (6) to edit the open reports.</p>

	<p>By clicking on this button (7) you can choose whether you wish to edit an open report, save it as a new one, or overwrite the existing report. It's possible to export opened report to XLS or CSV format.</p>
	<p>Edit values for some fields in records (8).</p>

## New Report Creation

After clicking on the *New Report* button, as demonstrated earlier, a new window will appear, prompting you to select a category for your base report. In our example, we selected *Registered Hours* (2) from the available options. Upon clicking the *Start Report* (3) button, your newly created report will be displayed.

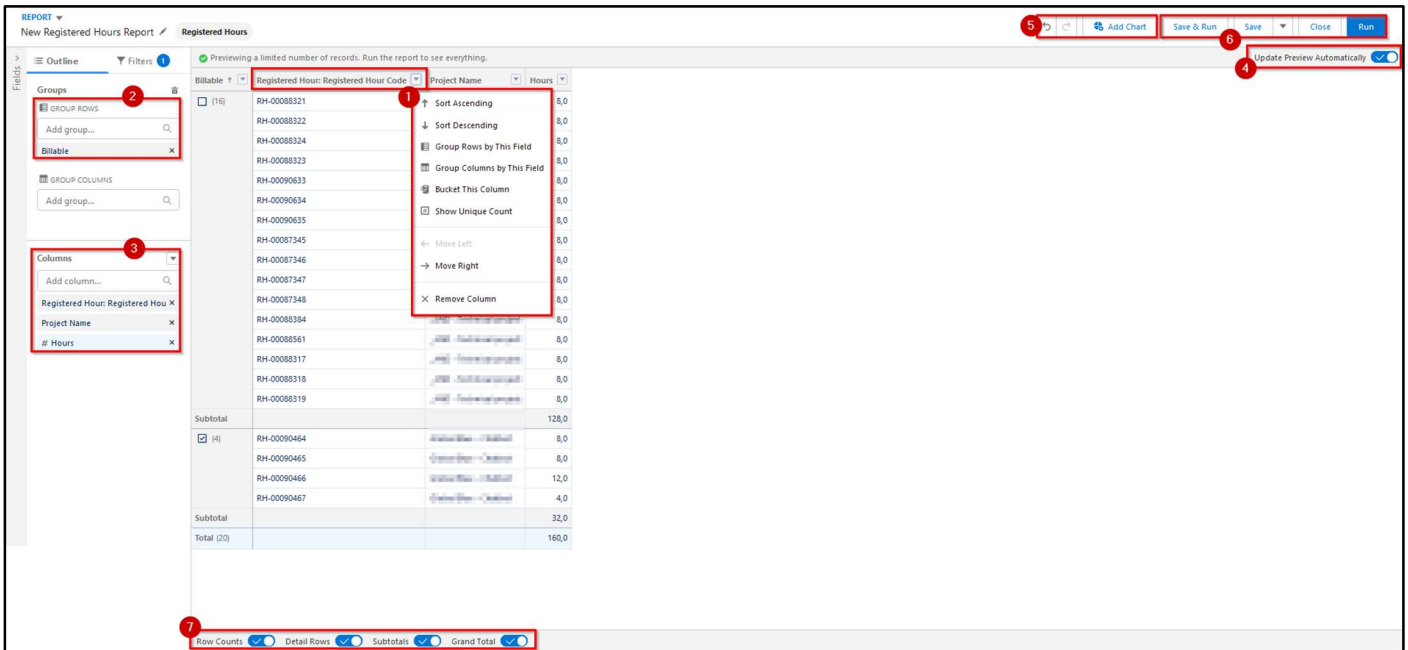


Note that in *Registered Hours*, only one attribute is initially displayed as column values, which is the *Registered Hours code* (1). By clicking on the  icon next to its name, a menu for the attribute will expand, allowing you to delete it if desired. In this example, we selected the *Billable* attribute (2) to group the rows, creating a visual split of the data and providing subtotals for each section. Similarly, you can group the records by chosen columns. If you prefer not to have subtotal information shown, you can uncheck the option in the menu (7), along with other choices.

To add more attributes as columns, such as *Project Name* and *Hours* (3), to view an overview of tracked hours per project, simply add them using the search bar.

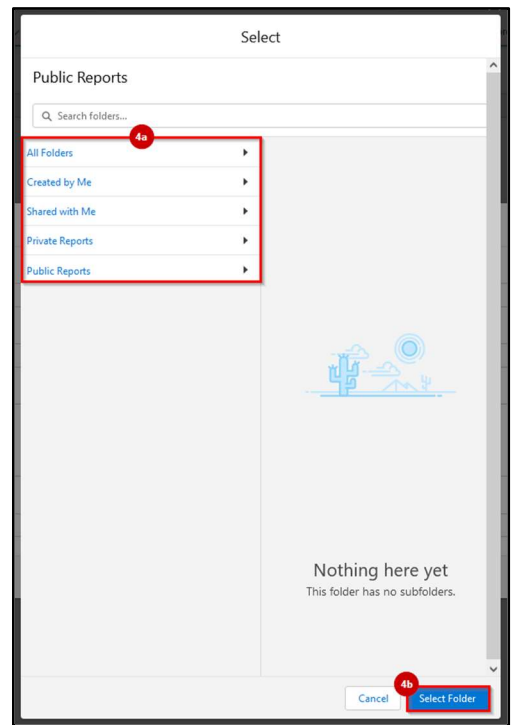
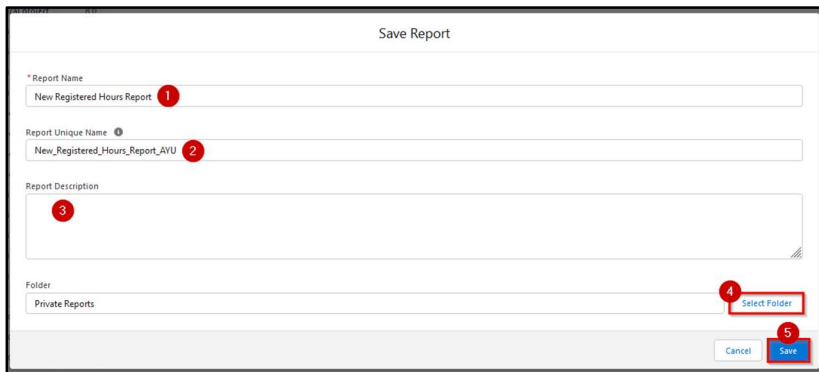
On the left side, there is an option to enable *Update Preview Automatically* (4). Selecting this option will automatically update your report as you add or remove attributes. Additionally, you can undo or redo actions or even add a chart to your report (5), for example, to visualize tracked hours over time.

To save or close the report, select one of the options from the menu (6). Choosing *Close* will cancel the report without the possibility of returning to it while selecting *Run* will generate the report but not save it – you will need to save it separately afterwards.



If you decide to save your report, a new window will pop-up asking you to enter a new Report Name (1). Report Unique Name (2) is generated automatically; hence no change has to be made there. You can also describe your report (3). Then it is important to *Select Folder* (4).

The *Select Folder* window will ask you to choose any of the folders in the list (4a). Once you pick your preferred folder, click on *Save* (4b). It will return you to the prior window, where you must also click on *Save* (5).



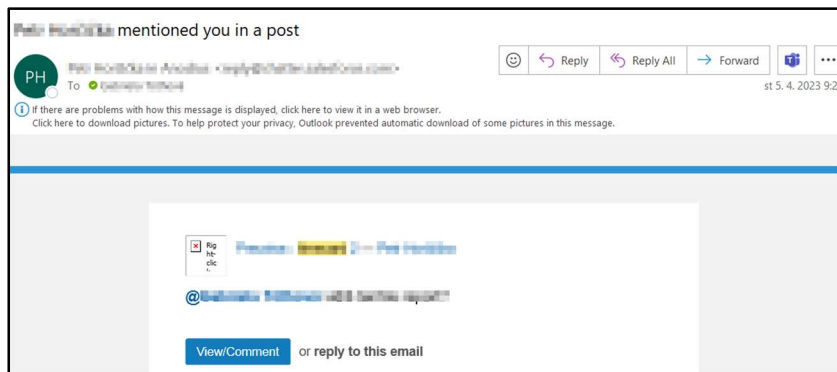
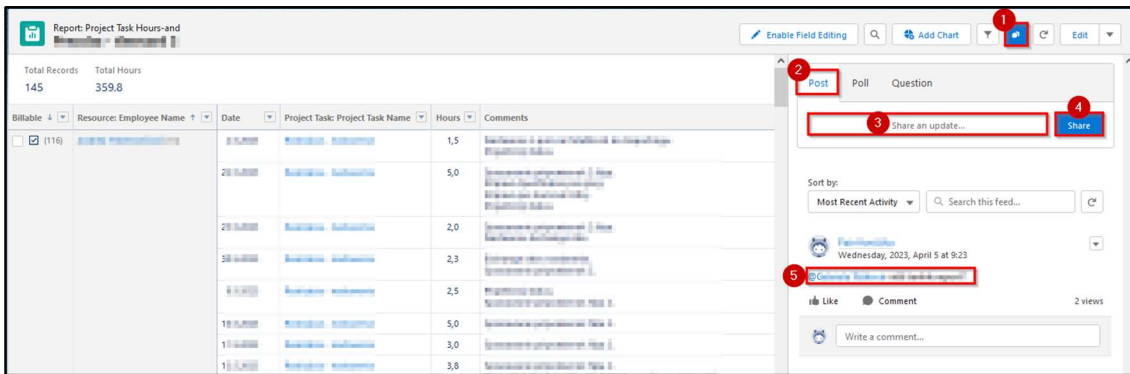
Your report should now be created and ready for use.

## Sharing A Report/Folder

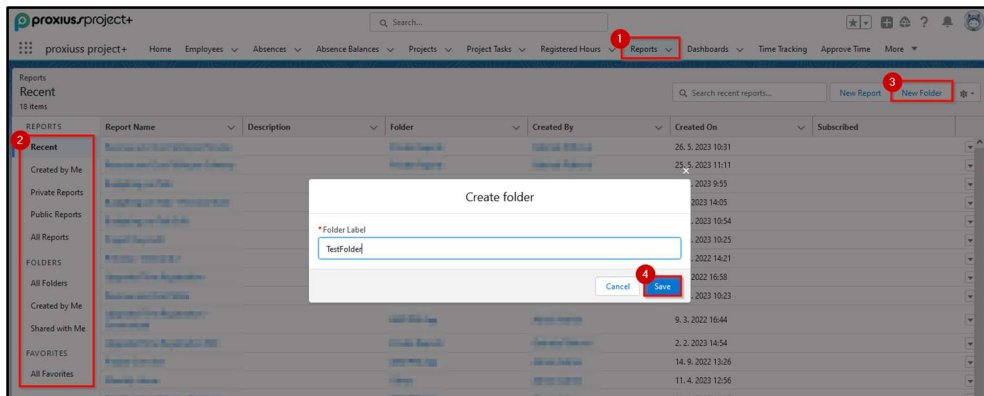
There are two ways to share a report: the *Collaboration* function or by creating a new folder to save the reports.

To share a report using the *Collaboration* function, the report must be saved in the 'Public Folder'; hence it must be available to everyone. Private reports cannot be shared.

Open the report you wish to share and click the *Collaboration* button (1). A menu will appear; ensure it is set to the *Post* tab (2). Enter your update in the textbox (3) and tag your colleagues by typing "@" followed by their name. Select the correct names from the list that appears. Once you have tagged your colleagues and included a message, click on the *Share* button (4). The update with the tagged employees will be displayed below (5), and an email notification will be sent to those who were tagged.

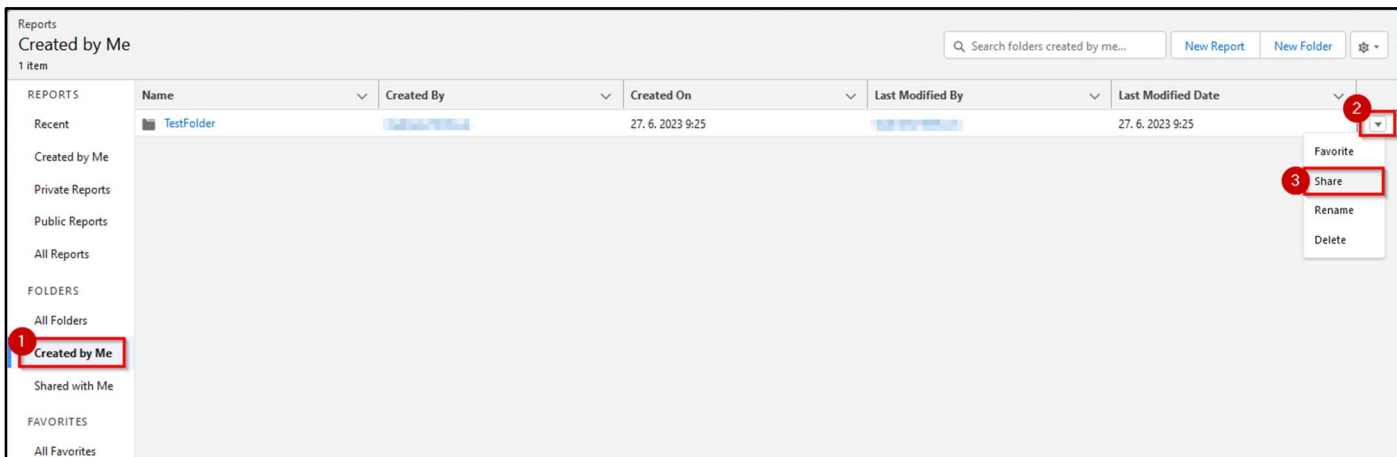


If you are managing multiple reports and find sharing through the *Collaboration* function to be tedious, it is recommended to create a new folder. Go to the *Reports* tab (1) without clicking the arrow next to its name. Regardless of which *Report* option you are in (2), you will still see the *New Folder* button (3). Click on it to open a pop-up window to enter a 'Folder Label.' Then click *Save* (4) to create the folder.



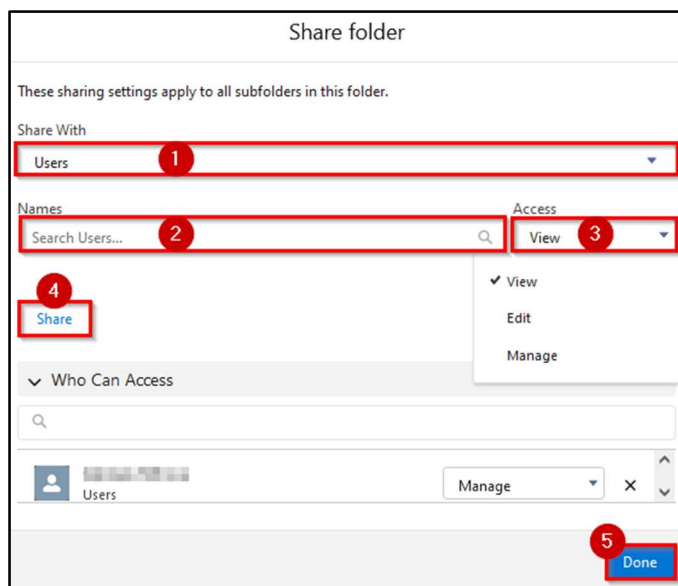


Your newly created folder will be accessible in the 'Created By Me' option (1) within the report list. Click the arrow at the end of the record line (2) to reveal the folder options. From there, select the *Share* option (3).



In the new pop-up window, you can choose whether to share your folder with specific users or public groups (1) within your organization. The search bar (2) will adjust accordingly. Adjust the *Access* settings (3) for the individuals or groups you share the folder with - 'View' allows them to only see the folder, 'Edit' enables them to make changes, and 'Manage' grants the ability to share and delete the folder. Click the *Share* button (4) for each user or group you want to share the folder with.

The list of recipients can be managed in the 'Who Can Access' section below. Once you are satisfied with the changes, click *Done* (5). The users will receive an email notification about the shared folder. The folder is now ready to be populated with reports of your choice, either by creating new ones or editing existing reports.



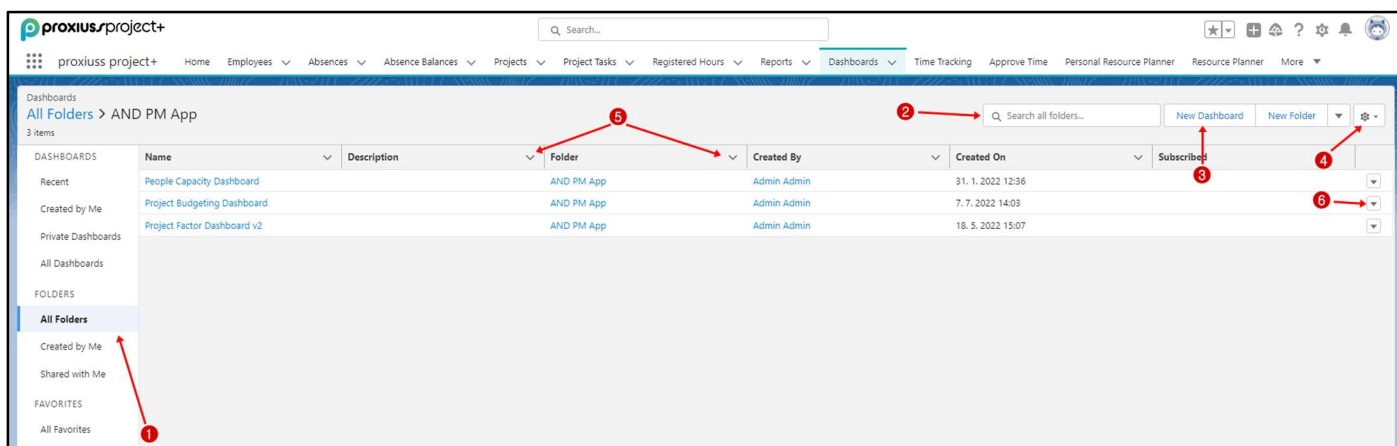
**IMPORTANT:** The report's content may vary depending on the user rights, as certain attributes are only visible to specific roles. For instance, employees may not have access to the financial information within the project.

## 6. Dashboards

The dashboard serves as a graphical user interface that offers concise and visually appealing views of key performance indicators (KPIs) pertinent to specific goals or business processes. Often referred to as a 'progress report' or 'report,' a dashboard represents a form of data visualization that presents data in a user-friendly and easily understandable format.

Within PROXIUSS PROJECT+, you can create and customize up to 20 dashboards, also known as reports. These dashboards provide a comprehensive overview of various aspects, such as tasks, projects, or other relevant data. By leveraging dashboards, you can gain valuable insights and effectively monitor your projects' or processes' progress and performance.

Click on the *Dashboards* tab to open the section.



On the left panel, you can see all available dashboards and folders (1).

Use the search field to find the requested dashboard according to name (2) or use the filters (5).

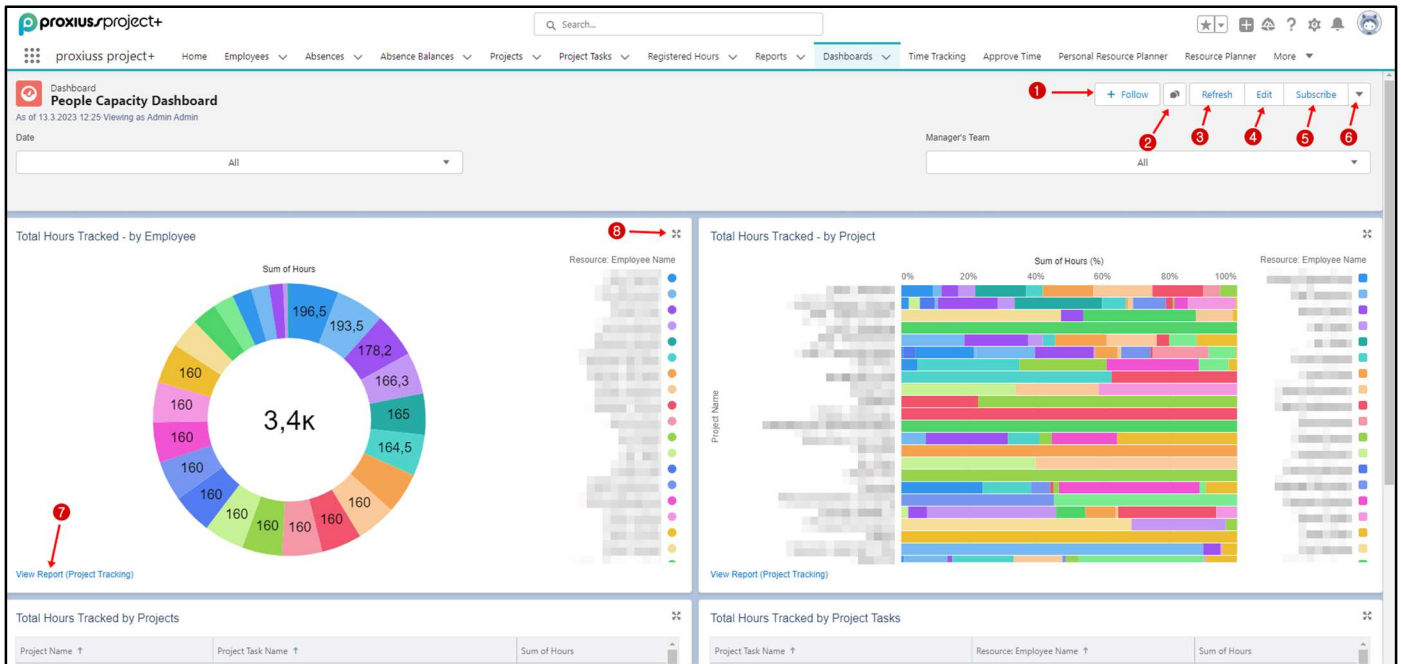
To create a new dashboard, click on *New Dashboard* (3).

Click on a gear icon (4) to select displayable fields in a filtering row (4) or to reset the column width.


By clicking on the arrow button (6), you can mark the requested dashboard as favorite, subscribe to the dashboard, schedule dashboard refreshes, and receive results.

To open a certain dashboard, click on its name.

Below, you can see an example of a dashboard view:




Use *Follow* button (1) to follow/unfollow certain opened dashboards.

When you click the  button (2), you will activate the collaborate function. *Collaborate* is an internal chat app that you can use for sharing information and for a chat with your team.

Click on the refresh button (3) to refresh the opened dashboard.

Click on an arrow button (6) to download the report in PNG format.

To see the dashboard source, click on *View Report* (7).

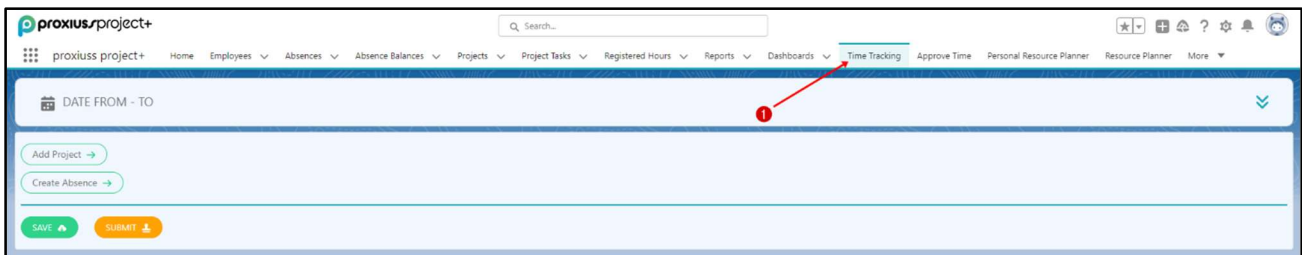
For the full-screen expansion of a given dashboard window, click on the  icon (8).

## 7. Time Tracking

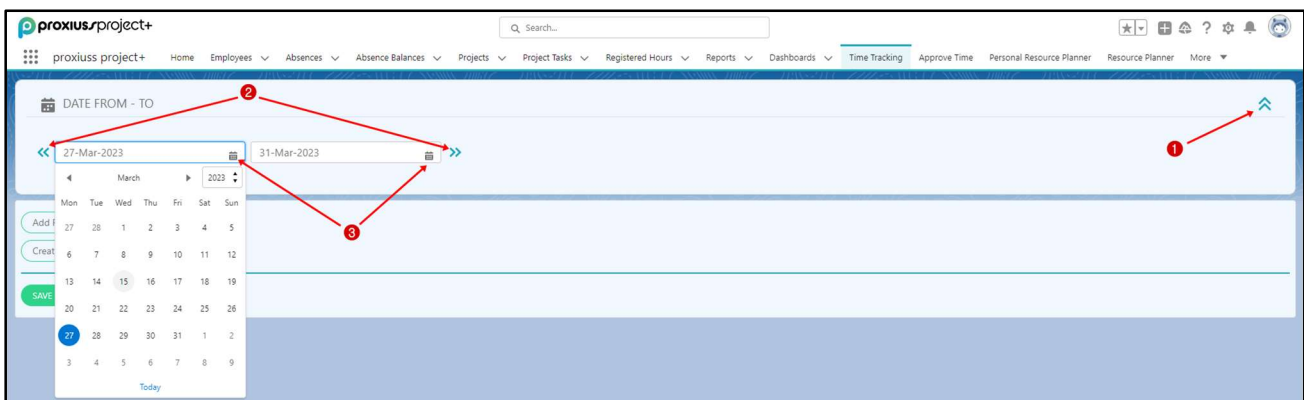
*Time Tracking* within PROXIUSS PROJECT+ offers an automated and efficient approach to monitoring working hours on a weekly basis. This feature allows team members to accurately record and track the time spent on projects while providing the flexibility to add detailed task descriptions or request absences as needed.

Once a week is completed, team members can submit their recorded working hours. Managers then have the ability to review and assess the work completed by each employee. The manager can choose to either approve, reject, or reassign the approval request based on their evaluation. For a comprehensive understanding of absence management, please refer to the dedicated [Absences](#) section.

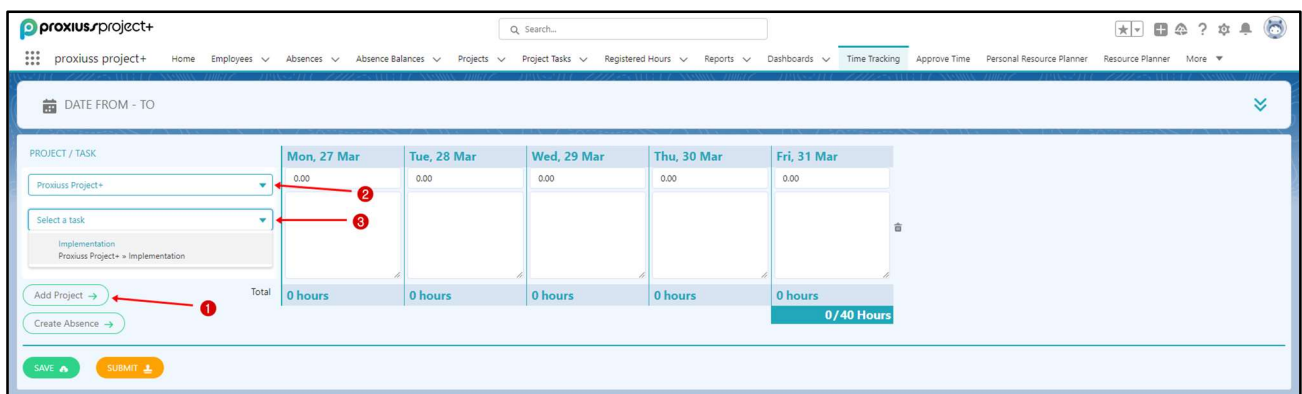
To track the work time, you must click on the *Time Tracking* tab (1).



The next step is to click on the drop-down arrow (1) and choose the correct period for time tracking. You can pick the week by clicking on side arrows (2), or you can also choose your desired date range by using the calendar (3). Per default, the date is set to the actual week every time you visit this tab.



To select the required project and task, click on *Add Project* button (1) and then select the project (2) and the task (3).

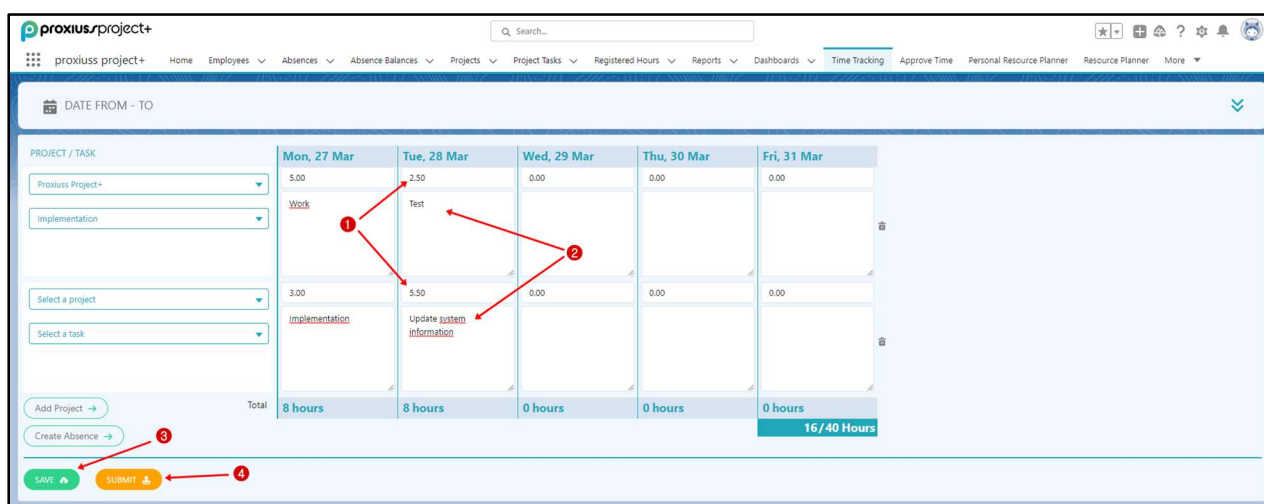


In case you need to choose more than one project/task, you have to click on *Add Project* button (1) again to add another project and task.

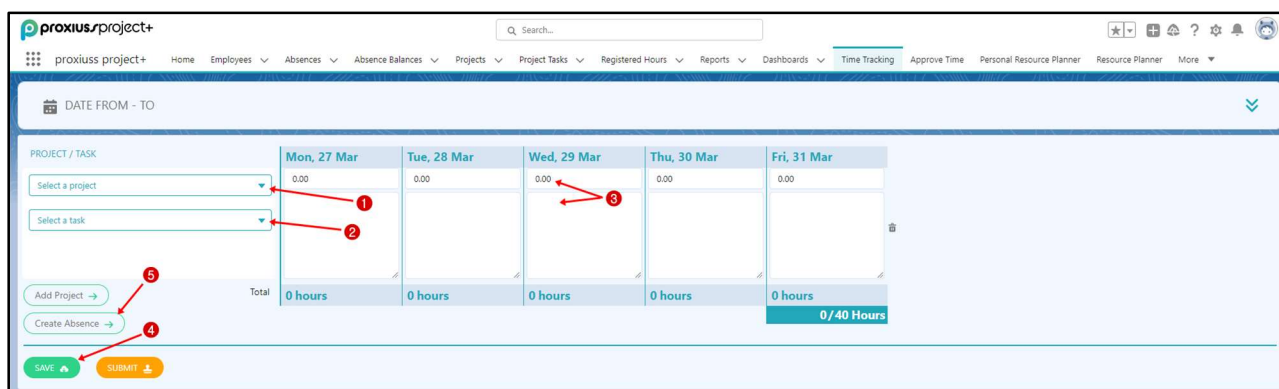
Please, always check whether the dates and days are correct. Now you can fill in the number of working hours (1) for each project/task and write a short description (2).

Then click on the *Save* button (3) to preserve your changes.

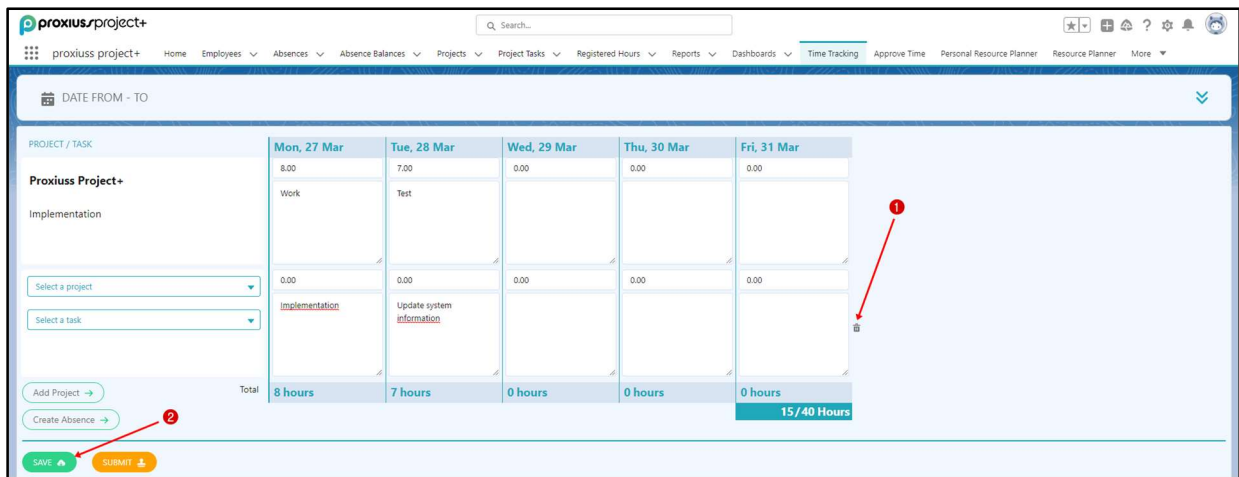
If you want to send your tracked work hours to your manager for approval, click on *Submit* button (4). Your inputs can be edited at any given time before they are submitted to your manager. However, if you want to edit your records after submission, you must ask your manager to unlock them.



To log the absences (e.g., vacation or illness), click on *Projects*, choose project for absences (1), and then choose the needed task (2). Also, here you have to fill in the working hours and description (3). Click on the *Save* button to save the changes (4).

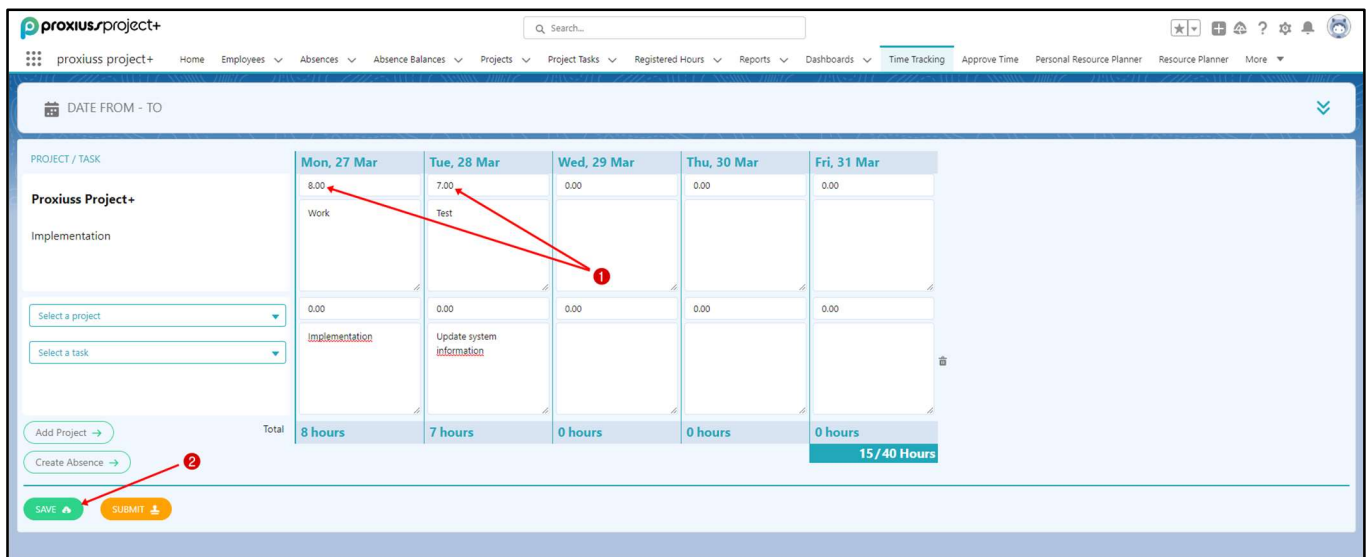


To erase the inserted records, click on the *Trash bin* icon (1) next to the project you want to delete. This will delete the whole selected row for the chosen period. Click on the *Save* button afterward (2).



You can change the data in working hours/description columns even after saving and before submitting them to your line manager. To do so, simply set the 0 (1) to the hours column and click on the Save button (2).

By setting 0 hours for the entire hour's line, the project will be deleted from your list automatically.



After saving your projects, tasks, and working hours for the chosen period, click on the Submit button in order to close the week and submit the working hours for approval to your line manager. The submitted column with information about the week becomes gray afterward.

### Recommendation:

**It is highly recommended to log, save and submit your working hours on a regular basis (i.e., daily/weekly).**

The underlying rationale for the recommendation lies in its ability to facilitate efficient monitoring and control of the project through the utilization of key performance indicator (KPI) metrics.

## Submitted/Approved Hours Change

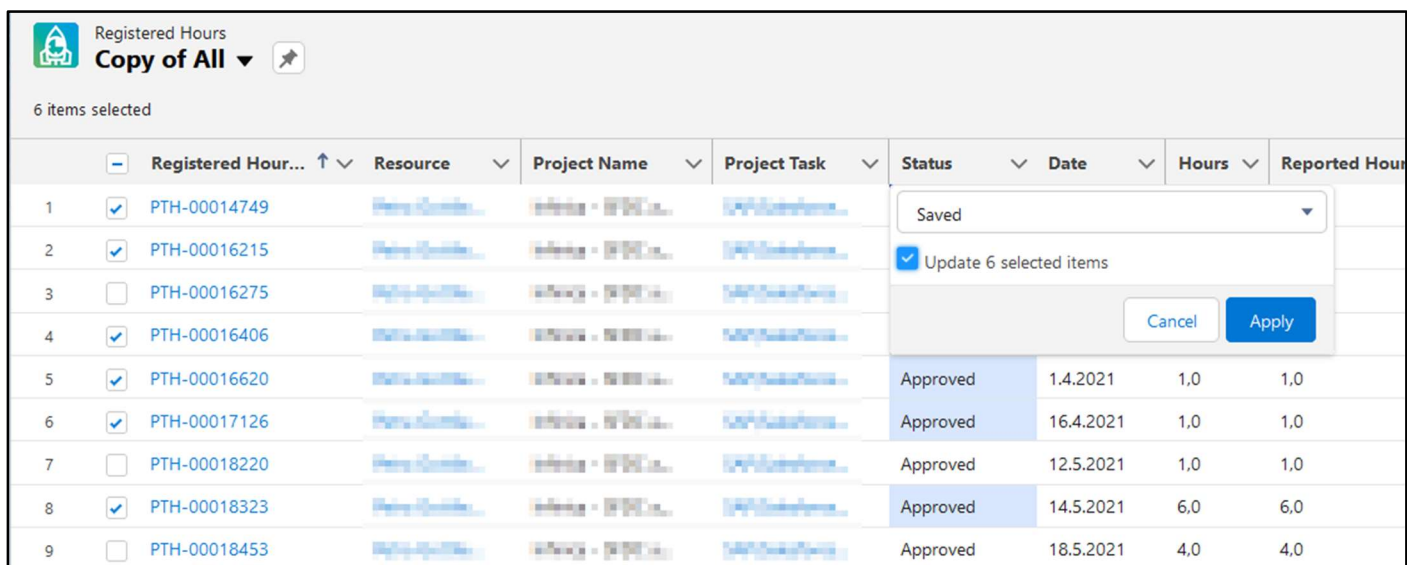
Once the logged time is 'Submitted' for approval or becomes 'Approved,' the data becomes locked for editing. In the case where the hours are incorrect, the change follows the steps as shown in the chapter [Reported Hours](#).

## Switching Tracked Hours to A Different Task

Ideally, employees are responsible for changing their tracked hours within the *Time Tracking* tab. If any changes need to be made, employees can edit their hours accordingly upon being notified about a new task, unless the tracked hours are already in a 'Submitted' or 'Approved' status.

However, if the tracked hours are in a 'Submitted' or 'Approved' status, the *Registered Hours* overview can be utilized. The detailed instructions for setting up a *Registered Hours* overview are outlined in the [Billable Flag change](#) chapter. In the overview, you will need to switch the status of the selected records to Saved.

Here, in the overview, you will have to switch the status to 'Saved' for the chosen records:



The screenshot shows the 'Registered Hours' overview interface. At the top, there is a header with a house icon, the text 'Registered Hours', and a 'Copy of All' button. Below the header, it says '6 items selected'. The main part of the interface is a table with columns: Registered Hour..., Resource, Project Name, Project Task, Status, Date, Hours, and Reported Hour. The table contains 9 rows of data. A modal is open over the table, showing a dropdown menu with 'Saved' selected, a checked checkbox for 'Update 6 selected items', and 'Cancel' and 'Apply' buttons.

	Registered Hour...	Resource	Project Name	Project Task	Status	Date	Hours	Reported Hour
1	<input checked="" type="checkbox"/> PTH-00014749	...	...	...	Saved			
2	<input checked="" type="checkbox"/> PTH-00016215	...	...	...				
3	<input type="checkbox"/> PTH-00016275	...	...	...				
4	<input checked="" type="checkbox"/> PTH-00016406	...	...	...				
5	<input checked="" type="checkbox"/> PTH-00016620	...	...	...				
6	<input checked="" type="checkbox"/> PTH-00017126	...	...	...				
7	<input type="checkbox"/> PTH-00018220	...	...	...	Approved	1.4.2021	1,0	1,0
8	<input checked="" type="checkbox"/> PTH-00018323	...	...	...	Approved	16.4.2021	1,0	1,0
9	<input type="checkbox"/> PTH-00018453	...	...	...	Approved	12.5.2021	1,0	1,0
					Approved	14.5.2021	6,0	6,0
					Approved	18.5.2021	4,0	4,0

This change will allow modifications to be made for each unlocked Registered Hours record.

**IMPORTANT:** To switch the tracked hours, avoid modifying the project task to a new one, as this will not unlink the original hours from the old task.

## 8. Absences

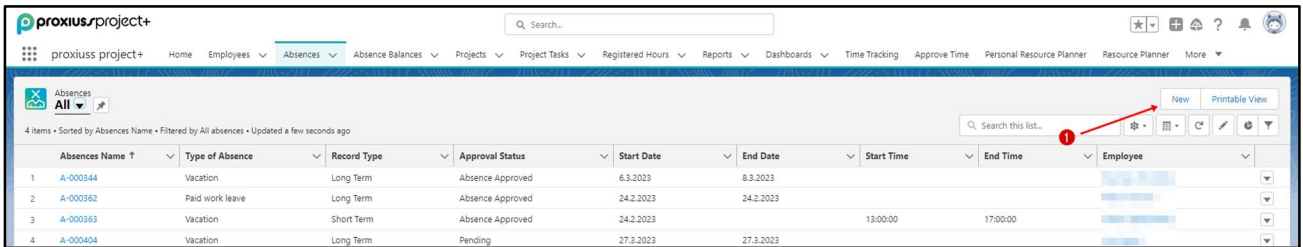
**IMPORTANT:** For the absences to work properly, you must have the Professional version of Salesforce or higher. You also need to set up the Approval Process for full functionality of absences.

The Absences tab provides a comprehensive view of all absences logged by you and your team members, assuming you possess the team leader role. This tab is a centralized hub for managing and tracking absences within your team.

Additionally, you can request a new absence by simply clicking on the New button (1). This feature enables you to easily initiate the process of requesting time off and provides a streamlined way to manage and track absences.

To request an absence, you need to:

1. Click on New (1).



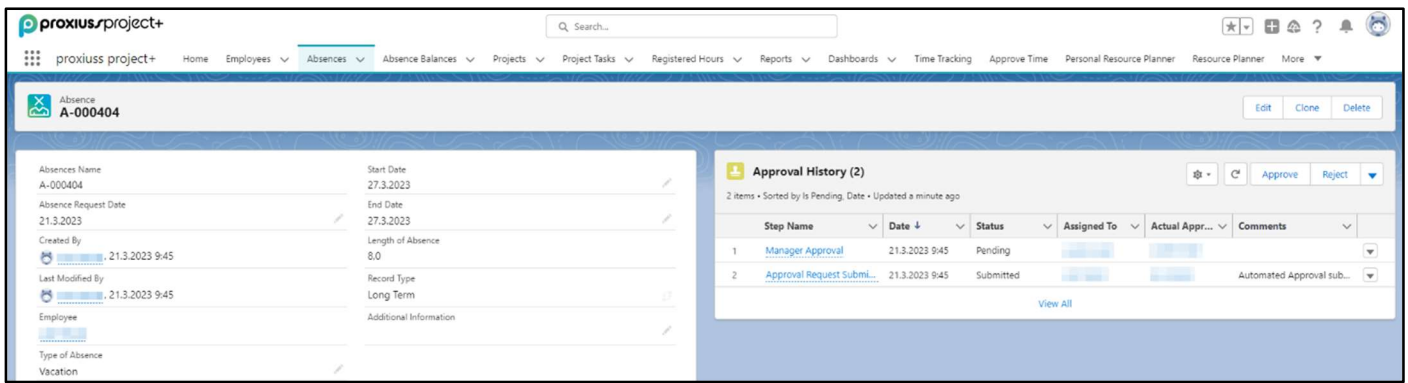
2. Select whether the absence is Long Term or Short Term and click Next,
3. Insert information about your absence – Employee, Type of Absence, Start Date, and based on your choice in the step before, you get End Date or Start Time with End Time. Field *Additional Information* is optional. Then click on the Save button.

The screenshot shows the 'New Absence: Long Term' form. It has a title bar 'New Absence: Long Term' and a section 'Information'. The form contains several fields: 'Absences Name' (text input), '\* Start Date' (calendar icon), 'Absence Request Date' (text input with value '1.6.2023'), '\* End Date' (calendar icon), '\* Employee' (search input with value 'Search Employees...'), 'Record Type' (dropdown with value 'Long Term'), '\* Type of Absence' (dropdown with value '--None--'), and 'Additional Information' (text area). At the bottom, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

After your absence is complete and saved, your manager should acknowledge it via notification in their e-mail, on the Salesforce platform, and in the Salesforce mobile application.

The picture below shows the absence entry details:



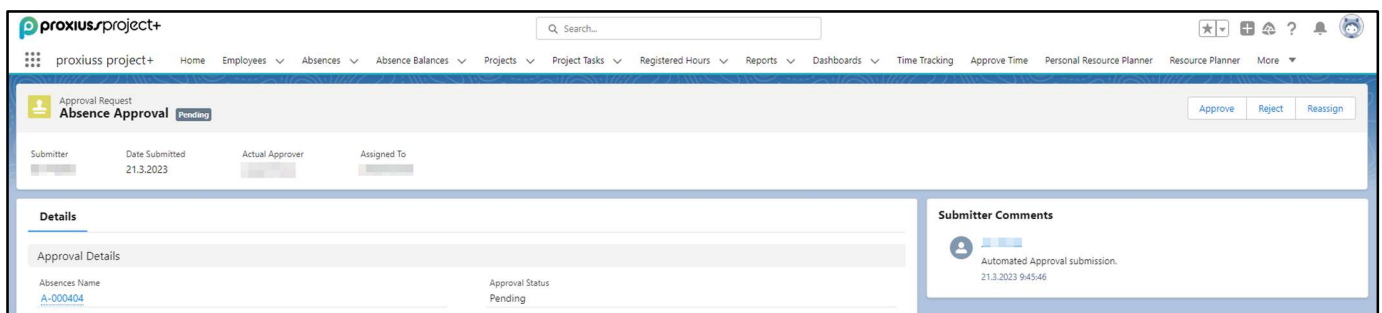


## Approve Absence

When an absence request is submitted for approval, the respective manager is promptly notified through multiple channels, including Salesforce notifications, email, and the Salesforce mobile app. This ensures that managers are promptly informed of pending absence requests and can take appropriate action.

The manager holds the authority to review and respond to the absence request by either approving, rejecting, or reassigning the approval request as necessary. This allows for efficient and timely decision-making, ensuring that the absence management process remains streamlined.

Once an absence request is approved, a corresponding record is automatically created in both the *Time Tracking* and *Project Task Hours* tab. This integration ensures accurate and comprehensive tracking of the approved absence, facilitating seamless coordination between absence management and time-tracking processes.

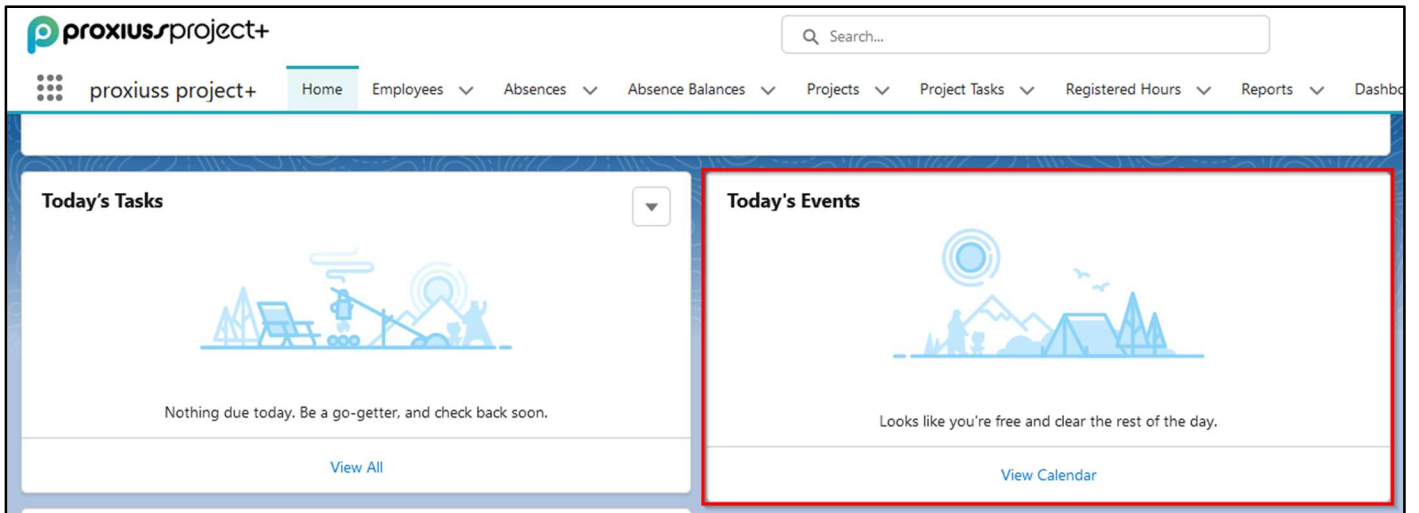


**IMPORTANT:** If an approved absence needs to be modified for any reason, the employee should reach out to their local administrator to request deletion of the absence. The administrator shouldn't edit the absence – the change wouldn't be reflected in the system.

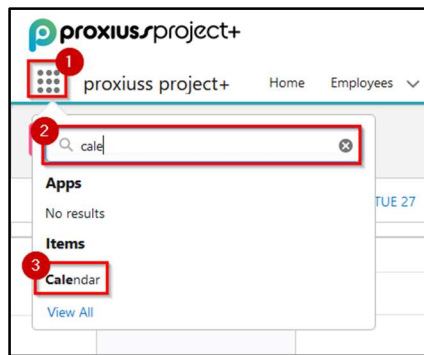
## Absence Calendar

Managers are encouraged to make use of the calendar feature in the application. By reviewing their subordinates' absence hours, they can improve resource allocation and stay informed about their team's availability. The calendar provides a quick overview of upcoming deadlines, phases, and more.

Employees can also utilize the calendar to track their important tasks, which will be displayed on the *Home* page under the *Today's Events* section when they log in:



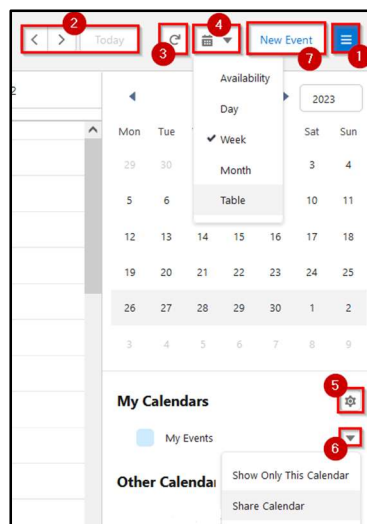
To access the *Calendar*, click the dots menu (1) to reveal a dropdown menu. Then, type "calendar" in the search bar (2) and select the *Calendar* item (3) displayed below.



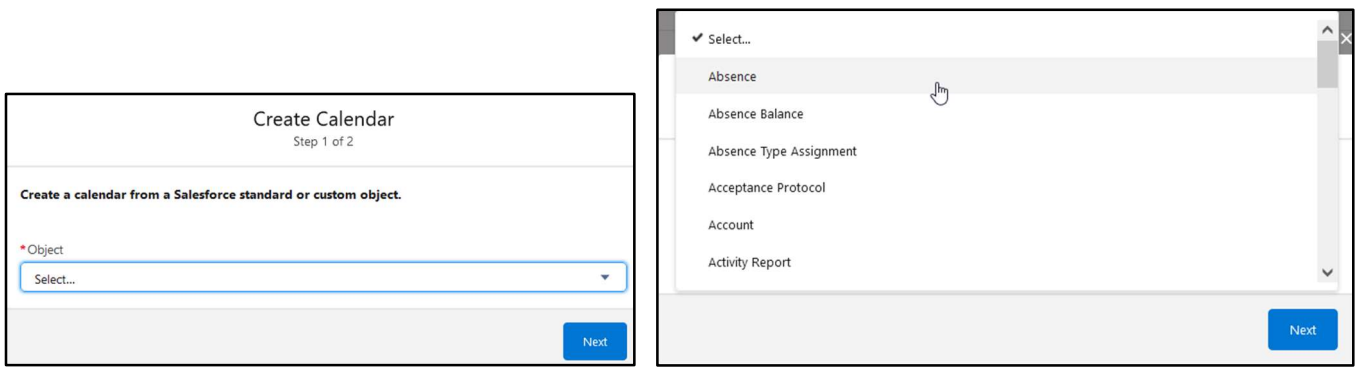
A calendar will open, and the most important buttons are located on the left side. The hamburger menu (1) allows you to toggle the calendar controls. Use the arrows to navigate between weeks and the *Today* button (2) to return to the current day.

The *Refresh* button (3) updates the calendar(s), and the calendar icon (4) allows you to switch between different calendar views.

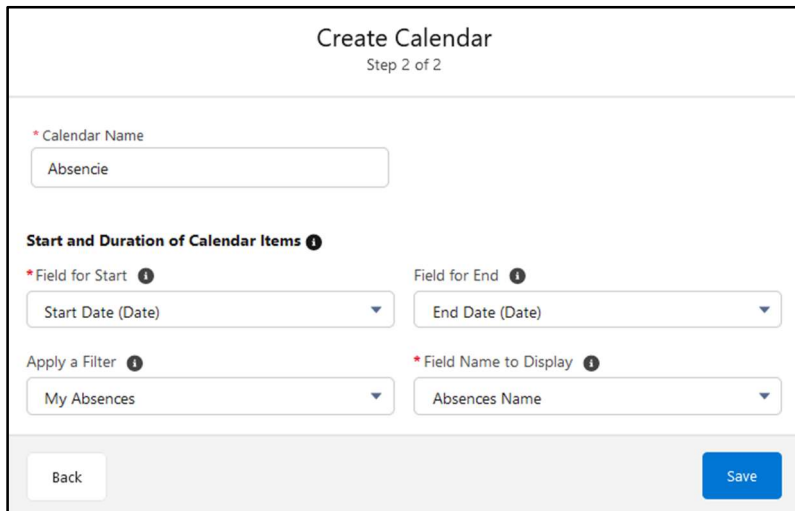
The control button (5) enables you to create a new calendar, and the arrow next to each calendar (6) provides options to prioritize or share the calendar with other users. To create a new event (7), click on the respective button or simply click anywhere on the calendar to open the prompt window.



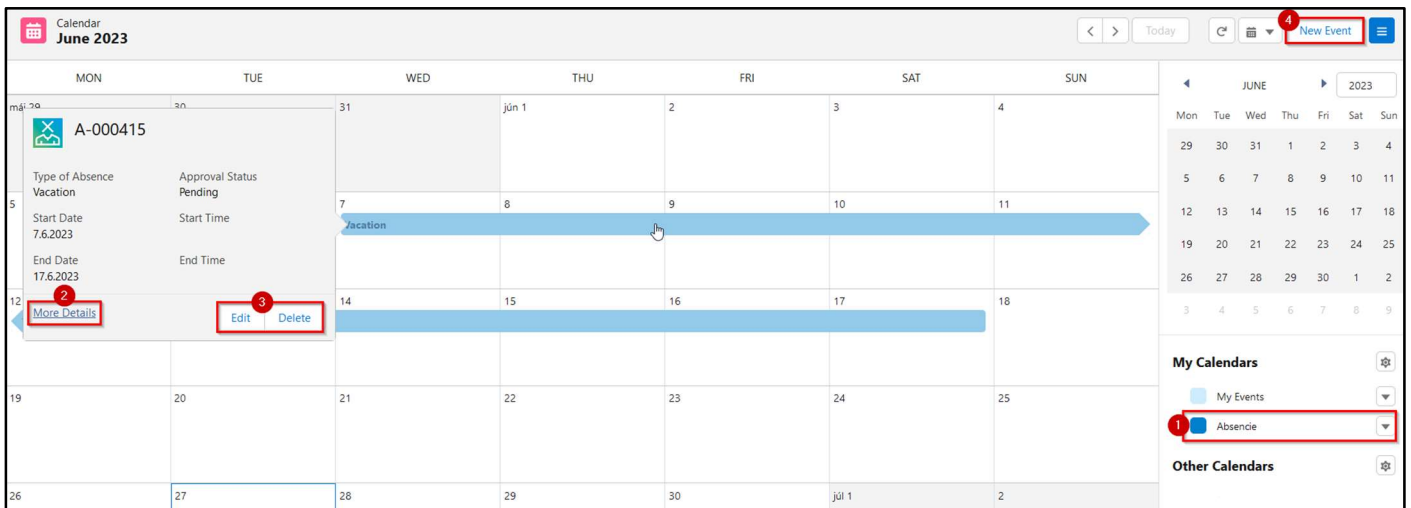
If you want to create a dedicated calendar for absences, click on (5) as shown in the screenshot above and select the Absence object as the first step:



After completing the first step, you will be prompted to name your calendar, select the start and end fields, apply a filter, and choose a field name to display. Here is an example of basic settings for listing absences that will be shown with their type:



Once you click on *Save*, your newly created *Calendar* will be displayed. If you have already created absences, as mentioned earlier in this chapter, you will see them listed with the color corresponding to your calendar (1). Hovering over a record will provide additional information about it. Clicking on *More Details* (2) will take you to the *Absence* detail overview. You can also directly edit or delete a record using the provided buttons (3).



To create a new event, you have two options: click on the New Event button or select any blank space on the calendar. A pop-up window will appear, prompting you to enter the necessary information.

The screenshot shows the 'New Event' form with the following fields and options:

- Calendar Details**
  - Assigned To:** A dropdown menu with a user profile icon and a close button (X).
  - Subject:** A text input field with a search icon.
  - All-Day Event:** A checkbox that is checked.
  - Start:** A date picker showing '16.6.2023'.
  - End:** A date picker showing '16.6.2023'.
  - Activity Currency:** A dropdown menu showing 'EUR - Euro'.
- Related To:** A search bar with the text 'Search Absence Balances...' and a search icon. Below it is a '+ New Absence Balance' button.
- Private:** A checkbox that is unchecked.
- Disclaimer:** A note stating: 'Your private event details are also visible to your Salesforce admin and users with the View All Data permission. For more information, contact your Salesforce admin.'

At the bottom of the form, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

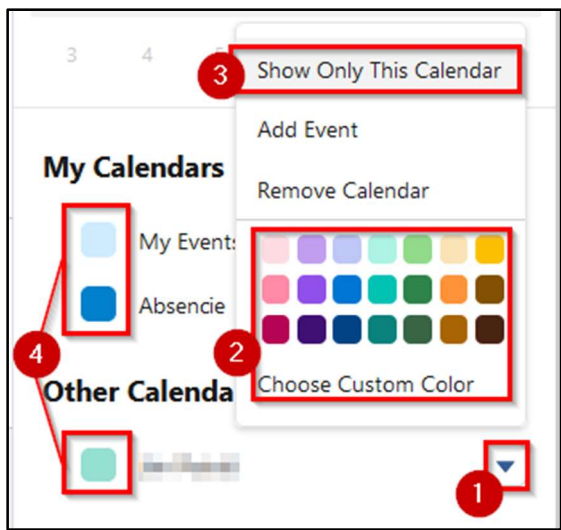
After clicking Save, the event will be added to your calendar. Additionally, you can integrate other employees' calendar information into your own. To do this, click the control button next to *Other Calendars* and select *Add Calendars*. At this stage, enter the user's name, choose it from the list, and click Save.

The screenshot shows the 'Other Calendars' section with a gear icon (control button) and an 'Add Calendars' button.

The screenshot shows the 'Add Calendars' form with the following fields and options:

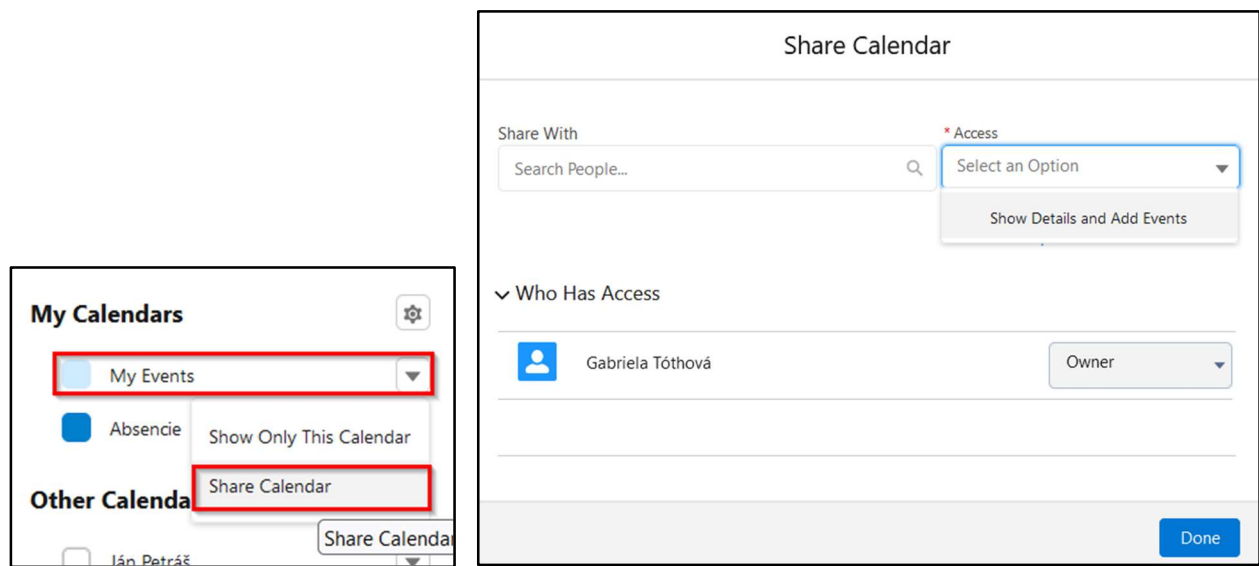
- Select Calendar Type:** A dropdown menu with a user profile icon and a search icon.
- Search People:** A search bar with the text 'Search People...' and a search icon.
- Search Results:** A list of user profile icons and names.

This will merge the employee's calendar with yours, and you can further customize it by clicking the arrow next to its name (1). In the pop-up menu, you can change the calendar's color or choose to show only this calendar (3). Alternatively, you can click the color (4) on the left side of the calendar's name to filter your calendar view to display only the records per desired employee(s).



**IMPORTANT:** Note that the ability to view other employees' calendars is contingent upon user rights and the employee's decision to share their calendar.

To share your calendar, select the arrow next to the *My Events* calendar and choose the *Share Calendar* option. A pop-up window will prompt you to select the person you wish to share your calendar with and customize their access rights. Once you have made the desired adjustments, click on *Done* to confirm.



## 9. Personal Resource Planner

This section focuses on effectively managing employees who work on projects, including their time availability and allocation on a weekly basis. The human resources planning section provides a comprehensive platform for visualizing and organizing employee resources. It allows project managers and team leaders to efficiently allocate resources based on individual projects' requirements. By planning employee availability on a weekly basis, it ensures optimal utilization of workforce capacity while aligning with project timelines and goals.

One of the key advantages of the Personal Resource Planner tab is its ability to provide a clear overview of resource availability for a period of 12 weeks ahead. This long-term visibility enables effective resource planning, allowing project managers to identify potential resource constraints and make informed decisions regarding project timelines and resource allocation.

To facilitate seamless planning and execution, the responsibility of filling out the human resources planning section rests with the employees themselves. This empowers them to provide accurate information regarding their time availability and ensures that the planning process is collaborative and reflects individual constraints and commitments.

1. To start, click on the drop-down arrow (1).
2. Choose the first day of the period (2).
3. Click on the *Show Projects* button (3).
4. Fill in your available work time for the project in column EMP (Employee) (4) for individual weeks.
5. To save changes, click on the *Save* button (5).

WEEK / DATE	12	20.3. - 26.3.	13	27.3. - 2.4.	14	3.4. - 9.4.	15	10.4. - 16.4.	16	17.4. - 23.4.	17	24.4. - 30.4.	18	1.5. - 7.5.	19	8.5. - 14.5.	20	15.5. - 21.5.	21	22.5. - 28.5.	22	29.5. - 4.6.	23	5.6. - 11.6.
EMP	40		40		32		32		40		40		32		40		40		40		40		40	
TYPE	PM		PM		PM		PM		PM		PM		PM		PM		PM		PM		PM		PM	
SUMMARY	0%	80%	0%	70%	0%	44%	0%	100%	0%	88%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	
Proxiuss Project+	0	32	0	28	0	14	0	32	0	35	0	0	0	0	0	0	0	0	0	0	0	0	0	

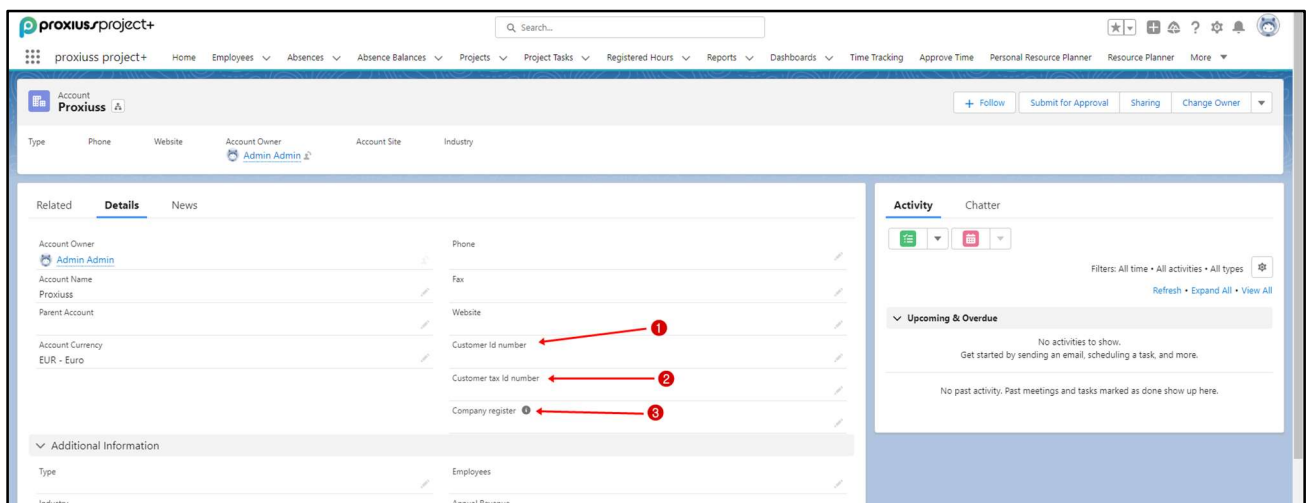
## 10. Accounts

The Accounts section is a standard feature in Salesforce, specifically designed for managing client-related data, which serves as a central repository for storing client information. For more context, it provides a dedicated space to store and organize essential information about your clients, ensuring easy access and effective client management.

Within the Accounts section, there are three additional fields that play a crucial role in generating *Activity Reports* and *Acceptance Protocols*. These fields include:

- Customer Id number (1): This field captures a unique identifier assigned to each customer, enabling streamlined tracking and identification.
- Customer tax Id number (2): This field stores the tax identification number associated with each customer, facilitating compliance and financial reporting.
- Company Register (3): This field records the registration details of the client's company, ensuring accurate and up-to-date information about their legal entity.

It is the responsibility of the project manager or the designated individual responsible for maintaining client information to fill in these fields. By populating these fields with the relevant data, you ensure that *Activity Reports* and *Acceptance Protocols* are comprehensive and accurate.




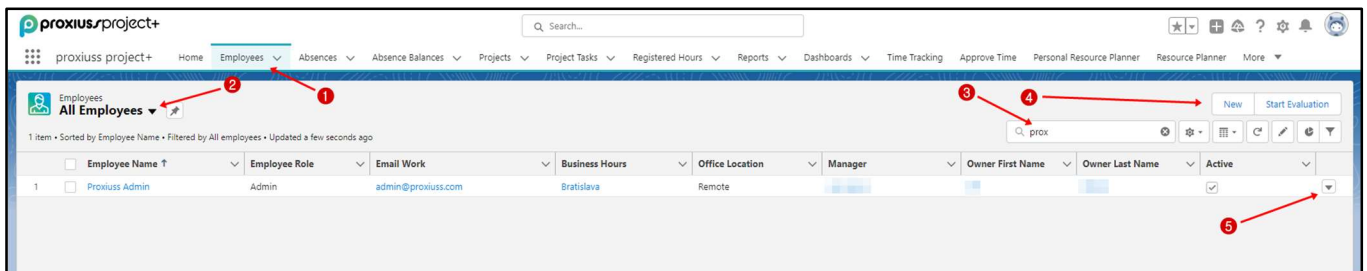
## 11. Employees

The Employees section (managerial section) serves as a comprehensive tool for managing all employees involved in projects throughout the entire company.

Open the section by clicking on the *Employees* tab (1).

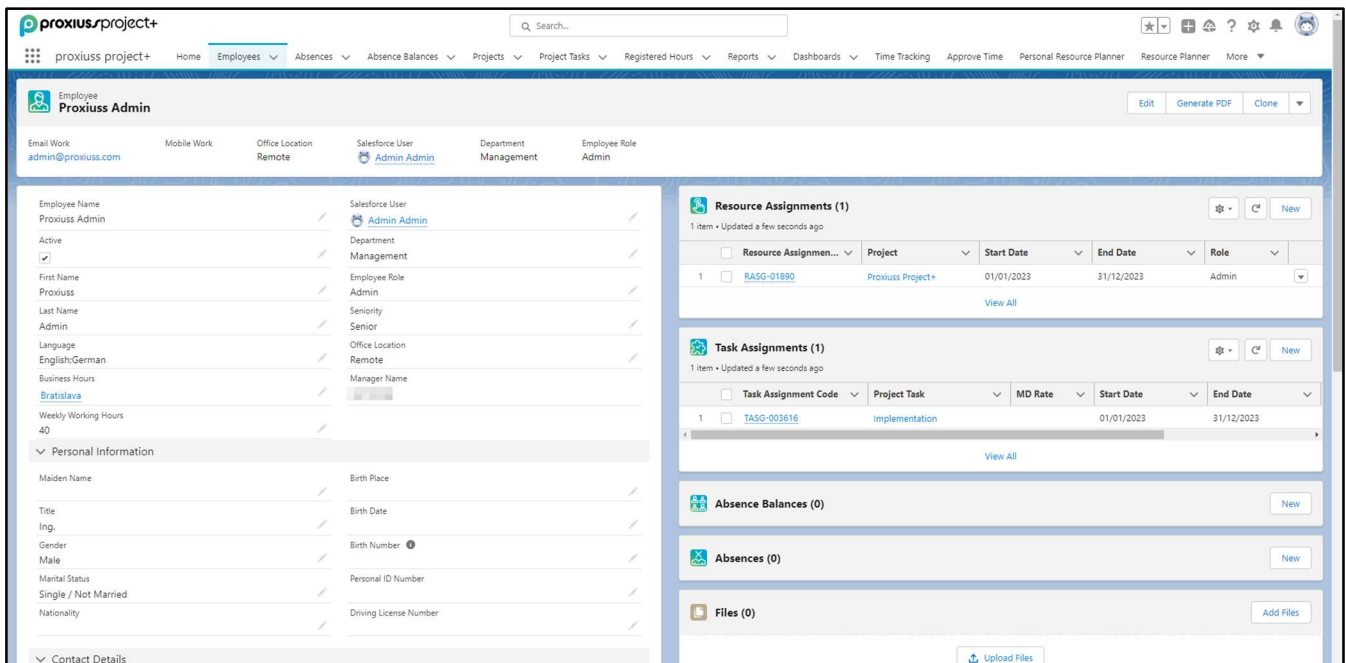
You can sort employees using the list views (2) and pin your favorite list to show up every time you click on the tab or use the search list (3).

To add a new employee, click on the button *New* (4). If you click on the quick actions  icon (5), you can edit the selected employee's details, or you can delete the employee or change the manager of an employee.



### Employee details

Clicking on an employee's name grants you access to a comprehensive overview of important details, such as assignments, tasks, absences, notes, and more.





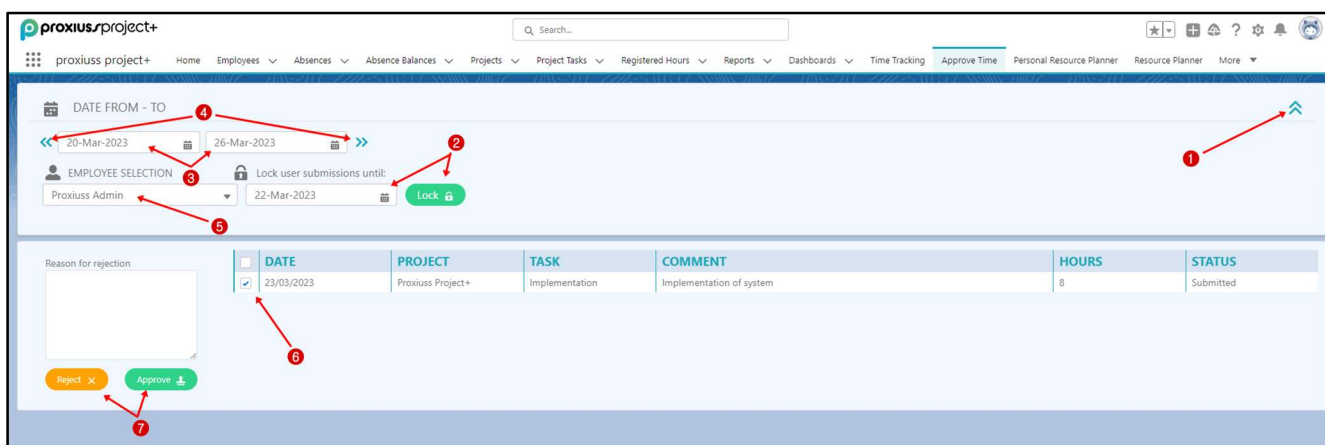
## 12. Approve Time

The *Approve Time* section is specifically designed for managers to oversee and approve the working hours of their team members. Within this section, managers have the flexibility to selectively approve or reject the submitted working hours as per their review.

Additionally, managers possess the capability to *Lock* user submissions (2) until a specified date. This feature temporarily restricts the ability to log time and submit hours, ensuring better control and alignment with specific time-tracking periods. Once the designated period is reached, the submission process reopens, allowing team members to resume logging their working hours.

By utilizing the *Approve Time* section, managers gain a comprehensive and transparent view of all the work performed by their team. This tool aids in monitoring and maintaining a clear overview of the team's activities, facilitating effective time management and resource allocation.

1. To start, click on the drop-down arrow (1).
2. Choose *Date From* and *Date To* (3) to show working hours from the selected period – you can also choose the week by clicking on *Previous Week / Next Week* (4).
3. Select the employee (5) whose working hours require approval.
4. Select working hours (6) to approve/reject.
5. Click on the button *Approve/Reject* (7).

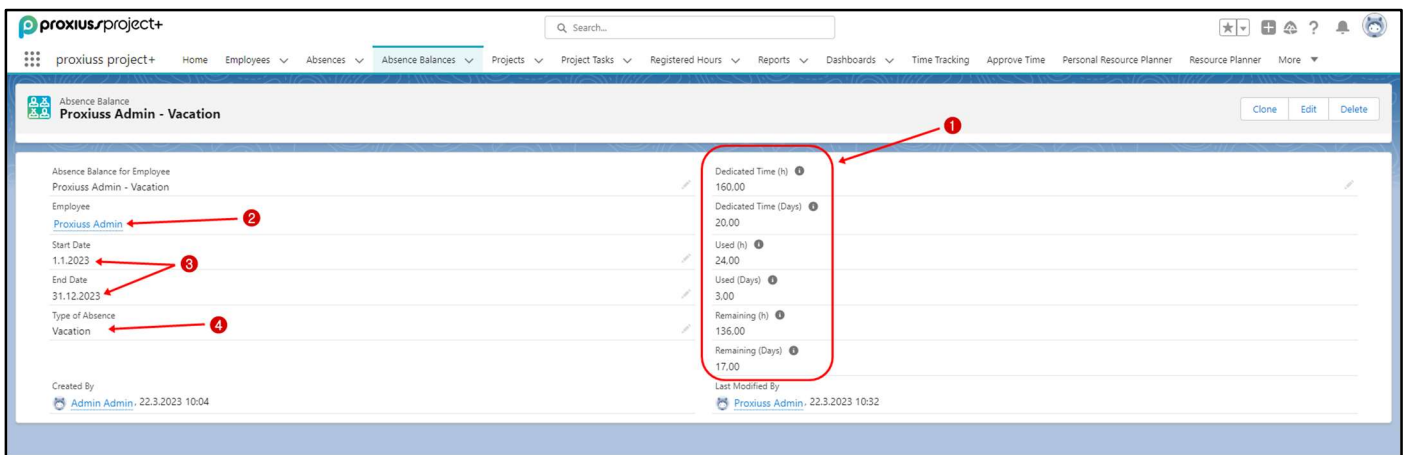


### 13. Absence Balances

The *Absence Balances* tab provides a comprehensive view of employee absences. Within this section, you can access detailed information about the total, used, and remaining hours for a specific absence (1).

In addition, the Absence Balances section allows you to view absence-related details specific to individual employees (2) and set an overview time frame using the *Start Date* and *End Date* (3) and *Type of Absence* (4).

It's important to note that the information displayed in this tab pertains to the absences available to an employee within the current year. This ensures that you have access to up-to-date and relevant absence-related data.



## 14. Resource Planner

Resource Planning (RP) is a crucial process that involves assigning tasks to team members based on their capacity, skill sets, and suitability for the job at hand. By optimizing resource allocation, RP enhances efficiency, enabling teams to effectively manage utilization rates, track capacity, and monitor project progress to ensure projects stay within budget and on track.

Within PROXIUSS PROJECT+, the Resource Planner tab is specifically designed to cater to the needs of project managers. This tab provides a comprehensive overview of resource planning, offering valuable insights into task assignments and resource allocation.

By utilizing the Resource Planning Scheduler, project managers can effectively visualize and manage the allocation of resources. This empowers them to make informed decisions, optimize workforce utilization, and ensure the successful execution of projects. You can see the resource planning overview below.

DATE	12	13	14	15	16	17	18	19	20	21	22	23						
TYPE	PM	EMP	DISP	PM	EMP	DISP	PM	EMP	DISP	PM	EMP	DISP	PM	EMP	DISP	PM	EMP	DISP
Admin Proxiuss	38%	0%	40	75%	0%	16	88%	0%	32	100%	0%	32	70%	0%	40	75%	0%	40
Proxiuss Project-	15	0	12	0	28	0	32	0	28	0	30	0	20	0	0	0	0	0

To modify the anticipated hours for each employee, follow the steps listed below:

1. First, open the top bar using the arrow (1) on the right.
2. To assign or remove employees from the resource planner, you need to click on the employee name, followed by the arrow button (2), and then on the *Show Projects* button (4).
3. Select the dates for project planning by clicking on the calendar icon (3) and then on the *Show Projects* button (4). Please note that you can select *Date From* only. On the other hand, *Date To* is automatically determined as 12 weeks from *Date From*.
4. In order to check which projects are assigned to which employees, you need to select one of the employees by clicking on an arrow icon (5). If the project is assigned to a certain employee, then you will be able to see the project name.

A project manager should allocate estimated project working hours for a relevant employee by filling in working hours in the column PM (6). In fact, a project manager can fill in estimated working hours for up to 12 weeks ahead.

**IMPORTANT:** Please be cautious when scheduling project work during the week when an employee is absent. In such cases, the usual percentage in the PM column will be replaced with "N/A" (not available).

N/A	N/A	0	90
-----	-----	---	----

After working hours are allocated, you need to save them by clicking on the Save button (7).

**Abbreviations used in Resource Planner (8):**

- **PM** = PROJECT MANAGER - allocated working time defined by the project manager for the employee in % for the chosen project.
- **EMP** = EMPLOYEE - allocated working time in percentage defined by the responsible employee for the chosen project.
- **DISP** = DISPONIBLE TIME - the total disponible working hours for a certain week. Working hours are defined automatically by the system. Working hours are counted based on the weekly calendar and planned vacations for the certain employee (meaning that the working time is reduced in case of bank holidays or planned vacations).

## 15. Confirmation of Work

The PROXIUSS PROJECT+ application incorporates two distinct work confirmations: the *Acceptance Protocol* and the *Activity Report*. These confirmations serve different purposes within the project workflow.

The *Acceptance Protocol* is primarily utilized to confirm the completion of work milestones throughout the project. It provides a structured framework to validate and acknowledge the achievement of specific project milestones.

On the other hand, the *Activity Report* is used to confirm work on a time and material basis within agreed timeframes. This report verifies work completed within specified periods, which can be repeated until the entire project is concluded. It offers transparency and tracking capabilities for monitoring project progress and resource utilization.

### Acceptance Protocol

The purpose of this section is to create a document for the client to validate the order's pricing. Each acceptance protocol includes all basic information related to the project.

Use the fields for inserting the relevant information, including project name (1), client name (2), date of creation of the acceptance protocol (3), date of creation/requirements (4), order subject (5), additional information for the client (6) and link to invoice (7).

Use the Print Acceptance Protocol button (8) to generate the acceptance protocol.

The screenshot shows the 'Acceptance Protocol v1' form in the PROXIUSS PROJECT+ application. The form is divided into two main columns. The left column contains fields for 'Acceptance Protocol Name', 'Project', 'Project Task', 'Reported Status', 'Send To Customer', 'Milestone Revenue Sum', and 'Title Name'. The right column contains fields for 'Customer', 'Contract', 'As of the date', 'Date of issue', 'Subject', 'Subject of delivery', and 'Invoice URL'. A 'Print Acceptance Protocol' button is located at the top right of the form. Red arrows with numbers 1 through 8 point to specific fields: 1 points to 'Project', 2 to 'Customer', 3 to 'As of the date', 4 to 'Date of issue', 5 to 'Subject', 6 to 'Subject of delivery', 7 to 'Invoice URL', and 8 to the 'Print Acceptance Protocol' button. Below the main form is a section for 'Additional Customer Information' with fields for 'Customer Id number', 'Customer tax Id number', and 'Company register'. At the bottom, there are fields for 'Created By' and 'Last Modified By', both showing 'Jan Petráš' and the date '19.07.2023'.

### Activity Report

The Activity Report summarizes the reported hours that will be billed to the client. The activity report contains the following fields that are to be filled:

1. *Project* (1) for which the activity report is being generated.
2. Name of the *Customer* (2) for whom the activity report is issued.

3. Name of the *Contract* (3) and *Date* (4) of that contract.
4. *Status* (5) of the activity report, whether it has already been sent to the customer, approved by the customer, or invoiced.
5. On the bottom of the work field are the *Transactions* (6) with the reported hours counted in the activity report.

To assign a transaction to an activity report, click the *New* button (7).

To generate the activity report, click on the *Print Activity Report* button (8).

The screenshot shows the 'Activity Report' page in Proxiuss Project+. The interface is divided into several sections:

- Activity Report Details:** A form with fields for Activity Report Name, Project, Reported Status, Title Name, Show Costs, Show Hours, Show MD Rate, Customer, Manager, Contract, As of the date, Subject, Invoice URL, Group by Tasks, and Group by Employees. Red callouts 1 through 5 point to the Project, Reported Status, Contract Name, and As of the date fields respectively.
- Buttons:** At the top right of the form, there are buttons for 'Print Activity Report' (callout 8), 'Edit in Report', 'Edit', 'Clone', and 'Delete'.
- Reported Tasks (1):** A section showing one task: 'Manager Main Task 2'. A red callout 7 points to the 'New' button in the top right of this section.
- Transactions (1):** A table with columns: Transaction Name, Registered Hours, Reported Hou..., MD Rate, Acceptance Revenue, Acceptance comment, and Reported Status. A red callout 6 points to the 'Transactions (1)' header.
- Expenses (0):** A section with a 'New' button.
- Files (0):** A section with an 'Add Files' button and an 'Upload Files' button.

## 16. Transactions

Transactions is an object used to link the reported hours from the *Project Task Hours* object to the *Activity Report* object. It displays information about a specific reported time.

The screenshot displays the Proxius project+ interface. The top navigation bar includes a search field and various menu items: Home, Employees, Absences, Absence Balances, Projects, Project Tasks, Registered Hours, Reports, Dashboards, Time Tracking, Approve Time, Personal Resource Planner, Transactions, and More. The main content area shows a Transaction record for ID RH-T-000020. The record details are as follows:

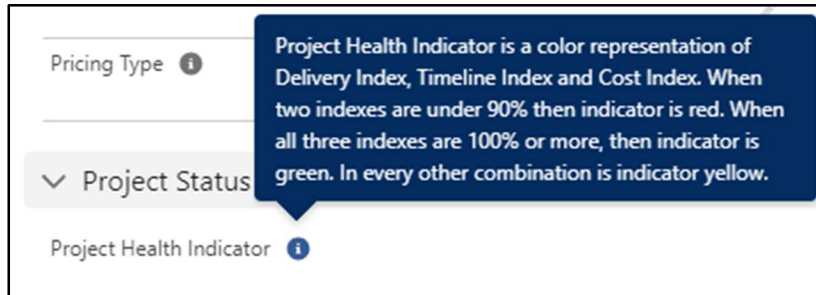
Transaction Name	RH-T-000020
Registered Hours	RH-0000011
Registered Hours Code	RH-0000011
Date	06.07.2023
Comments	RH MT2
Resource	Test Manager
Reported Hours (h)	16,0
Reported Personnel Revenue	200,00
Activity Report	<a href="#">a04720000H8hzc</a>
Reported Status	Send to Customer
Reported Task	<a href="#">Manager Main Task 2</a>
Created By	Test Manager, 06.07.2023 15:53
Last Modified By	Test Manager, 06.07.2023 15:53

## 17. Budget Control

In this chapter, we will discuss the financial controls that are essential for effective project cost management. These controls will give you a comprehensive view of your project's finances. You can easily access all the attributes mentioned in this chapter on your project's main page within the application.

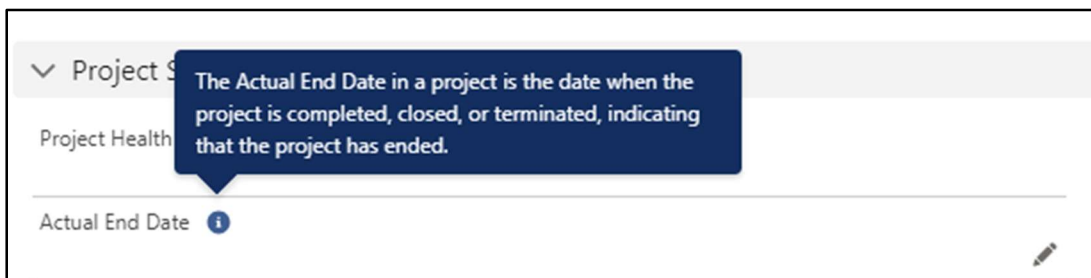
Specifically, you will find the following attributes within the Project Status Summary:

### Project Health Indicator



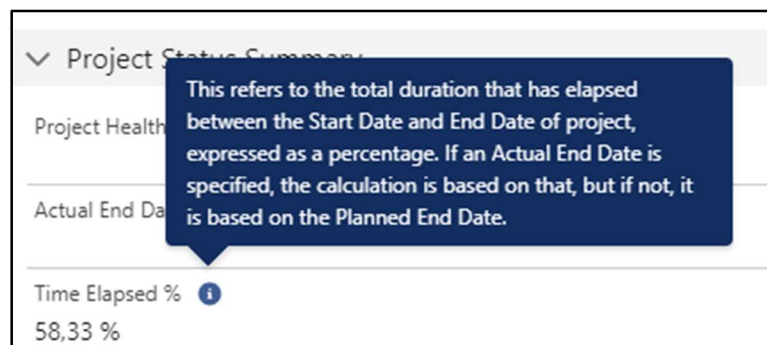
Project Health Indicator is a colored bar representing the project's overall health. This attribute only considers data from the Project Health attribute.

### Actual End Date



The Actual End Date is considered for Time Elapsed calculation. It is editable by clicking on the pen icon once you hover over the icon with your cursor.

### Time Elapsed %



Time Elapsed is an automatically counted attribute; its value changes depending on the Start Date and End Date of the project.



## Completion Rate Auto-Calculated

Time Elapsed % ⓘ	58,33 %
Completion Rate (Est.) ⓘ	

Do Not Count Task Completion Estimated ⓘ

Completion Rate is calculated automatically as the average for all Completion Rates entered by the Project Manager for each of the main tasks in a project. If a main task contains subtasks, the completion rate of those subtasks will not be considered for the calculation.

Every main task has an option for its Completion Estimated to be not counted toward the Completion Rate Auto-Calculated.

## Completion Rate Manual

Time Elapsed % ⓘ	58,33 %	
Completion Rate (Est.)		
Completion Rate Manual ⓘ		

This attribute serves as a manual override for the automatic Completion Rate (Est.) when disparities exist between system data and actual data.

## Completion Rate Estimated On

Added Value Index ⓘ	
Completion Rate Estimated On ⓘ	

This serves for the Project Manager to mark the last date they updated the Completion Rate.

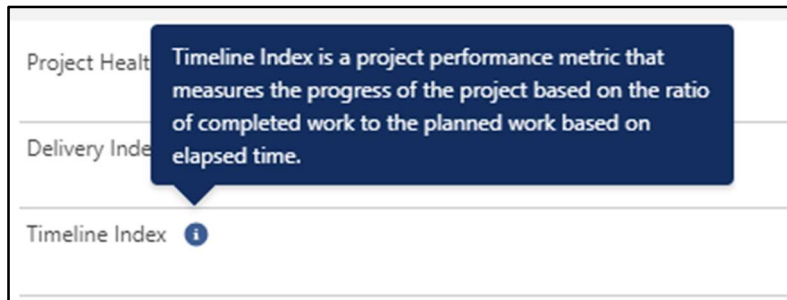
## Delivery Index

As of the date		
Project Health		
Delivery Index ⓘ		

This attribute operates through automated calculations based on the Completion Rate and Hours Spent % ratio. When the index registers at 100%, it signifies that the project is adhering to the

planned schedule. If the index falls below 100%, it indicates a schedule delay, whereas a value exceeding 100% signifies that the project is ahead of schedule.

### Timeline Index



Project Health

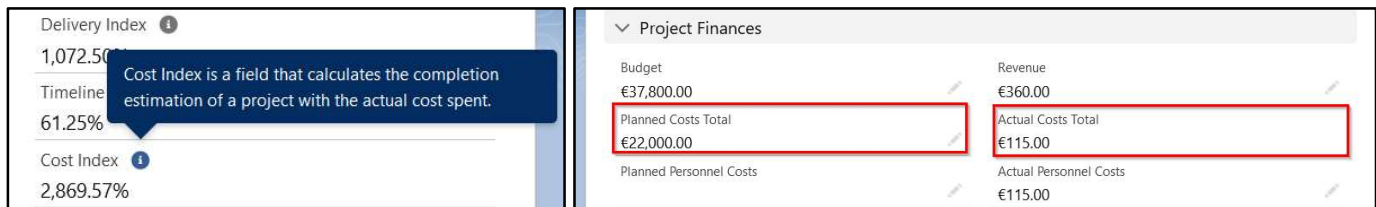
Delivery Index

Timeline Index ⓘ

**Timeline Index is a project performance metric that measures the progress of the project based on the ratio of completed work to the planned work based on elapsed time.**

Timeline Index is calculated automatically as the ratio between the Completion Rate and Time Elapsed. When the index shows 100%, we go as planned. If the index reads less than 100%, we are behind schedule, whereas above 100% indicates that we are doing better than schedule.

### Cost Index



Delivery Index ⓘ

1,072.50

Timeline

61.25%

Cost Index ⓘ

2,869.57%

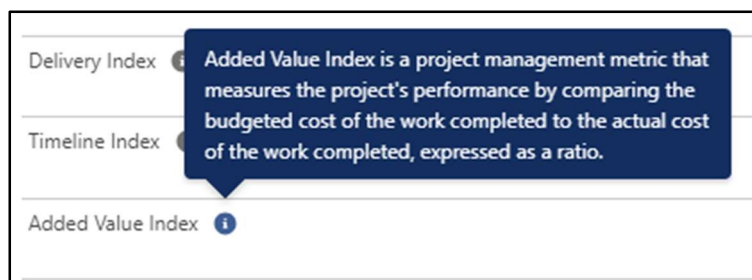
**Cost Index is a field that calculates the completion estimation of a project with the actual cost spent.**

Project Finances

Budget	€37,800.00	Revenue	€360.00
Planned Costs Total	€22,000.00	Actual Costs Total	€115.00
Planned Personnel Costs		Actual Personnel Costs	€115.00

For automatic calculation of the Cost Index, it is imperative to populate the Completion Rate attribute and input the associated costs within the project. Failure to do so will result in the Cost Index remaining uncalculated. Costs are manifested through the Planned Costs Total and Actual Costs Total attributes. The latter is automatically computed per employee as they log their hours within the project task, contingent on the employee having an assigned cost rate.

### Added Value Index



Delivery Index ⓘ

Timeline Index ⓘ

Added Value Index ⓘ

**Added Value Index is a project management metric that measures the project's performance by comparing the budgeted cost of the work completed to the actual cost of the work completed, expressed as a ratio.**

To calculate the Added Value Index automatically, you must populate the Budget attribute. Actual Cost is calculated automatically based on the tracked hours entered in the application by the employee(s). When the index shows 100%, we go as planned. If the index reads less than 100%, we are behind schedule, whereas above 100% indicates that we are doing better than schedule.

## Personnel Section

Personnel contains the attributes related to budget and shows how much of budget has already been spent:

Personnel	
Planned Hours 160,00	Actual Hours 32,00
% Hours Spent 20,00 %	Spent Indicator <div style="width: 20%; background-color: green;"></div>
Remaining Hours 128,00	Reported Hours 32,00

Please note that the data in Personnel attributes is automatically calculated based on the information entered in the project tasks (Planned Hours) or the hours tracked by the assigned employees (for the remaining attributes).

## Project Finances Section

Project Finances	
Budget 11 100,00 €	Revenue 13 000,00 €
Planned Costs Total 4 650,00 €	Actual Costs Total 800,00 €
Planned Personnel Costs 4 700,00 €	Actual Personnel Costs 800,00 €
Planned External Costs 750,00 €	Actual External Costs
Planned Material Costs	Actual Material Costs
Planned Other Costs	Actual Other Costs

In this section, Project Managers can efficiently plan their costs by adjusting two key attributes – Budget and Revenue. All other cost-related attributes are automatically calculated based on the information provided in the main project tasks. It's important to note that costs entered within subtasks won't be considered in the overall calculations.

## Project Status Report

Project Status - Rates&Indexes Extended																			
% Hours Spent	Completion Rate	Delivery Index	Delivery Index Indicator	Hours Forecast	% Hours Change	Project Duration	% Time Elapsed	Timeline Index	Timeline Index Indicator	Duration Forecast	% Duration Change	Planned Costs Total	Actual Costs Total	% Cost Spent	Cost Index	Cost Index Indicator	Cost Forecast	% Cost Change	
100.00%	100.00%	95.01%	<span style="color: green;">■</span>	229.00	2.01%	89.00	78.82%	727.4%	<span style="color: green;">■</span>	10.00	-11.22%	69.700.00	69.781.50	94.72%	103.50%	<span style="color: green;">■</span>	9.787.50	-2.8%	
94.42%	95.00%	100.01%	<span style="color: green;">■</span>	239.00	-0.00%	100.00	95.79%	134.21%	<span style="color: green;">■</span>	205.00	-25.40%	43.800.00	43.781.50	92.69%	102.25%	<span style="color: green;">■</span>	3.400.50	-2.4%	
95.22%	90.00%	99.99%	<span style="color: red;">■</span>	97.50	40.29%	214.00	90.69%	18.50%	<span style="color: red;">■</span>	272.00	27.24%	421.770.00	412.716.75	97.87%	99.29%	<span style="color: red;">■</span>	21.706.00	46.42%	
Avg: 95.49%	Avg: 95.00%	Avg: 98.33%			Avg: 16.42%			Avg: 113.29%			Avg: 6.50%	631.070.00	627.099.75	Avg: 92.14%	Avg: 102.01%		45,444.00	38.89%	Avg: 12.89%

Delivery Index Indicator (1) provides a visual representation of the Delivery Index. It employs a color-coded system to indicate the status:

- Green: When the percentage is 100% or greater.
- Yellow: When the percentage ranges from 90% to 100%.
- Red: When the percentage falls below 90%.

Hours Forecasted (2) is a terminology utilized to denote the projected or expected number of labor hours necessary to accomplish a particular task or project activity. This metric aids in estimating resource allocation and project planning.

% Hours Change (3) quantifies the percentage variance between the projected hours needed for project activities and the originally allocated hours.

Project Duration (4) signifies the complete time span required for the entire project's execution, commencing from initiation to conclusion.

Time Elapsed (5) represents the cumulative time duration that has transpired between the project's Start Date and the current date (TODAY). It is expressed as a percentage. If an Actual End Date is specified, the calculation is based on that date. However, if no Actual End Date is provided, it is calculated based on the Planned End Date.

Timeline Index Indicator (6) serves as a visual representation of the Timeline Index. It employs color coding to convey information. When the Time Index percentage reaches 100% or surpasses it, the indicator is displayed in green. When the percentage falls within the range of 90% to 100%, the indicator appears in yellow. If the percentage drops below 90%, the indicator is shown in red.

Duration Forecast (7) represents an approximation of the anticipated time required to finalize a project. This estimation is grounded in the project's advancement and the existing work rate.

Duration Change (8) signifies the variation, expressed as a percentage, between the initially planned or budgeted timeframe for a project or task and the predicted duration.

% Cost Spent (9) denotes the proportion of total allocated funds that has been disbursed or consumed in percentage terms up to a specified point in the project's timeline.

Cost Index (10) is a field that calculates the completion estimation of a project with the actual cost spent.

Cost Index Indicator (11) serves as a visual representation of the Cost Index. It employs a color scheme, appearing green when the percentage is equal to or exceeds 100%, yellow when the percentage falls within the range of 90% to 100%, and red when the percentage is below 90%.

Cost Forecast (12) functions as a predictive metric for estimating the final project cost. This estimate is based on the current project progress and expenditures and is utilized to anticipate the eventual project cost.

% Cost Change (13) quantifies the variance, typically expressed in percentage terms, between the originally planned or budgeted cost for a project and the actual or revised cost.

## Useful Links

Main Company & Product page: <https://www.proxiuss.com/>

Youtube: [Proxiuss Project+ Channel](#)

LinkedIn: <https://www.linkedin.com/company/proxiuss/>

## Troubleshooting / Haven't found what you were looking for?

As Proxiuss Project+ is a native application built on the Salesforce platform, it is possible to get help from the user guides and manuals regarding the basic functions and navigation from their official site.

In order to get the Salesforce official manuals, please head over to their main page:

<https://www.salesforce.com/>

In case you miss any information regarding the PROXIUSS PROJECT+ application within this User Guide, or you find a bug, please contact us at:

- Report a problem: [support@proxiuss.com](mailto:support@proxiuss.com)
- Request Sales/Marketing information: [sales@proxiuss.com](mailto:sales@proxiuss.com)

