Module 1 • Concept & Navigation

1.1 Vision and Concept
1.2 Navigation
INTRODUCTION

Welcome to PSA 2015 Step by Step Guide series! The intent of these guides is to teach you the core functionalities of Assistance PSA. You can use them as a complete training tool or as a reference for implementation purposes.

Based on the PSA methodology they are broken down into 7 modules designed to walk you through the implementation process up to and including best practice when working with the solution. For a complete description of each module please refer to the Appendix of Module 1.

Starting at the beginning and working your way through all the exercises will provide you with enough proficiency to be able to work with all the common functionality of PSA and apply this knowledge to your own business requirements.

Last but not least this series of step by step guide will also prepare you for the certification exam of Assistance PSA. Good luck!

* PSA for Microsoft CRM can be accessed from a web browser, from Microsoft Outlook by using the Microsoft Dynamics CRM for Outlook feature or from a mobile device. The screen shots and examples in this guide show the web browser option. Also note that for the purposes of this guide the security role used for all the exercises is System Administrator.
INTRODUCTION

MODULE 1. CONCEPT AND NAVIGATION

This step by step guide is the first of the series. In this module you will learn:

- The vision and concept behind Assistance PSA
- How to navigate in the solution.
1.1 Vision and concept
VISION AND CONCEPT

PSA Suite for Microsoft CRM

The PSA Suite for Microsoft CRM is a complete Professional Services Automation solution.

Assistance PSA is the core functionality of the PSA Suite, which also consists of two other solutions, Assistance Financials and Assistance HRM, as well as a Portal.

The three apps completing the Suite: PSA mobile, PSA Approval and PSA Project Status, will respectively allow booking and approval of hours in PSA as well as provide you with access to your projects’ actuals and KPI’s from a mobile device.

Finally, within PSA, you will find several HTML5 components that are accessible from any devices, cross-browsers and with a deep link direct.

*For additional information regarding the PSA Suite, please go to our website www.asssistantesoftware.com

Assistance PSA

When you install Assistance PSA you extend the Microsoft CRM experience with the following components (light blue):

Microsoft SharePoint

Accounts

Opportunities

Microsoft SharePoint

Contacts

Leads

Microsoft SharePoint

Projects

Assistance HRM

Microsoft SharePoint

Project Estimate

Campaigns

Microsoft SharePoint

Project Forecast

Time and Expenses

Microsoft SharePoint

Project Planning

Invoices

Microsoft Dynamics NAV/GP/AX

Microsoft SharePoint

Financials

Microsoft Outlook

Microsoft SharePoint

Microsoft Outlook
Providing you with a complete solution that allows you to turn opportunities into projects, budget and forecast your hours, plan your project and resources, track actual time and expenses and execute invoicing.

The time and expenses module of Assistance PSA is seamlessly integrated with Microsoft Outlook and you can also integrate it with Assistance HRM module.

As for your Projects they can also be seamlessly integrated with SharePoint.

Finally if you install Assistance Financials (from the PSA Suite) you will extend PSA with project accounting functionality. The solution can also assist you in the integration of your financial data into your ERP system*.

*For more information regarding financial integration please go to our website http://www.assistancesoftware.com/financials/
1.2 Navigation
NAVIGATION

Basic Concepts

If you have experience working with Microsoft Dynamics CRM (version 2013 and up) you will easily find your way around in Assistance PSA.

If you are not familiar with Microsoft Dynamics CRM (version 2013 and up) you will find below some basic concepts about navigation.

1. Command area
2. Grid view
3. Inline Chart

1. Command area.

- Navigation bar:
  
  Will bring you from one module/entity/record to another within Microsoft CRM.

  Simply click the down arrow next to the area you wish to go and a drop down menu will be displayed. The hierarchy of the navigation goes from left to right. You can use the scroll wheel of your mouse or click the arrow on the far right (or far left) to scroll through the available modules/entities/records.
1.2 NAVIGATION

The Navigation bar will also indicate where you are within the solution. The navigational breadcrumb will always display the information in the same order:

- at the far right the record currently displayed;
- just before the entity to which it is related;
- and finally the module to which it belongs.

Local Command bar:

Located just below the navigation bar, you will find local commands related to the specific area you are currently viewing. The top 5 commands are listed on the bar and more commands are found by clicking the ellipses button to the right.

2. Grid View.

Whenever you are looking at list of data, it is always displayed as a grid view. The grid views throughout Microsoft CRM have common functionality, including:

- The ability to select one or more records to complete an action
- The ability to sort, filter, and search the data
- The ability to analyze the data with in-line charts
1.2 NAVIGATION

- Note that when you are looking at a grid view, you have the option to pin it so that when you return back to the area the pinned view will open by default.

3. Inline Chart.

- Though not visible by default, inline charts will provide you with real-time information on the data you are viewing.

- Charts are interactive such that you can drill down into a chart to filter the data in the grid view.

- You can create multiple charts and use the drop down menu to display the one you wish to see.

For further information regarding navigation please refer to Microsoft CRM resources.
1.2 NAVIGATION

**Modules, Work Areas and Entities**

Within Microsoft CRM, Assistance PSA includes the following two modules:

- ASSISTANCE PSA
- PSA SETTINGS

1. The first module, ASSISTANCE PSA, is where you will work; i.e. create your projects, budget and forecast your hours, plan your project and resources, track actual time and expenses, execute invoicing etc.

It is broken down into 3 work areas: Projects, Resource Planning and Time and Expenses.

Within each work area you will find the following entities:

<table>
<thead>
<tr>
<th>Projects</th>
<th>Resource planning</th>
<th>Time and expenses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Projects</td>
<td>Employees*</td>
<td>Timesheet</td>
</tr>
<tr>
<td>Project items</td>
<td>Vacation Leave</td>
<td>Timesheet (line)</td>
</tr>
<tr>
<td>Budget</td>
<td>Sick Leave</td>
<td>Hours</td>
</tr>
<tr>
<td>Programs</td>
<td>Utilization Sheet</td>
<td>Time Cards</td>
</tr>
<tr>
<td>Invoices</td>
<td>Sales Forecast</td>
<td>Hours analysis</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Expenses</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Expense Claims</td>
</tr>
</tbody>
</table>

*The entity *Employees* is the same as the entity *CRM Users* located in the Module PSA Settings in the work area PSA Settings.*
2. The second module, PSA SETTINGS, is where you will configure the solution according to your business requirements as well as where you will create your master data (ex: project templates).

It is broken down into 2 work areas: Assistance PSA and PSA Tables.

Within each work area you will find the following entities:

<table>
<thead>
<tr>
<th>Assistance PSA</th>
<th>PSA Tables</th>
</tr>
</thead>
<tbody>
<tr>
<td>PSA Settings</td>
<td>Program Types</td>
</tr>
<tr>
<td>PSA Users</td>
<td>Program Status</td>
</tr>
<tr>
<td>CRM Users*</td>
<td>Project Types</td>
</tr>
<tr>
<td></td>
<td>Project Templates</td>
</tr>
<tr>
<td></td>
<td>Project Item Groups</td>
</tr>
<tr>
<td></td>
<td>Project Template Items</td>
</tr>
<tr>
<td></td>
<td>Project Status</td>
</tr>
<tr>
<td></td>
<td>Hour Types</td>
</tr>
<tr>
<td></td>
<td>Hour Type Localized Label</td>
</tr>
<tr>
<td></td>
<td>Hourly Rates</td>
</tr>
<tr>
<td></td>
<td>Hourly Rate Groups</td>
</tr>
<tr>
<td></td>
<td>Hourly Rate Adjustments</td>
</tr>
<tr>
<td></td>
<td>Tax Groups</td>
</tr>
<tr>
<td></td>
<td>Tax Types</td>
</tr>
<tr>
<td></td>
<td>Credit Management</td>
</tr>
<tr>
<td></td>
<td>Cost Centers</td>
</tr>
<tr>
<td></td>
<td>Legal Entities (and Department)</td>
</tr>
<tr>
<td></td>
<td>Ledgers</td>
</tr>
<tr>
<td></td>
<td>Locations</td>
</tr>
<tr>
<td></td>
<td>Regions</td>
</tr>
<tr>
<td></td>
<td>Scheduled jobs</td>
</tr>
</tbody>
</table>

*The entity CRM Users is the same as the entity Employees located in the Module Assistance PSA in the work area Resource Planning.

Note regarding PSA Security roles: Assistance PSA leverages Microsoft CRM security therefore the creation of its roles will be done at the same place as with the standard CRM security roles; in the Module Settings under Administration.
APPENDIX: Content of Step by Step Guide (broken down by modules).

In this module you will get an understanding of:
- The concept behind Assistance PSA as well as navigation in the solution.

Module 2. Settings.
In this module you will learn how to:
- Create the Organization and Financials (Basic) settings of your organization. Ex: legal entities, tax groups, booking periods, etc.
- Set up the different functionalities of the solution based on your business requirements. Ex: levels of approval, use of project item activities, CRM cases, Alerts, etc.
- Create PSA Security roles.
- Create PSA Users (and define them as time card users, Admin approver, etc).

In this module you will learn how to:
- Employee’s Work and Leave parameters.
- Hour types, hourly rates and hourly rate adjustments.
- Project and Program types as well as Project and Program status.
- Project templates.

Module 4. Projects:
In this module you will get an understanding of:
- The BAFPA methodology* and the 3 levels of project management in PSA.
  *BudgetAgreementForecastPlanningActualsMethodology

You will also learn how to create and work with:
- Projects and budget.
- Project forecast.
- Project and Resource planning.
- Utilization Sheet.
- Programs.

Module 5. Timesheet.
In this module you will learn how to:
- Book time and Expenses in the Timesheet (Calendar view and By Line).
- Book time via the Instant Time Entry.
Module 6. Time and Expenses.
In this module you will get an understanding of:
- The PSA standard validation process.
You will also learn how to create and work with:
- Timesheet completion (including posting to a time card).
- Analysis and adjustments of time and expense entries.
- Approval of time and expenses.
- Closing of booking periods.
- Putting hours on hold.

Module 7. Invoicing.
In this module you will learn how to:
- Generate single project invoicing
- Execute batch invoicing
- Execute Invoice approval
- Review Assistance PSA Revenue dashboard