



User Guide

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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 proxiuss.com

Should you have any questions, please visit the FAQ section on our website proxiuss.com and if you find yourself lost, please contact our helpdesk at 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.

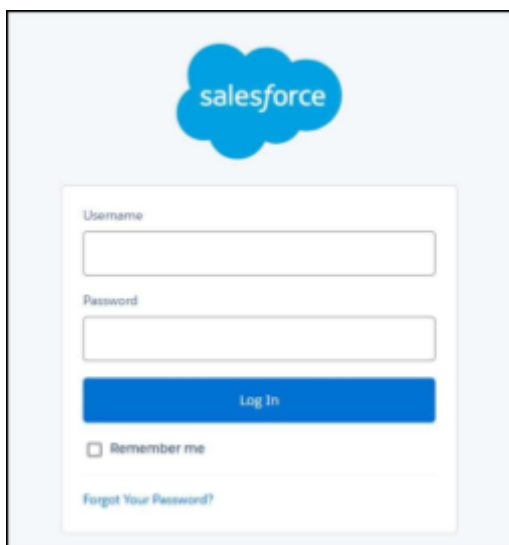
Once you click the provided link, you will be redirected to the PROXIUSS PROJECT+ login page. Here, you will need to enter your Salesforce credentials, including your username and password. Make sure to double-check the accuracy of your credentials to avoid any login errors.

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.



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 Enterprise, Unlimited, Developer or Performance Salesforce license, you can 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. Visit the Proxiuss website

Go to proxius.com and locate the **GET IT FREE** button in the header section. Click it.

Note: The first 5 users are free forever.

2. Redirect to AppExchange

You will be redirected to the Salesforce AppExchange page for Proxiuss Project+. On this page, click either **GET IT NOW** or **TRY IT** to start the installation process.

3. Verify Salesforce Edition

To install the app, ensure your Salesforce account is on one of the supported editions:

- Enterprise
- Unlimited
- Developer
- Performance

4. Complete the Installation

Follow the on-screen instructions to complete the app installation.

5. Purchase Additional Users (Optional)

If you would like to purchase additional users, navigate to our [Stripe payment gateway](#). For detailed instructions, [visit our website](#).

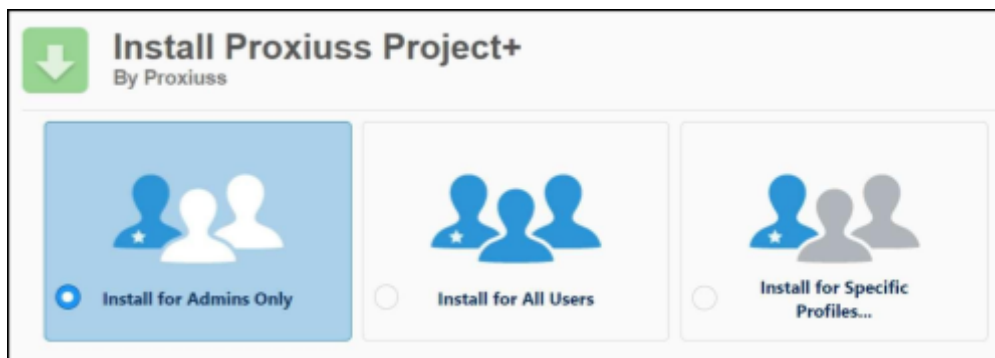
6. Enjoy and Explore

Once installed, start using Proxiuss Project+ and explore its features. Check out the

integrated [ChatGPT agent](#) to ask questions, or reach out directly through the Proxiuss website for support.

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:

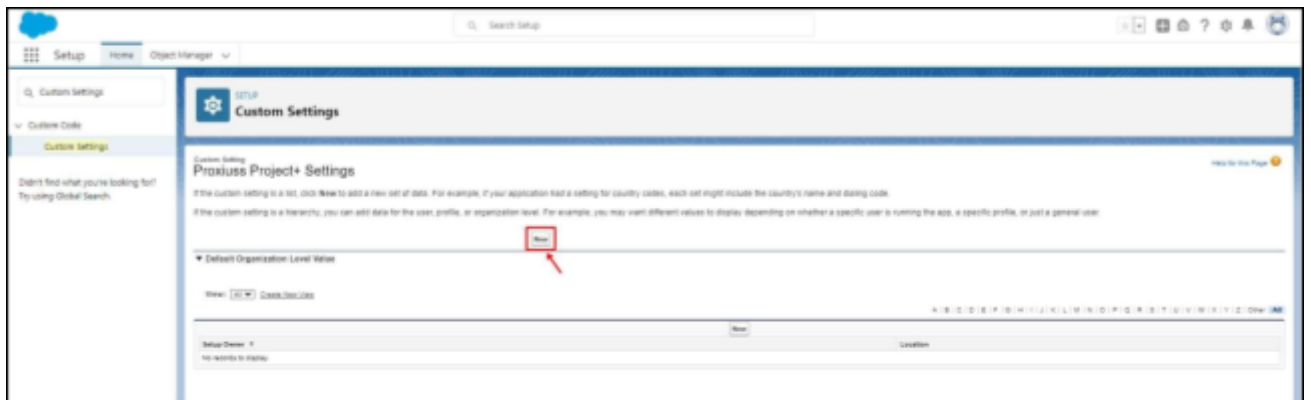
In this section, we will walk you through configuring the essential attributes to facilitate a seamless user experience within the application. The responsibility for the initial setup primarily lies with the Admin, but there is also an option to grant standalone admin rights to specific user roles.

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.

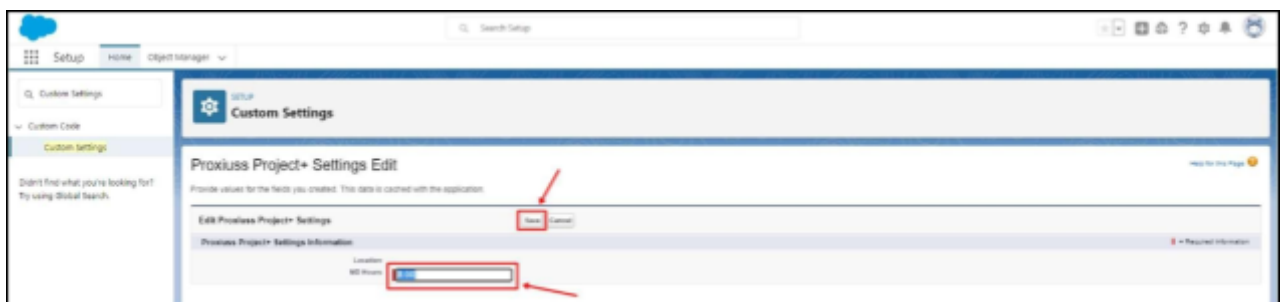
1. In Setup, type "Custom Settings" in the Quick Find box on the left and click on *Custom Settings*. Next to Proxiuss Project+ Settings, click on *Manage*.



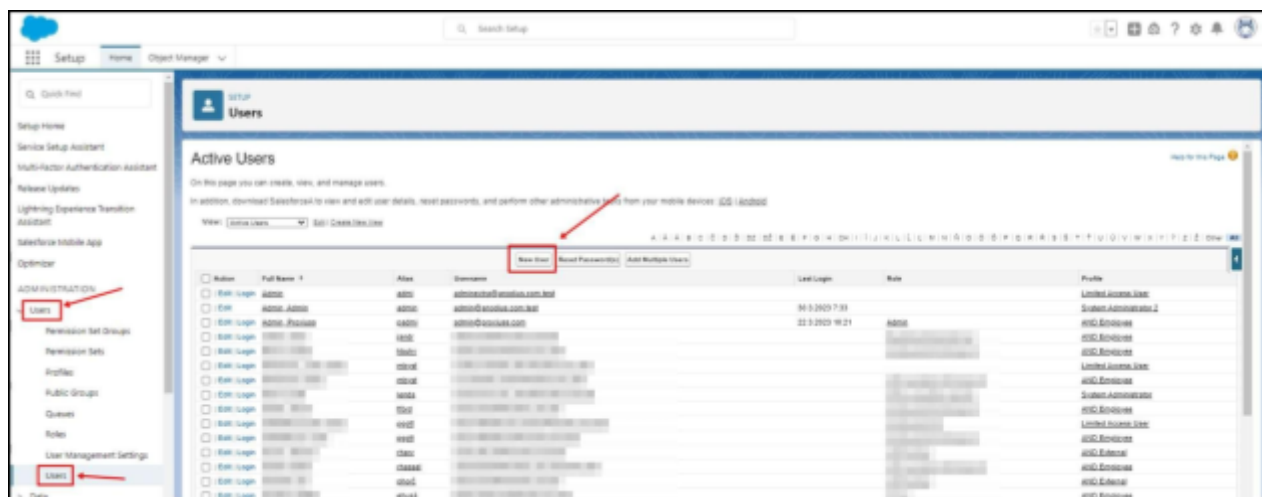
2. Click on the upper button *New*.



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

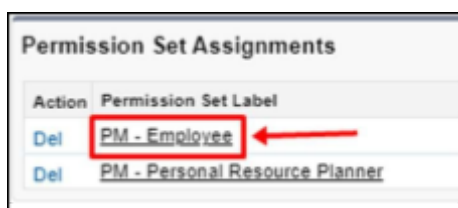


4. Create the user account in *Setup -> Users -> Users* and click on the *New User* button.



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*.

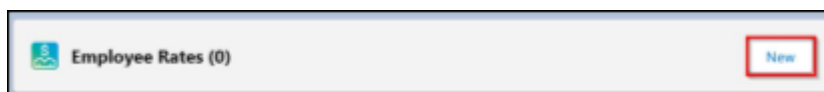
- iii. We highly recommend filling in the *Business Hours* attribute. This setting allows Time Tracking to distinguish working days from non-working days, which are indicated with a yellow box. Although weekends and holidays are marked with a yellow box, you can still report work on these days if needed.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

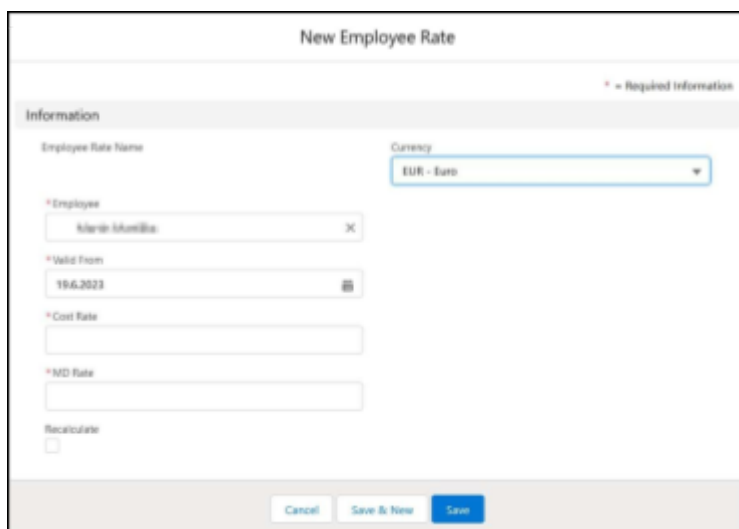
10. Create [Projects](#) and [Project Tasks](#). On *Project Tasks*, create *Task Assignments* – add employee who is appointed to work on that task. After being added to the task, employee(s) can start tracking hours in the *Time Tracking* tab in the relevant project task.

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.

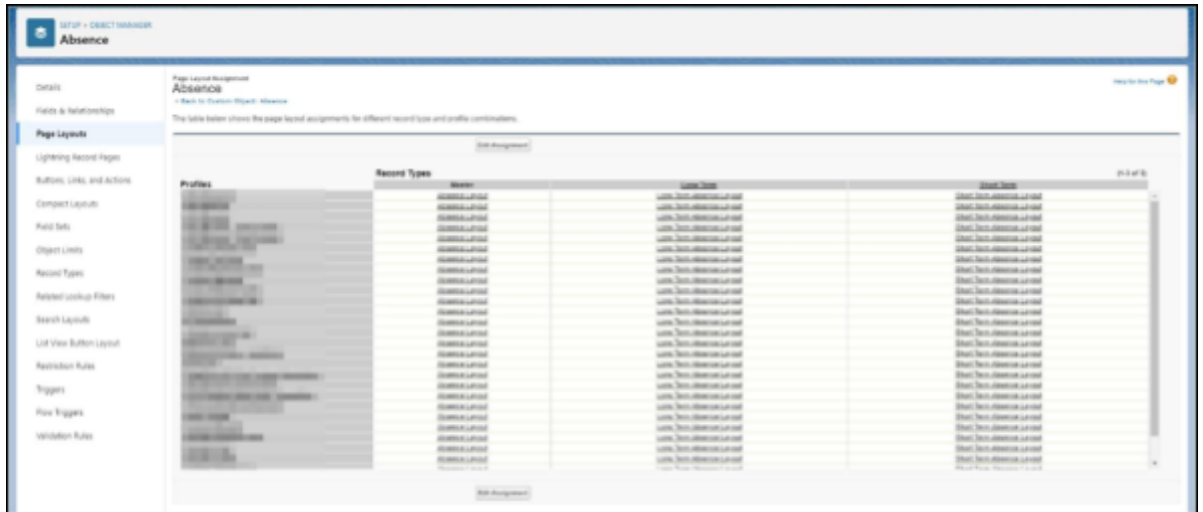


- iii. If there has been a time gap between a rate change and the actual update in the application, you can ensure accurate cost and revenue information by checking the *Recalculate* box. This option triggers a recalculation of the tracked hours during the time difference using the new rate. By doing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

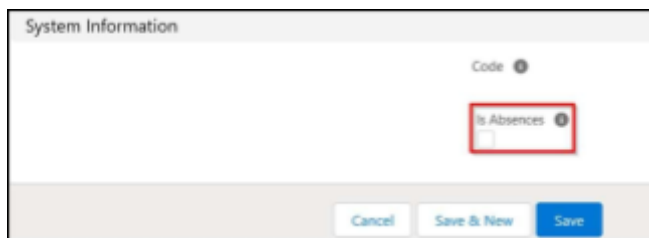
IMPORTANT: The standard rate for employees is set by entering the MD Rate in their *Employee* profile. However, it's important to note that the rate can vary for different projects or project tasks. In such cases, you can specify a specific MD Rate for the task, as explained in the chapter [Task assignment](#).

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*.



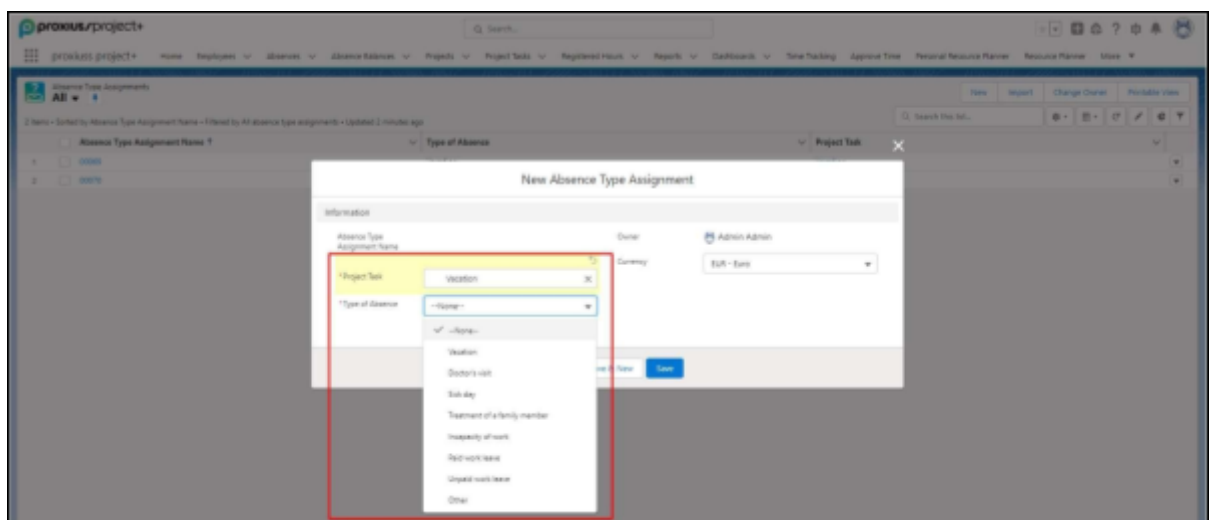
ii. Create Project and check field *Absences*.



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*.



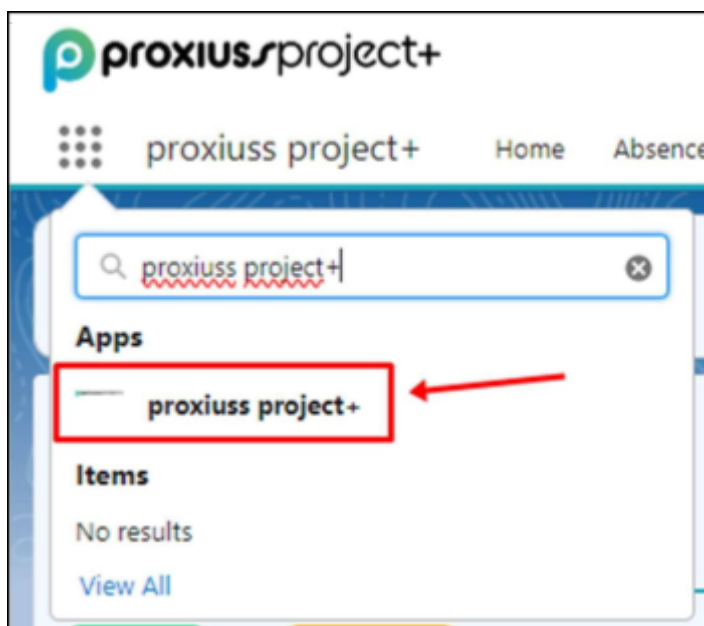
User Settings

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.

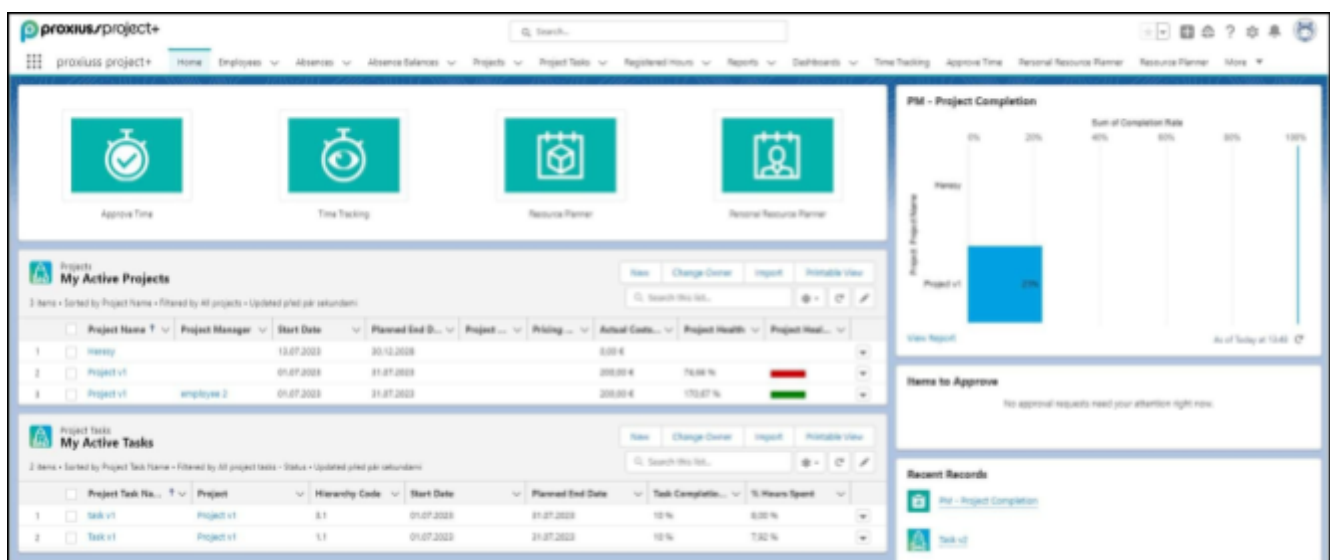
1. Home (Landing Page)

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.

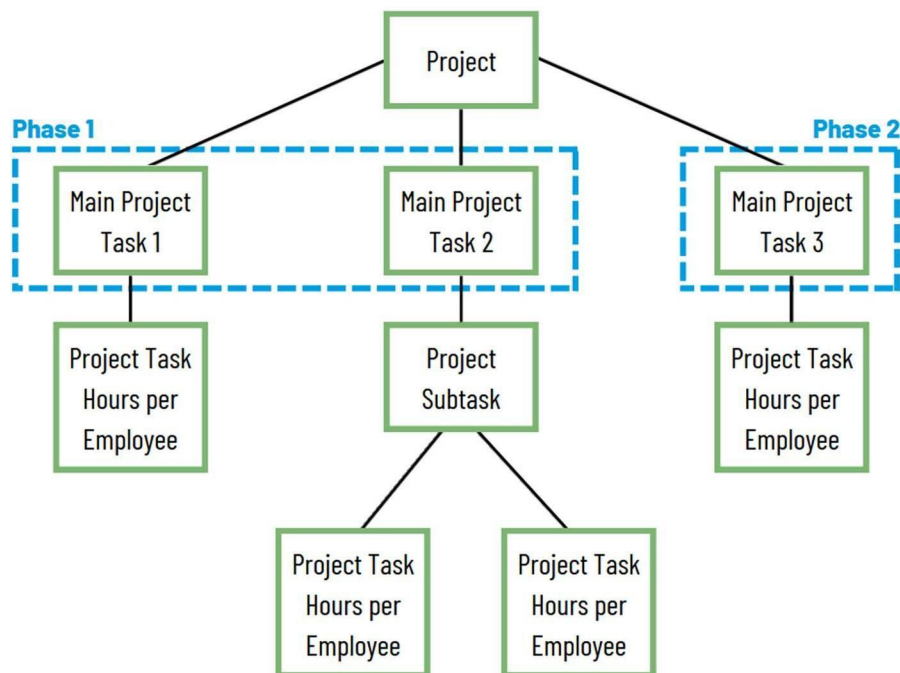


By customizing the Home screen view and offering a launchpad with convenient shortcuts, PROXIUSS PROJECT+ aims to enhance user productivity and streamline navigation within the application.

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.

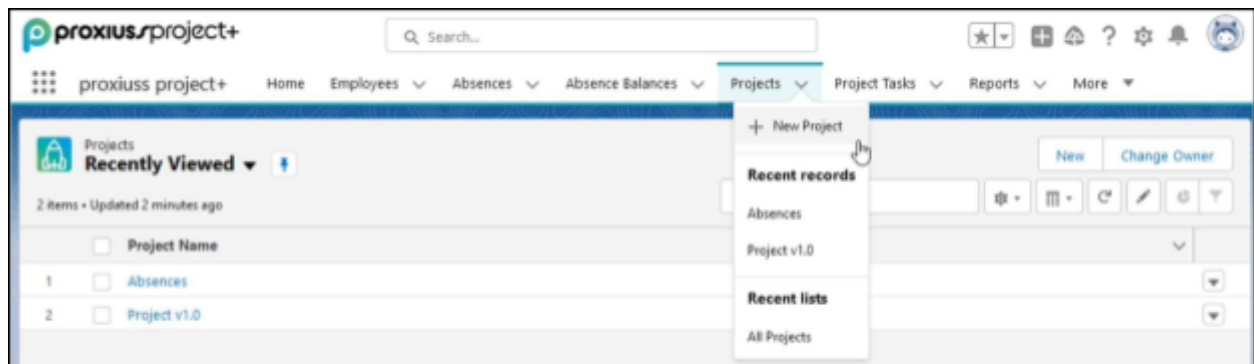
proxiuss project+ Home Employees Absences Absence Balances Projects Project Tasks Registered Hours Reports Dashboards Time Tracking Approvals Personal Resource Planner Resource Planner More

Projects All Projects 27 items • Sorted by Project Name • Filtered by All projects • Updated 2 minutes ago

Project Name	Start Date	Planned End Date	Created Date	Last Modified Date	Project Health Indicator
1			20.11.2022 16:28	16.12.2022 17:28	
2			16.1.2023 10:21	16.1.2023 16:27	
3	1.1.2023	28.2.2023	25.1.2023 13:00	25.1.2023 13:01	
4	1.1.2023	28.2.2023	16.1.2023 10:59	22.2.2023 15:28	
5	1.1.2023	2.1.2023	16.1.2023 12:40	25.1.2023 16:27	
6			2.11.2022 19:00	6.10.2022 19:48	
7	1.1.2021	31.12.2021	25.10.2022 8:09	17.2.2023 18:07	
8	1.10.2022	31.12.2022	25.10.2022 10:22	21.2.2023 18:28	
9	1.10.2022	31.12.2022	25.10.2022 16:08	6.12.2022 14:24	
10	1.9.2022	31.12.2022	27.10.2022 16:06	6.1.2023 19:40	
11	1.10.2022	31.12.2022	6.10.2022 10:40	5.1.2023 19:57	
12			16.11.2022 8:50	16.11.2022 8:50	
13	1.12.2022	31.12.2022	15.12.2022 13:50	15.12.2022 13:50	
14	27.8.2022	6.1.2023	2.11.2022 12:14	6.10.2022 14:24	

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*:

New Project Task

Task Information

*Project Task Name

Task Owner

*Project

Recent Projects

- Absences
- Project v1.0
- + New Project

Pricing Type

Phase

Parent Task

Ultimate Parent Task

Status

Planned End Date

Billable ☐

Milestone ☐

Agile ☐

Task Status Summary

Cancel Save & New Save

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

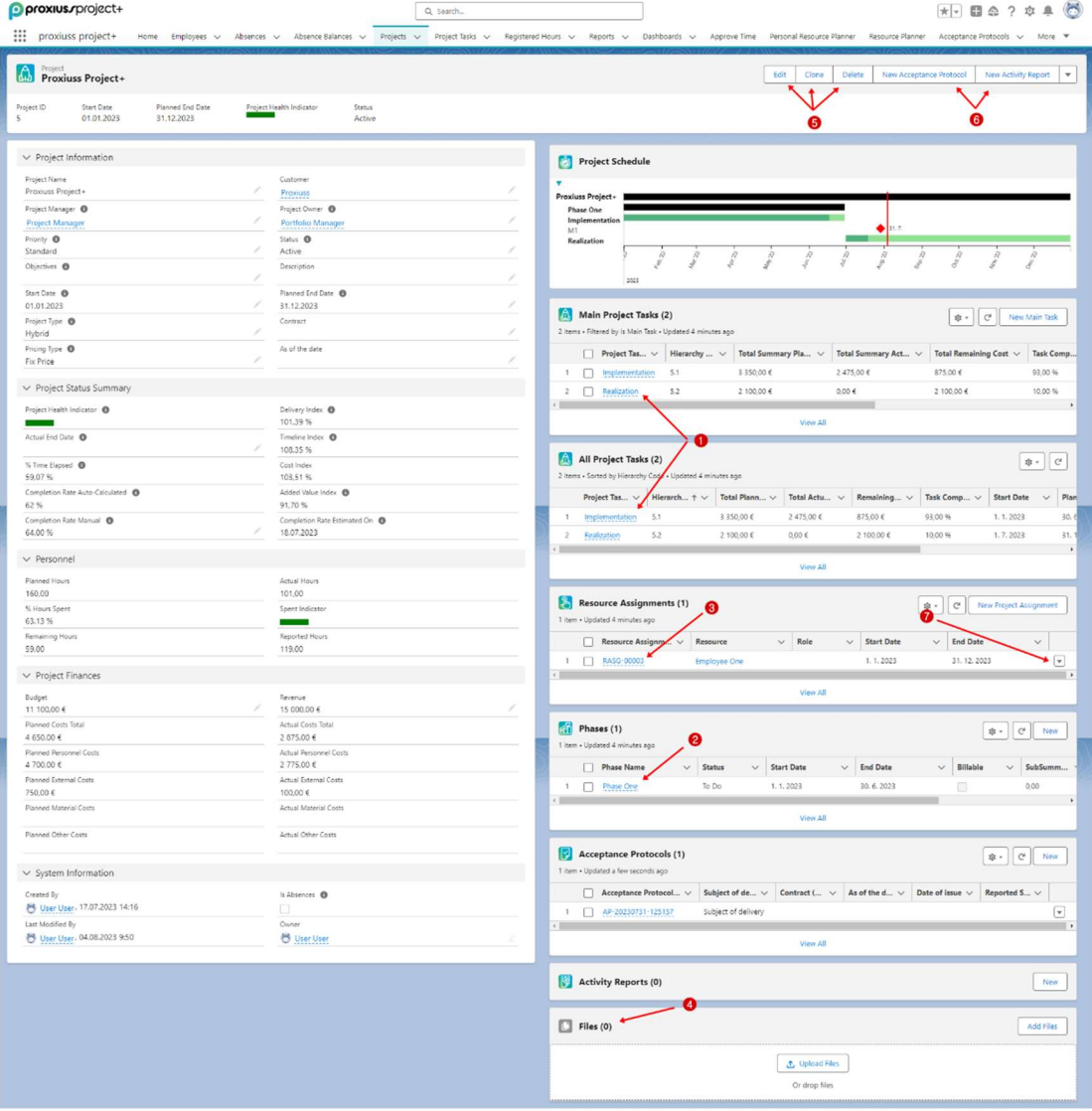
Project Details

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 Proxiuss Project+ interface. The top navigation bar includes links for Home, Employees, Absences, Absence Balances, Projects, Project Tasks, Registered Hours, Reports, Dashboards, Approve Time, Personal Resource Planner, Resource Planner, Acceptance Protocols, and More. The main content area is divided into several sections:

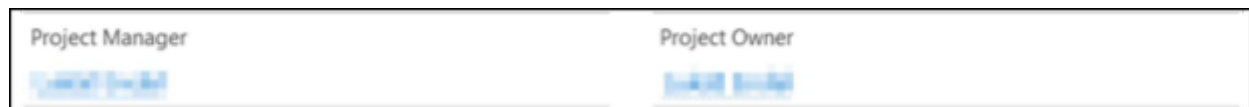
- Project Information:** Displays project details such as Project Name, Project Manager, Priority, Start Date, Planned End Date, Project Type, and Pricing Type.
- Project Status Summary:** Provides a summary of project health, including Project Health Indicator, Delivery Index, Actual End Date, % Time Elapsed, Completion Rate, and Completion Rate Manual.
- Personnel:** Shows planned and actual hours, % hours spent, and remaining hours.
- Project Finances:** Displays budget, revenue, planned costs, and actual costs.
- System Information:** Shows the user who created and last modified the project.
- Project Schedule:** A Gantt chart showing the project timeline.
- Main Project Tasks (2):** A table showing tasks with columns for Project Task, Hierarchy, Total Summary Plan, Total Summary Act, Total Remaining Cost, and Task Comp.
- All Project Tasks (2):** A table showing tasks with columns for Project Task, Hierarchy, Total Plan, Total Act, Remaining, Task Comp, Start Date, and Plan.
- Resource Assignments (1):** A table showing resource assignments with columns for Resource, Role, Start Date, and End Date.
- Phases (1):** A table showing phases with columns for Phase Name, Status, Start Date, End Date, Billable, and SubSum.
- Acceptance Protocols (1):** A table showing acceptance protocols with columns for Acceptance Protocol, Subject of de, Contract, As of the d, Date of issue, and Reported S.
- Activity Reports (0):** A section for activity reports.
- Files (0):** A section for project files, including an 'Upload Files' button and a 'Drop files' area.

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 Sum...	Total Rema...	Task Comp...	Start Date
1	Implementation	S.1	3 350,00 €	2 475,00 €	875,00 €	93,00 %	1. 1. 2023
2	Realization	S.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	S.1	3 350,00 €	2 475,00 €	875,00 €	93,00 %
2	Realization	S.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.

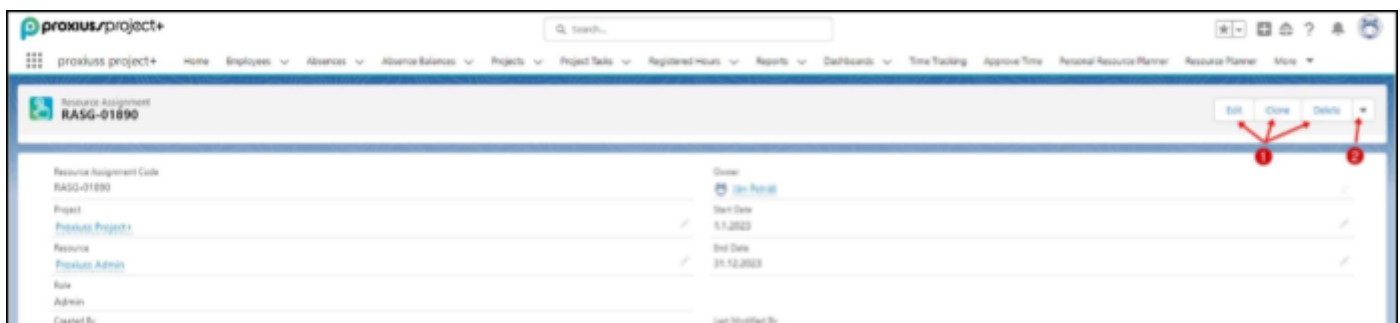


The *Project Manager* role is automatically assigned as the owner of tasks created within the project – it's a pre-fill and could be changed within the task creation window or task details. This individual holds direct responsibility for managing and overseeing the project's execution. On the other hand,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

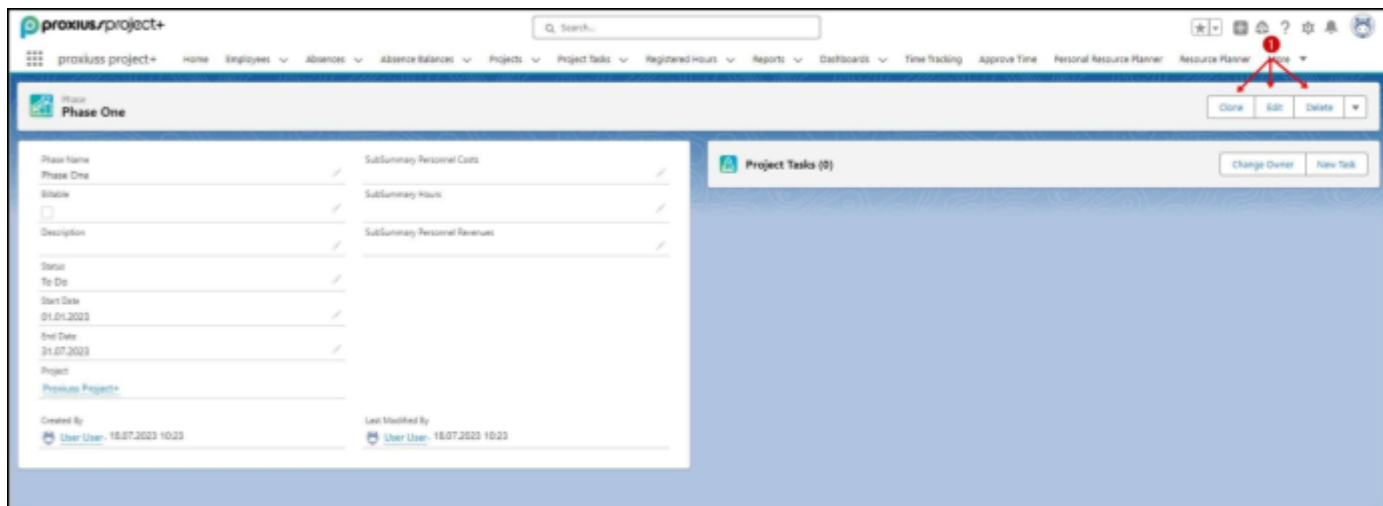


IMPORTANT: To ensure efficient tracking of work within the project, it is crucial to assign employees to each relevant task utilizing [Task assignment](#). When employees are assigned to a project as *Resource*, they will not be able to track any work within the individual project tasks created under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

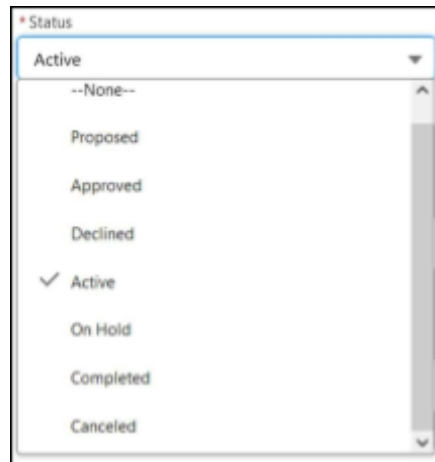
Phases (5)					
5 items • Updated 3 minutes ago					
☐	Phase Name	Status	Start Date	End Date	
1	Project starting template	Open	1. 6. 2022	31. 12. 2022	
2	Realization	Open	1. 1. 2023	30. 6. 2024	
3	Implementation and progress	Open	1. 7. 2024	30. 6. 2025	
4	Roll back & after - internal report	Open	1. 6. 2022	31. 7. 2025	
5	Finalization and report	Open	1. 10. 2024	31. 7. 2025	
View All					

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

Phases									
5 items • Updated a few seconds ago									
Phase Name	Status	Start Date	End Date	Billable	SubSum...	SubSum...	SubSum...	SubSum...	
1 Project starting template	Open	1.6.2022	31.12.2022	☒	617 110 000	140 000 000	1 400 000		
2 Realization	Open	1.1.2023	30.6.2024	☒	100 000 000	20 000 000	400 000		
3 Implementation and progress	Open	1.7.2024	30.6.2025	☒					
4 Roll back & after - internal report	Open	1.6.2022	31.7.2025	☐	1 000 000	0000	000 000		

Project Status Change

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



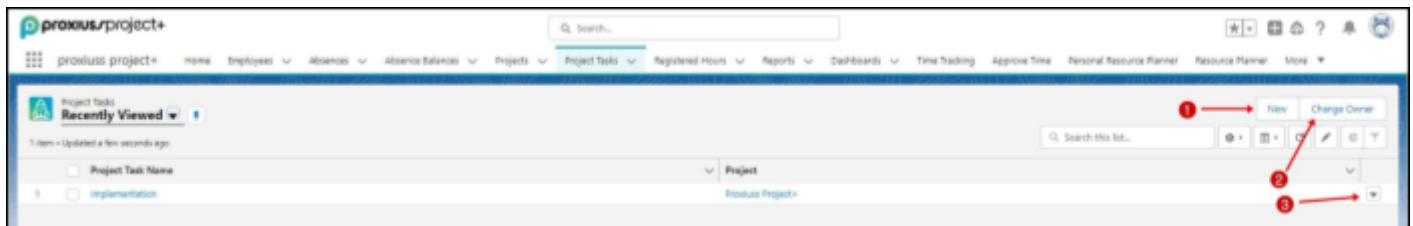
When the project status is marked as *Proposed*, *Approved*, or *Active*, assigned team members retain the ability to record their time for the respective project. However, if the project status is indicated as *Declined*, *On Hold*, *Completed*, or *Canceled*, time tracking within the project is not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

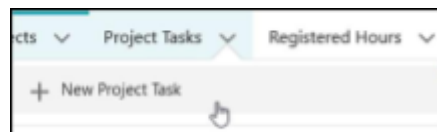
There is also a quick action button  available which can be used for editing/deleting the selected project task (3).

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.

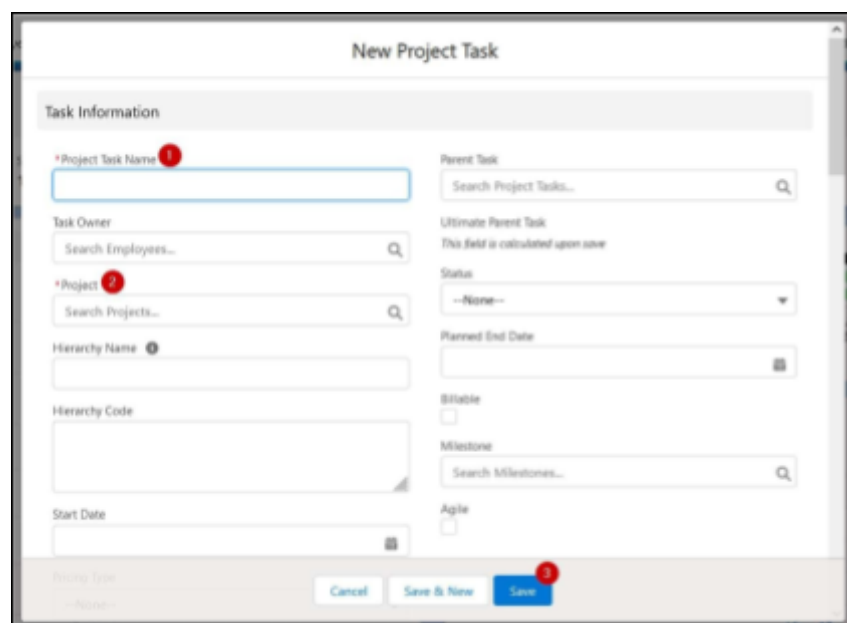


Project Task Creation

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

Search Project Tasks...

Ultimate Parent Task

Status

Planned End Date

Billable

Milestone

Agile

Cancel Save & New ³ Save

Project Task Details

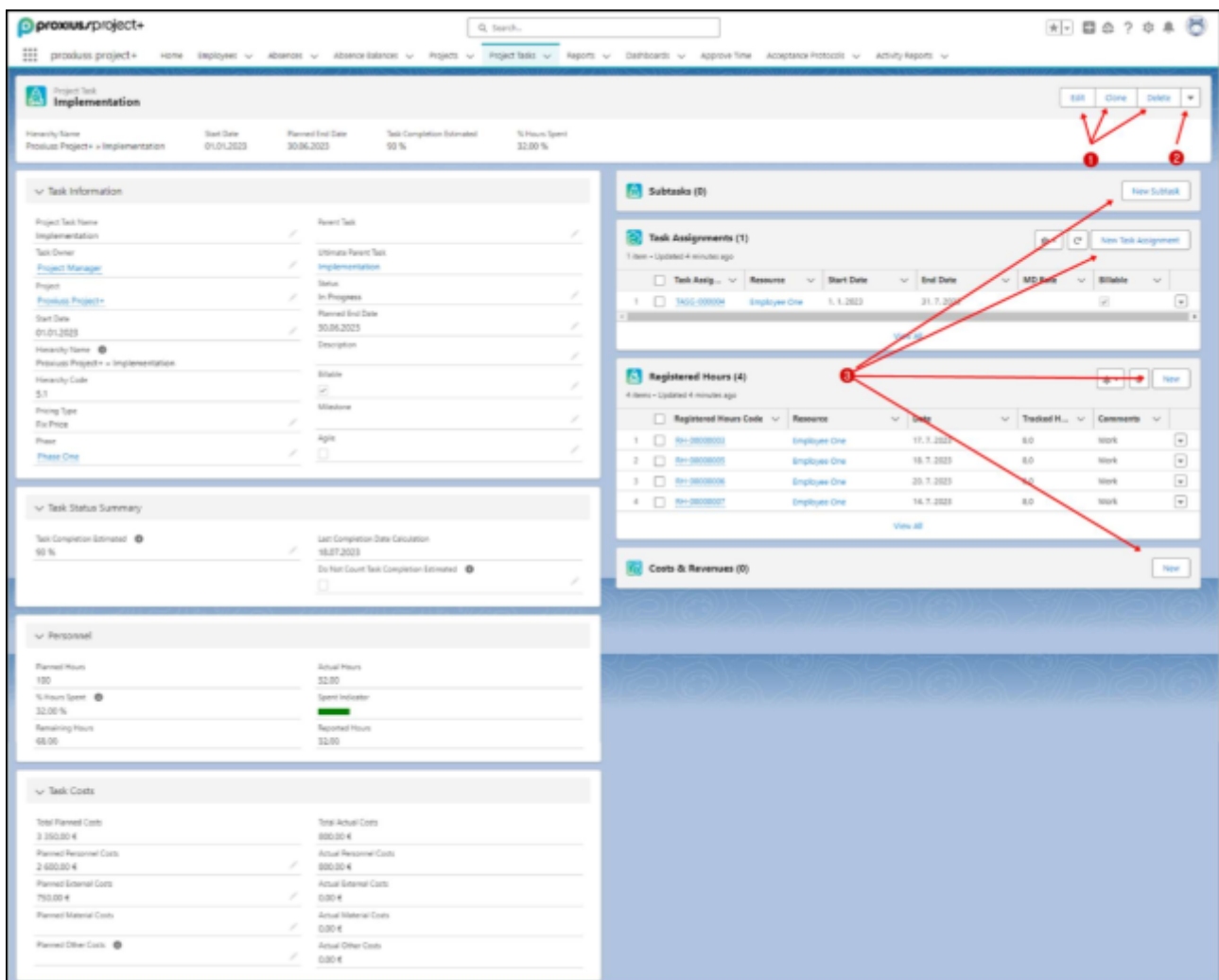
By clicking on a project task name, you can see the project task details, including assigned employees in *Task Assignments* table, *Subtasks*, and *Project Task Hours*.

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.



The screenshot displays the 'Project Task Details' page for a task named 'Implementation'. The interface includes a top navigation bar with various menu items and a search bar. The main content area is divided into several sections:

- Task Information:** Displays details such as Project Task Name, Task Owner, Project, Start Date, Planned End Date, Task Completion Estimated, and % Hours Spent.
- Task Status Summary:** Shows Task Completion Estimated and Last Completion Date Calculation.
- Personnel:** Displays Planned Hours, Actual Hours, % Hours Spent, and Remaining Hours.
- Task Costs:** Shows Total Planned Costs, Planned Personnel Costs, Planned External Costs, Planned Material Costs, and Planned Other Costs.
- Subtasks (0):** A section for adding new subtasks.
- Task Assignments (1):** A table showing assigned employees, including columns for Task Assign, Resource, Start Date, End Date, MD Rate, and Billable.
- Registered Hours (4):** A table showing registered hours, including columns for Registered Hours Code, Resource, Start Date, End Date, Tracked H., and Comments.
- Costs & Revenues (0):** A section for adding new costs and revenues.

Red arrows and numbers (1, 2, 3) highlight specific features: (1) points to the 'Edit', 'Clone', and 'Delete' buttons; (2) points to the 'Print' icon; and (3) points to the 'New' buttons in the 'Subtasks', 'Task Assignments', 'Registered Hours', and 'Costs & Revenues' sections.

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+ interface. The top navigation bar includes links for 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 Manager, Project Owner, Priority, Objectives, Start Date, Planned End Date, Project Type, and Pricing Type.
- Project Status Summary:** Shows Project Health (Active), Delivery Index (152.38%), Time Elapsed (54.80%), and Completion Rate (62%).
- Project Schedule:** A Gantt chart showing the project timeline from 2020 to 2022.
- Project Tasks (2):** A table listing tasks with columns for Task Name, Hierarchy, Total Planned Cost, Total Actual Cost, Remaining Cost, and Task Cost. Tasks include 'Implementation' and 'Realization'.
- Resource Assignments (1):** A section for assigning resources to tasks, with a 'New Project Assignment' button highlighted by a red arrow.

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 Task' form. The form includes fields for Project, Hierarchy Name, Hierarchy Code, Start Date, Pricing Type, Currency, and Phase. A red box highlights the 'Agile' checkbox, which is currently unchecked. The form also includes a 'Cancel' button and a 'Save & New' button.

This screenshot shows the 'Test SubTask' form. The form includes fields for Pricing Type, Currency, and Phase. A red box highlights the 'Agile' checkbox, which is currently checked. The form also includes a 'Cancel' button and a 'Save & New' button.

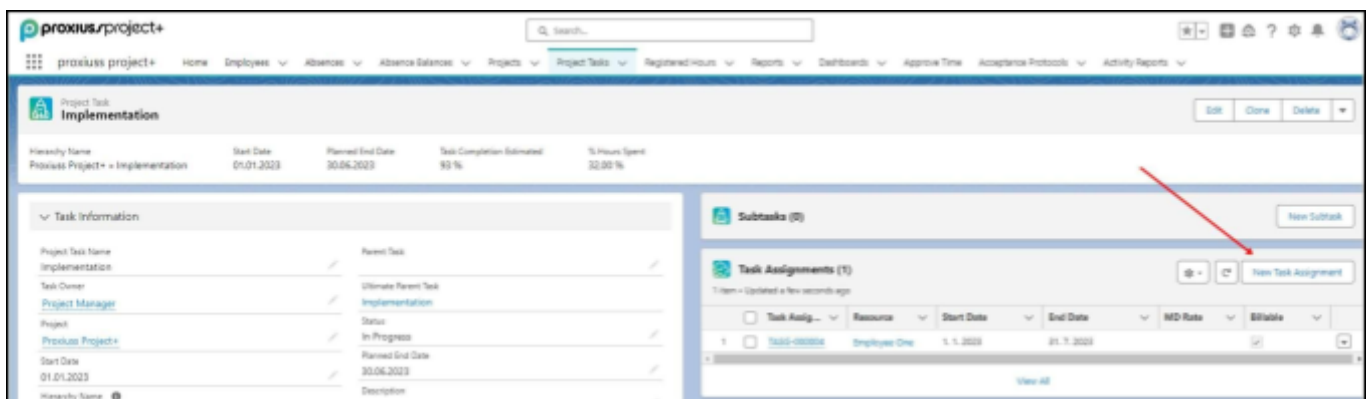
When applying the Agile approach, several attributes within the task details are modified:

- 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.

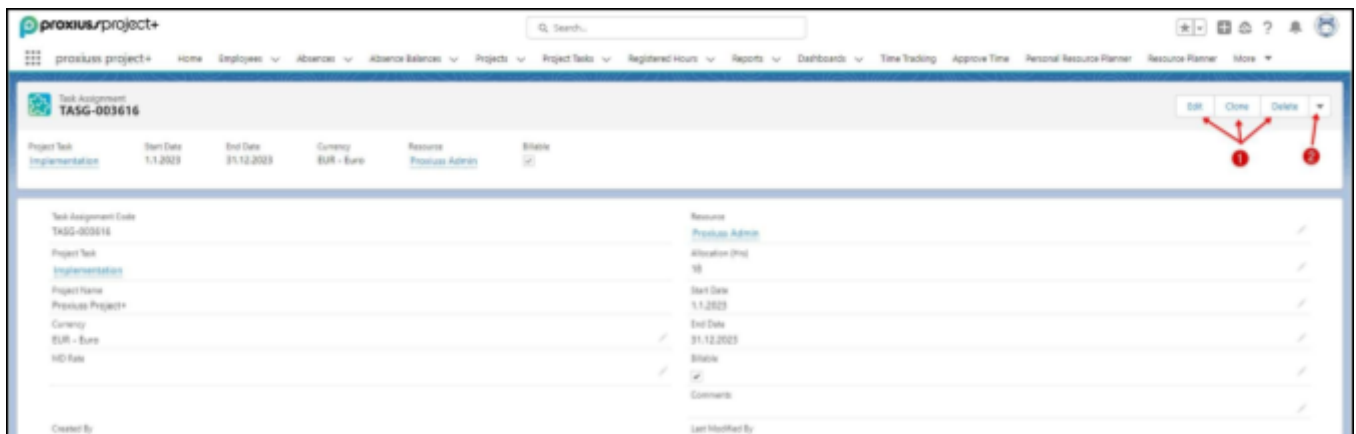
Task Assignment

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)								
7 items • Sorted by Resource • Updated a few seconds ago								
	☐ Task Assignme...	Resource ↑	Start Date	End Date	MD Rate	Billable		
1	☐ TASG-004218	Agile	1. 3. 2023	31. 12. 2023		☒		
2	☐ TASG-003657	Agile	1. 3. 2023	31. 12. 2023	\$30,00	☒		
3	☐ TASG-003656	Agile	1. 3. 2023	31. 12. 2023	\$70,00	☒		
4	☐ TASG-003655	Agile	1. 3. 2023	31. 12. 2023	\$50,00	☒		
5	☐ TASG-003658	Agile	1. 3. 2023	31. 12. 2023	\$30,00	☒		
6	☐ TASG-003853	Agile	1. 3. 2023	31. 12. 2023	\$20,00	☒		
7	☐ TASG-004079	Agile	1. 3. 2023	31. 12. 2023	\$20,00	☒		

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).

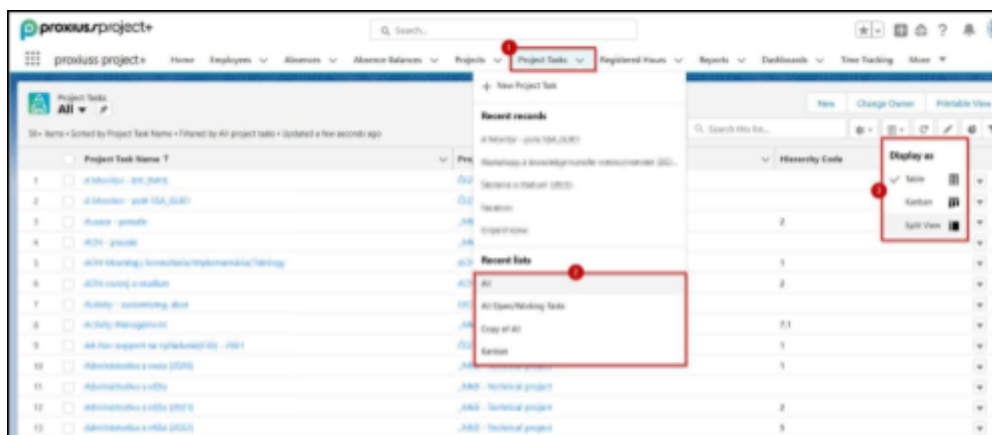
When a project task is set as waterfall (Agile field is unchecked) (1), it can be mapped under a milestone through the field *Milestone* (2). If you want to see all milestones, you can also search for them through the App Launcher (3).

The screenshot shows the Proxius Project+ interface. The main content area displays task details for 'Implementation'. The 'Task Information' section includes fields for Project Task Name, Task Owner, Project, Start Date, Hierarchy Name, Hierarchy Code, Pricing Type, Fix Price, and Phase. The 'Task Status Summary' section shows the task is set to 'Waterfall' (Agile is unchecked). The right-hand panel shows 'Subtasks (0)' and 'Registered Hours (4)'. Red arrows point to the 'Milestone' field in the task details and the 'Agile' checkbox in the task status summary.

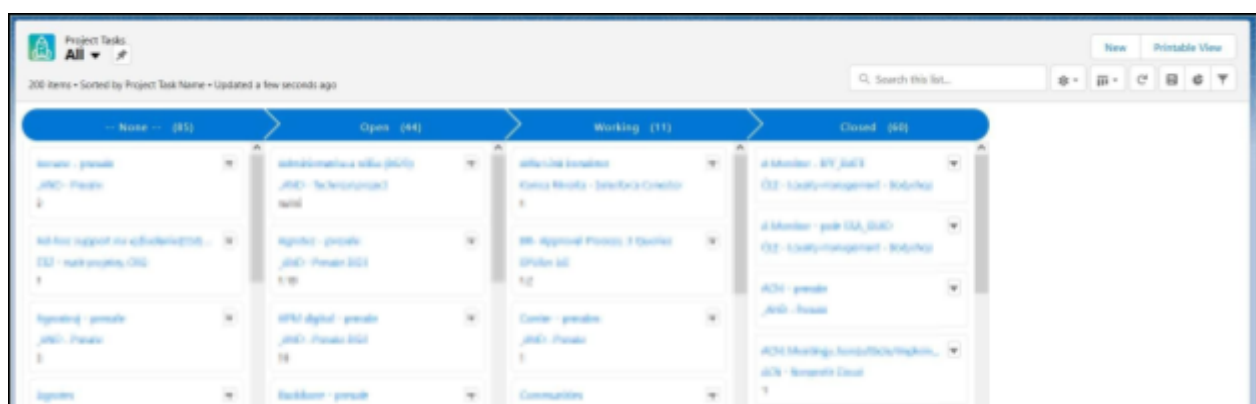
Project Task Overview

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.

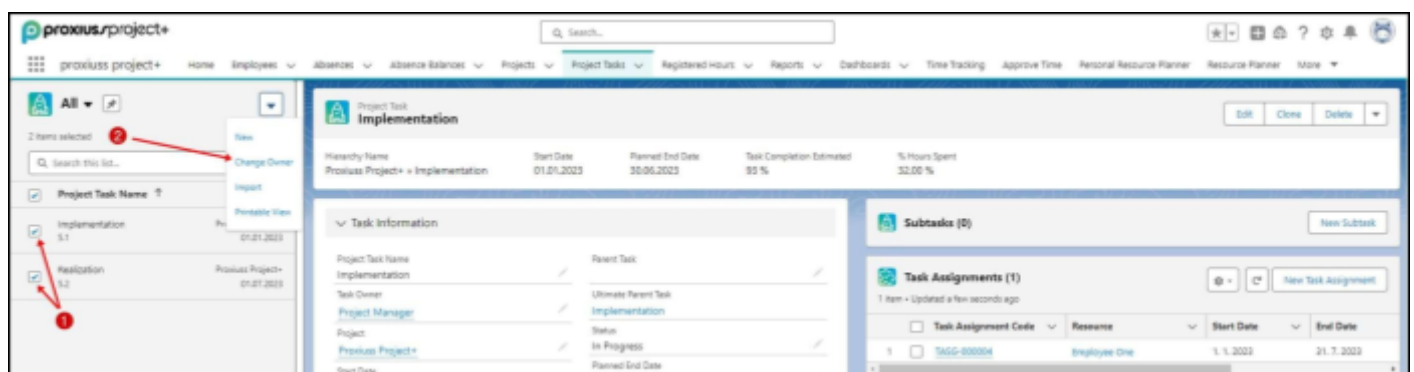


Kanban display shows the tasks based on their status:

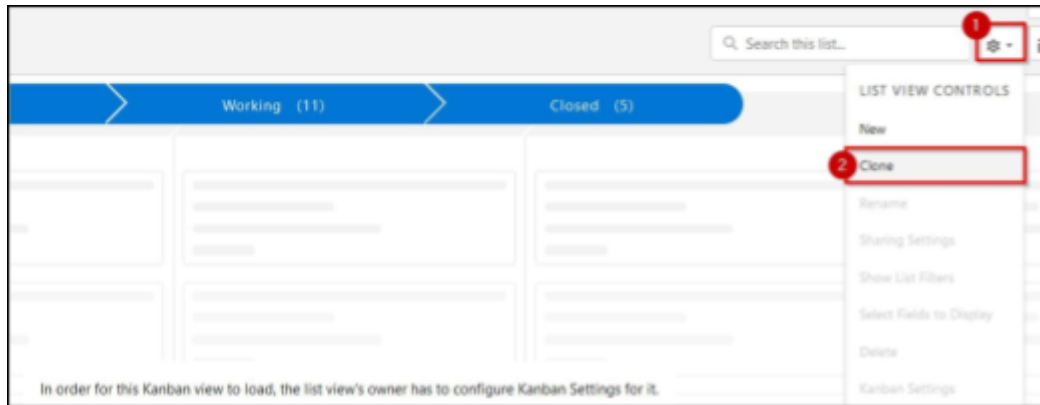


The *Split View* feature provides a convenient way to navigate tasks while accessing *Project Details* information. By clicking on any task in the list, the corresponding details will be displayed on the right side, as depicted in the screenshot below.

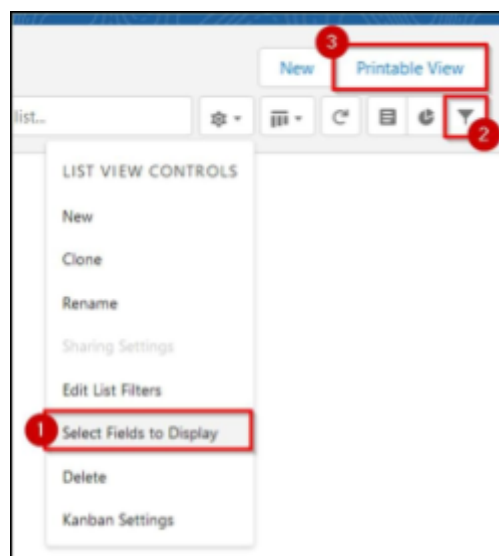
Furthermore, *Split View* allows you to select specific projects by checking the boxes (1) and, if your user rights permit, change the assigned tasks' owner. This enables you to manage ownership responsibilities within the project tasks efficiently.



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).

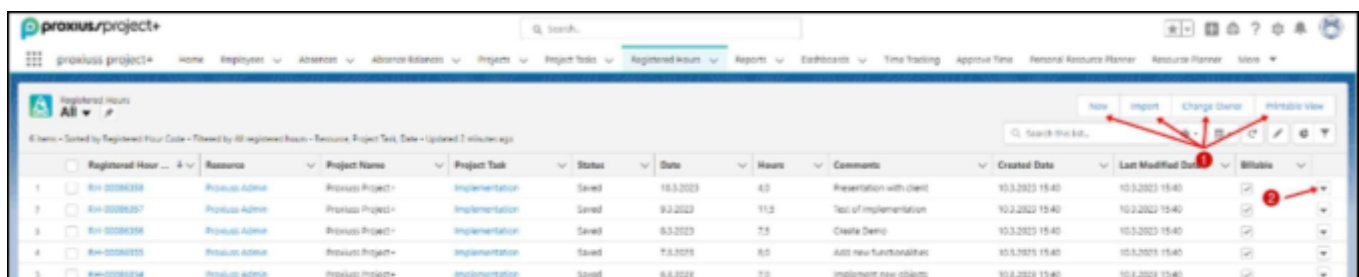


4. Registered Hours

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.

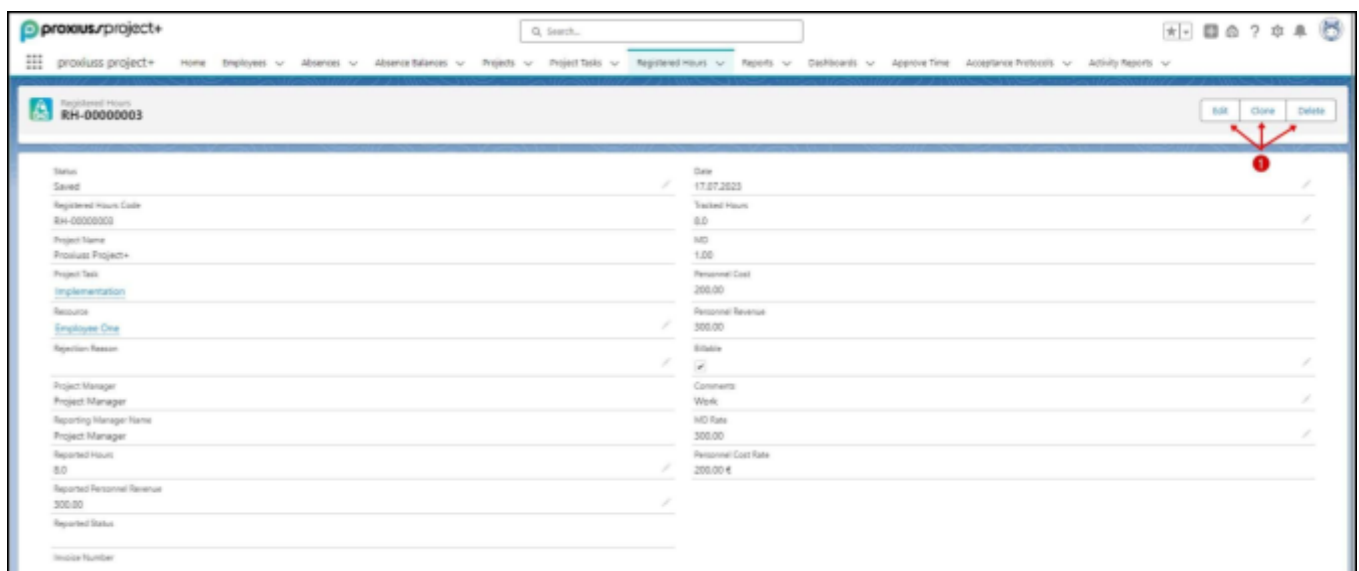


Registered Hour	Resource	Project Name	Project Task	Status	Date	Hours	Comments	Created Date	Last Modified Date	Actions
RH-00000001	Proxius Admin	Proxius Project+	Implementation	Saved	10.3.2023	4.0	Presentation with client	10.3.2023 15:40	10.3.2023 15:40	
RH-00000002	Proxius Admin	Proxius Project+	Implementation	Saved	9.2.2023	11.0	Test of implementation	10.3.2023 15:40	10.3.2023 15:40	
RH-00000003	Proxius Admin	Proxius Project+	Implementation	Saved	9.3.2023	7.0	Create Demo	10.3.2023 15:40	10.3.2023 15:40	
RH-00000004	Proxius Admin	Proxius Project+	Implementation	Saved	7.5.2023	8.0	Add new functionalities	10.3.2023 15:40	10.3.2023 15:40	
RH-00000005	Proxius Admin	Proxius Project+	Implementation	Saved	8.2.2023	10.0	Implement new items	10.3.2023 15:40	10.3.2023 15:40	

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.

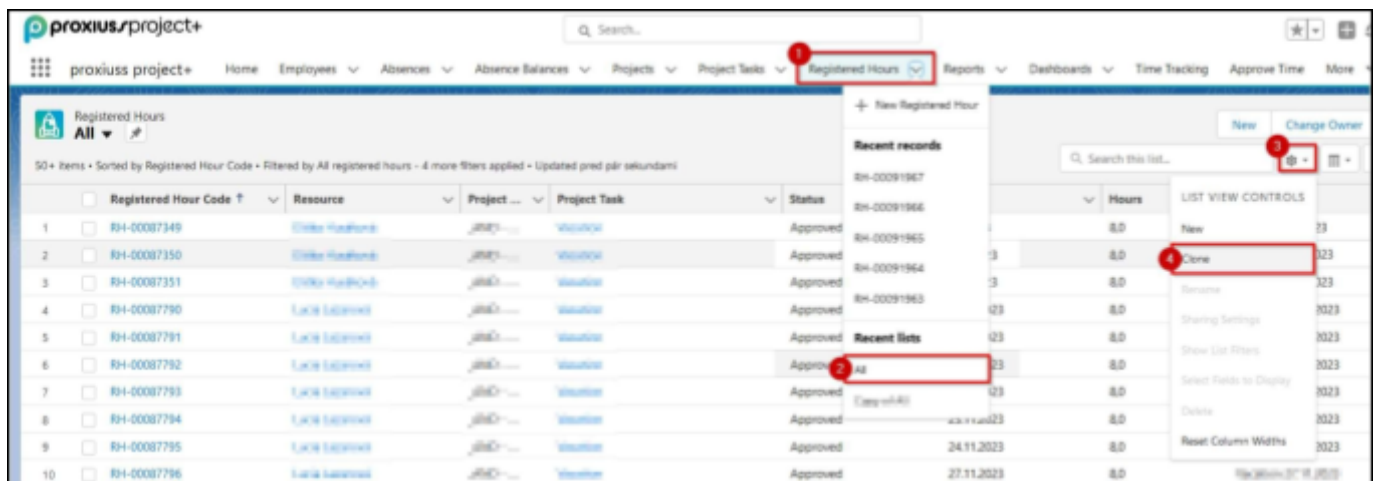


Status	Saved	Date	17.07.2023
Registered Hours Code	RH-00000003	Tracked Hours	8.0
Project Name	Proxius Project+	MD	1.00
Project Task	Implementation	Personnel Cost	200.00
Resource	Employee One	Personnel Revenue	300.00
Rejection Reason		Stable	
Project Manager	Project Manager	Comments	Work
Reporting Manager 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			

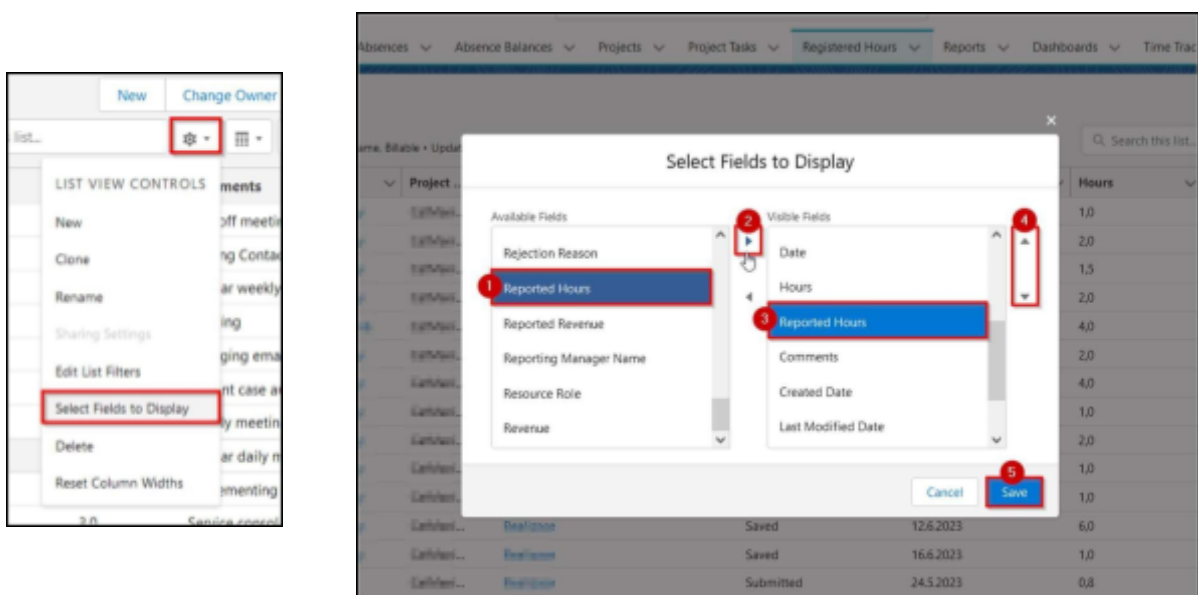
Reported Hours

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.

The screenshot shows a table titled 'Registered Hours' with a 'Copy of All' dropdown. The table has columns: Registered Hour Code, Resource, Project, Project Task, Status, Date, Hours, Reported, and Comments. There are 21 items listed. Annotations include: 1. A red box around the first column header. 2. A red box around the 'Reported' column header. 3. A red box around the 'Reported' value '1.1' in the first row. 4. A red box around the 'Update 21 selected items' button. 5. A red box around the 'Apply' button. 6. A red box around the 'Save' button. 7. A red box around the search bar.

	Registered Hour Code	Resource	Project	Project Task	Status	Date	Hours	Reported	Comments
1	RH-00086720	Marlon Buttrick	Collins	Realtime	Approved	21.3.2023	1.0	1.1	late call meeting
2	RH-00087166	Marlon Buttrick	Collins	Realtime	Approved	28.3.2023	2.0	2.0	Building Conference into company
3	RH-00087845	Marlon Buttrick	Collins	Realtime	Approved	5.4.2023	1.5	1.5	regular weekly meeting with manager
4	RH-00088445	Marlon Buttrick	Collins	Realtime	Approved	18.4.2023	2.0	2.0	meeting
5	RH-00088470	Heur Giesbrecht	Collins	Realtime	Approved	17.4.2023	4.0	5.20	
6	RH-00088603	Marlon Buttrick	Collins	Realtime	Approved	24.4.2023	2.0		
7	RH-00088626	Marlon Buttrick	Collins	Realtime	Approved	25.4.2023	4.0		
8	RH-00088949	Marlon Buttrick	Collins	Realtime	Approved	2.5.2023	1.0		
9	RH-00089495	Marlon Buttrick	Collins	Realtime	Approved	15.5.2023	2.0	3.0	implementing sustained class for staff
10	RH-00089798	Marlon Buttrick	Collins	Realtime	Approved	18.5.2023	1.0	3.0	Service contract for user implementation
11	RH-00090445	Marlon Buttrick	Collins	Realtime	Approved	29.5.2023	1.0	1.0	meeting
12	RH-00091296	Marlon Buttrick	Collins	Realtime	Saved	12.6.2023	6.0	6.0	Urgent deployment/ide Case development
13	RH-00091862	Marlon Buttrick	Collins	Realtime	Saved	16.6.2023	1.0	1.0	Content/Community Elements (https://net)
14	RH-00090493	Marlon Buttrick	Collins	Realtime	Submitted	24.5.2023	0.8	3.0	Preparation of the flow for rollouts
15	RH-00090478	Marlon Buttrick	Collins	Realtime	Submitted	10.5.2023	1.5	3.0	SDC-18 Hours-Action-Checklist (2023)

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.

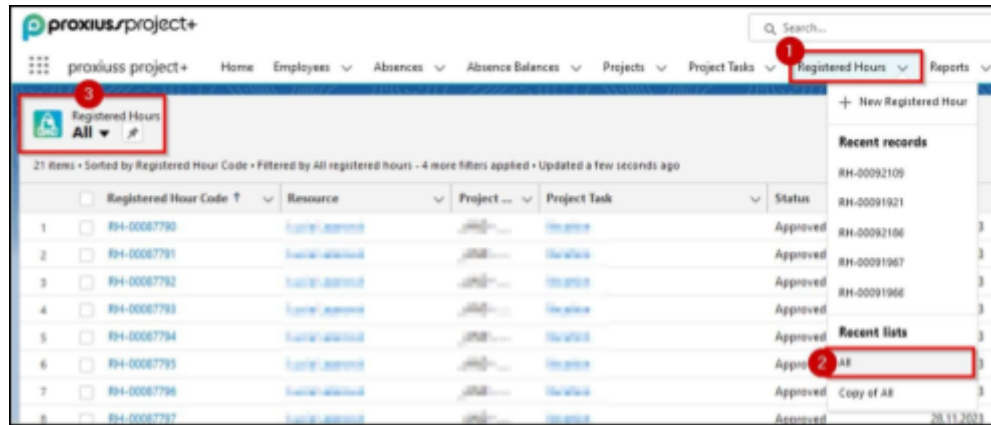
The screenshot shows the 'Project Task' details form. It includes fields for 'Hierarchy Name', 'Planned end Date', 'Hierarchy Code', and 'Billable'. The 'Billable' checkbox is checked.

Hierarchy Name	Planned end Date
1.2	31.12.2023
Hierarchy Code	Billable
1.2	☒

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:

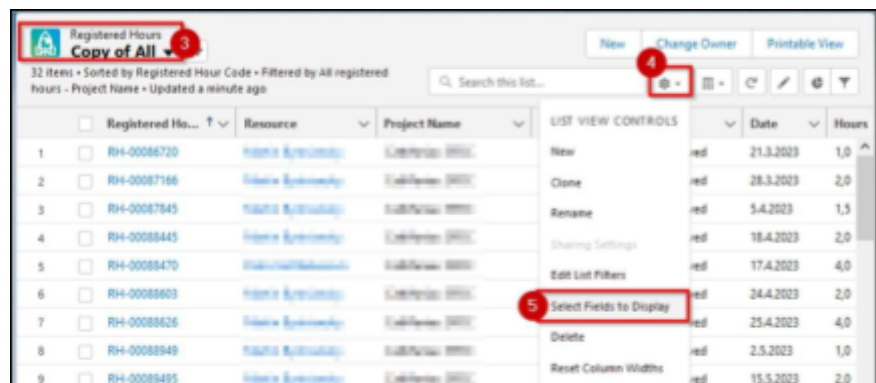
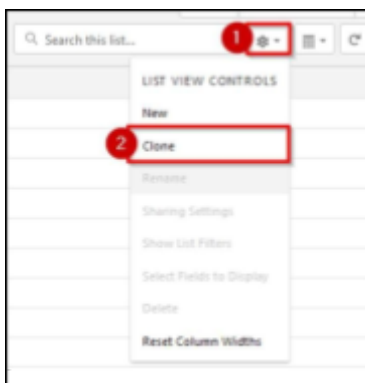
1. Go to the *Registered Hours* tab (1).
2. Select the 'All' option (2) from the Recent Lists.
3. After the page refreshes automatically, the *Registered Hours* overview (3) will be displayed.

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.



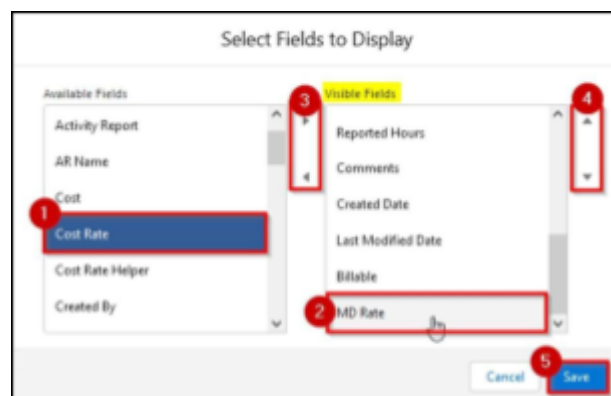
The *Registered Hours* overview is designed as a read-only display, meaning you cannot directly edit or modify the shown attributes. However, if you wish to create a copy of the overview, follow these steps: click on the *List View Controls* button (1) and select the *Clone* option (2) from the menu.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



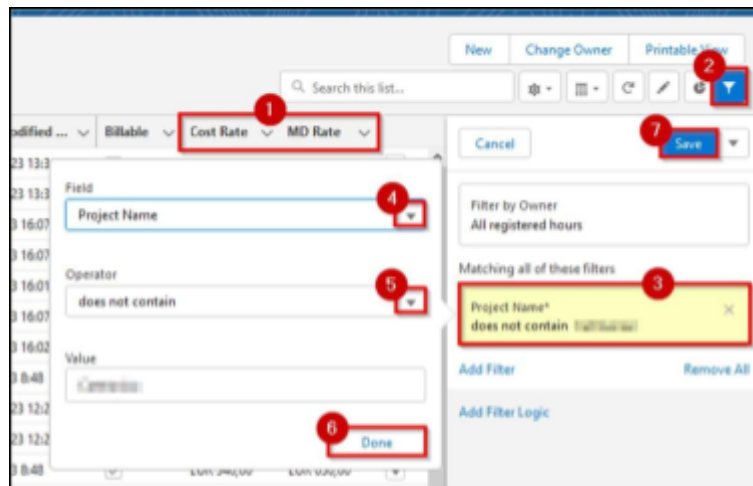
To ensure that both *Cost Rate* (1) and *MD Rate* (2) are displayed in the 'Visible Fields' column, follow these steps:

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 Hours	Resource	Project Name	Project Task	Status	Date	Hours	Reported Hours	Comments	Created Date	Last Mod.	Billable	Cost Rate	MD Rate
142	Ben-00000000	RandomThought	RandomThought	Approved	24.4.2023	2.0	2.0	RandomThought	24.4.2023 11:40	5.5.2023 11:40	☒	EUR 340.00	EUR 630.00
143	Ben-00000000	RandomThought	RandomThought	Approved	25.4.2023	4.0	5.0	RandomThought	25.4.2023 13:56	6.6.2023 11:40	☒	EUR 340.00	EUR 630.00
144	Ben-00000000	RandomThought	RandomThought	Approved	2.5.2023	1.0	1.0	RandomThought	2.5.2023 16:31	6.6.2023 6:31	☒	EUR 340.00	EUR 630.00
145	Ben-00000000	RandomThought	RandomThought	Approved	15.5.2023	2.0	3.0	RandomThought	15.5.2023 15:15	16.6.2023 15:15	☒	EUR 340.00	EUR 630.00
146	Ben-00000000	RandomThought	RandomThought	Approved	16.5.2023	1.0	3.0	RandomThought	16.5.2023 15:42	16.6.2023 15:42	☒	EUR 340.00	EUR 630.00
147	Ben-00000000	RandomThought	RandomThought	Approved	28.5.2023	1.0	1.0	RandomThought	28.5.2023 16:20	6.6.2023 6:20	☒	EUR 340.00	EUR 630.00
148	Ben-00000000	RandomThought	RandomThought	Submitted	9.5.2023	0.5	0.5	RandomThought	30.5.2023 10:33	6.6.2023 6:33	☐	EUR 250.00	
149	Ben-00000000	RandomThought	RandomThought	Submitted	10.5.2023	0.5	0.5	RandomThought	30.5.2023 10:33	6.6.2023 6:33	☐	EUR 250.00	
150	Ben-00000000	RandomThought	RandomThought	Submitted	10.5.2023	1.5	3.0	RandomThought	30.5.2023 10:33	16.6.2023 10:33	☒	EUR 250.00	EUR 520.00
151	Ben-00000000	RandomThought	RandomThought	Submitted	12.5.2023	1.0	2.0	RandomThought	30.5.2023 10:34	16.6.2023 10:34	☒	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	☒	BH-00000470	Service Project	Call Center (PST)	Business	Submitted	10.5.2023	1.5	2.0	[X] view item...	30.5.2023 10:33	22.6.2023 ...	☒	1	EUR 210.00	2	100.00
151	☒	BH-00000479	Service Project	Call Center (PST)	Business	Submitted	12.5.2023	1.0	2.0	Roll-up item...	30.5.2023 10:34	18.6.2023 ...	☒	3	EUR 210.00	4	Update 4 selected items
152	☒	BH-00000480	Service Project	Call Center (PST)	Business	Submitted	15.5.2023	0.5	0.5	Item [X] view...	30.5.2023 10:37	9.6.2023 9...	☐	5	EUR 210.00	6	Cancel
153	☒	BH-00000481	Service Project	Call Center (PST)	Business	Submitted	15.5.2023	0.5	1.0	Item [X] view...	30.5.2023 10:37	18.6.2023 ...	☒	7	EUR 210.00	8	Apply
154	☐	BH-00000482	Service Project	Call Center (PST)	Business	Submitted	18.5.2023	2.0	2.0	Registration of...	30.5.2023 10:39	9.6.2023 9...	☐	9	EUR 210.00	10	

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.

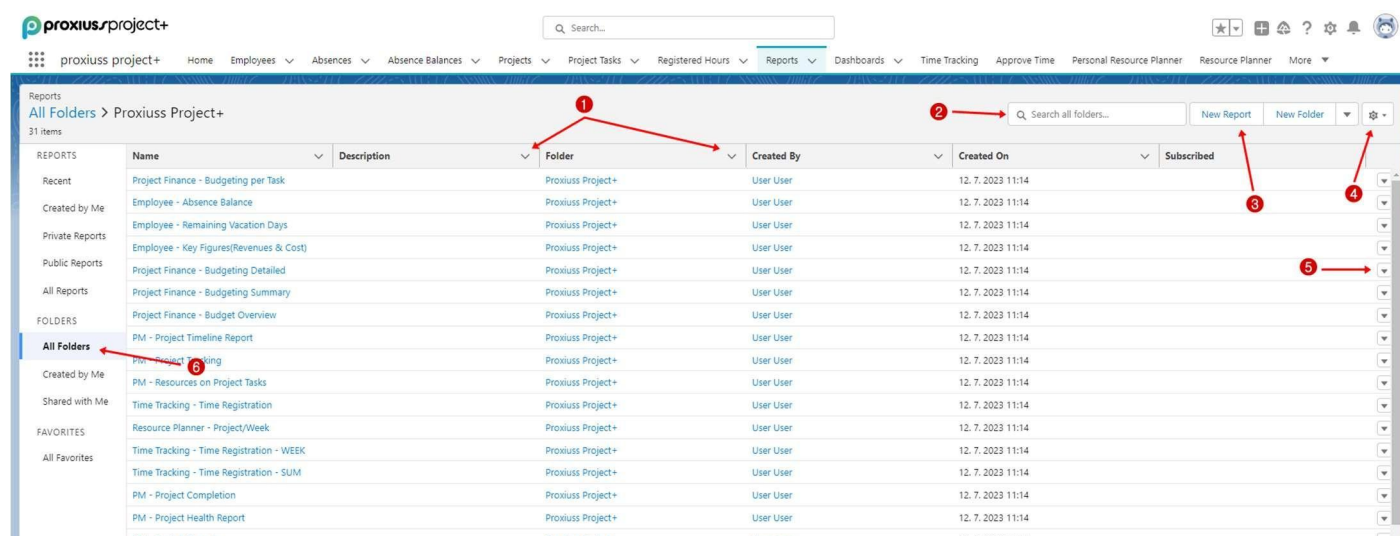
To find reports, use filters (1) or search lines (2).

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).

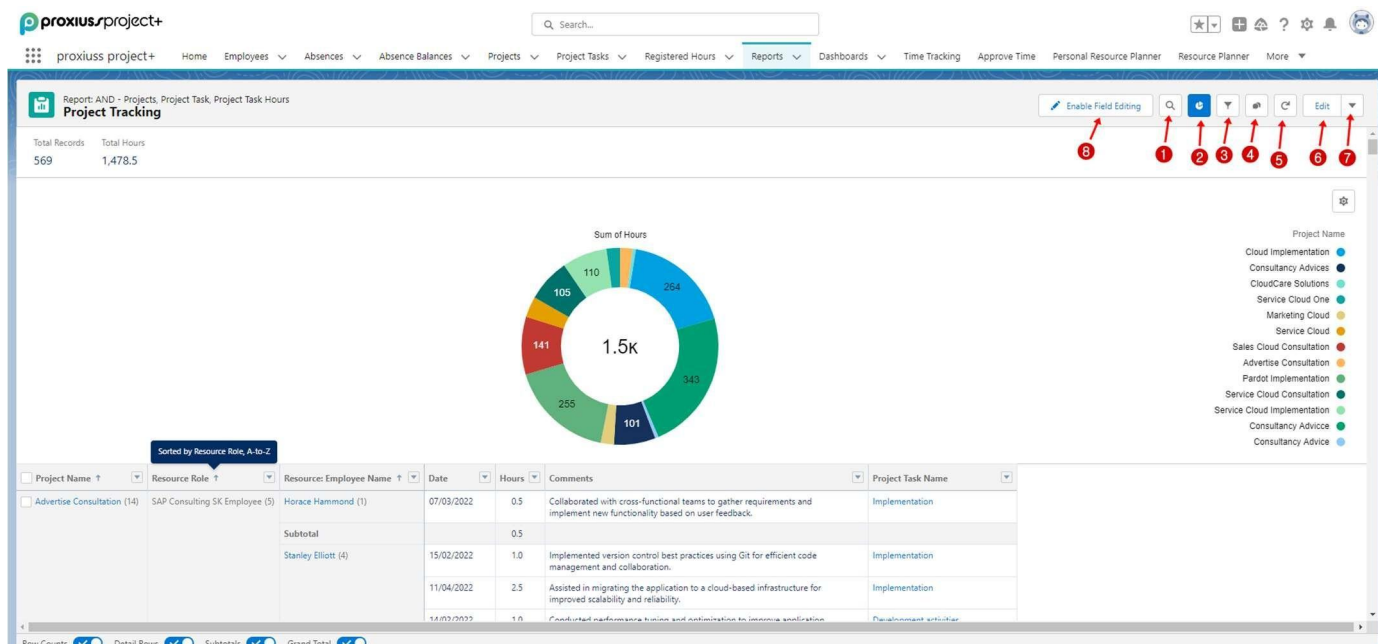
You can find all available folders in this view (6) – folder access rights can be managed by the admin and/or project manager only.



The screenshot displays the 'Reports' section of the PROXIUSS PROJECT+ application. The interface includes a top navigation bar with various tabs like Home, Employees, Absences, and Reports. The main content area shows a list of reports with columns for Name, Description, Folder, Created By, Created On, and Subscribed. Red callouts are placed over the interface to highlight specific features: (1) points to the 'Folder' column header; (2) points to a search bar; (3) points to the 'New Report' button; (4) points to a gear icon for column settings; (5) points to a dropdown arrow icon on the right side of a report row; and (6) points to the 'All Folders' link in the left sidebar.

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.



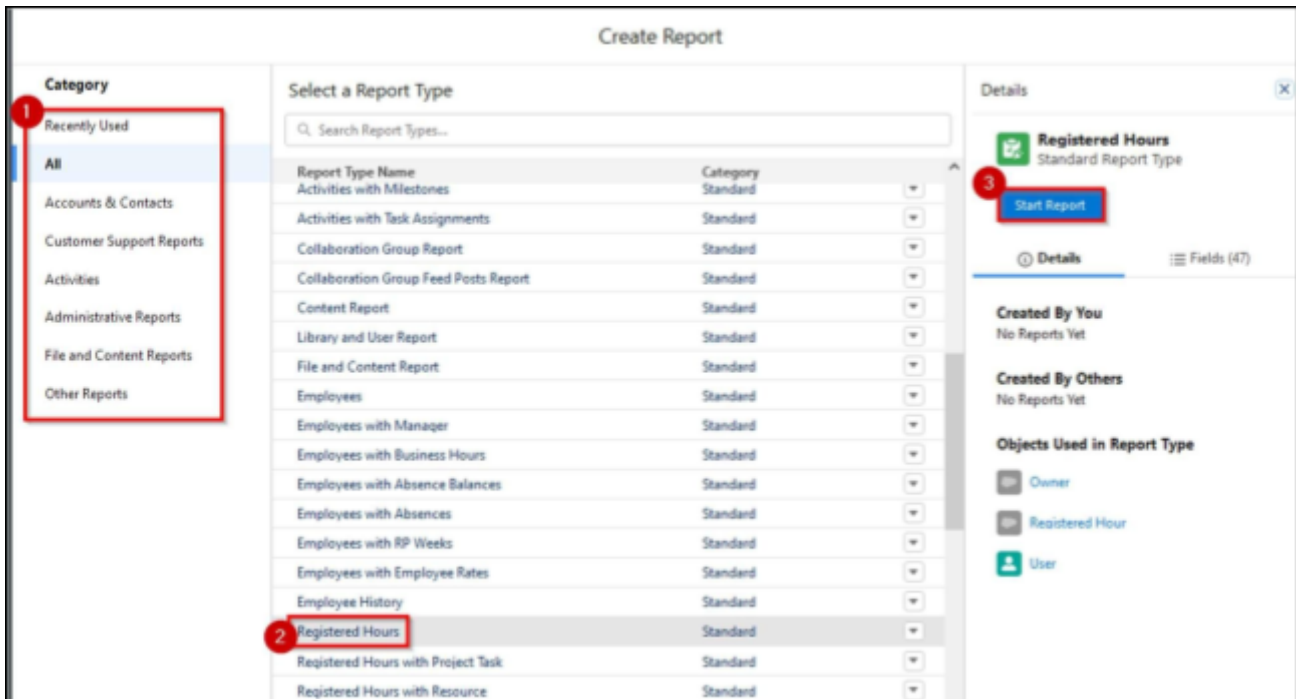
Buttons description:

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

	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.
	Edit values for some fields in records (8).

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.



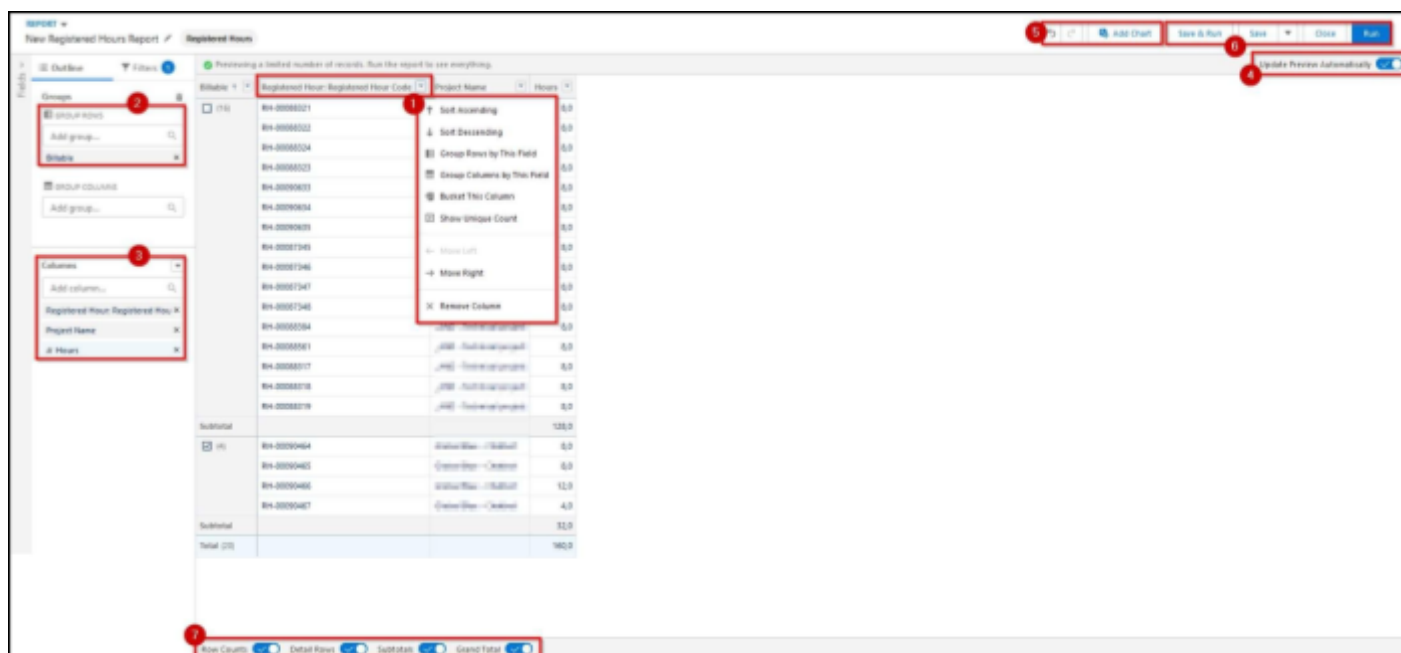
Note that in *Registered Hours*, only one attribute is initially displayed as column values, which

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.

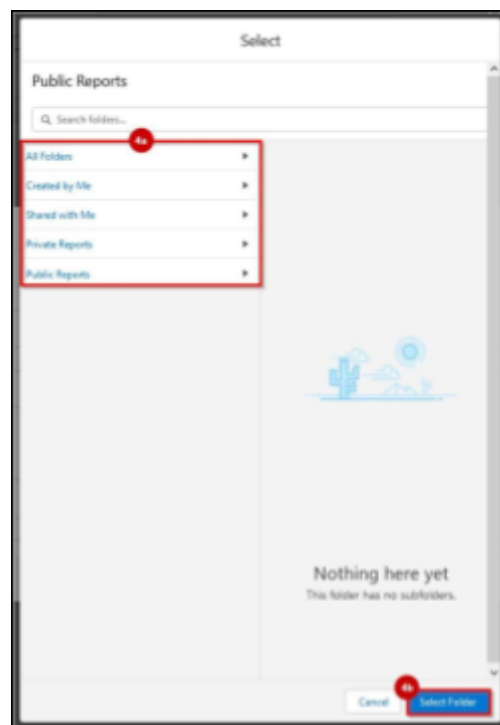
On the left side, there is an option to enable *Update Preview Automatically* (4). Selecting this option will automatically update your report as you add or remove attributes. Additionally, you can undo or redo actions or even add a chart to your report (5), for example, to visualize tracked hours over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



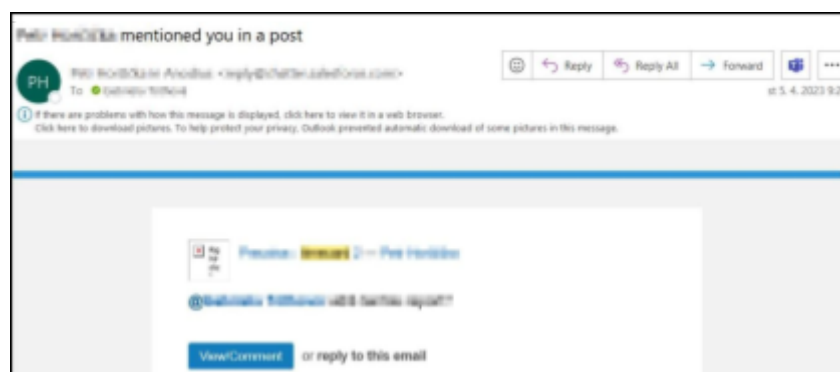
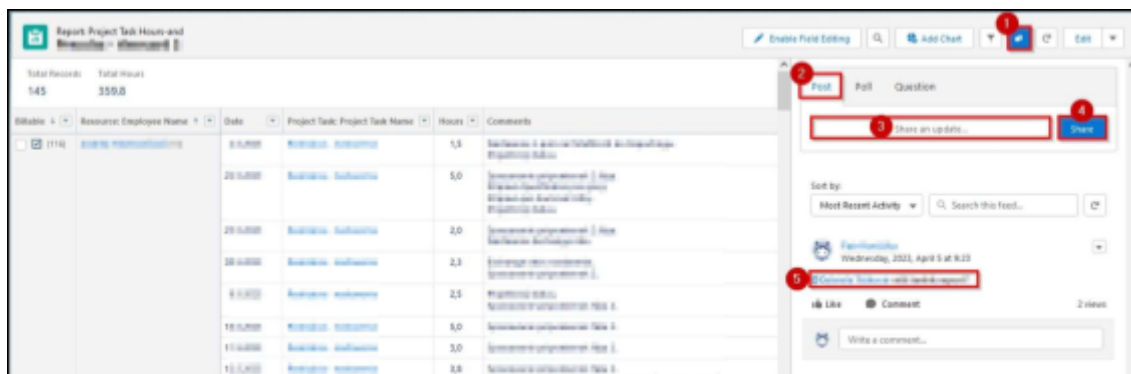
Your report should now be created and ready for use.

Sharing A Report/Folder

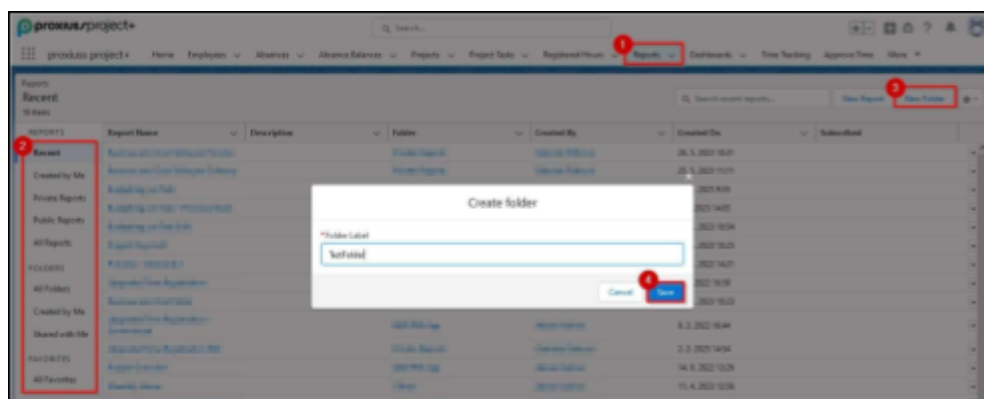
There are two ways to share a report: the *Collaboration* function or by creating a new folder to save the reports.

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.

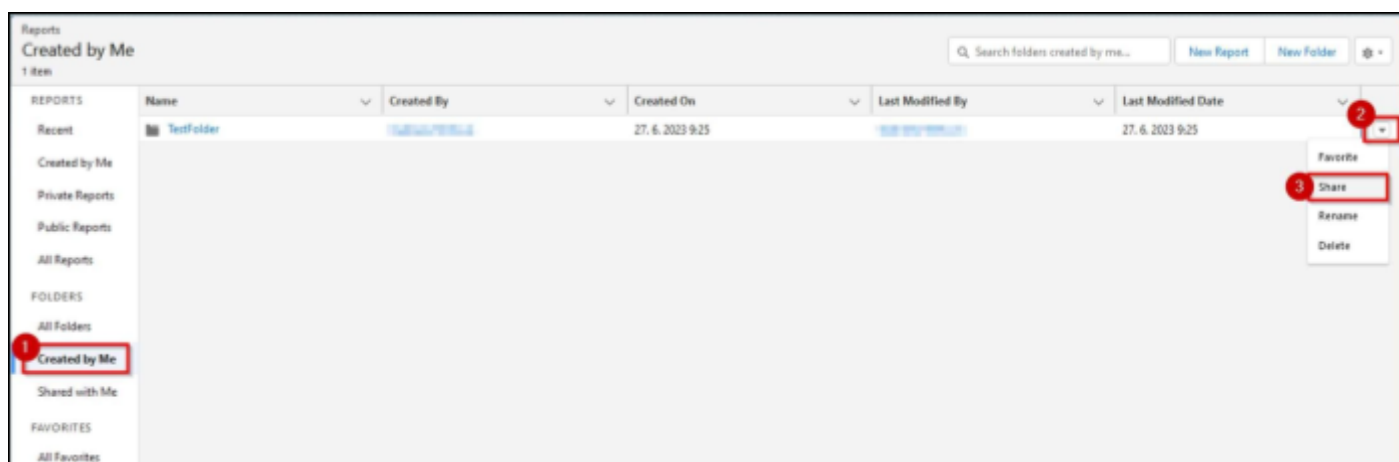
Open the report you wish to share and click the *Collaboration* button (1). A menu will appear; ensure it is set to the *Post* tab (2). Enter your update in the textbox (3) and tag your colleagues by typing "@" followed by their name. Select the correct names from the list that appears. Once you have 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.

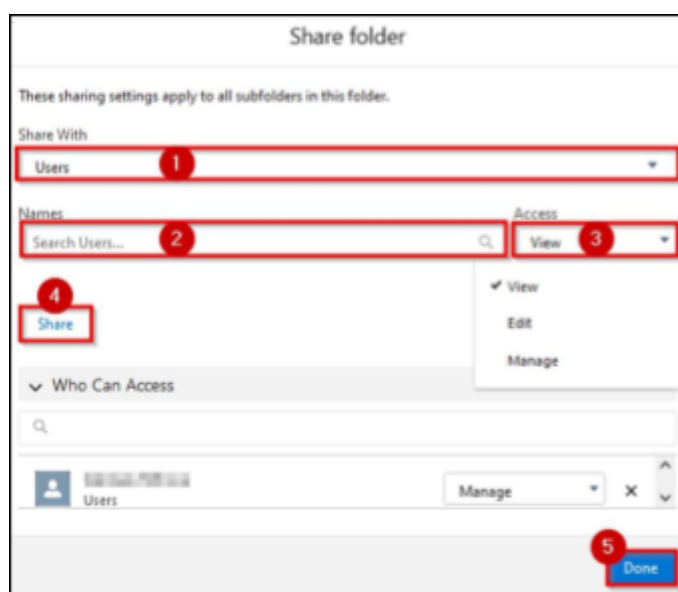


Your newly created folder will be accessible in the 'Created By Me' option (1) within the report list. Click the arrow at the end of the record line (2) to reveal the folder options. From there, select the *Share* option (3).



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.



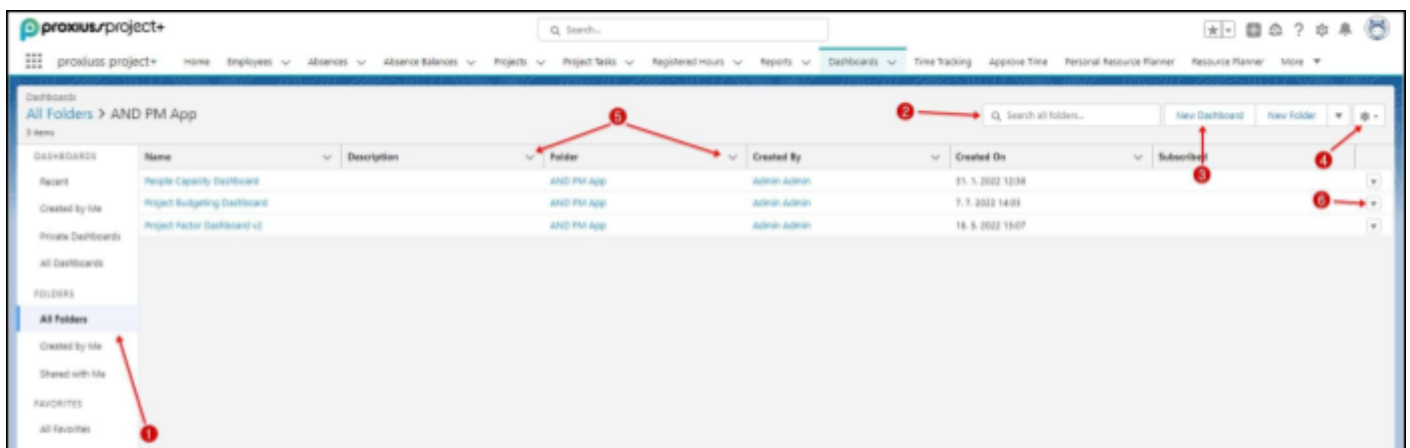
IMPORTANT: The report's content may vary depending on the user rights, as certain attributes are only visible to specific roles. For instance, employees may not have access to the financial information within the project.

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.

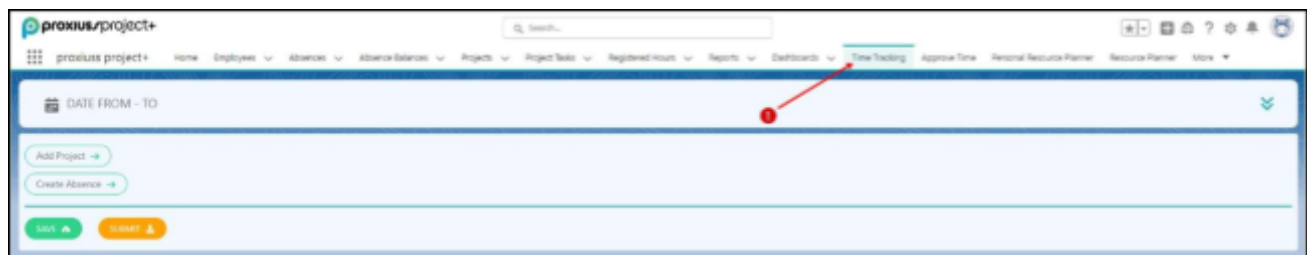
Below, you can see an example of a dashboard view:

7. Time Tracking

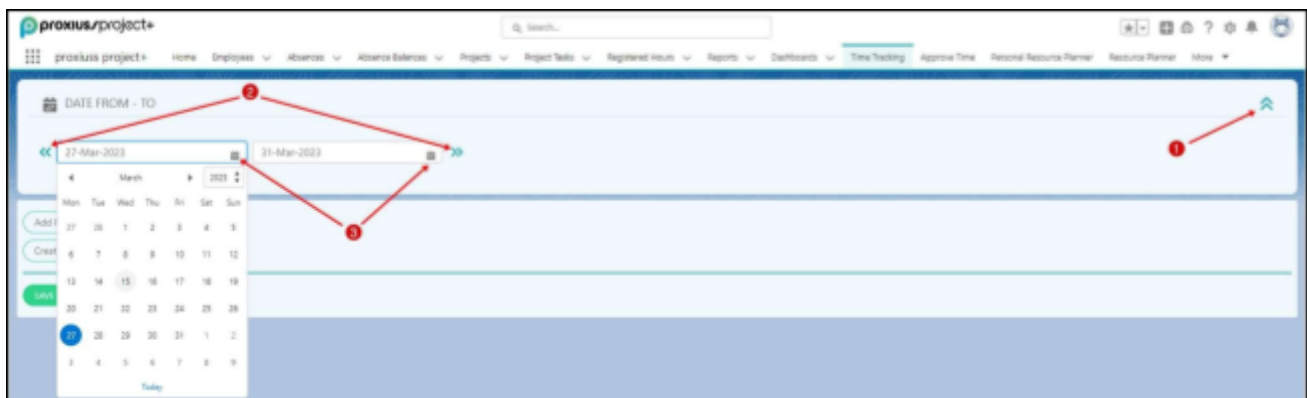
Time Tracking within PROXIUSS PROJECT+ offers an automated and efficient approach to monitoring working hours on a weekly basis. This feature allows team members to accurately record and track the time spent on projects while providing the flexibility to add detailed task descriptions or request absences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

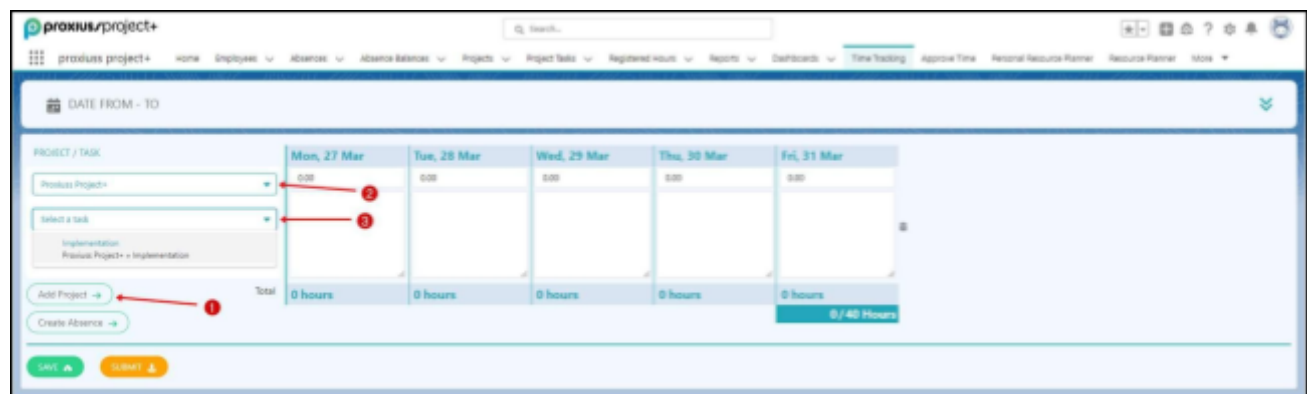
To track the work time, you must click on the *Time Tracking* tab (1).



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.

The screenshot shows the 'proxius/project+' interface. At the top, there's a search bar and navigation tabs: Home, Employees, Absences, Absence Balances, Projects, Project Tasks, Registered Hours, Reports, Dashboards, Time Tracking (selected), Approve Time, Personal Resource Planner, Resource Planner, and More. Below the tabs, there's a 'DATE FROM - TO' filter. The main area is a table with columns for dates: Mon, 27 Mar, Tue, 28 Mar, Wed, 29 Mar, Thu, 30 Mar, and Fri, 31 Mar. The table has rows for 'PROJECT / TASK' with dropdowns for 'Select a project' and 'Select a task'. Red arrows indicate the steps: (1) Select a project, (2) Select a task, (3) Fill in working hours and description, and (4) Click the Save button. The 'Save' button is highlighted in orange.

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).

The screenshot shows the 'proxius/project+' interface. At the top, there's a search bar and navigation tabs: Home, Employees, Absences, Absence Balances, Projects, Project Tasks, Registered Hours, Reports, Dashboards, Time Tracking (selected), Approve Time, Personal Resource Planner, Resource Planner, and More. Below the tabs, there's a 'DATE FROM - TO' filter. The main area is a table with columns for dates: Mon, 27 Mar, Tue, 28 Mar, Wed, 29 Mar, Thu, 30 Mar, and Fri, 31 Mar. The table has rows for 'PROJECT / TASK' with dropdowns for 'Select a project' and 'Select a task'. Red arrows indicate the steps: (1) Select a project, (2) Select a task, (3) Fill in working hours and description, and (4) Click the Save button. The 'Save' button is highlighted in orange.

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).

proxius/project+

DATE FROM - TO

PROJECT / TASK	Mon, 27 Mar	Tue, 28 Mar	Wed, 29 Mar	Thu, 30 Mar	Fri, 31 Mar
Proxiuss Project+	0.00	7.00	0.00	0.00	0.00
Implementation	Work	Test			
	0.00	0.00	0.00	0.00	0.00
	Implementation	Update system information			
Total	8 hours	7 hours	0 hours	0 hours	0 hours
	15 / 40 Hours				

Save Submit

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.

proxius/project+

DATE FROM - TO

PROJECT / TASK	Mon, 27 Mar	Tue, 28 Mar	Wed, 29 Mar	Thu, 30 Mar	Fri, 31 Mar
Proxiuss Project+	0.00	7.00	0.00	0.00	0.00
Implementation	Work	Test			
	0.00	0.00	0.00	0.00	0.00
	Implementation	Update system information			
Total	8 hours	7 hours	0 hours	0 hours	0 hours
	15 / 40 Hours				

Save Submit

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

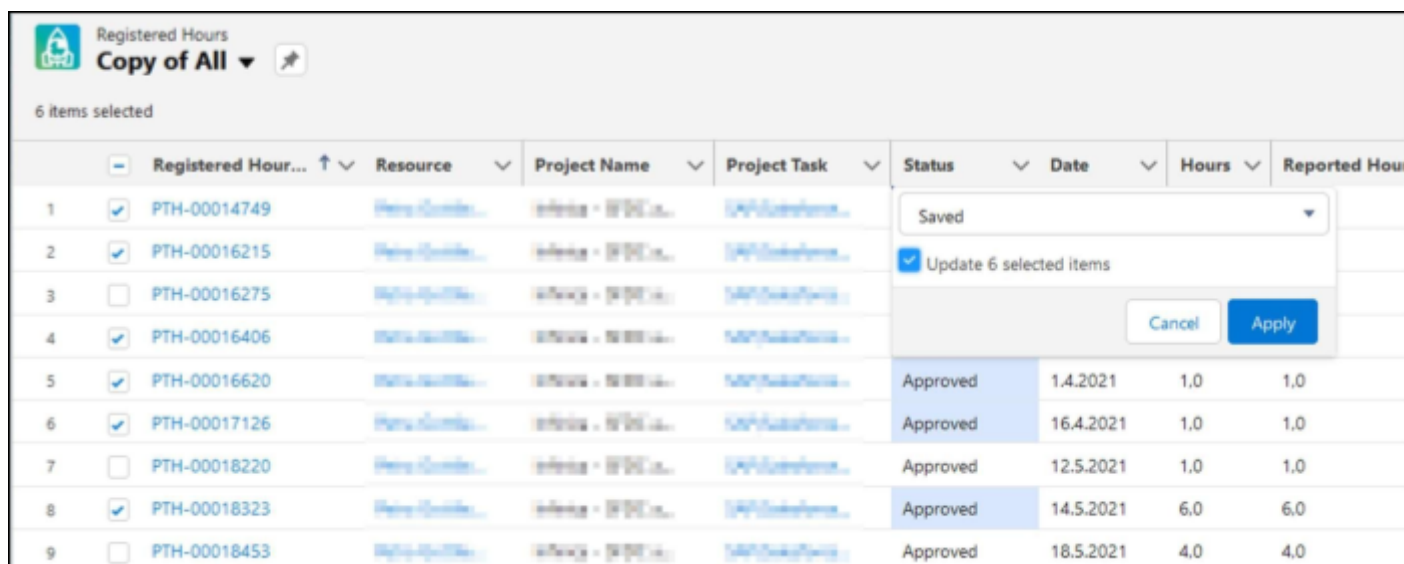
Once the logged time is 'Submitted' for approval or becomes 'Approved,' the data becomes locked for editing. In the case where the hours are incorrect, the change follows the steps as shown in the chapter [Reported Hours](#).

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 table. At the top, there is a header bar with a 'Registered Hours' title, a 'Copy of All' button, and a '6 items selected' indicator. Below the header, there 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 context menu is open over the table, showing a dropdown menu with 'Saved' selected, a checkbox for 'Update 6 selected items' which is checked, and 'Cancel' and 'Apply' buttons. The table data is as follows:

	Registered Hour...	Resource	Project Name	Project Task	Status	Date	Hours	Reported Hour
1	☒ PTH-00014749	Henry Gonder...	Infirmary - BSC...	UAP Substanc...	Saved			
2	☒ PTH-00016215	Henry Gonder...	Infirmary - BSC...	UAP Substanc...	Update 6 selected items			
3	☐ PTH-00016275	Henry Gonder...	Infirmary - BSC...	UAP Substanc...				
4	☒ PTH-00016406	Henry Gonder...	Infirmary - BSC...	UAP Substanc...				
5	☒ PTH-00016620	Henry Gonder...	Infirmary - BSC...	UAP Substanc...	Approved	1.4.2021	1,0	1,0
6	☒ PTH-00017126	Henry Gonder...	Infirmary - BSC...	UAP Substanc...	Approved	16.4.2021	1,0	1,0
7	☐ PTH-00018220	Henry Gonder...	Infirmary - BSC...	UAP Substanc...	Approved	12.5.2021	1,0	1,0
8	☒ PTH-00018323	Henry Gonder...	Infirmary - BSC...	UAP Substanc...	Approved	14.5.2021	6,0	6,0
9	☐ PTH-00018453	Henry Gonder...	Infirmary - BSC...	UAP Substanc...	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

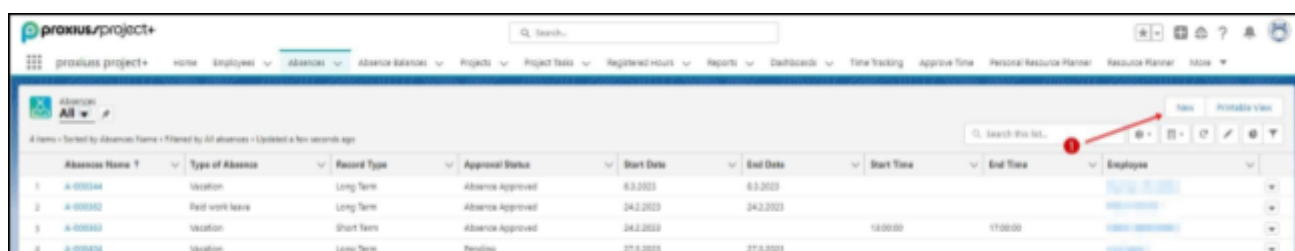
IMPORTANT: For the absences to work properly, you must have the Professional version of Salesforce or higher. You also need to set up the Approval Process for full functionality of absences.

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.

A screenshot of the 'New Absence: Long Term' form. The form is titled 'New Absence: Long Term' and has an 'Information' section. It contains the following fields: 'Absence Name' (text input), 'Absence Request Date' (calendar icon, showing 1.6.2023), '*Employee' (search dropdown with 'Search Employees...' text), '*Type of Absence' (dropdown menu showing '--None--'), '*Start Date' (calendar icon, with a red border and 'Complete this field' text below it), '*End Date' (calendar icon), 'Record Type' (dropdown menu showing 'Long Term'), 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:

Step Name	Date	Status	Assigned To	Actual App...	Comments
1 Manager Approval	21.3.2023 9:45	Pending			
2 Approval Request Submitted	21.3.2023 9:45	Submitted			Automated approval sub...

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.

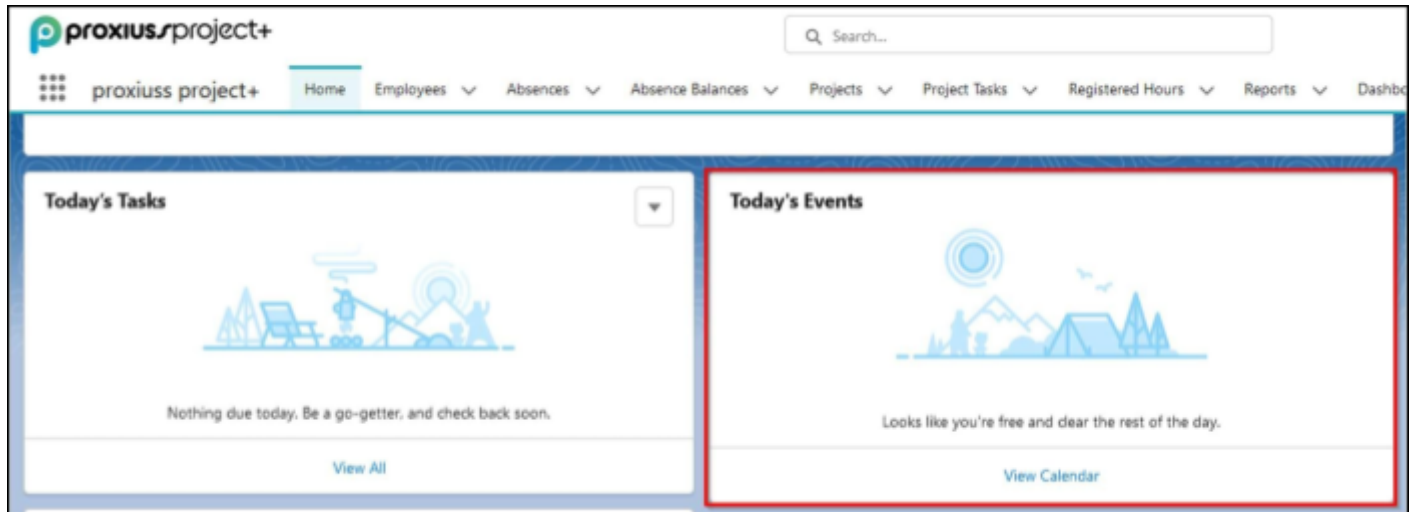
Submitter	Date Submitted	Actual Approver	Assigned To
	21.3.2023		

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.

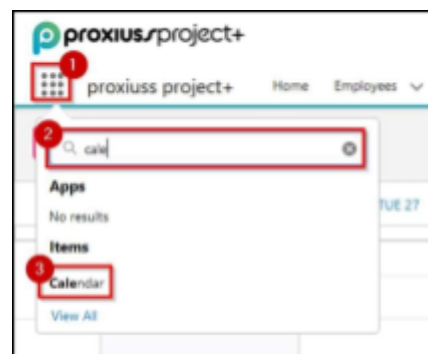
Absence Calendar

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.

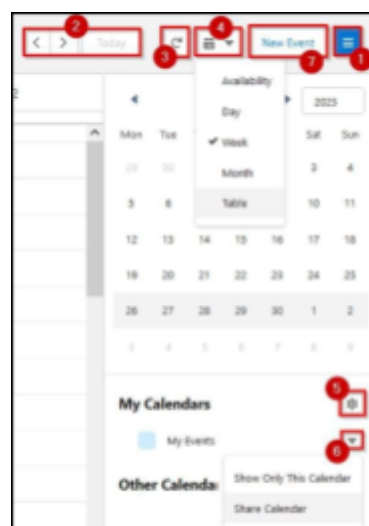


A calendar will open, and the most important buttons are located on the left side. The hamburger menu

(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:

The left screenshot shows the 'Create Calendar' interface, Step 1 of 2. It prompts the user to 'Create a calendar from a Salesforce standard or custom object.' There is a dropdown menu labeled 'Object' with a 'Select...' button. A 'Next' button is at the bottom right.

The right screenshot shows a dropdown menu with the following options: Absence, Absence Balance, Absence Type Assignment, Acceptance Protocol, Account, and Activity Report. The 'Absence' option is highlighted. A 'Next' button is at the bottom right.

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:

The screenshot shows the 'Create Calendar' interface, Step 2 of 2. It prompts the user to 'Create a calendar from a Salesforce standard or custom object.' The 'Calendar Name' field is set to 'Absence'. The 'Start and Duration of Calendar Items' section has 'Field for Start' set to 'Start Date (Date)' and 'Field for End' set to 'End Date (Date)'. The 'Apply a Filter' dropdown is set to 'My Absences'. The 'Field Name to Display' dropdown is set to 'Absences Name'. There are 'Back' and 'Save' buttons at the bottom.

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).

The screenshot shows the 'Calendar' interface for June 2023. A calendar event is highlighted in blue, and a 'More Details' button is visible. A 'New Event' button is also visible. The event details show 'Type of Absence: Vacation', 'Approval Status: Pending', 'Start Date: 7.6.2023', and 'End Date: 17.6.2023'. The event is labeled 'A-000415'. The 'More Details' button is labeled 'More Details'. The 'Edit' and 'Delete' buttons are also visible.

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.

New Event

Calendar Details

*Assigned To: [User Selection]

*Subject: [Search Icon]

☒ All-Day Event

*Start: 16.6.2023

*End: 16.6.2023

*Activity Currency: EUR - Euro

Related To: [Search Absence Balances...]

+ New Absence Balance

☒ Private

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.

Other Information

Location: [Text Field]

Show Time As: Busy

Description Information

Description: [Text Area]

Cancel Save & New **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*.

Other Calendars [Gear Icon] Add Calendars

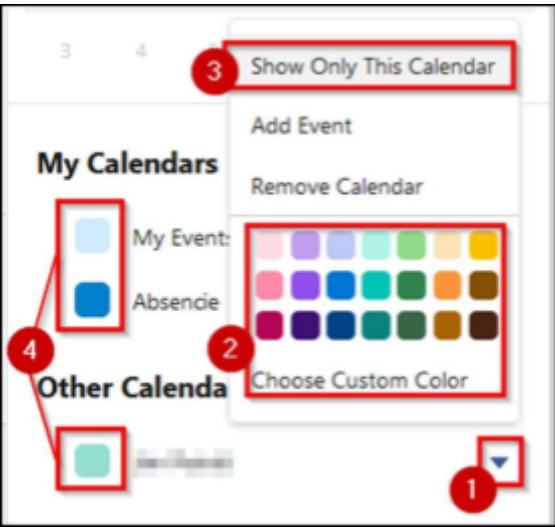
Add Calendars

Select Calendar Type

[User Selection] Search People... Search People

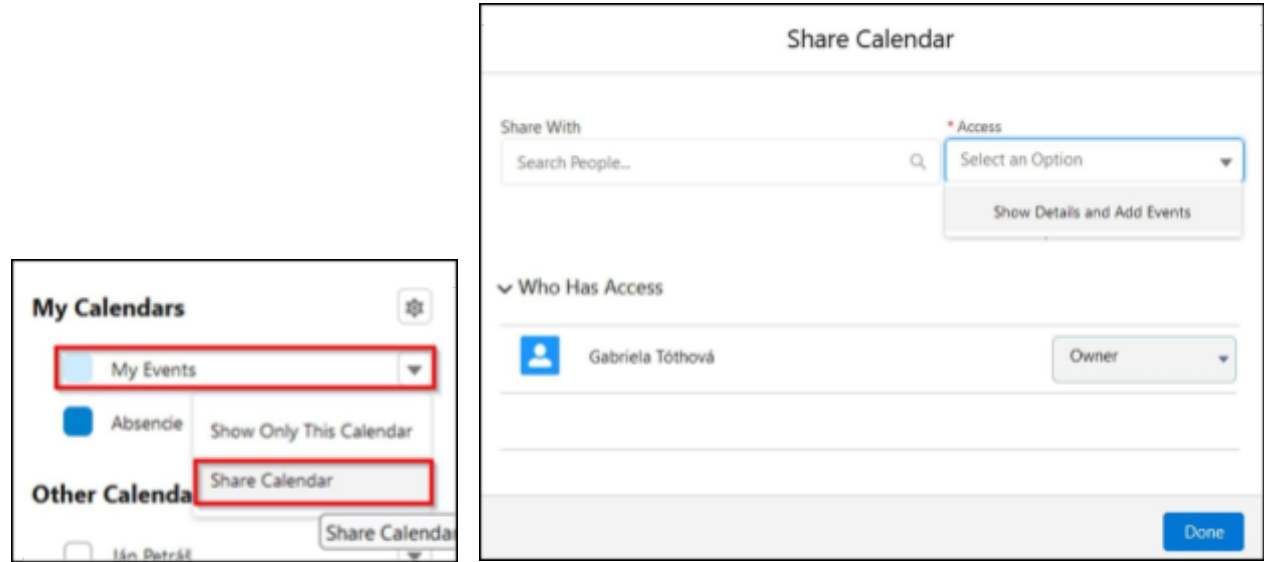
[User Selection] [User Selection] [User Selection]

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.



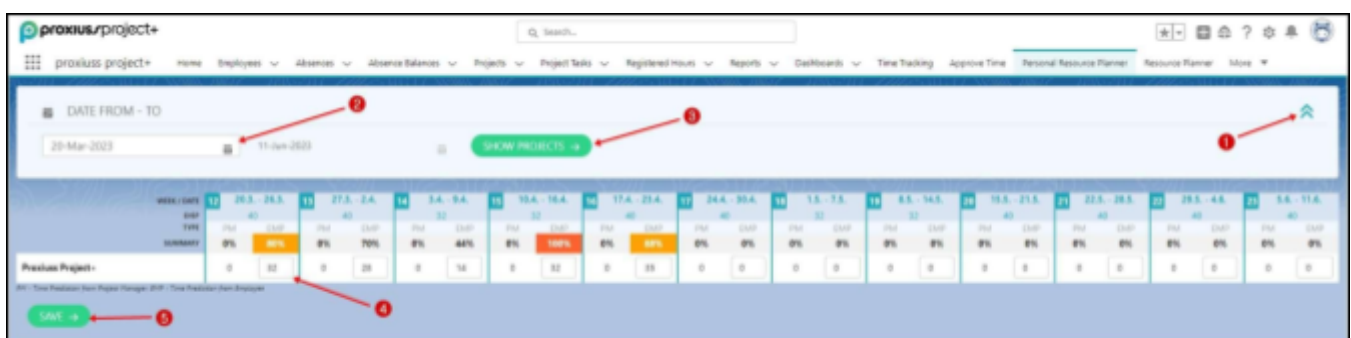
9. Personal Resource Planner

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).



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.

The screenshot displays the Salesforce interface for the Proxius project+ Accounts section. The main view shows the details of an account, with fields for Account Owner, Account Name, Account Site, Industry, Phone, Fax, Website, Customer Id number, Customer tax Id number, Company register, and Additional Information. Red arrows point to the Customer Id number, Customer tax Id number, and Company register fields, which are labeled 1, 2, and 3 respectively. The right sidebar shows the Activity and Charter sections, with filters for All time, All activities, and All types. The Upcoming & Overview section indicates no activities to show and no past activity.

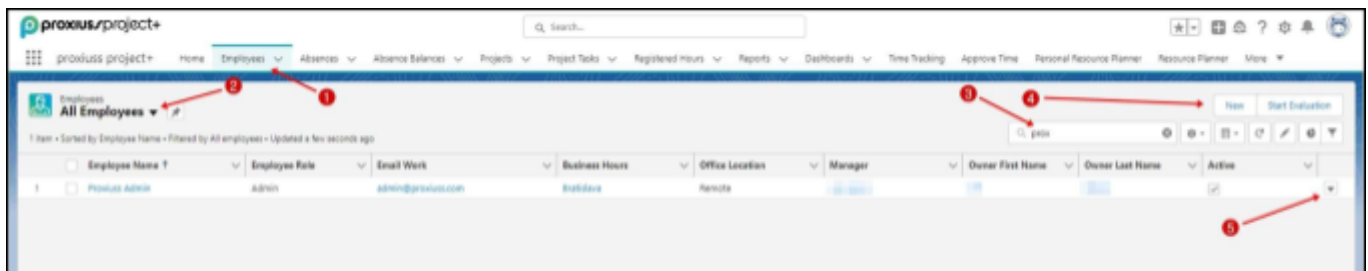
11. Employees

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).

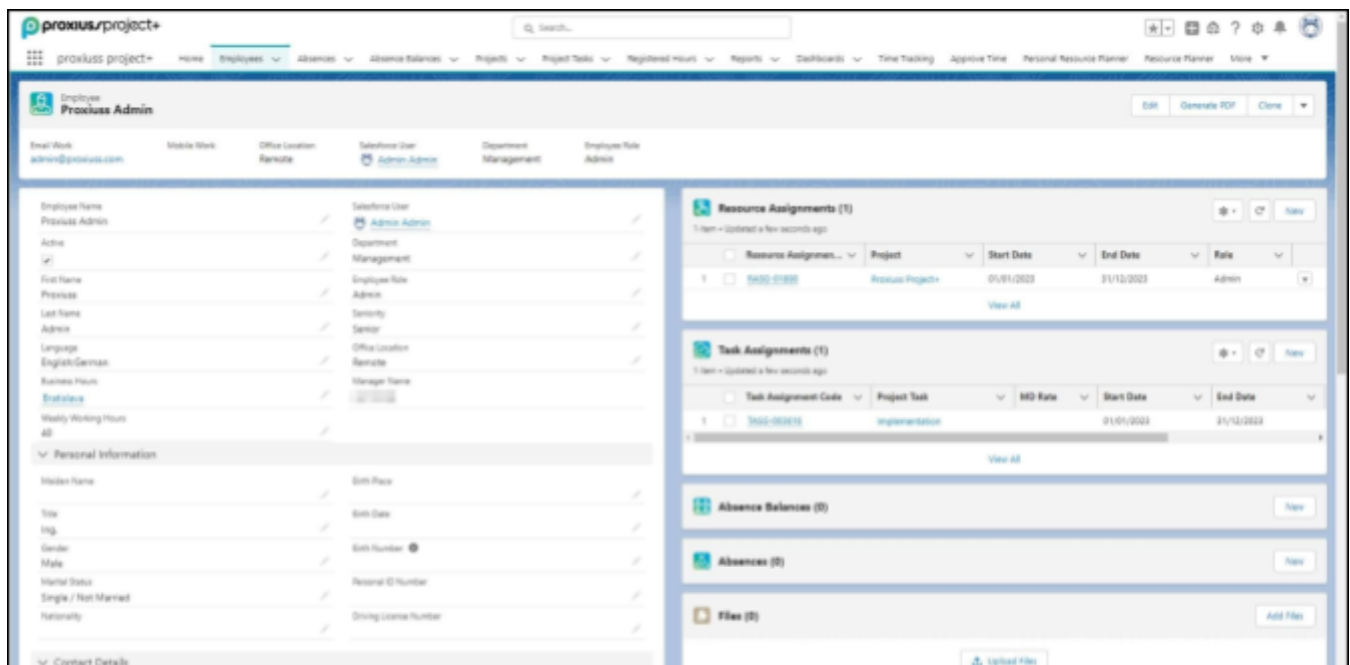
You can sort employees using the list views (2) and pin your favorite list to show up every time you click on the tab or use the search list (3).

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.



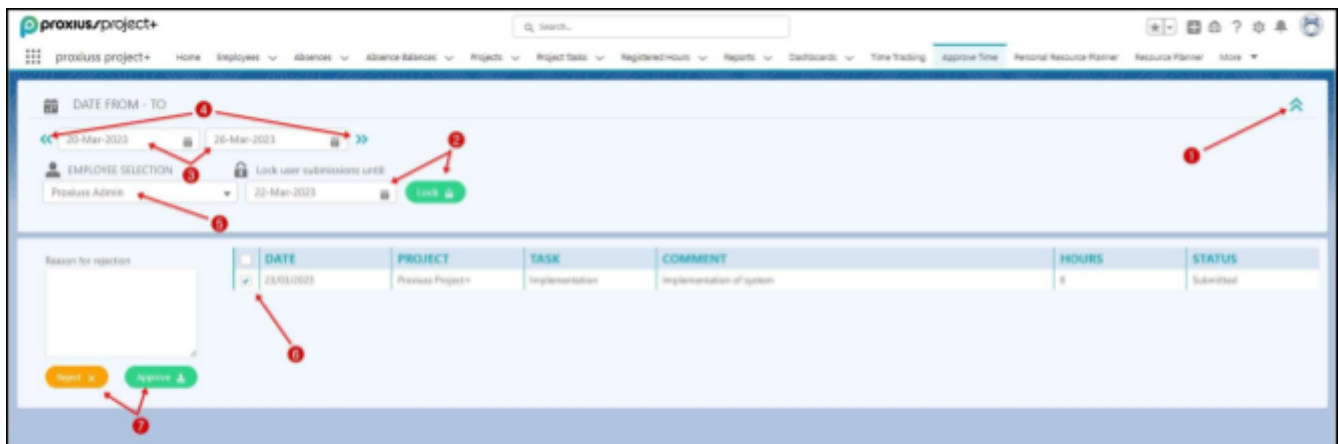
12. Approve Time

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.

The screenshot shows the 'Absence Balances' tab for 'Proxiuss Admin - Vacation'. The interface includes a search bar at the top and a navigation menu. The main content area displays the absence balance for the selected employee. A red box highlights the 'Dedicated Time (h)' and 'Dedicated Time (Days)' fields, which are labeled with a red '1'. The 'Start Date' and 'End Date' fields are labeled with a red '3', and the 'Type of Absence' field is labeled with a red '4'. The 'Employee' field is labeled with a red '2'.

Field	Value
Dedicated Time (h)	160.00
Dedicated Time (Days)	20.00
Used (h)	24.00
Used (Days)	3.00
Remaining (h)	136.00
Remaining (Days)	17.00

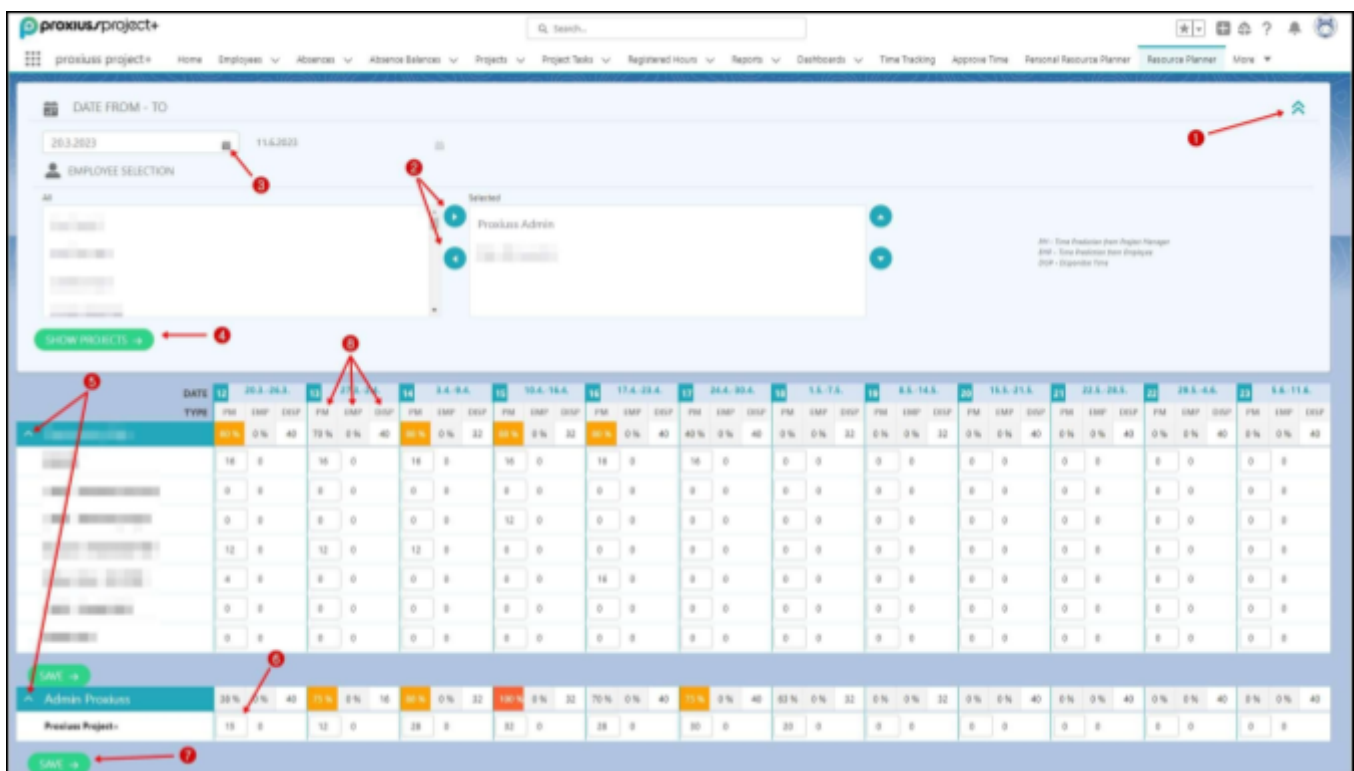
Created By: Admin Admin - 22.3.2023 10:04
Last Modified By: Proxiuss Admin - 22.3.2023 10:02

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.



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 displays the 'Acceptance Protocol' form in the PROXIUSS PROJECT+ application. The form is titled 'Acceptance Protocol v1' and includes a search bar at the top. The form is divided into two main sections: 'Acceptance Protocol' and 'Additional Customer Information'. The 'Acceptance Protocol' section contains fields for 'Project v1' (1), 'Customer v1' (2), 'As of the date' (3), 'Date of issue' (4), 'Subject' (5), and 'Subject of delivery' (6). The 'Additional Customer Information' section includes fields for 'Customer ID number', 'Customer tax ID number', and 'Company register'. The form also features a 'Print Acceptance Protocol' button (8) and a 'Send to Customer' button. The form is populated with sample data, including 'Project v1', 'Customer v1', 'As of the date', 'Date of issue', 'Subject', 'Subject of delivery', 'Customer ID number', 'Customer tax ID number', and 'Company register'. The form is created by 'Jan Petráš' on 19.07.2023 at 15:23 and last modified by 'Jan Petráš' on 19.07.2023 at 16:06.

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 the proxius project+ system. The interface includes a top navigation bar with various menu items and a search bar. The main content area is divided into several sections:

- Activity Report Header:** Displays the report name 'a04720000H8hz' and a 'Print Activity Report' button (8).
- Form Fields:**
 - Left Column:** Fields for 'Project' (1), 'Reported Status' (5), 'Title Name' (ACTIVITY REPORT), 'Show Costs' (checked), 'Show Hours' (checked), 'Show MD Rate' (unchecked), and 'Created By' (Test Manager).
 - Right Column:** Fields for 'Customer Manager Customer' (2), 'Contract' (3), 'Contract Name v1' (5), 'As of the date' (4), 'Subject' (SCOPE OF WORK), 'Invoice URL', 'Group by Tasks' (unchecked), 'Group by Employees' (checked), and 'Last Modified By' (Jen. Petric).
- Reported Tasks (1):** A table with one task: 'Manager Main Task 2'.
- Transactions (1):** A table with one transaction: 'Bn-1-000000'.
- Expenses (0):** A section with an 'Add Expense' button.
- Files (0):** A section with an 'Upload Files' button and a 'Drop files' area.

Red arrows and numbers (1-8) highlight specific elements: (1) Project, (2) Customer Manager Customer, (3) Contract, (4) As of the date, (5) Reported Status, (6) Transactions, (7) New button, and (8) Print Activity Report 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+ web application interface. The top navigation bar includes the Proxius Project+ logo, a search bar, and various menu items such as 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 is titled 'Transaction RH-T-000020' and contains a form with the following fields:

- Transaction Name: RH-T-000020
- Registered Hours: RH-00000011
- Registered Hours Code: RH-00000011
- Date: 06-07-2023
- Comments: RH MTD
- Resource: Test Manager
- Reported Hours (h): 16.0
- Reported Personal Revenue: 200.00
- Activity Report: RH-T-00000043Huz
- Reported Status: Sent to Customer
- Reported Task: Manager Main Task 2

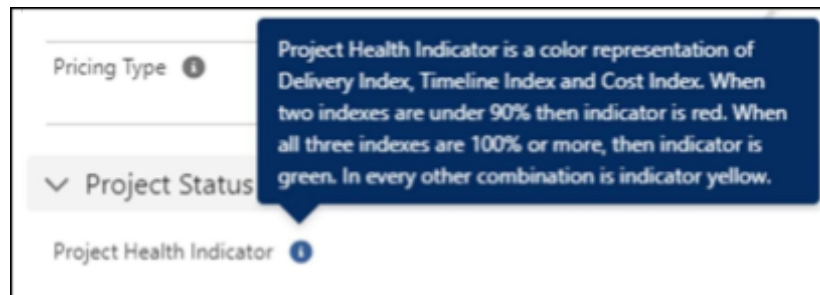
At the bottom of the form, it indicates 'Created By: Test Manager' and 'Last Modified By: Test Manager' on 06-07-2023 at 15:53. A 'Delete' button is located in the top right corner of the transaction details section.

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.

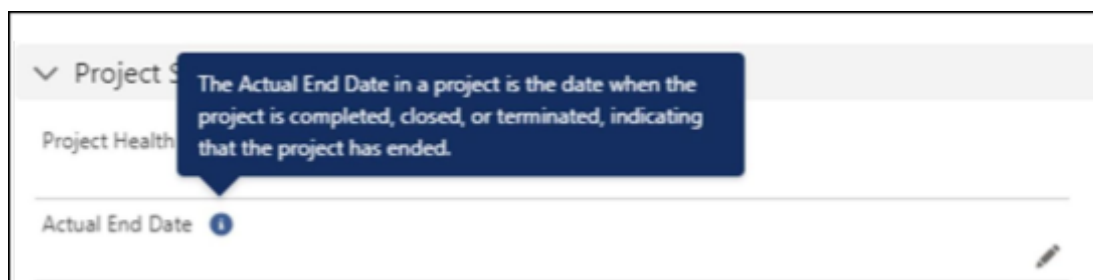
Specifically, you will find the following attributes within the Project Status Summary:

Project Health Indicator



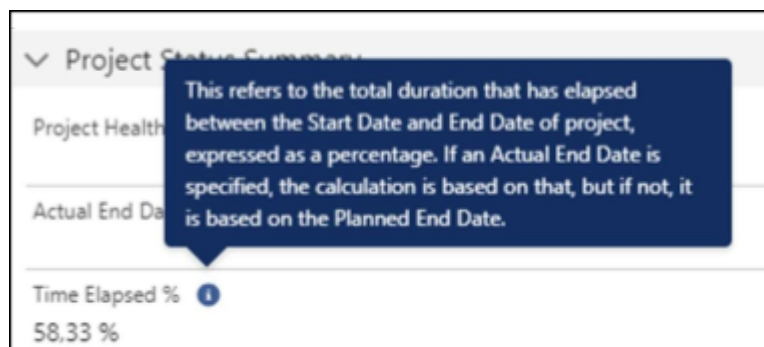
Project Health Indicator is a colored bar representing the project's overall health. This attribute only considers data from the Project Health attribute.

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

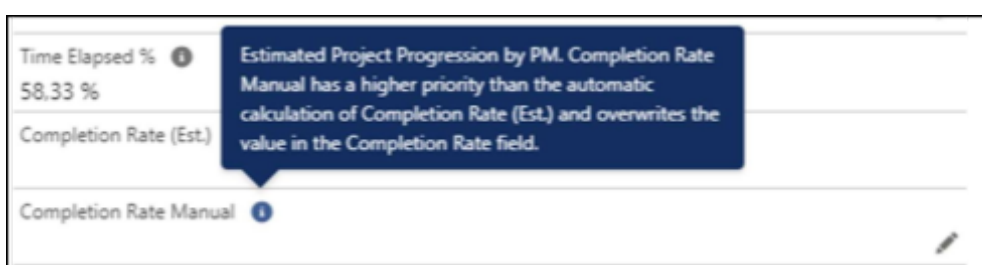


Time Elapsed %	Completion Rate (Est.)	Do Not Count Task Completion Estimated
58.33 %		☐

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.

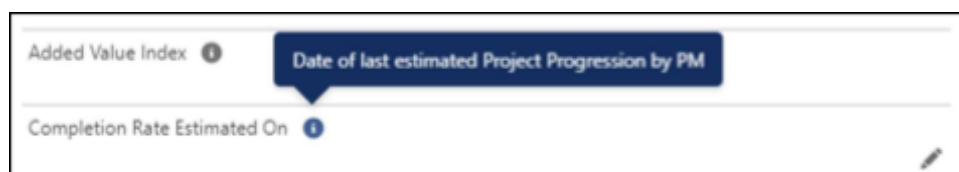
Completion Rate Manual



Time Elapsed %	Completion Rate (Est.)	Completion Rate Manual
58.33 %		

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

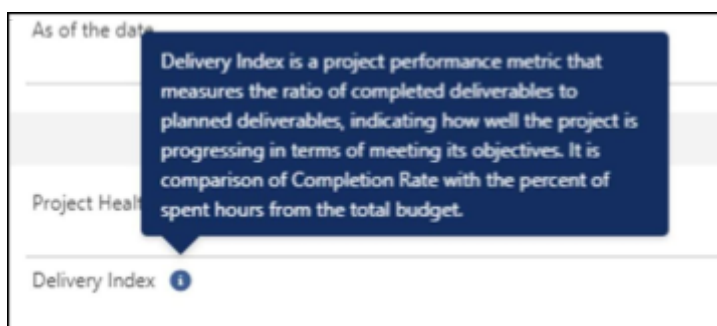
Completion Rate Estimated On



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

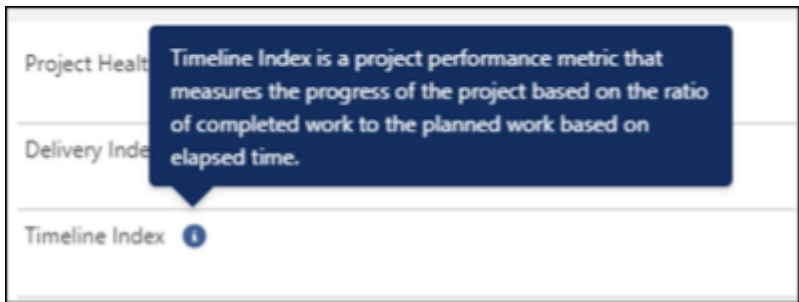


As of the date	Project Health	Delivery Index

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



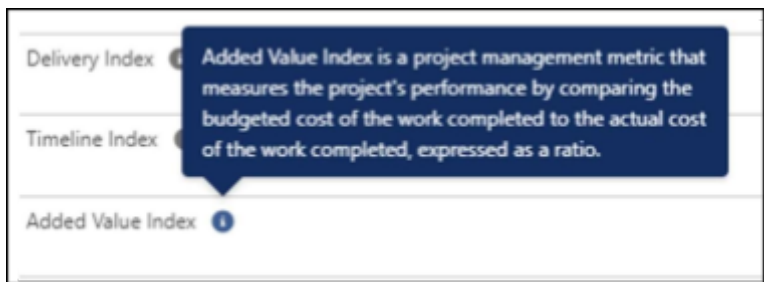
Timeline Index is calculated automatically as the ratio between the Completion Rate and Time Elapsed. When the index shows 100%, we go as planned. If the index reads less than 100%, we are behind schedule, whereas above 100% indicates that we are doing better than schedule.

Cost Index



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



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	Actual Hours
160.00	32.00
% Hours Spent	Spent Indicator
20.00 %	
Remaining Hours	Reported Hours
128.00	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	Revenue
11 100.00 €	13 000.00 €
Planned Costs Total	Actual Costs Total
4 650.00 €	800.00 €
Planned Personnel Costs	Actual Personnel Costs
4 700.00 €	800.00 €
Planned External Costs	Actual External Costs
750.00 €	
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 - Ratios/Indicators Extended														
% Hours Spent	Completion Rate	Delivery Index	Delivery Index Indicator	Planned Revenue	% Revenue Change	Project Revenue	% Revenue Spent	Revenue Spent	Revenue Indicator	Revenue Indicator Indicator	Revenue Indicator	% Revenue Change	Planned Cost Total	Actual Cost Total
100.0%	100.0%	100.0%	Green	10000	0.0%	10000	100.0%	10000	Green	Green	100.0%	0.0%	10000	10000
90.0%	90.0%	90.0%	Yellow	9000	-10.0%	9000	90.0%	9000	Yellow	Yellow	90.0%	-10.0%	9000	9000
80.0%	80.0%	80.0%	Red	8000	-20.0%	8000	80.0%	8000	Red	Red	80.0%	-20.0%	8000	8000
70.0%	70.0%	70.0%	Red	7000	-30.0%	7000	70.0%	7000	Red	Red	70.0%	-30.0%	7000	7000
60.0%	60.0%	60.0%	Red	6000	-40.0%	6000	60.0%	6000	Red	Red	60.0%	-40.0%	6000	6000
50.0%	50.0%	50.0%	Red	5000	-50.0%	5000	50.0%	5000	Red	Red	50.0%	-50.0%	5000	5000
40.0%	40.0%	40.0%	Red	4000	-60.0%	4000	40.0%	4000	Red	Red	40.0%	-60.0%	4000	4000
30.0%	30.0%	30.0%	Red	3000	-70.0%	3000	30.0%	3000	Red	Red	30.0%	-70.0%	3000	3000
20.0%	20.0%	20.0%	Red	2000	-80.0%	2000	20.0%	2000	Red	Red	20.0%	-80.0%	2000	2000
10.0%	10.0%	10.0%	Red	1000	-90.0%	1000	10.0%	1000	Red	Red	10.0%	-90.0%	1000	1000
0.0%	0.0%	0.0%	Red	0	-100.0%	0	0.0%	0	Red	Red	0.0%	-100.0%	0	0

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://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
- Request Sales/Marketing information: sales@proxiuss.com

