

**User Guide** 

Version 1.0

September 2023

# **Table of Contents**

INTRODUCTION	4
USER LOGIN	5
USER ROLES AND LEVELS	6
BASIC SETTINGS	9
Admin Settings	9
User Settings	14
USER MANUAL – BY SECTIONS	16
1. Home (Landing Page)	16
2. Projects	
Project Creation	
Project Details	19
Resource Assignment	20
Phase	21
Project Status Change	22
3. Project Tasks	
Project Task Creation	
Project Task Details	24
Waterfall/Agile Approach	
Task Assignment	
Milestone	
Project Task Overview	
4. Registered Hours	
Registered Hours Details	
Reported Hours	
Billable Flag Change	
5. Reports	
Reporting Details and Options	
New Report Creation	
Sharing A Report/Folder	40
6. Dashboards	
7. Time Tracking	
Submitted/Approved Hours Change	
Switching Tracked Hours to A Different Task	
8. Absences	

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

# INTRODUCTION

### Dear User,

Welcome on board PROXIUSS PROJECT+!

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

For better understanding, you can also find the video manual on our website www.proxiuss.com

Should you have any questions, please visit the FAQ section on our website <u>www.proxiuss.com</u> and if you find yourself lost, please contact our helpdesk at <u>support@proxiuss.com</u>.

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 <u>Admin Settings</u> 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.

sa	lesforce	
Username		
Password		
	Log In	
Remember me		
Forgot Your Password?		



# **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 realtime, 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.

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

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

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



# **BASIC SETTINGS**

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

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

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

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

### **Admin Settings**

Installation from AppExchange:

The application PROXIUSS PROJECT+ can be found on the <u>Salesforce AppExchange</u> platform.



Simply type the name of the app in the search bar and press Enter. Locate the app on the right side of the results list.

During the installation of the ProxiussProject+ app from AppExchange 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*.

-		Q Search Set	up			*	- 🖪 🗠 ? 🌣 🐥 🐻
Setup Home Object M	lanager 🤝						
Q. Custom Settings	Custom Settings						
Custom Settings	Custom Settings Use custom settings to create and manage custom data at the orga Visualforce, Apex, and the Web Services APL.	anization, profile, and us	er levels. Custom settings data	a is stored in the application cache	e. This means you can access it efficiently, wi	thout the cost of repeated queries. Custom settings data	Help for this Page 🕢
	View: Al V Counte New View			Get Usage	A	. B C D E F G H I J K L M N O P Q R	S   T   U   V   W   X   Y   Z   Other All
		10.00		New	Burnsheller.		
	Action Label * Manage Provides Provides Settings	Visibility Public	Settings Type Hierarchy	Namespace Prefix Proxiuss	Description	Record Size Number of Records 104 0	Total Size

2. Click on the upper button New.

-	Q. Search Setup 🗇 🕫 🖨 🗘 🌣 🜲 🐻
Setup Home Object	Manager 🗸
Q Custom Settings	Custom Settings
Custom Settings	Custon Setting
Didn't find what you're looking for? Try using Global Search.	Proxiuss Project+ Settings  If the custom setting is a list, click New to add a new set of data. For example, if your application had a setting for country codes, each set might include the country's name and daling code. If the custom setting is a hierarchy, you can add data for the user, prolife, or granization level. For example, or organization level. For example, you may want different values to display depending on whether a specific user is running the app, a specific prolife, or just a general user.  Ver:  Ve
	100 - 100 -
	Stup Owner 1 Lecation
	No weards to display

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

-	Q, Search Setup	*• 🖬 🕸 ? 🌣 🐥 🐻
Setup Home Object	Aanager 🗸	
Q Custom Settings	Custom Settings	
Custom Settings Didn't find what you're looking for? Try using Global Search.	Proxiuss Project+ Settings Edit Provide values for the fields you created. This data is cached with the application.	Heip for the Page \Theta
	Edit Proxiuss Project • Settings Information Leastion WD Hours	1 + Report Information



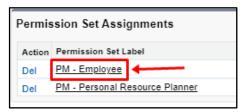
4. Create the user account in *Setup -> Users -> Users* and click on the *New User* button.

			Q, Search Setup			ו 🖬 🗢 ? 🌣 🐥 🔇
Setup Home Object	t Manager 🗸					
Q, Quick Find	SETUP Users		ning - reasonal - PPL-south P	111117 - 1888-2411 - 1442-2	SATULT SSENAGEMENT - J	AND
vice Setup Assistant ilti-Factor Authentication Assistant	Active Users	- 1996-53			- 511-112-20	Help for this Page 😝
ase Updates	On this page you can create, view, and ma					
htning Experience Transition	2 - 2 - 2 - 2 - 2 - 2 - 2 - 2 - 2 - 2 -		R passwords, and perform other administrative taks from your mobile device	es IOS   Android		
istant	View: Active Users V Edit   Cras	de New View				
esforce Mobile App			A Å Å B C	0 0 0 0 02 02 E E F 0 H 0H 11	J K L L L M N Ñ 0 0 0 0 0	: R   R   S   S   T   T   U   Û   V   W   X   Y   Ŷ   Z   Ż   Omar   All
atimizer			New User Reset Password(s) Add Multiple Users			4
	Action Full Name 1	Alias	Usemame	Last Login	Role	Profile
MINISTRATION	Edit   Login Admin	admi	adminextra@anodius.com.test			Limited Access User
Users	Edit Admin. Admin	admin	admin@ anodius.com.test	30.3.2023 7.33		System Administrator 2
and the second se	Edit ( Login Admin, Proxiuss	padmi	admin@proxiuss.com	22 3 2023 10 21	Admin	AND Employee
Permission Set Groups	🗌   Edit   Login	jandr	A REAL PROPERTY AND A REAL PROPERTY.		and the second se	AND Employee
Permission Sets	🗌   Edit   Login	kbuky	a state of the second stat			AND Employee
100 C 10	Edit   Login	mbyst	CONTRACTOR OF MUSIC AND ADDRESS OF ADDRESS OF ADDRESS ADDR			Limited Access User
Profiles	Edit   Login	mbyst	the second descent of the second second second			AND Employee
Public Groups	Edit   Login	lenda	CONTRACTOR DESIGNATION OF THE OWNER.		and a second second a	System Administrator
Queues	Edit   Login	tford	and a second sec			AND Employee
-doenes	Edit   Login	899	And the second of the second second			Limited Access User
Roles	Edit / Login	890	and shared statements on the			AND Employee
User Management Settings	Edit   Login Hand Bland	rhary	And the subscription of th		and the second se	AND External
	Edit   Login	rhassel	Annual and a prime and			AND Employee
Users +	Edit   Login	phoré	and the second second second			AND External
Data	C  Edit   Login	ehusä	and the second sec			AND Employee

- 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*).

Approver Settings			
Deleg	ated Approver		
	Manager		
Receive Approval R	equest Emails	Only if I am an approver	~
Generate new password and notify u	ser immediately		
			Save Save & New Cancel

- 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).



proxius_project+ proxiuss project+ Home Employees V Absences V	Information	New E	mployee		Personal Resource Planner	Resource Flanner More *
Proprieta Viewed      Z      Item - Ladered 2 millione up     Braine Millione Up     Anna Admonitation     Anna Admonitation	*Eerplayee Name Active Frst Name *Last Name Language Aoalable Abkhazian	Admin Protos	*Salasforce User Department Implayee Rale Seniority Office Location	Anni Adrin X     Tore-     Tore	2, Search this list.	Nev SerSubor
prostuss project+     prostuss project+     prostuss project+     wave support     projects     projects	Email Personal Haulth Insurance Provider Employment Related		Mobile Personal Bank Name IBAN		Personal Resource Planner	Route Rene More *
Improvement     Acons Advergadar	Cort Rete  Cort Rete  Cort Rete  Corporate Type Salary Connect Type Connect Data of Rate Connys Additional Responsion Notes		Menager Date of Joining Date of Resignation Date of Exit	Administrative         N           Administrative         X           B         B           B		T

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*.

proxius_project+	Q, Search	× •	- 🖩 🌣 ? 🌣 🛎 🐻 👘
proxiuss project+ Home Employees V Absences	<ul> <li>Absence Balances</li> <li>Projects</li> <li>Project Tasks</li> <li>Reg</li> </ul>	gistered Hours 🗸 Reports 🗸 Dashboards 🗸 Time Tracking Approve Time Personal Resource Planner Resou	urce Flanner More ♥
Admin Proxiuss		tdr	Generate PDF Clone V
Email Personal	Mobile Personal	Evaluations (0)	
Eark Name	BAN /	-	
Health Insurance Provider	BC/SWFT	Evaluations (Supervisor) (0)	
✓ Employment Related		Looking for (0)	New Change Owner
Cost Rate 0	Manager Admin Administrator		
MD Rate 🕲	Date of Joining	Employee Rates (0)	New
Employment Type	Years in Company		
Salary /	Date of Resignation		
Currency EUR + Euro	Date of Edit		
Date of Role Change			
✓ Additional			
Resignation Notes	Ect Interview Notes		
Owner	Last Motified By           Admin Admin. 3.4.2023 10:36		
Orested By			

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.

Q

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 <u>Projects</u> and <u>Project Tasks</u>. 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.



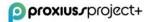
ii. By clicking on *New*, fill in the required information.

	New Employee Rate	
		* = Required Information
Information		
Employee Rate Name	Currency EUR - Euro	▼
* Employee		
Marile Montilles	×	
* Valid From		
19.6.2023	曲	
* Cost Rate		
* MD Rate		
Recalculate		
	Cancel Save & New Save	

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

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

- 12. [Optional] For reporting absences:
  - 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.



	Page Layout Assignment				Help for this Pr
tails	Absence				10001010101
lds & Relationships	< Back to Custom Object: Absence The table below shows the page layout assignments for diffe	rent record type and profile combinations.			
ge Layouts		Edit Assignment			
htning Record Pages		a series a series of the serie			
		Record Types			(1-3 of 3)
ttons, Links, and Actions	Profiles	Master	Long Term	Short Term	
		Absence Layout	Long Term Absence Layout	Short Term Absence Layout	
mpact Layouts		Absence Layout	Long Term Absence Layout	Short Term Absence Layout	
	and the second se	Absence Layout	Long Term Absence Layout	Short Term Absence Layout	
d Sets	the second se	Absence Layout	Long Term Absence Layout	Short Term Absence Layout	
	the second station of the second	Absence Layout	Long Term Absence Layout	Short Term Absence Layout	
ect Limits		Absence Layout	Long Term Absence Layout	Short Term Absence Layout	
	Contraction of the second s	Absence Layout	Long Term Absence Layout	Short Term Absence Layout	
ord Types	and the second sec	Absence Layout	Long Term Absence Layout	Short Term Absence Layout	
ord types	Contraction of the local distance of the loc	Absence Layout	Long Term Absence Layout	Short Term Absence Layout	
ated Lookup Filters	and the second se	Absence Lavout	Long Term Absence Layout	Short Term Absence Layout	
ated Lookup Filters		Absence Layout	Long Term Absence Layout	Short Term Absence Layout	
	and the second se	Absence Layout	Long Term Absence Layout	Short Term Absence Layout	
rch Layouts		Absence Layout	Long Term Absence Layout	Short Term Absence Layout	
	and the second se	Absence Layout	Long Term Absence Layout	Short Term Absence Layout	
View Button Layout		Absence Layout	Long Term Absence Larout	Short Term Absence Layout	
	Contraction and the second	Absence Layout	Long Term Absence Layout	Short Term Absence Layout	
triction Rules		Absence Layout	Long Term Absence Layout	Short Term Absence Layout	
	Contraction of the local division of the loc	Absence Layout	Long Term Absence Layout	Short Term Absence Layout	
gers	the second s	Absence Layout	Long Term Absence Lavout	Short Term Absence Layout	_
9015	a second s	Absence Layout	Long Term Absence Layout	Short Term Absence Layout	
v Triggers	The second se	Absence Layout	Long Term Absence Layout	Short Term Absence Layout	_
v mggers		Absence Layout	Long Term Absence Layout	Short Term Absence Layout	
	and the second se	Absence Layout	Long Term Absence Layout	Short Term Absence Layout	
dation Rules		Absence Layout	Long Term Absence Layout	Short Term Absence Layout	
	100 M	Absence Layout	Long Term Absence Layout	Short Term Absence Layout	
		Absence Layout	Long Term Absence Layout	Short Term Absence Layout	

ii. Create Project and check field Absences.

System Information	
	Code 🚯
	Is Absences
	Cancel Save & New Save

- iii. Create Project Tasks for absences (e.g., Vacation, Illness, Doctor visit).
- iv. Open App Launcher by clicking on iii icon, choose *Absence Type Assignments,* and click on the button *New.*
- v. Assign Project Tasks to *Type of Absence*.

proxius.rproject+		Q. Search							* • • • • •	6
proxiuss project+ Home Employees ~ Absences ~	Absence Balances 🗸 🗸	Projects 🗸 Project Tasks 🗸 Register	ed Ho	ours 🗸 Reports 🗸	Dashboards 🗸	Time Tracking	Approve Ti	ime Personal Resource Planner Re	source Planner More 🔻	
Absence Type Assignments All	mante a lindated 2 minutes and	- 106777 - 11985-1117777775			2 JIW 244 (			New Impor	t Change Owner Prin	
Absence Type Assignment Name †		Type of Absence				✓ Project T	ask	×		~
1 00069 2 00070		New Absence	e Ty	/pe Assignment		Marking.				V
	Information									
	Absence Type Assignment Name			Owner	🖰 Admin Admin					
			5	Currency	EUR - Euro		•			
	* Project Task	Vacation ×								
	*Type of Absence	None 🔻	J							
		✓None Vacation								
		Doctor's visit	we 8	New Save						
		Sick day								
		Treatment of a family member								
		Incepacity of work								
		Paid work leave Unpaid work leave								
		Unpaid work leave								

#### **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

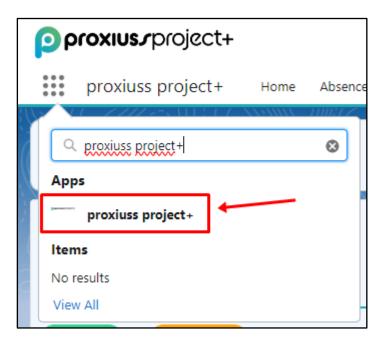


fully leverage the capabilities of Proxiuss Project+. If you're unsure about the license level associated with your Salesforce account, we recommend reaching out to your manager, mentor, or Salesforce administrator for further information.

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 "proxiuss project+," and click on its name that appears on the screen.



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



# **USER MANUAL - BY SECTIONS**

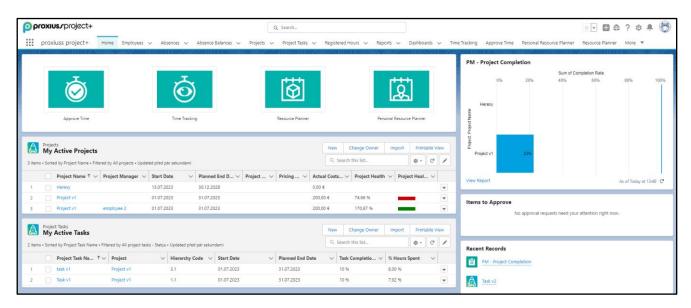
# 1. Home (Landing Page)

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.



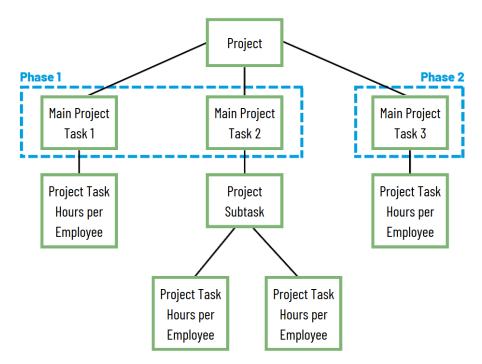
By customizing the Home screen view and offering a launchpad with convenient shortcuts, PROXIUSS PROJECT+ aims to enhance user productivity and streamline navigation within the application.



# 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 <u>following link</u>.

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.



oproxius.rproject+		Q Search			*-	a? 🛊 🖡 🛅
proxiuss project+ Home Empl	oyees 🗸 Absences 🗸 Absence Balances	✓ Projects ✓ Project Tasks ✓ Re	gistered Hours 🗸 Reports 🗸 Dashboa	erds 🗸 Time Tracking Approve Time Pe	rsonal Resource Planner Resource Planne	More 👻 🔮
All Projects	< ////////////////////////////////////				New Change Owner In	nport Printable View
27 items • Sorted by Project Name • Filtered by All project	s • Updated 2 minutes ago			Q, Sei	arch this list 🕸 🔹 👖	- C 🖋 C 🔻
Project Name ↑	✓ Start Date	✓ Planned End Date	✓ Created Date	✓ Last Modified Date	V Project Health Indicate	r v
1			21.11.2022 16:28	16.2.2023 17:28		V
2		30.12.2023	18.1.2023 13:21	13.2.2023 15:27	6	¥
3	1.1.2023	28.2.2023	23.1.2023 13:00	23.1.2023 13:31	•	•
4	1.1.2023	28.2.2023	18.1.2023 10:59	22.2.2023 15:26	-	
5	1.11.2022	2.1.2023	18.1.2023 12:43	25.1.2023 16:37		•
6			2.11.2022 13:30	8.12.2022 13:48		¥
7	1.1.2021	31.12.2023	23.12.2022 8:39	17.2.2023 13:07		•
8	1.10.2022	31.12.2022	25.10.2022 12:22	21.2.2023 15:29	-	•
9	1.10.2022	31.12.2022	26.10.2022 16:08	8.12.2022 14:24		¥
10	1.9.2022	31.12.2022	27.10.2022 16:08	4.1.2023 13:40		¥
11	1.12.2022	31.12.2023	9.12.2022 12:42	5.1.2023 7:57		•
12			16.11.2022 8:30	16.11.2022 8:30		Ŧ
13	1.12.2022	31.12.2022	15.12.2022 13:50	15.12.2022 13:50		
14	27.6.2022	6.1.2023	3.11.2022 13:14	8.12.2022 14:24		W

### **Project Creation**

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

proxius_project+ Q Search		*• 🗄 🚓 ? 🌣 🐥 👼
proxiuss project + Home Employees $\lor$ Absences $\lor$ Absence Balances $\lor$	Projects 🗙 Project Tasks 🗸	Reports 🗸 More 🔻
A Projects	+ New Project	New Change Owner
2 items • Updated 2 minutes ago	Recent records	
Project Name	Project v1.0	~
1 Absences	Recent lists	$\blacksquare$
2 Project v1.0	All 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*:

t+	Q Search			*	8
		New Pro	oject Task		
Task Information					
* Project Task Name			Parent Task		
			Search Project Tasks	Q	
Complete this field.			Ultimate Parent Task		
Task Owner			This field is calculated upon save		
Search Employees		Q	Status		
* Project			None	-	
Search Projects		Q	Planned End Date		
Recent Projects				₩	
Absences			Billable		
Project v1.0					
+ New Project			Milestone		
T New Project	ζŀm		Search Milestones	Q	
	0	曲	Agile		
Pricing Type					
None		•			
Phase					
Search Phases		Q			
	Can	icel Sav	ve & New Save		

Depending on the path you choose, you will either be shown your new <u>project's details</u> or <u>project task</u> <u>details</u>.



#### **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).

Project Proxiuss Project+		Edit Clone Delete New Acceptance Protocol New Activity Report
ect ID Start Date Planned End Date 01.01.2023 31.12.2023	e Project Health Indicator Status Active	
Project Information		Project Schedule
voject Name	Customer	
Iroxiuss Project+	Proxiuss	Proxiuss Project+
roject Manager   Project Manager	Project Owner  Portfolio Manager	Phase One Implementation
hority 0	Status 0	M1 \$21.7.
tandard	Active	
bjectives 0	Description	
tart Date 📵	Planned End Date	
1.01.2023	/ 31.12.2023	(c) New Main Tasks (2)
roject Type 🚯 Iybrid	Contract	2 items - Fitered by Is Main Task - Updated 4 minutes ago
ticing Type 0	As of the date	Project Tas V Hierarchy V Total Summary Pla V Total Summary Act V Total Remaining Cost V Task Co
ix Price		1 I Implementation 5.1 ≥ 250,00 € 2.475,00 € 93,00 € 93,00 €
Project Status Summary		2 <b>Realization</b> 5.2 2 100,00 € 0,00 € 2 100,00 € 10,00 €
roject Health Indicator	Delivery Index	
	101.39 %	View All
ctual End Date 0	Timeline Index  108.35 %	
Time Elapsed 0	Cost Index	All Project Tasks (2)
9,07 %	103,51 %	2 items + Sorted by Hierarchy Cod + Updated 4 minutes ago
ompletion Rate Auto-Calculated 0 2 %	Added Value Index   91,70 %	Project Tas 🗸 Hierarch † 🗸 Total Plann 🗸 Total Actu 🗸 Remaining 🗸 Task Comp 🗸 Start Date 🗸
ompletion Rate Manual 0	Completion Rate Estimated On	1 Implementation 5.1 3 350,00 € 2 475,00 € 875,00 € 93,00 % 1.1.2023
4,00 %	/ 18.07.2023	2 Realization 5.2 2 100,00 € 0,00 € 2 100,00 € 10,00 % 1.7.2023
Personnel		
lanned Hours	Actual Hours	View All
60,00	101,00	👌 Resource Assignments (1) 👩 🔹 🦿 🖓 New Project Assignment
i Hours Spent 13,13 %	Spent Indicator	Resource Assignments (1) (2 New Project Assignment
lemaining Hours	Reported Hours	□ Resource Assigning. ∨ Resource ∨ Role ∨ Start Date ∨ End Date ∨
9,00	119,00	I RASG-00003 Employee One     I. 1. 2023 31. 12. 2023
Project Finances		Employee the     Intravia Strite and
udget	Revenue	View All
1 100.00 €	/ 15 000.00 €	
lanned Costs Total   650.00 €	Actual Costs Total 2 875.00 €	🚮 Phases (1) 🔯 · C' New
lanned Personnel Costs	Actual Personnel Costs	1 item + Updated 4 minutes ago
700.00 €	2 775,00 €	Phase Name  V Status  V Start Date  V End Date  V Billable  V SubSumm
lanned External Costs 50.00 €	Actual External Costs 100.00 €	1 Phase One To Do 1. 1. 2023 80. 6. 2023 0,00
lanned Material Costs	Actual Material Costs	
lanned Other Costs	Actual Other Costs	View All
lanned Other Costs	Actual Other Costs	
Contras Information		Acceptance Protocols (1)     (# =      (" New     1 tem - Updated a fem seconds app
System Information		
reated By Suser User, 17.07.2023 14:16	Is Absences 🔘	Acceptance Protocol v Subject of de v Contract ( v As of the d v Date of issue v Reported S v
ast Modified By	Owner	1 AP-20230731-123157 Subject of delivery
User User, 04.08.2023 9:50	S User User	E View All
		Activity Reports (0)
		Add Files (0)

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:



2 items + Filtered by Is Main Task + Updated a minute ago										
	Project Task 🗸	Hierarchy $\lor$	Total Sum $\lor$	Total Sum $\lor$	Total Rema $\lor$	Task Comp 🚿	<ul> <li>Start Date</li> </ul>			
	Implementation	5.1	3 350,00 €	2 475,00 €	875,00 €	93,00 %	1. 1. 2023			
	Realization	5.2	2 100,00 €	0,00 €	2 100,00 €	10,00 %	1. 7. 2023			
All Project Tasks (2)     &										
	•						\$* C			
• Upda	ated a minute ago	✓ Hierarchy	✓ Total Planned	C 🗸 Total Act	ual 🗸 Remain	ning Cost 🗸 🗸	Task Comp V			
• Upda Projec	ated a minute ago	Hierarchy 5.1	✓ Total Planned 3 350,00 €	C ∨ Total Act 2 475,00		-				
			Implementation 5.1	Implementation         5.1         3 350,00 €           Realization         5.2         2 100,00 €	implementation 5.1 3 350,00 € 2 475,00 €	Implementation         5.1         3 350,00 €         2 475,00 €         875,00 €           Realization         5.2         2 100,00 €         0,00 €         2 100,00 €	Implementation         5.1         3 350,00 €         2 475,00 €         875,00 €         93,00 %           Realization         5.2         2 100,00 €         0,00 €         2 100,00 €         10,00 %			

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

Project Manager	Project Owner
Cash Contraction	Loket Brokel

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.

proxius_project+					[	Q Search							* 🖬 🚓	? 4	L 🔁
proxiuss project+	Home	Employees 🗸	Absences 🗸	Absence Balances	↓ Projects ↓	Project Tasks 🗸 🤝	Registered Ho	ours 🗸 Reports	🗸 Dashboards 🗸	Time Tracking	Approve Time	Personal Resource Planner	Resource Planner More	•	
Resource Assignment RASG-01890													Edit Clone	Delete	Ť
Resource Assignment Code RASG-01890							~917 ~~~	Owner					0		2
Project Proxiuss Project+							1	Start Date 1.1.2023							_
Resource Proxiuss Admin							1	End Date 31.12.2023							/
Role Admin															
Created By								Last Modified By							

**IMPORTANT**: To ensure efficient tracking of work within the project, it is crucial to assign employees to each relevant task utilizing <u>Task assignment</u>. 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 ( iii icon).

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

proxius_project+		Q Searc	h		😥 🖬 🎝 ? 🌣 🖡 🧑
proxiuss project+ Home Emplo	yees 🗸 Absences	✓ Absence Balances ✓ Projects ✓ Project	t Tasks ∨ Registered H	ours 🗸 Reports 🗸 Dashboards 🗸 Time Tracking Approve Ti	ime Personal Resource Planner Resource Planner
Phase Phase One		THE SUBJECT AND THE PROPERTY OF THE		- 17 XXXXXX - 110472 - 3443241 C 222222340 : 17 XXX	Clone Edit Delete 💌
Phase Name Phase One		SubSummary Personnel Costs		Project Tasks (0)	Change Owner New Task
Billable	1	SubSummary Hours	1		
Description	Ø	SubSummary Personnel Revenues			
Status To Do	1				
Start Date 01.01.2023	1				
End Date 31.07.2023	1				
Project Proxiuss Project+					
Created By		Last Modified By			
S User User, 18.07.2023 10:23		S User User, 18.07.2023 10:23			

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.

	Phase Name	~	Status 🗸	Start Date 🗸 🗸	End Date
1	india.coldini.torest		Open	1. 6. 2022	31. 12. 2022
2	bulluce .		Open	1. 1. 2023	30. 6. 2024
3	Collected and and and		Open	1. 7. 2024	30. 6. 2025
4	Instantion and the state		Open	1. 6. 2022	31. 7. 2025
5	manipha amani		Open	1. 10. 2024	31. 7. 2025

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

Pha	cts > Internet a few seconds ago												¢ ، (C	New
	Phase Name	$\sim$	Status	$\sim$	Start Date	$\sim$	End Date	$\sim$	Billable	$\sim$	SubSum $\lor$	SubSumm $\vee$	SubSum $\vee$	
1	Analysis in the second		Open		1.6.2022		31.12.2022		<ul> <li>Image: A start of the start of</li></ul>		40.702	10.000.00	1.000	•
2	Realizione		Open		1.1.2023		30.6.2024				10103-008	10.000 (C	10.00	•
3	Persing Investigation produces		Open		1.7.2024		30.6.2025		<b>~</b>					•
4	Relative visiting range		Open		1.6.2022		31.7.2025				100,00	100	10.01	



#### **Project Status Change**

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

* Status	
Active	•
None	^
Proposed	
Approved	
Declined	
✓ Active	
On Hold	
Completed	
Canceled	~

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 vailable 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.

proxius_project+	Q Search	*• 🗉 🗠 ? 🐥 👼
proxiuss project+ Home Employees V Absences V Absence Balances V Projects V	Project Tasks 🗸 Registered Hours 🗸 Reports 🗸 Dashboards 🗸 Time Tracking	Approve Time Personal Resource Planner Resource Planner More 🔻
Project Tasks Recently Viewed       1     item • Updated a few seconds ago		Q. Search this list
Project Task Name	✓ Project	2 ~
1 Implementation	Proxiuss Project+	
		•

### **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.

cts 🗸 Project Tasks 🗙	Registered Hours 🗸 🗸
+ New Project Task	

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 <u>Project Task details</u> chapter.

	New Pro	ject Task	^
Task Information			
* Project Task Name		Parent Task	
		Search Project Tasks	Q
Task Owner		Ultimate Parent Task	
Search Employees	Q	This field is calculated upon save	
*Project 2		Status	
Search Projects	Q	None	•
Hierarchy Name	~	Planned End Date	
			Ê
Hierarchy Code		Billable	
		Milestone	
		Search Milestones	Q
Start Date		Agile	
	Cancel Sav	e & New Save	
	Cancer		



#### **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  $\checkmark$  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.

proxius_project+	Q. Search		💌 🖬 🕸 ? 🌣 🛊 💽
proxiuss project + Home Employees V Absences	✓ Absence Balances ✓ Projects ✓ Project Tasks ✓ Reports	✓ Dashboards ✓ Approve Time Acceptance Protocols ✓ Activity Reports ✓	
	ed End Date Task Completion Estimated % Hours Spent 2023 93 % 32.00 %		Esit Cone Delete V
✓ Task Information		🔝 Subtasks (0)	New Subtask
Project Task Name Implementation Task Owner	Perent Task // // // // // // // // // // // // //	Task Assignments (1)     Item - Updated 4 minutes ago	C <sup>e</sup> New Task Assignment
Project Manager Project Produss Project+ Start Date	In Progress // Plannet Brd Date 30.062/023	□ Task Asig ∨         Resource         ✓         Start Date         ∨         End Date           1         TASG-000004         Employee One         1.1.2023         31.7.2024	✓ MD Berfe ✓ Billable ✓ ✓ ♥
01.01.2023 Hienrchy Name ① Proxiuss Project + > Implementation Hienrchy Code	Description /	Registered Hours (4)	New )
5.1 Pricing Type Fix Price	Milestone /		V Tracked H V Comments V 8.0 Work V
Phase One	<u> </u>	1         BH-0000003         Employee One         17.7.202           2         BH-0000005         Employee One         18.7.2023           3         BH-0000006         Employee One         20.7.2023	8.0 Work V 8.0 Work V Vork V
✓ Task Status Summary Task Completion Estimated ●	Last Completion Date Calculation	4 RH-00000007 Employee One 14.7.2023	8,0 Work 👻
aax completion estimated 0 93 %	Larc Completion User Calculation 18.07.2023 Do Not Count Task Completion Estimated	🐻 Costs & Revenues (0)	New
✓ Personnel			1211 212 CH
Planed Hours 100 % Hours Spent <b>©</b> 32.00 % Remaining Hours 68.00	Actual Hours 32.00 Spent Indicator Reported Hours 32.00	EDISTICED.	XIZZO)
∨ Task Costs			
Total Panned Costs         3 350.00 €           Plunced Personal Costs         2 600.00 €           2 600.00 €         //           Plunced External Costs         //           750.00 €         //	Total Actual Costs           800.00 €           Actual Bernand Costs           800.00 €           Actual External Costs           000.00 €		
Planned Material Costs // Planned Other Costs ()	Actual Material Costs 0.00 € Actual Other Costs 0.00 €		

**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.

proxius.rproject+	Q Search	★▼ ■ ⇔ ? 후 畁 🗟
proxiuss project+ Home Employees	s 🗸 Absences 🧹 Absence Balances 🗸 Projects 🧹 Project Tasks	✓ Reports ✓ Dashboards ✓ Approve Time Acceptance Protocols ✓ Activity Reports ✓
Project Proxiuss Project+		Edit     Clone     Delete     New Acceptance Protocol     New Activity Report
Project ID Start Date Planned End Dat 5 01.01.2023 31.12.2023	te Project Health Indicator Status Active	
✓ Project Information		S Project Schedule
Project Name Proxiuss Project+	Customer Proxiuss	Proxiuss Project+
Project Manager  O Project Manager	Project Owner 🔞	Phase One Implementation
Priority   Standard	Status  Active	Realization
Objectives 🕚	Description	
Start Date 0 01.01.2023	Planned End Date   31.12.2023	Project Tasks (2) 🔯 🖓 New Main Task
Project Type 🔹	As of the date	2 items • Updated a few seconds ago
Pricing Type  Fix Price		Project Task Name         Hierarchy ∨         Total Planned C ∨         Total Actual ∨         Remaining Cost ∨         Task Cor           1         implementation         5.1         3 350,00 €         800,00 €         2 550,00 €         93 %
<ul> <li>Project Status Summary</li> </ul>		2 <u>Realization</u> 5.2 2100,00 € 0,00 € 2100,00 € 10 %
Project Health Indicator	Project Health  152.38 %	< View All
Actual End Date	152,38 % Delivery Index  309,38 %	Resource Assignments (1)
Time Elapsed % 🕚 54.40 %	SU3.50 % Timeline Index 113.75 %	Resource Assignments (1)     Intern - Updated a few seconds ago
Completion Rate Auto-Calculated  🚯	Added Value Index 0	□ Resource Assignme ∨ Resource ∨ Role ∨ Start Date ∨ End Date ∨
62.%	34.02 %	1 RASG-00003 Employee One 1, 1, 2023 31, 12, 2023

#### Waterfall/Agile Approach

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

Search Employees	Q	This field is calculated upon save				
*Project		Status				
Search Projects	Q	None	•			
Hierarchy Name		Planned End Date				
			<b></b>			
Hierarchy Code		Billable		Project Task Test SubTask		
		Milestone Search Milestones	٩	Pricing Type		1
	Ilis	Agile		Currency	Story Points	1
Start Date				EUR - Euro	Agile	
	苗			Phase		1
Pricing Type						
None	•					
Currency						
EUR - Euro	•					
EUR - Euro Phase	•					



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

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

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

### Task Assignment

Click on the name in *Task Assignments* to see the details of an assignment assigned to a particular employee working on the given task. This also enables employees to track their time within the <u>Time</u> <u>Tracking</u> tab.

proxiuss project Home Employees < Absence Balances < Projects < Project Task     Project Task     Iterarchy Name     Project Task     Start Date     Start Date     Project Task     Iterarchy Name     Project Task     Start Date     Start Date     Project Task     Start Date     Start Date     Project Task     Iterarchy Name     Project Task     Start Date     Start Date     Project Task     Iterarchy Name     Project Task     Iterarchy Name     Project Task     Start Date     Start Date     Project Task     Start Date     Start Date     Project Task     Iterarchy Name     Project Task     Start Date     Start Date     Project Task     Project Task     Iterarchy Name	oproxius.rproject+				٩	Search			]						* -	+ 4	2 2	1 <b>.</b>	C
Literation       Last Cone       Lest Cone       Lest Cone       Lest Cone       Delete         Hierarchy Name Proviuss Project + Implementation       Stat Date 01.01.2023       Bande End Date 39 %       Task Long       Subtasks (0)       New Subtasks (0)         V Task Information       Project Task Assignments (1)       Implementation       Implementation       Implementation         Project Managar       Utinate Parent Task       Implementation       Intermetation       Intermetation         Project Managar       Status       Project Managar       Implementation       Intermetation         Project Managar       Project Managar       Status       Implementation       Intermetation         Project Managar       Provides Project +       Implementation       Intermetation       Intermetation         Status       Provides Project +       Status       Project Managar       Intermetation       Intermetation         Status       Project Managar       Status       Provides Project +       Status       Intermetation         Status       Project Managar       Status       Project Managar       Intermetation       Intermetation         Status       Status       Project Managar       Status       Intermetation       Intermetation       Intermetask Assignments (1)       Interme	proxiuss project+ но	ne Employees 🗸	Absences 🗸	Absence Balances	✓ Projects ✓	Project Tasks 🗸 🗸	Registered H	ours 🗸 Reports 🗸	Dashboards	<ul> <li>Approve</li> </ul>	Time Ad	cceptance Protoc	cols 🗸	Activity Repo	ts 🗸	1 1 1 1 1 1			
Provius Project + Implementation       010.203       93 %       32.00 % <ul> <li>Task Information</li> <li>Project Task Name</li> <li>Implementation</li> <li>Project Task Assignments (1)</li> <li>Task Assi</li></ul>	Project Task Implementation					~~~~~					Z . 110.5				Ec	lit C	lone [	Delete	•
Projet Task Name Implementation     Purent Task Insk Owner     Utimate Parent Task Implementation     Implementation       Task Owner     Utimate Parent Task Implementation     Implementation       Project South     Implementation       Project South     In Progress       Sour Date     Pannet Tind Date       Sour Date     Pannet Tind Date       Sour Date     Pannet Tind Date							nt							~					
Implementation     Implementatio	✓ Task Information							🔝 Subtasks (0)							$\overline{}$		N	ew Subtas	sk
Task Conner     Ullimate Protect Task       Project     Statu       Providus Project +     Pinned for Date       Statu bate     Pinned for Date			/ P	arent Task			1	🔅 Task Assignm	ents (1)						\$ v	<b>ر ا</b>	New Task J	Assignmer	nt
Products         In Progress         1         TASG-000004         Employee One         1.1.2023         31.7.2023         Image: Comparison of the state								1 item • Updated a few se	conds ago										
Start Date 30.06.2023			2 I	n Progress			/							~	MD Rate				
View All	Start Date 01.01.2023		/ 3	0.06.2023			/	<				View All							

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.

<b>proxius</b> rpro	oject+				Q. Search							*• 🖬 🗠 ? 📮	L (
proxiuss pro	ject+ ноте	Employees 🗸	Absences 🗸 Abse	nce Balances 🗸 Projec	ts 🗸 Project Tasks 🔨	<ul> <li>Registered H</li> </ul>	ours 🗸 Reports 🗸	Dashboards 🗸	Time Tracking	Approve Time	Personal Resource Planner	Resource Planner More 🔻	2.
Task Assignmen TASG-0036 roject Task nplementation	t 516 Start Date 1.1.2023	End Date 31.12.2023	Currency EUR - Euro	Resource Proxiuss Admin	Billable I							Edit Clone Delete	1
Task Assignment C TASG-003616	ode						Resource Proxiuss Admin					,	_
Project Task Implementation							Allocation (Hrs) 18						/
Project Name Proxiuss Project	+						Start Date 1.1.2023						/
Currency EUR - Euro						1	End Date 31.12.2023						/
MD Rate						1	Billable					1	/
							Comments					,	/
Created By							Last Modified By						

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 <u>Billable flag change</u> 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 <u>Employee details</u>.

😥 7 item	Assignments (7) ted by Resource • Update	ed a few seconds ago					¢ ▼ C Ne	w Task Assignme	ant URL
	Task Assignme 🗸	Resource ↑	~	Start Date $\lor$	End Date	$\sim$	MD Rate $\lor$	Billable	~
1	TASG-004218	Antophysics		1. 3. 2023	31. 12. 2023			~	-
2	TASG-003657	In heat		1. 3. 2023	31. 12. 2023		⊪30,00	~	-
3	TASG-003656	And Taplita		1. 3. 2023	31. 12. 2023		∎70,00	~	
4	TASG-003655	La contra da		1. 3. 2023	31. 12. 2023		⊪50,00	~	
5	TASG-003658	Reneway recently		1. 3. 2023	31. 12. 2023		⊪30,00	~	-
6	TASG-003853	No. Constants		1. 3. 2023	31. 12. 2023		20,00	~	-
7	TASG-004079	terratives,		1. 3. 2023	31. 12. 2023		20,00	1	-

#### 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).

proxius.rproject+				Q	Search	★▼ ■ ⇔ ? 卒 ♣
proxiuss project+ Home	Employees 🗸	Absences 🗸	Absence Ba	ilances 🗸 Projects 🗸 I	roject Tasks 🗸 Reports	✓ Dashboards ✓ Approve Time Acceptance Protocols ✓ Activity Reports ✓
						Edit Clone Dekte
Hierarchy Name Proxiuss Project+ » Implementation	Start Date 01.01.2023	Planned Er 30.06.202		Task Completion Estimated 93 %	% Hours Spent 32.00 %	
✓ Task Information						Subtasks (0)  New Subtasks
Project Task Name Implementation		Pi	arent Task		/	Task Assignments (1)
Task Owner		U	ltimate Parent 1	ask		1 item • Updated 8 minutes ago
Project Manager		<u> </u>	nplementatio	n		
Project			atus			Task Assig  Resource  Start Date  MD Rate  Billable  Billable
Proxiuss Project+			Progress			1 TASG-000004 Employee One 1. 1. 2023 31. 7. 2023
Start Date 01.01.2023		1 3	0.06.2023	8	1	<
Hierarchy Name 🛛 🚯		D	escription		1	
Proxiuss Project+ » Implementation		В	llable			🔝 Registered Hours (4)
Hierarchy Code 5.1			•		1	Image: A sequence of the sequ
Pricing Type			ilestone	_		+ items • opoated a minutes ago
Fix Price		2 N	11	2	1	Registered Hours Code V Resource V Date V Tracked H V Comments V
Phase		A	gile	-		1 RH-00000003 Employee One 17. 7. 2023 8,0 Work
Phase One				0	1	2 <u>RH-00000005</u> Employee One 18. 7. 2023 8,0 Work
						3 RH-00000006 Employee One 20.7.2023 8,0 Work
✓ Task Status Summary						4 <u>RH-00000007</u> Employee One 14. 7. 2023 8,0 Work

#### **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  $\blacksquare$  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.

PP	roxius/project+		Q Search						* •	<b>H</b> @	? J	
	proxiuss project+ Home	Employees $\checkmark$ Absences $\checkmark$	Absence Balances 🗸	Proje	cts V Project Tasks V Registered Hours V	Reports 🗸 Da	ashboards	√ Tin	ne Tracki	ng More	*	
â	Project Tasks	788871( <i>7712</i> 78861788	J11877 - J1188-714		+ New Project Task		110617	New	Chang	e Owner	Printable	le View
	terns • Sorted by Project Task Name • Filtere	ed by All project tasks • Updated a few se	conds ago		Recent records	Q. Search this list			\$*		/	¢ T
	Project Task Name 🕇		~	Pro	Relations a local edge to easily meeting in sectors (202).	~	Hierarch	y Code		Display as		
1	WWWING - BATTALE			40	Service or mathematical services				3	🗸 Table	Π	•
2	d Marine - pair 033,000			às.	Taxation					Kanbar	П	•
3	Access - preside			-10	to perfect some		2			Split Vi	ew 📕	
4	ACH - prese											
5	All Markey, Innachister	glomanicia (Niringy		40	Recent lists		1					¥
6	di Di menjaria dan			60	All		2					Ŧ
7	Addy - setterising day			00	All Open/Working Tasks							W
8	Activity theregorium			,14	Copy of All		7.1					W
9	<ul> <li>Ad iter support to splitsheld)</li> </ul>	(CB) - 2884		άs	Kanban		1					w
10	Administrativa a maia (2011)			.10	the second project		1					w
11	Adverse Duction a within				p - Notherical president							T
12	Administrative a with process				8 - Northeland project		2					w
13	daministratus a ritis (200)				8 - Technical project		5					¥

Kanban display shows the tasks based on their status:

Project Tasks All ▼ ♪ 200 items • Sorted by Project Task Name •	Updated a	a few seconds ago				Q. Search this list	New         Printable View           \$\$ * \$\$ \$\$ \$\$ \$\$ \$\$ \$\$ \$\$ \$\$ \$\$ \$\$ \$\$ \$\$
None (85)		Open (44)		Working (11)		Closed (60)	
America possile AME-Poster E Million apport to edisobelegate		ninizionatus alla (60) 1805 - Technologia anti Apote - proste	*	attación insulare Conce Mindro - Sanctora Conesto R M- Appendi Process 3 Queles	×	al Manine - RY (MT) CD - Locato-mesoament - Roberton Al Manine - pair 100, 000 CD - Locato-mesoament - Roberton	Â
153 - mailtysophis, Olici 1 Typoshing - percelar	-	JAC Penale 201 178 WM digital - penale		Druke M N2		ADI-presis	
jato, Pasas 1		janto Provanciata 19		jando Annana E		ACM Manage Sumartices Highers.	
lagnativa		Backbare - pressie	π.	Communities	Ŧ	1	

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.

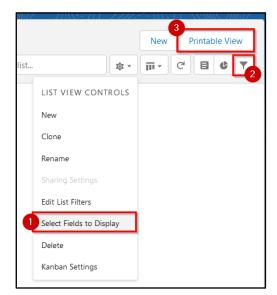
proxius.rproject+			Q Sea	irch			*• 🖬 🎕 ? 🌣 🐥 👼
ргохіuss project+ не	ome Employees 🗸	Absences 🗸 Absence Balances 🗸 Projec	ts 🗸 Pro	oject Tasks 🗸 Registered Hour	s 🗸 Reports 🗸 Dashbo	ooards 🗸 Time Tracking Approve Time Personal Resource Planne	er Resource Planner More 🔻
<ul> <li>All ▼ </li> <li>2 items selected</li> </ul>	New	Project Task Implementation	77 714	(, , , , , , , , , , , , , , , , , , ,	Alanni Juna - John	AND	Edit Clone Delete 🔻
Q Search this list	Change Owner	Hierarchy Name Proxiuss Project+ » Implementation	Start Date 01.01.2023	Planned End Date 30.06.2023	Task Completion Estimated 93 %	% Hours Spent 32.00 %	
Project Task Name      Implementation     5.1	Printable View Prt 01.01.2023	✓ Task Information	a)///	N X7771 M(7		🔝 Subtasks (0)	New Subtask
Realization 5.2	Proxiuss Project+ 01.07.2023	Project Task Name Implementation Task Owner	/	Parent Task Ultimate Parent Task		Task Assignments (1)	🕸 🔹 🕑 New Task Assignment
0		Project Manager Project Prosivuss Project+ Start Date	1	Implementation Status In Progress Planned End Date			Start Date         End Date           1. 1. 2023         31. 7. 2023

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.



				Q Search this li	st
	Working (11)	<u> </u>	Closed (5)		LIST VIEW CONTROLS
		/			New
					2 Clone
					Rename
					Sharing Settings
					Show List Filters
					Select Fields to Display
					Delete
In order for this Kanb	oan view to load, the list view's o	wner has to configu	re Kanban Settings for it.		Kanban Settings

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.

orq	xius	rproject+				٩	Search	<b>.</b>									*• •	a ? 🌣	
р	roxius	s project+ Home	e Employees 🗸 -	Absences 🧹 Absence Ba	lances	∨ Projects ∨	Project	Tasks 🗸 Re	egister	red Hours 🤍 Re	ports	s 🗸 Dashb	ocards 🗸 Time Tracking	Approve	Time Personal Resource	e Planner R	lesource Planner	More 🔻	
<u>drab</u> /	legistere: All ▼ Sorted by	*	tered by All registered hou	irs - Resource, Project Task, Date	• Update	sd 2 minutes ago		- 114 - 7777					1994 I († 1777 - 541) 1994 - Lei Alexandre, 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997		Q. Search this list	ew Import	t Change Own	ner Print	able View
	Re	gistered Hour 🕴 🗸	Resource	✓ Project Name	$\sim$	Project Task	$\sim$	Status	$\sim$	Date 🗸	н	lours 🗸	Comments	~	Created Date	✓ Last Mod	iified Dat 🚺 🗸	Billable	~
1	RH	-00086358	Proxiuss Admin	Proxiuss Project+		Implementation		Saved		10.3.2023	4,	0	Presentation with client		10.3.2023 15:40	10.3.2023	15:40	2	
2	RH	-00086357	Proxiuss Admin	Proxiuss Project+		Implementation		Saved	9	9.3.2023	11	1,5	Test of implementation		10.3.2023 15:40	10.3.2023	15:40		¥
3	RH	-00086356	Proxiuss Admin	Proxiuss Project+		Implementation		Saved	1	8.3.2023	7,	5	Create Demo		10.3.2023 15:40	10.3.2023	15:40	(*)	¥
4	RH	-00086355	Proxiuss Admin	Proxiuss Project+		Implementation		Saved	;	7.3.2023	8,	0	Add new functionalities		10.3.2023 15:40	10.3.2023	15:40	<b>v</b>	
5	- RH	-00086354	Proxiuss Admin	Proxiuss Project+		Implementation		Saved		6.8.2028	7	0	Implement new objects		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.

proxius.rproject+					Q Search								**	∎ @ ?	φı	Ļ.
proxiuss project+ Hon	ne Employees 🗸	Absences 🗸	Absence Balances 🗸	<ul> <li>Projects</li> </ul>	✓ Project	Tasks 🗸	Registered I	iours 🗸 Reports	✓ Dashboards ∖	<ul> <li>Approve Time</li> </ul>	Acceptance Protocol	ils 🗸 Activity Repo				
Registered Hours RH-00000003													×111	Edit Cl	one	Dek
Status Saved							1	Date 17.07.2023								/
Registered Hours Code RH-00000003								Tracked Hours 8,0								/
Project Name Proxiuss Project+								MD 1,00								
Project Task Implementation								Personnel Cost 200.00								
Resource							_	Personnel Revenue 300,00								
Employee One Rejection Reason							-	Billable								
Project Manager								✓ Comments								
Project Manager Reporting Manager Name								Work MD Rate								
Project Manager Reported Hours								300,00 Personnel Cost Rate								_
8.0							1	200,00 €								
Reported Personnel Revenue 300,00							1									
Reported Status																
Invoice Number																



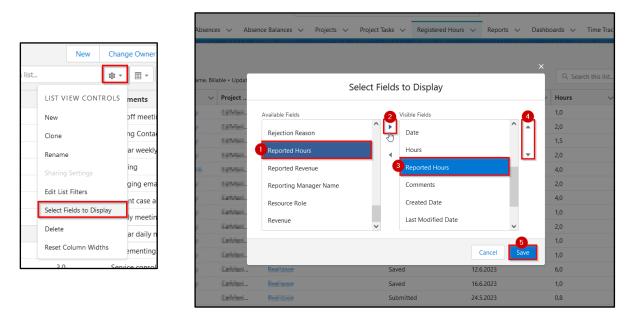
#### **Reported Hours**

*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 <u>Activity Report</u>. 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).

ρη	οχιυ	<b>Js/</b> project+				Q Search							*	
0 0 0 0 0 0	proxi	iuss project+ Home E	mployees 🗸 Absend	ces 🗸	Absence Balar	ces 🗸 Projects 🗸	Project Tasks	✓ Register	ered Hours 🔗 Report	s 🗸 Dash	boards	√ Time	Tracking Approve Time	e More
	Regist	tered Hours		~ \       +		147 / ANS / 14 /			+ New Registered Hour	////×\\\\	N 17 - 3	ANAMA ZIMD		
		✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓	ed by All registered beyrs	4 mores	filters applied - Lip	datad arad afr colundami			Recent records		QS	earch this list.	3-	ange Owr
or ne	1115 * 50		ed by Air registered hours	- 4 more					RH-00091967					
		Registered Hour Code † 🗸 🗸 🗸	Resource	$\sim$	Project 🗸	Project Task	~	Status	RH-00091966		$\sim$	Hours	LIST VIEW CONTROLS	5
1		RH-00087349	Citike Husbords		,880	100000		Approved	RH-00091965			8,0	New	23
2		RH-00087350	Citike Hashevile		.490	Weston .		Approved	RH-00091964	:3		8,0	4 Clone	)23
3		RH-00087351	Unite Hardwork		,860	Variation 1		Approved		:3		8,0	Rename	)23
4		RH-00087790	Loca Laborate		,860	whereas the		Approved	RH-00091963	123		8,0		2023
5		RH-00087791	Loca Laborate		,000	deader .		Approved	Recent lists	23		8,0		2023
6		RH-00087792	Loca Laborate		,80	where the second s		Approv 2	All	23		8,0	- Show List Filters	2023
7		RH-00087793	Cost Service		,ee	departies -		Approved	Casy of All	123		8,0	Select Fields to Display	2023
8		RH-00087794	Loca Lagranda		,00°	Vestine		Approved	23.11.	2023		8,0	Delete	2023
9		RH-00087795	Loca Lagrance			Vestine		Approved	24.11.	2023		8,0	Reset Column Widths	2023
10		RH-00087796	Loris Languagi			Vanita		Approved	27.11.			8,0	Technold C	-

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

### o proxius project+

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.

	Regist C <b>op</b>	rered Hours y of All ▼ 🖈			ANN AMBUT - ANN SAAN A AAAA SAA				New	Change Owner Printable View
21 items	select	ed						Q. Search this list		*• III• C' 🖋 C' T
		Registered Hour Code $\sim$	Resource ~	Project $\lor$	Project Task $\checkmark$	Status † 🗸 🗸	Date ~	Hours $\checkmark$	Reporte	Comments
1	•	RH-00086720	Marks Igenianally	Getting	Regiment	Approved	21.3.2023	1,0	1,1 🖉	taken and meeting
2	•	RH-00087166	Marin Igenianity	Catholine 1	Regiment	Approved	28.3.2023	2,0	2,0	Salary Containers into compari
3	•	RH-00087845	Martin Bathlandy	Collins.	Regimer:	Approved	5.4.2023	1,5	1,5	repulse sealing making with require
4	•	RH-00088445	Martin Bathlands	College.	Regiment	Approved	18.4.2023	2,0	2,0	randing
5	•	RH-00088470	Price Collinian coll	Contract.	Induse	Approved	17.4.2023	4,0	5,20	
6	•	RH-00088603	Martin Bjatclands	Collins.	Indiane	Approved	24.4.2023	2,0	Update 21 s	elected items
7	•	RH-00088626	Martin Byahlandy	Colline	Reviewe:	Approved	25.4.2023	4,0		
8	•	RH-00088949	Martin Baltisenty	Colline	Regiment	Approved	2.5.2023	1,0		Cancel Apply
9	•	RH-00089495	Martin Baltisedy	Colline	Regime	Approved	15.5.2023	2,0	3,0	implementing isolated along for and
10	•	RH-00089798	Martin Baltisette	California	Ref DO	Approved	18.5.2023	1,0	3,0	Destaurante de san beplenent
11	•	RH-00090445	Martin Baltisetta	Colline	Ref Doi	Approved	29.5.2023	1,0	1,0	sensitive .
12	•	RH-00091296	Martin Baltisers	Colline	Refiber	Saved	12.6.2023	6,0	6,0	Specific production from the solution
13	•	RH-00091862	Martin Baltisetta	Colline.	Ref Doi	Saved	16.6.2023	1,0	1,0	Series arrange Dentity Align. The
14	•	RH-00090493	Torrise Relay	odian.	Rentpox:	Submitted	24.5.2023	0,8	3,0	Pagement in few to oblige
15	•	RH-00090478	Torrise Relay	odian.	Territoria	Submitted	10.5.2023	1,5	3,0	100-is specification for
<						6				>
					Cancel	Save				

#### **Billable Flag Change**

As mentioned earlier in the <u>Project Task Details chapter</u>, 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.

	Project Task			
2	Hierarchy Name 🔹	1	Planned End Date 31.12.2023	1
100	Hierarchy Code		Billable	/
	1.2	1	$\checkmark$	

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.

ορ	roxil	<b>us</b> rproject+						Q Search		
	prox	iuss project+ Home	Employees 🗸 Absenc	es 🗸	Absence Balar	nces 🗸 Projects 🗸	Project Tasks	Regist	ered Hours 🗙 Rep	oorts
	-3	ALL CANNER	THEFT THAT	-111	11115		יו באווונו ב	NS2110	+ New Registered H	lour
â	Regis All	tered Hours							Recent records	
21 it	ems • So	rted by Registered Hour Code • Filt	ered by All registered hours	- 4 more	filters applied •	Updated a few seconds ag	go		RH-00092109	
		Registered Hour Code † 🗸 🗸	Resource	$\sim$	Project 🗸	Project Task	$\sim$	Status	RH-00091921	
1		RH-00087790	hade been d		100	in all a		Approved	RH-00092186	
2		RH-00087791	Local and the		,000 mm	Territoria.		Approved	RH-00091967	
3		RH-00087792	had blanced		100	tion prime.		Approved	RH-00091966	
4		RH-00087793	Local Concept		100-11	Teacher		Approved	11100031300	
5		RH-00087794	Lange and the		300 mm	10000		Approved	Recent lists	
		RH-00087795	Local Connect		100-	ingine (		Appro 2	All	
6										
6 7		RH-00087796	the second s		All and a second	The second second		Approved	Copy of All	

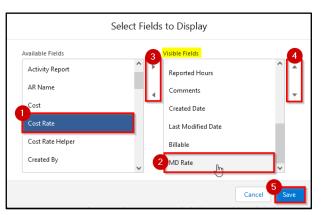
The *Registered Hours* overview is designed as a read-only display, meaning you cannot directly edit or modify the shown attributes. However, if you wish to create a copy of the overview, follow these steps: click on the *List View Controls* button (1) and select the *Clone* option (2) from the menu.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

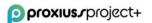
To refine the attributes shown in the copied overview, navigate back to the *List View Controls* menu (4) and choose the 'Select Fields to Display' option (5). This will open a window where you can customize the attributes displayed within the overview.

	his list 🛛 💭 🕸 🕶 🔳 🗸		 ov of All 💎				New Chan	ge Owner	Printable	
	LIST VIEW CONTROLS		rted by Registered Hour Co ect Name • Updated a minut		red	Q Search this list	🕸 🗸	Π.	C /	6 7
	New		Registered Ho ↑ ∨	Resource V	Project	Name 🗸	LIST VIEW CONTROLS	~	Date 🔨	Hours
	2 Clone	1	RH-00086720	North Application	C-82	a 950	New	/ed	21.3.2023	1,0 ^
	Rename	2	RH-00087166	Distantia Restationality	1.00	- 1993	Clone	/ed	28.3.2023	2,0
	Sharing Settings	3	RH-00087845	NAME OF TAXABLE	140.00	- 1993	Rename	/ed	5.4.2023	1,5
Sh	iow List Filters	4	RH-00088445	NUMBER OF STREET,	1.00	- 1910 - C	Sharing Settings	/ed	18.4.2023	2,0
	lect Fields to Display	5	RH-00088470	The second second	1000	- 1000	Edit List Filters	/ed	17.4.2023	4,0
	Delete	6	RH-00088603	Maria Ayesinaty	Cathole Sectors		Select Fields to Display	/ed	24.4.2023	2,0
		7	RH-00088626	Marin Iphinesis	in the	- 1411	Delete	/ed	25.4.2023	4,0
	Reset Column Widths	8	RH-00088949	NAME AND ADDRESS	140.00		Delete	/ed	2.5.2023	1,0
		9	RH-00089495	NUMBER OF STREET, STRE	College.	a. (2011)	Reset Column Widths	/ed	15.5.2023	2,0

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

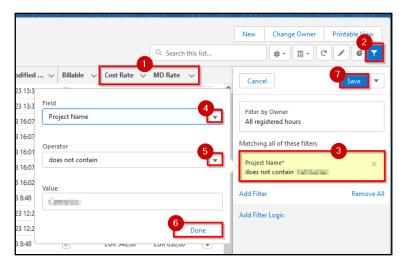
- 1. In the 'Available Fields' column, locate Cost Rate and MD Rate(1).
- 2. Click on each field to select them (1), and then use the arrow buttons (3) to move them to the 'Visible Fields' column (2).
- 3. If desired, use the up and down arrows (4) to adjust the positioning of the fields within the overview.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

den la	Registered Hours     Copy of All      F      F      Softed by Registered Hour Code • Filtered by All registered hours - Project Name • Updated 5 minutes ago													Q Search thi	is list	New	Change Owner	Printable View	
142		Registered Hou 1 V RH-00088603	Resource 🗸	Project Name 🗸	Project Task	Status V	Date ~	Hours V	Reported Hours ~	Comments ~	Created Date ~ 24.4.2023 17:48	Last Mod v	Billable 🗸	Cost Rate v	MD Rate V	¥			
			Maria Ayes.	California (RCC	Realize a	Approved	25.4.2023	4,0	5,0	unity service.	25.4.2023 13:56			EUR 340,00	EUR 630,00				
144		RH-00088949	State Sec.	Onterior (1995)	Refere	Approved	2.5.2023	1,0	1,0	again dala as	2.5.2023 16:31	9.6.2023 8	~	EUR 340,00	EUR 630,00				
145		RH-00089495	see open	March 201	Sector 1	Approved	15.5.2023	2,0	3,0	and the second sec	15.5.2023 15:15	19.6.2023	<ul> <li>Image: A set of the set of the</li></ul>	EUR 340,00	EUR 630,00	•			
146		RH-00089798	the local sectors.	California (RCC	Number of Control of C	Approved	18.5.2023	1,0	3,0	being service.	18.5.2023 15:42	19.6.2023	<b>V</b>	EUR 340,00	EUR 630,00				
147		RH-00090445	terra aparte	follower die	Distance in	Approved	29.5.2023	1,0	1,0	sectory (	29.5.2023 18:20	9.6.2023 8	<b>V</b>	EUR 340,00	EUR 630,00				
148		RH-00090476	Senti Pary	California (NOC	Internal Control (	Submitted	9.5.2023	0,5	0,5	in the desidence	30.5.2023 10:33	9.6.2023 9		EUR 250,00		V			
149		RH-00090477	Section 2.	California (1996)	March 1001	Submitted	10.5.2023	0,8	0,8	10 deleteration	30.5.2023 10:33	9.6.2023 9		EUR 250,00		V			
150		RH-00090478	No. of Concession, Name	March 201	Tradition in	Submitted	10.5.2023	1,5	3,0	the second second	30.5.2023 10:33	19.6.2023	<ul> <li>Image: A set of the set of the</li></ul>	EUR 250,00	EUR 520,00				
151		RH-00090479	Section 2.	California (ROC	Relation	Submitted	12.5.2023	1,0	2,0	Pring Street,	30.5.2023 10:34	19.6.2023	~	EUR 250,00	EUR 520,00	V			

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 RH-00090478	Sec. Print	Collector (FCC	last and	Submitted	10.5.2023	1,5	3,0	Distantianes	30.5.2023 10:33	22.6.2023	<b>⊘1</b> 4	EUR	2
15 RH-00090479	No. All Street, St	All shares where	Sector 1	Submitted	12.5.2023	1,0	2,0	the system is a	30.5.2023 10:34	19.6.2023	✓ 4	EUR	Update 4 selected items
152 RH-00090480	Terrat Party	Collector (MIC)	history)	Submitted	15.5.2023	0,5	0,5	Second Stationers	30.5.2023 10:37	9.6.2023 9		EUR (	
153 📿 RH-00090481	No. of Concession, Name	Contractor (1991)	Sec. 1	Submitted	15.5.2023	0,5	1,0	NAME OF TAXABLE	30.5.2023 10:37	19.6.2023	~	EUR 2	Cancel Apply
154 RH-00090482	Second Protocol	California (MCC)	Address of the second	Submitted	18.5.2023	2,0	2,0	Reporting stress	30.5.2023 10:39	9.6.2023 9		EUR 2	

**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 view 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.

proxiuss proxiuss pr		ences 🗸 Absence Balances 🗸 Projects	Q Search ∨ Project Tasks ∨ Registered Hours	✓ Reports ✓ Dashboards ✓ Time		★ 💌 🖪 🚓 ? 🏟 🌲 🐻
Reports All Folders > P 31 items	roxiuss Project+		0	AAAMMU <i>JIIIRIZ — JE</i> ANS-2414 – ZZA	Q. Search all folders	v Report New Folder
REPORTS	Name $\checkmark$	Description	Folder	Created By	Created On	
Recent	Project Finance - Budgeting per Task		Proxiuss Project+	User User	12. 7. 2023 11:14	
Created by Me	Employee - Absence Balance		Proxiuss Project+	User User	12. 7. 2023 11:14	3 4
Private Reports	Employee - Remaining Vacation Days		Proxiuss Project+	User User	12. 7. 2023 11:14	
	Employee - Key Figures(Revenues & Cost)		Proxiuss Project+	User User	12. 7. 2023 11:14	
Public Reports	Project Finance - Budgeting Detailed		Proxiuss Project+	User User	12. 7. 2023 11:14	<b>⑤</b> →
All Reports	Project Finance - Budgeting Summary		Proxiuss Project+	User User	12. 7. 2023 11:14	•
FOLDERS	Project Finance - Budget Overview		Proxiuss Project+	User User	12. 7. 2023 11:14	
All Folders	PM - Project Timeline Report		Proxiuss Project+	User User	12. 7. 2023 11:14	
-	PM Project To king		Proxiuss Project+	User User	12. 7. 2023 11:14	
Created by Me	PM - Resources on Project Tasks		Proxiuss Project+	User User	12. 7. 2023 11:14	•
Shared with Me	Time Tracking - Time Registration		Proxiuss Project+	User User	12. 7. 2023 11:14	•
FAVORITES	Resource Planner - Project/Week		Proxiuss Project+	User User	12. 7. 2023 11:14	•
All Favorites	Time Tracking - Time Registration - WEEK		Proxiuss Project+	User User	12. 7. 2023 11:14	T
	Time Tracking - Time Registration - SUM		Proxiuss Project+	User User	12. 7. 2023 11:14	
	PM - Project Completion		Proxiuss Project+	User User	12. 7. 2023 11:14	
	PM - Project Health Report		Proxiuss Project+	User User	12. 7. 2023 11:14	<b>v</b>
	ne national constant		encoderer enclosed		10 7 0000 11.11	

### **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.



proxius.rproject		✓ Absences ✓ Absence B	alances 🗸 🖡	rojects 🗸	Q Search Project Tasks v Registered Hours v Reports v Da	ashboards 🗸 Time Tracking	Approve Tim	ne Personal Resource Planner Resource Planner More 🔻
Report: AND - Projects Project Tracking	, Project Task, Project Task Hou 9	irs	11.XX 11.52 11.XX 11.52	1	- MANNIME DAMAN N		111201	Enable Field Editing Q 0 T C Edit
total Records Total Hours 569 1,478.5								0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0
					Sum of Hours			Project Na
								Cloud Implementation
					110			Consultancy Advices
					105 264			CloudCare Solutions
								Service Cloud One Marketing Cloud
								Service Cloud
				1	1.5ĸ			Sales Cloud Consultation
					1.5K			Advertise Consultation
					343			Pardot Implementation
								Service Cloud Consultation
					255			Service Cloud Implementation
					101			Consultancy Advicce
	Sorted by Resource Role, A-to-Z							Consultancy Advice
oject Name 🕇 💌 R		Resource: Employee Name 1	Date	Hours	Comments	<ul> <li>Project Task Name</li> </ul>		
Ivertise Consultation (14) S	AP Consulting SK Employee (5)	Horace Hammond (1)	07/03/2022	0.5	Collaborated with cross-functional teams to gather requirements and implement new functionality based on user feedback.	Implementation		
		Subtotal		0.5				
		A	15/02/2022	1.0	Implemented version control best practices using Git for efficient code	Implementation		
		Stanley Elliott (4)			management and collaboration.			
		Stanley Elliott (4)	11/04/2022	2.5	management and collaboration. Assisted in migrating the application to a cloud-based infrastructure for improved scalability and reliability.	Implementation		

# Buttons description:

Q	Search button (1) for full-text search in open report.
Ľ	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.
C	Refresh button (5).
Edit	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.
Enable Field Editing	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.

	C	reate Report			
Category	Select a Report Type			Details	
Recently Used	Q Search Report Types			Registered H	lours
All	Report Type Name Activities with Milestones	Category Standard	^	Registered H Standard Rep	
Accounts & Contacts	Activities with Milestones Activities with Task Assignments	Standard	<b>v</b>	Start Report	
Customer Support Reports	Collaboration Group Report	Standard	•	(i) Details	:= Fields (47)
Activities	Collaboration Group Feed Posts Report	Standard	•		
Administrative Reports	Content Report	Standard	•	Created By You	
-	Library and User Report	Standard	•	No Reports Yet	
File and Content Reports	File and Content Report	Standard	•	Created By Others	
Other Reports	Employees	Standard	•	No Reports Yet	
	Employees with Manager	Standard	•		
	Employees with Business Hours	Standard	•	Objects Used in Rep	oort Type
	Employees with Absence Balances	Standard	-	Owner	
	Employees with Absences	Standard	•	Registered Hour	
	Employees with RP Weeks	Standard			
	Employees with Employee Rates	Standard	•	L User	
	Employee History	Standard	•		
	2 Registered Hours	Standard			
	Registered Hours with Project Task	Standard	•		
	Registered Hours with Resource	Standard	•		

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 *sicon next to its name, a menu for the attribute will expand, allowing you to delete it if desired. In this example, we selected the <i>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.

REPORT 👻 New Registered Hours	Report 🖌 🖡	Registered Hours	)		
≔ Outline ¶	Filters 1	Previewing	a limited number of records. Run the re	port to see everything.	
6		Billable 🕈 💌	Registered Hour: Registered Hour Cod	e 💌 Project Name 💌 Hour	s 💌
Groups	2-	(16)	RH-00088321	↑ Sort Ascending	8,0
Add group	Q		RH-00088322	↓ Sort Descending	8,0
Billable	×		RH-00088324	📕 Group Rows by This Field	8,
			RH-00088323	Group Columns by This Field	8,
GROUP COLUMNS			RH-00090633	Bucket This Column	8,
Add group	Q		RH-00090634	Show Unique Count	8
			RH-00090635		8,
Columns	3		RH-00087345	← Move Left	8,0
			RH-00087346 RH-00087347	→ Move Right	8,0
Add column	۹		RH-00087347 RH-00087348	× Remove Column	8,0 8,0
Registered Hour: Reg	istered Hou ×		RH-00088384	X Remove Column	8,0
Project Name # Hours	×		RH-00088561	And Andrewson and	8,0
# Hours	^		RH-00088317	All finishments	8,0
			RH-00088318	AND ADDRESS OF	8,
			RH-00088319	AND TRANSPORT	8,0
		Subtotal			128,0
		✓ (4)	RH-00090464	Andrew Control	8,0
			RH-00090465	Onter Day - Output	8
			RH-00090466	and a first of balance	12,
			RH-00090467	Onter/Deer-Outbut	4,0
		Subtotal			32,0
		Total (20)			160,0
		0			
		Row Counts	🗸 🔿 Detail Rows 🔨 Subtota	ls 🔽 Grand Total 🔽	

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).

		Selec	t
	Public Reports		,
	Q Search folders		
	All Folders	•	
	Created by Me Shared with Me		
	Private Reports		
	Public Reports	•	
			- <u>-</u>
Save Report			
*Report Name			
New Registered Hours Report			
Report Unique Name 0 New Registered Hours Report AVU 2			
Report Description			
0			Nothing here yet
li			This folder has no subfolders.
Folder Private Reports			
			46
Cancel			Cancel Select Folder

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.

Rep	ort: Project Task Hours-and					🖍 Enable Field Editing 🔍 🍓 Add Chart 🔻 🔽 C' Edit 💌
Total Record 145	ds Total Hours 359,8					Post Poll Question
Billable 🕹 💌	Resource: Employee Name 🕇 💌	Date 💌	Project Task: Project Task Name 💌	Hours 💌	Comments	3 Share an update Share
(116)	And the restriction in the	10.000	tradical tensorial	1,5	factores a proceeded to a computery. Experimentation	
		2010-000	harana haharin	5,0	Annual of a property of a line for the second second second for the second second second for the second second second second for the second second second second se	Sort by: Most Recent Activity  Q. Search this feed  Q <sup>4</sup>
		2	formation - Andrewster	2,0	Second statements of the second	
		3	Instance industries	2,3	Entering data contaction	Wednesday, 2023, April 5 at 9:23     Soc
		11.00	Restatore restorante	2,5	Name and Annual States and A	i Like Comment 2 views
		10.000	Namina, Association	5,0	Symmetry and a second second second second	
		1	barrens automa	3,0	Special and a standard line 1.	Write a comment
		1	Automatic subsects	3,8	Semantic and a first set of the second	
	PH (1) If there a	Γο Ο International Providence of the second	ith how this message is displayed, o	click here to		st 5. 4. 2023 9:24
			clic L.		<ul> <li>D - Pet Hallow</li> <li>Define apoliti</li> </ul>	

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.

	oject+			Q Search					* - 🖬 🏼	:? 🐥 🖁
proxiuss pr	oject+ Home Employees 🗸	Absences 🗸	Absence Balances	✓ Projects ✓	Project Tasks 🗸 🛛 I	Registered Hours	Reports N	Dashboards 🗸 Time Trac	king Approve Time More	¥
Reports Recent 18 items								Q Search recent reports	New Report	ew Folder 🏚 -
REPORTS	Report Name 🗸	Description	~	Folder	√ Cri	sated By	~	Created On	✓ Subscribed	
Recent	And a second second second			Training at		10000		26. 5. 2023 10:31		
Created by Me	Income and including subliming			interaction of				25. 5. 2023 11:11		
Private Reports	Longing on Sale							. 2023 9:55		
	And the Party of t				Create folder			2023 14:05		
Public Reports	Longing on Soliday		• Folder Label					. 2023 10:54		
All Reports	Land Republic		TestFolder					. 2023 10:25		
FOLDERS	And the second sec							. 2022 14:21		
All Folders	Separate Vice Augustan						Cancel Save	2022 16:58		
Created by Me	Income and Parlian							, 2023 10:23		
Shared with Me	And the Appendix -			10000		-		9. 3. 2022 16:44		
	Statistics Supplements					and interest		2. 2. 2023 14:54		
FAVORITES	Approximate .			100000				14. 9. 2022 13:26		
All Favorites	Real Property lines			100				11. 4. 2023 12:56		



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).

reated by Me								Q Search folders created by r	ne	New Report	New Folder	\$
REPORTS	Name	~	Created By	~	Created On	~	Last Modified B	y ~	Last Mod	ified Date	$\sim$	2
Recent	TestFolder		NUMBER OF STREET		27. 6. 2023 9:25				27. 6. 202	3 9:25		٩
Created by Me											Favor	ite
rivate Reports											3 Share	
ublic Reports											Renar	ne
All Reports											Delet	e
DLDERS												
II Folders												
reated by Me												
hared with Me												
VORITES												
All Favorites												

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.

Share	e folder
These sharing settings apply to all subfolders in th	is folder.
Share With	
Users 1	<b>*</b>
Names Search Users 2	Access
4 Share	✓ View Edit Manage
✓ Who Can Access	
Q	
Users	Manage 💌 🗙 🗘
	5 Done

**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.

<b>proxius</b> rproj	ect+		Q Search			★ - 🖬 🗠 ? 🌣 🐥
proxiuss proj	ect+ Home Employees ∨ Abse	nces 🗸 Absence Balances 🗸 Projects	✓ Project Tasks ✓ Registered Hours √	Reports 🗸 Dashboards 🗸	Time Tracking Approve Time Personal Res	ource Planner Resource Planner More 🔻
Dashboards All Folders > ANI 3 items	D PM App	(	5	2 2 2	Q Search all folders	New Dashboard New Folder
DASHBOARDS	Name	<ul> <li>Description</li> </ul>	Folder	Created By	✓ Created On	√ Subscribed
Recent	People Capacity Dashboard		AND PM App	Admin Admin	31. 1. 2022 12:36	3
Created by Me	Project Budgeting Dashboard		AND PM App	Admin Admin	7. 7. 2022 14:03	6—
Private Dashboards	Project Factor Dashboard v2		AND PM App	Admin Admin	18. 5. 2022 15:07	
All Dashboards						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
	1					

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

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

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

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

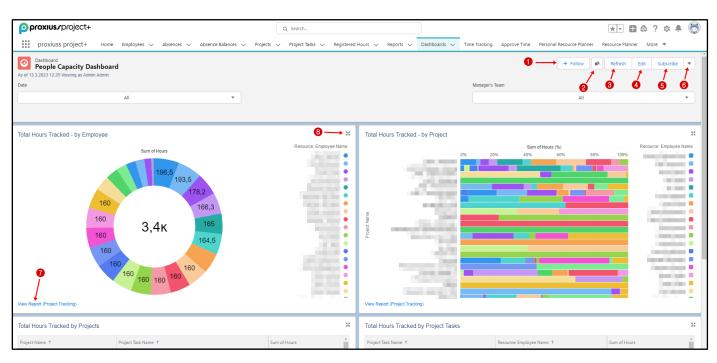
Click on a gear icon (4) to select displayable fields in a filtering row (4) or to reset the column width.

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

To open a certain dashboard, click on its name.

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





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

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

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

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

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

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



# 7. Time Tracking

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

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

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

proxius/project+	Q Search	** 🖩 🎕 ? 🌣 🖡 🐻
proxiuss project+ Home Employees v Absences v Absence Balances v Projects	Project Tasks v Registered Hours v Reports v Dashboards v Time Tracking Approve Time Personal Resource Planne	r Resource Planner More 🔻
DATE FROM - TO	0	*
Add Project →       Create Absence →		
SAVE A SURANT &		

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.

•	proxius/project+ Q. Search.	× = = + + + + + + + + + + + + + + + + +
Ē	proxiuss project + Home Employees < Absence Balances < Project s < Project Tasks < Registered Hours < Repo	ts v Dashboards v Time Tracking Approve Time Personal Resource Planner Resource Planner More v
Cre	Mon         Tue         Wed         Thu         Fri         Sat         Sun           Add         27         28         1         2         3         4         5           Creat         6         7         8         9         10         11         12           Sout         1         14         15         16         17         18         19	
	20 21 22 23 24 25 26 20 28 29 30 31 1 2 3 4 5 6 7 8 9 Today	

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

proxius.rproject+		Q	Search					*• 🖬 🕸	? 🌣 🌲 💍
proxiuss project+ Home Employees 🗸	Absences 🗸 Absence Bal	lances 🗸 Projects 🗸 F	Project Tasks 🗸 Registered	Hours 🗸 Reports 🗸	Dashboards 🗸 Time Track	ing Approve Time	Personal Resource Planner	Resource Planner Mi	ore 🔻
💼 DATE FROM - TO	S-11-7777-53464								×
PROJECT / TASK	Mon, 27 Mar	Tue, 28 Mar	Wed, 29 Mar	Thu, 30 Mar	Fri, 31 Mar				
Proxiuss Project+	0.00	0.00	0.00	0.00	0.00				
Select a task	®					亩			
Implementation Proxiuss Project + = Implementation						-			
Add Project -> Total	0 hours	0 hours	0 hours	0 hours	0 hours				
Create Absence →					0/40 Hour	5			
SAVE A SUBMIT									



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.

oroxius.rproject+			a	Search				** 🖽 🗠 ? 🌣 🐥 🤇
proxiuss project+ Home Er	mployees 🗸	Absences 🗸 Absence	Balances 🗸 Projects 🗸	Project Tasks 🤝 Register	ed Hours 🗸 Reports 🗸	Dashboards 🗸 Time Tr	acking Approve Time Personal Resource Planner	Resource Planner More 🔻
DATE FROM - TO	MC ABN	s211(- <i>7711,2</i> 5344		//////////////////////////////////////	HTELE ANNU AMERICA	7 - 11WS-11 (- 7777)	-5411317 XXXXX JIIIA7 — JAXX5244	
		_/^_		111 / 201720-01				
PROJECT / TASK		Mon, 27 Mar	Tue, 28 Mar	Wed, 29 Mar	Thu, 30 Mar	Fri, 31 Mar		
Proxiuss Project+	•	5.00	2.50	0.00	0.00	0.00		
Implementation	•	Work O	Test				â	
Select a project	•	3.00	5.50	0.00	0.00	0.00		
Select a task	•	Implementation	Update system				â	
Add Project →	Total	8 hours	// 8 hours	0 hours	/ 0 hours	0 hours		
Create Absence → 8						16/40 Ho	urs	
	- 4							

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).

proxius_project+		Q	Search					** 🖩 💩 ? 🌣	r 🖗
proxiuss project+ Home Employees 🗸	Absences 🤍 Absence Ba	lances 🗸 Projects 🧹	Project Tasks 🗸 🛛 Registered	i Hours 🗸 Reports 🗸	Dashboards 🗸 Time Traci	ting Approve Time	Personal Resource Planner	Resource Planner More 🔻	11111-1 2
DATE FROM - TO									*
PROJECT / TASK	Mon, 27 Mar	Tue, 28 Mar	Wed, 29 Mar	Thu, 30 Mar	Fri, 31 Mar				
Select a project	0.00	0.00	0.00	0.00	0.00				
Select a task	1		->3						
	2					音			
6						e e e e e e e e e e e e e e e e e e e			
Add Project -> Tota	0 hours	0 hours	0 hours	0 hours	0 hours				
Select a project					0/40 Hour	s			

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.rproject+		٩	Search		]		*• 🖬 🕸 ? 🌣 🐥 橠
proxiuss project+ Home Employee	V Absences V Absence	Balances 🗸 Projects 🗸	Project Tasks 🤝 Registere	d Hours 🗸 Reports 🗸	Dashboards 🗸 Time Track	ing Approve Time Personal Resource Planner	Resource Planner More 🔻
💼 date from - to		LT NNNNN THURT	1988-244 (= 77777-288	US UT ANNAN THEAT	- 1988-2110- <i>2211</i> 27	s (CG (7 NAXIMA JUBI)7 — JPASS 11	★
PROJECT / TASK	Mon, 27 Mar	Tue, 28 Mar	Wed, 29 Mar	Thu, 30 Mar	Fri, 31 Mar		
Proxiuss Project+	8.00 Work	7.00 Test	0.00	0.00	0.00		
Implementation	YVIR	TEST				0	
		4	« .		4	. /	
Select a project	• 0.00	0.00	0.00	0.00	0.00		
Select a task	Implementation	Update system information				ii ii	
Add Project →	Total 8 hours	7 hours	0 hours	Ø hours	/ A hours	e	
Create Absence -> 2					15/40 Hours	s	

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.

DATE FROM - TO								*
ROJECT / TASK		Mon, 27 Mar	Tue, 28 Mar	Wed, 29 Mar	Thu, 30 Mar	Fri, 31 Mar		
Proxiuss Project+		8.00	7.00	0.00	0.00	0.00		
		Work	Test					
nplementation				$\leq$				
				0			4	
Select a project	•	0.00	0.00	0.00	0.00	0.00		
		Implementation	Update system					
Select a task			information				亩	
Add Project →	Total	8 hours	7 hours	0 hours	0 hours	0 hours		
Create Absence →						15/40 Hour	rs	

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 <u>Reported Hours</u>.

#### **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 <u>Billable Flag change</u> 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:

6 items	Сор	ered Hours <b>y of All</b>								
	-	Registered Hour $\uparrow \lor$	Resource 🗸 🗸	Project Name 🗸 🗸	Project Task 🗸 🗸	Status	✓ Date	∨ Hour	s 🗸 Repo	orted Hou
1		PTH-00014749	Peter Contine.	March 1990 Au	Withold	Saved			•	
2	<ul><li>✓</li></ul>	PTH-00016215	Pairs Coldina.	Margin 1990 rule	Witness.	Update 6 se	lected items			
3		PTH-00016275	Residents.	March - Million	SPORTER.					
4	<ul><li>✓</li></ul>	PTH-00016406	No. of the local diversion of the local diver	CONTRACTOR -	sequence.			Cancel	Apply	
5		PTH-00016620	No. of the local sectors of th	Real Address	Methodologie	Approved	1.4.2021	1,0	1,0	
6	<ul> <li>Image: A start of the start of</li></ul>	PTH-00017126	Pers Gardan	Mar. With-	White the second	Approved	16.4.2021	1,0	1,0	
7		PTH-00018220	Peter Continue	March 1990 Au	Withdaw.	Approved	12.5.2021	1,0	1,0	
8	<ul> <li>Image: A start of the start of</li></ul>	PTH-00018323	Pairs Contine.	Margin (1990) a.	Witness.	Approved	14.5.2021	6,0	6,0	
9		PTH-00018453	Research	March - Station	SPECIAL CONTRACTOR OF	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).

ρρ	roxius/project+						Q Search										*-	H @ 7	? <b>.</b>	6
	proxiuss project+	Hon	ne Employees 🗸	Absences	<ul> <li>Absence Balances</li> </ul>	√ Proje	ects 🗸 Project Tasks	s V R	Registered Hours 🗸 🗸	Reports	✓ Dashboards	√ Tin	e Tracking	Approve Time	Personal Resource Plan	ner Reso	urce Planner	More 🖲	*	
~	Absences																	New Pr	rintable V	liew
4 item	ns • Sorted by Absences Name	Filtered	d by All absences • Update	ed a few secor	ids ago										), Search this list	_	\$• ≣	• C	/ 0	T
4 item	Absences Name		d by All absences • Update		ids ago Record Type	√ App	proval Status	~	<ul> <li>Start Date</li> </ul>	~	End Date	~	Start Time		A Search this list	✓ Empl		• C'	/ C	
4 item		~			-		proval Status	Ŷ	Start Date     6.3.2023	~	End Date 8.3.2023	~	Start Time		1	V Empl	loyee	• 6		
4 item 1 2	Absences Name 1	~	Type of Absence		Record Type	Abs		v		~		~	Start Time		1		loyee	• C		•
4 item 1 2 3	Absences Name † A-000344	~	Type of Absence Vacation		Record Type	Abs	sence Approved	v	6.3.2023	~	8.3.2023	~	Start Time		1		loyee	• C		

- 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.

	New Absence: Long Term											
Information												
Absences Name		* Start Date Complete this field.	曲									
Absence Request Date		* End Date										
1.6.2023	Ê		曲									
* Employee		Record Type										
Search Employees	Q	Long Term										
* Type of Absence		Additional Information										
None	•											
			li.									
	Cancel Sav	e & New 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:

proxius_project+				Q Search											*	• • • ?	, ŵ
proxiuss project+ Home Employees	Absences	✓ Absence Balances ✓	Projects 🗸	Project Tasks 🗸 🗸	Registered Ho	urs 🗸 I	Reports 🗸 Dashbo	ards	✓ Time Trackin	g App	rove Tir	me Perso	al Resour	ce Planner Reso	urce Pla	anner More 🔻	į
Absence A-000404																Edit Clone	Delet
Absences Name A-000404		Start Date 27.3.2023					pproval History (2						276	\$	C	Approve	Reject
Absence Request Date 21.3.2023	1	End Date 27.3.2023			1		Sorted by Is Pending, Dates Step Name			Status		<ul> <li>✓ Assign</li> </ul>	ed To	<ul> <li>Actual Appr</li> </ul>	~ (	Comments	~
Created By		Length of Absence 8,0				1	Manager Approval		21.3.2023 9:45	Pendin							
Last Modified By		Record Type Long Term			28	2	Approval Request Sub	mi	21.3.2023 9:45	Submit					4	utomated Approv	al sub
Employee		Additional Information			1			_				View All					
Type of Absence					_												

#### **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.

oroxius.pr	oject+				Q Search							*• (	8@?	, ŵ	6
proxiuss pr	roject+ Home B	Employees 🗸 Absences	✓ Absence Balances ✓	Projects 🗸	Project Tasks 🗸 🗸	Registered Hours $\checkmark$	Reports 🗸	Dashboards 🗸	Time Tracking	Approve Time	Personal Resource Planner	Resource Planner	More 🔻	,	
Approval Requ Absence	uest Approval Pending						) / <u>(</u>		(((777)))	111672216		Approve	Reject	Reas	sign
Submitter	Date Submitted 21.3.2023	Actual Approver	Assigned To												
Details									Sub	mitter Comme	ents				
Approval Details	s										approval submission.				
Absences Name A-000404				Approval Sta Pending	tus					21.3.2023 9:45	046				_

**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:

proxius.rproject+	Q Search
proxiuss project+ Home Employees V Absences V Absence	e Balances 🗸 Projects 🗸 Project Tasks 🧹 Registered Hours 🗸 Reports 🗸 Dashb
Today's Tasks	Today's Events
Nothing due today. Be a go-getter, and check back soon.	Looks like you're free and clear the rest of the day.
View All	View Calendar

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.

proxius_project+			
proxiuss project+	Home	Employee	s ∨
2 cale		8	
Apps No results		ΓU	JE 27
Items			
Calendar View All			

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.

< > T	oday	3		<u>]</u> [	New E	vent	4
		-		Availabil	ity		
2	•			Day		202	3
^	Mon	Tue	~	Week		Sat	Sun
				Month		3	4
	5	6		Table		10	11
	12	13	14	15	16	17	18
	19	20	21	22	23	24	25
	26	27	28	29	30	1	2
		4		6		8	9
	My C	alenda	ars				5
		My Ev	/ents			_	6
	Othe	r Cale	ndai	Show	Only Ti	nis Caler	ndar
				Share	Calenc	lar	



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:

	✓ Select	^×
	Absence رائس	
Create Calendar	Absence Balance	
Step 1 of 2	Absence Type Assignment	
Create a calendar from a Salesforce standard or custom object.	Acceptance Protocol	
	Account	
*Object	Activity Report	~
Select *		2
Next	Next	

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:

	Calendar <sup>o 2 of 2</sup>
* Calendar Name Absencie	
Start and Duration of Calendar Items () * Field for Start	Field for End
Start Date (Date)	End Date (Date)
Apply a Filter 🕕	* Field Name to Display 🕕
My Absences	Absences Name
Back	Save

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).

	Calendar June 2023						< > To	day	C	<b></b>	<b>4</b>	ew Eve	ent	3
	MON	TUE	WED	THU	FRI	SAT	SUN	•		JUNE		•	2023	
má		30	31	jún 1	2	3	4	Mon	Tue	Wed	Thu	Fri	Sat	Sun
	A-000415							29	30	31	1	2	3	4
	Type of Absence	Approval Status						5	6	7	8	9	10	11
	Vacation Start Date	Pending Start Time	7	8	9	10	11	12	13	14	15	16	17	18
	7.6.2023	start time	Vacation	ŀ	)			19	20	21	22	23	24	25
	End Date 17.6.2023	End Time						26	20	21		30	1	23
2	2 More Details	Edit Delete	14	15	16	17	18	3	4	5	6	7	8	9
								My	alenc	lars				\$
9		20	21	22	23	24	25		My	Events				•
								Q	Abse	encie				•
								Othe	r Cale	endars				¢
26		27	28	29	30	júl 1	2							



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.

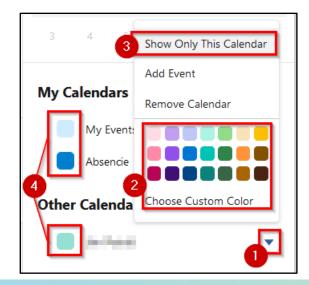
Calendar Details     *Assigned To     *Subject        *Subject        *Subject                 *Subject   <		New	Event
Subject   *Subject   *Subje	Calendar Details		
Subject Subject Subject Subject Transmission. For more information, contact your Salesforce admin. All-Day Event * Start 16.6.2023 * End 16.6.2023 * End 16.6.2023 * Event EUR - Euro Other Information Location Show Time As Busy Description Information	*Assigned To		Related To
*subject   *Subject   Image: with the View All Data permission. For more information, contact your Salesforce admin.   Al-Day Event   *Start   16.6.2023   *End   16.6.2023   *End   16.6.2023     *End     *End   *End     *End     *End     *End     *End <td></td> <td>×</td> <td>Search Absence Balances 🗌 🔍 🔍</td>		×	Search Absence Balances 🗌 🔍 🔍
Image: Control of the second of t			+ New Absence Balance
Vour private event details are also visible to your Salesforce admin.   and users with the View AI Data permission. For more information, contact your Salesforce admin.     * Start   16.6.2023   * End   16.6.2023   * End   16.6.2023   * Euro     Other Information     Location   Show Time As   Busy     Description Information	*Subject		Private
and users with the View All Data permission. For more information, contact your Salesforce admin.		Q	
<pre>start     16.6.2023     im     formation  Cother Information  Location  Show Time As Busy  Description Information </pre>			and users with the View All Data permission. For more information,
16.6.2023   *End   16.6.2023   *Activity Currency   EUR - Euro     Other Information     Location   Show Time As   Busy     Description Information	All-Day Event		
*End 166.2023 *Activity Currency EUR - Euro Other Information Location Show Time As Busy Description Information	* Start		
16.6.2023   Activity Currency   EUR - Euro     Other Information     Location   Show Time As   Busy     Description Information	16.6.2023	Ħ	
16.6.2023   Activity Currency   EUR - Euro     Other Information     Location   Show Time As   Busy     Description Information	*End		
EUR - Euro       Other Information       Location       Show Time As       Busy       Description Information	16.6.2023	苗	
EUR - Euro     Other Information     Location     Show Time As   Busy     Description Information	Activity Correspond		
Other Information  Location  Show Time As Busy  Description Information		•	
Location Show Time As Busy			
Show Time As Busy	Other Information		
Busy   Description Information	Location		
Busy   Description Information			
Description Information	Show Time As		
	Busy	•	
	Description lefernation		
	Description		
			li.
Cancel Save & New			Cancel Save & New Sav

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*.

		Add Calendars	
		Select Calendar Type	٩
<b></b>			
Other Calendars	ŝ	Education Association	
	Add Calendars	Constructioners	



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.

		S	hare Calenda	ar
		Share With		* Access
		Search People	Q	Select an Option 🔹
				Show Details and Add Events
My Calendars	\$	✓ Who Has Access		
My Events		Gabriela Tóthová		Owner 🗸
Absencie Show Only	This Calendar			
Other Calenda Share Calen	ndar			
lán Patráč	Share Calenda			Done



# 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).

jects v Project Tasks v Registered Hours v Repo	ts 🗸 Dashboards 🗸 Time Tracking Approve Time 🛛 P	ersonal Resource Planner More 🔻
₩ <i>₩7 - 3₩₩₩₩17 - 2222</i> 5416-77 -₩₩₩₩	THE ACCOUNTS AND A MARKED AND A M	1987 — 1988-2110 - 2722-3-4413 (77 - Menillo 778) 1987 — 1988-2110 - 2722-3-4413 (77 - Menillo 778)
6		*
HOW PROJECTS →		0
		1.5. 21 22.5 28.5. 22 29.5 4.6. 23 5.6 11.
15 10.4 16.4. 15 17.4 23.4. 17 24.4 30.4 32 40 40	32 32 32 40	1.5. 21 22.5 28.5. 22 29.5 4.6. 23 5.6 11. 40 40 40 40
		IMP PM EMP PM EMP PM EI
0% 100% 0% 88% 0% 09	0% 0% 0% 0% 0% 0	0% 0% 0% 0% 0% 0
0 32 0 35 0 0	0 0 0 0 0 0	0 0 0 0 0 0
	32         40         40           PM         EMP         PM         EMP           0%         100%         0%         88%         0%         0%	15         10.416.4         16         17.423.4         17         24.430.4         18         1.57.5.         19         8.514.5.         20         15.52           PM         EMP         PM         EMP <t< td=""></t<>

## **10. Accounts**

The Accounts section is a standard feature in Salesforce, specifically designed for managing clientrelated 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.

proxius_project+	Q, Search	★▼ 🖩 🌣 ? 🌣 🐥 🐻
proxiuss project+ Home Employees V Absences V Absence Balances	✓ Projects ∨ Project Tasks ∨ Registered Hours ∨ Reports ∨ Dashboards ∨ Tim	ne Tracking Approve Time Personal Resource Planner Resource Planner More 💌
Proxiuss A		+ Follow Submit for Approval Sharing Change Owner
Type Phone Website Account Owner Account Site Admin Admin &	Industry	
Related <b>Details</b> News		Activity Chatter
Account Owner	Phone	
S Admin Admin	Fax	Filters: All time • All activities • All types
Proxiuss	rax /	Refresh • Expand All • View All
Parent Account	Website	✓ Upcoming & Overdue
Account Currency	Customer Id number	No activities to show.
EUR - Euro		Get started by sending an email, scheduling a task, and more.
	Customer tax ld number 🔶 🖉	No past activity. Past meetings and tasks marked as done show up here.
	Company register 🕚 🔶 🧳	
✓ Additional Information		
Type	Employees	
Industry	Annual Revenue	

### 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.

oproxius.rproject+				٩	Search					★• ■ @ ? \$	þ 🖡 🐻
proxiuss project+ но	me Employees	✓ Absences ✓	Absence Balances 🗸	Projects 🗸 P	Project Tasks 🗸 🛛 Reg	gistered Hours 🗸 🤉 Reports 🗸	🗸 Dashboards 🧹	Time Tracking Approve Time	Personal Resource Planner	Resource Planner More 🔻	
Employees All Employees V		Updated a few seconds	s ago	SS 70017 7				8	4	New Star	t Evaluation
Employee Name ↑	∽ Emp	loyee Role	✓ Email Work	~	Business Hours	✓ Office Location	∨ Manager	<ul> <li>✓ Owner First I</li> </ul>	Name 🗸 Owner Last Name	e 🗸 Active	$\sim$
1 Proxiuss Admin	Admi	in	admin@proxiuss.com		Bratislava	Remote				~	

#### **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.

proxius.rproject+			Q Search		×- 🖬 🕸 ? 🌣 🐥 🕻
proxiuss project+ Home Em	ployees 🗸 Absences 🗸	Absence Balances 🗸	Projects 🗸 Project	Tasks 🗸 Registered	Hours 🗸 Reports 🗸 Dashboards 🗸 Time Tracking Approve Time Personal Resource Planner Resource Planner More 🔻
Employee Proxiuss Admin					Edit Generate PDF Clone •
nail Work Mobile Work dmin@proxiuss.com		Salesforce User	Department Management	Employee Role Admin	
Employee Name Proxiuss Admin		lesforce User	[ ( <u>[</u> . 0]/ //		Resource Assignments (1)     Item • Updated a few seconds ago
Active		epartment anagement		1	Resource Assignmen      Project      Start Date      Role      Role      Role
First Name Proxiuss	/ Ac	nployee Role dmin		1	1 <u>PASG-01690</u> Prosius Project+ 01/01/2023 31/12/2023 Admin View All
Last Name Admin	/ Se	niority nior fice Location		1	
Language English:German Business Hours	Re	mote anager Name			Task Assignments (1)     I item • Updated a few seconds ago
Bratislava		anager ivanie			Task Assignment Code v Project Task v MD Rate v Start Date v End Date
Weekly Working Hours 40	/				1 TASG-003616 Implementation 01/01/2023 31/12/2023
<ul> <li>Personal Information</li> </ul>					View All
Maiden Name	1	th Place		· · · ·	Absence Balances (0) New
Ing.	/			/	
Gender Male	/	th Number 0		1	Absences (0)
Marital Status Single / Not Married	Pe	rsonal ID Number		1	-
Nationality	Dr	iving License Number		1	Files (0) Add Files
✓ Contact Details				_	t Upload Files



# 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 Week1 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 *Approvel Reject*(7).

proxius.rproject+			Q Search				* -	🖽 @ ? 🌣 🐥 🐻
proxiuss project+ Home	Employees 🗸 Absences 🗸 Abs	ence Balances 🗸 🛛 Projects	🗸 Project Tasks 🧹 Registi	ered Hours 🗸 Reports 🗸 Da	ashboards 🗸 Time Tracking	Approve Time Personal R	lesource Planner Resource P	anner More 🔻
EMPLOYEE SELECTION 3 Proxiuss Admin	6-Mar-2023 ☐ Lock user submissions unti 22-Mar-2023		ASSAAL(			: 1		0
Reason for rejection	<ul> <li>DATE</li> <li>23/03/2023</li> </ul>	PROJECT Proxiuss Project+	TASK	COMMENT Implementation of system			HOURS	STATUS Submitted
Reason for rejection	6							
Õ								



## 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.

proxius_project+ Q search_	* 🖬 🗢 ? 🐥 👼
proxiuss project+ Home Employees v Absences v Absence Balances v Project v Project Tasks v	Registered Hours 🗸 Reports 🗸 Dashboards 🗸 Time Tracking Approve Time Personal Resource Planner Resource Planner More 🛡
Absence Balance Proxiuss Admin - Vacation	Clone Edit Delete
Absence Bulance for Employee Proxiuss Admin - Vacation Employee Proviuss Admin - 2	Declicated Time (b)         0           166.00
Start Date 1.1.2023 End Date 3.1.12.2023	Used (h)  24.00 Used (Days)  3.00 Used (Days)
Type of Absence Vacation	Remaining (b) 136,00 Remaining (Days) 17,00 Last Modified By
Created by Admin Admin. 22.3.2023 10:04	Cast Moannes by Provides Admin, 22.3.2023 10:32



# 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.

proxius.rproject+									Q Search																		×		() (	, Ť
proxiuss project+ Home	e Emplo	yees 🗸	Absence:	i ∨ Ab	sence Ba	alances 🗸	/ Proje	ects 🗸	Project Ta	sks 🗸	Registe	ered Hour	s 🗸	Reports	~ 0	Dashboar	rds ∨	Time	e Tracking	Appro	ive Time	Persor	nal Resou	irce Plar	nner I	Resour	ce Plann	er N	lore 🔻	
📅 DATE FROM - TO			<u> </u>			1. ~ ~				<u> </u>								1111		111.5					<u> </u>					^
DATE FROM - TO																												_	/	* ^
20.3.2023	<b></b>	11.6.20	23			<b></b>																					0			
LEMPLOYEE SELECTION		6				2																								
All		•					Selecte	ed .																						
								xiuss A										U				04	- Time Prec		n Daniana M					
						1												0				EM	P - Time Pre P - Time Pre P - Disponit	diction fro						
						-																								
SHOW PROJECTS →	- 4			8																										
				Ň																										
5 A DAT	TE 12	20.326.3	13	27324.	14	3.4	9.4.	15	10.416.4.	16	17.423.	4. 17	24.	430.4.	18	1.57.	5.	19	8.514.5	20	15.5	-21.5.	21	22.528	3.5.	22	29.54	.6.	23	5.611.6
				+ >		4			10.416.4. EMP DISP	10							_						21 PM			~~	29.54. EMP			
	PE PM		ISP PM	+ >	ISP P	4	DISP	PM		PM		DISP P	'M E		PM		DISP	PM		ISP PN		DISP	-	EMP	DISP	PM		DISP	PM	EMP [
	PE PM	EMP E	ISP PM 40 70 %	EMP D	ISP P 40 88	PM EMP	DISP	PM 88 %	EMP DISP	PM	EMP 0 %	DISP P 40 40	'M E 0% C	MP DISI	PM	EMP	DISP	PM	EMP [	ISP PN	и емр 6 0%	DISP	РМ	EMP	DISP	PM	EMP	DISP	PM	EMP [
	PE PM 80 %	EMP [	ISP PM 40 70 %	EMP D	ISP P 40 88	2M EMP 8 % 0 %	DISP	PM 88 %	EMP DISP 0% 32	PM 80 %	EMP 0 %	DISP P 40 40	'M E 0.% C	MP DISI 96 40 0	P PM 0 %	EMP 0 %	DISP	PM 0 %	EMP [	ISP PN	и емр 6 0% 0	DISP	РМ 0 %	EMP 0 %	DISP	РМ 0 %	EMP 0 %	DISP	PM 0 %	EMP E
	PE PM 80 % 16	EMP E 0%	ISP PM 40 70 % 16	EMP D 0 %	ISP P 40 88 1	2M EMP 8 % 0 % 16 0	DISP	PM 88 % 16	EMP         DISP           0 %         32           0	РМ 80 % 16	EMP   0%	DISP P 40 40	VM E 0 % C 16	MP DISI 96 40 0	<ul> <li>PM</li> <li>0 %</li> <li>0</li> </ul>	EMP 0 %	DISP	PM 0 % 0	EMP [ 0 %	11SP PN 32 0 9	и емр 6 0% 0	DISP	РМ 0 %	EMP 0 %	DISP	PM 0 %	EMP 0 %	DISP	PM 0 %	EMP E 0 %
	PE PM 80 % 16 0	EMP E 0%	ISP PM 40 70 % 16 0 0	EMP D 0%	ISP P 40 88 1 0 0	PM EMP 8 % 0 % 16 0 0 0	DISP	PM 88 % 16 0	EMP         DISP           0 %         32           0	PM 80 % 16 0	EMP   0% 0	DISP P 40 40 1	M E	MP DISI 1% 40 0	<ul> <li>PM</li> <li>0 %</li> <li>0</li> <li>0</li> </ul>	EMP 0 % 0	DISP	PM 0 % 0	EMP [ 0%	115P PN 32 0 9 0	4 EMP 6 0 % 0 0	DISP	PM 0 % 0	EMP 0 %	DISP	PM 0 % 0	EMP 0 % 0	DISP	PM 0 % 0	EMP C 0%
	PE PM 80 % 16 0	EMP 0 0% 0 0	ISP PM 40 70 % 16 0 0	EMP D 0%	ISP P 40 88 1 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	PM EMP 8 % 0 % 16 0 0 0 0 0	DISP	PM 88 % 16 0 12	EMP         DISP           0 %         32           0	PM 80 % 16 0	EMP   0 % 0 0 0 0	DISP P 40 40 1 0 0 0 0 0 0 0 0 0 0 0	M E 0% C 16	MP         DISI           1%         40           0         -           0         -           0         -	<ul> <li>PM</li> <li>0 %</li> <li>0</li> <li>0</li> <li>0</li> </ul>	EMP 0% 0 0	DISP	PM 0 % 0 0	EMP 0 0% 0 0	115P PN 32 0 9 0 0	4 EMP 6 0 % 0 0 0	DISP	PM 0% 0 0	EMP 0% 0 0	DISP	PM 0 % 0 0	EMP 0 % 0 0 0	DISP	PM 0 % 0 0	EMP 0 0%
DA' TYI	PE PM 80 % 16 0 0 12	EMP 0 %	ISP PM 40 70 % 16 0 0 12	emp D 0% ·	ISP P 40 88 1 1 0 0 0 1 0 0 0 0 0 0 0 0 0 0 0 0 0	EMP         EMP           8 %         0 %           16         0           0         0           0         0           12         0	DISP	PM 88 % 16 0 12 0	EMP         DISP           0%         32           0	PM 80 % 16 0	EMP   0 % 0 0 0 0	DISP P 40 40 1 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	M E 0 % 0 16 0 0 0 0 0 0 0 0 0 0 0 0 0	MP         DISI           96         40           0         -           0         -           0         -           0         -	<ul> <li>PM</li> <li>0 %</li> <li>0</li> <li>0</li> <li>0</li> <li>0</li> <li>0</li> </ul>	EMP 0 % 0 0	DISP	PM 0 % 0 0 0	EMP 0 0% 0 0 0	ISP PN 32 0 9 0 0 0 0	4 EMP 6 0 % 0 0 0 0	DISP	PM 0% 0 0	EMP 0% 0 0 0	DISP	PM 0 % 0 0 0	EMP 0% 0 0 0	DISP	PM 0% 0 0	EMP D 0% · 0 0 0 0 0
DA' TYI	PE PM 80 % 16 0 0 0 0 12 4	EMP 0 0% 0 0 0 0 0 0	ISP PM 40 70 % 16 0 0 12 0	EMP D 0% · 0 0 0	ISP P 40 88 1 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	PM         EMP           8 %         0 %           16         0           0         0           12         0           0         0	DISP	PMI 88 % 16 0 12 0	EMP         DISP           0%         32           0	PM 80 % 16 0 0 16	EMP 0 %	DISP P 40 40 1 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	M E 0 % 0 16 0 0 0 0 0 0 0 0 0 0 0 0 0	MP         DISI           1%         40           0         -           0         -           0         -           0         -           0         -           0         -           0         -           0         -           0         -	<ul> <li>PM</li> <li>0 %</li> <li>0</li> <li>0</li> <li>0</li> <li>0</li> <li>0</li> <li>0</li> </ul>	EMP 0% 0 0 0 0 0	DISP	PM 0% 0 0 0 0	EMP E 0 % / 0 / 0 / 0 / 0 / 0 /	ISP PN 32 0 9 0 0 0 0 0	4 EMP 6 0 % 0 0 0 0 0 0 0 0 0 0	DISP	PM 0 % 0 0 0 0 0 0 0	EMP 0 % 0 0 0 0 0	DISP	PM 0 % 0 0 0 0	EMP 0 % 0 0 0 0 0	DISP	PM 0% 0 0 0	) 0 ) 0 ) 0
DA	PE PM 80 % 16 0 0 12 4 0	EMP 0 0% 0 0 0 0 0 0 0	ISP PM 40 70 % 16 0 0 12 0 0		ISP P 40 88 1 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	PM         EMP           8 %         0 %           16         0           0         0           12         0           0         0           0         0	DISP	PM 88 % 16 0 12 0 0 0 0	EMP         DISP           0%         32           0	PM 80 % 16 0 0 16 0	EMP   0%   0%   0 0 0 0	DISP P 40 40 1 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	M E 0 % 0 16 0 0 0 0 0 0 0 0 0 0 0 0 0	MP         DISI           196         40           0         -           0         -           0         -           0         -           0         -           0         -           0         -           0         -           0         -           0         -           0         -	PM 0% 0 0 0 0 0 0 0 0	EMP 0% 0 0 0 0 0 0 0 0	DISP	PM 0 % 0 0 0 0 0	EMP [ 0% ] 0 . 0 . 0 . 0 .	115P PN 32 0 5 0 0 0 0 0 0 0	4 EMP 6 0 % 0 0 0 0 0 0 0 0 0 0	DISP	PM 0 % 0 0 0 0 0	EMP 0 % 0 0 0 0 0 0 0	DISP	PM 0 % 0 0 0 0 0	EMP 0% 0 0 0 0 0 0 0	DISP	PM 0 % 0 0 0 0 0	EMP         D           0 %         -           0         -           0         -           0         -           0         -           0         -           0         -           0         -           0         -           0         -           0         -           0         -
DAT TYI SAVE →	PE PM 80 % 16 0 0 12 14 16 0 0 12 14 16 0 0 12 14 16 16 16 16 16 16 16 16 16 16 16 16 16	EMP 0 %	ISP PM 40 70 % 16 0 0 12 0 0 0 0 0	EMP D 0% · 0 0 0 0 0 0 0	ISP P 40 88 1 1 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	EMP           8 %         0 %           16         0           0         0           12         0           0         0           0         0           0         0	DISP 32	PM 88 % 16 0 12 0 0 0	EMP         DISP           0 %         32           0	PM 80 % 16 0 0 16 0 0	EMP 0 %	DISP P 40 40 1 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	M E 6	MP         DISI           196         40           0         -           0         -           0         -           0         -           0         -           0         -           0         -           0         -           0         -           0         -           0         -           0         -	PM 0% 0 0 0 0 0 0 0 0 0 0 0 0 0	EMP 0% 0 0 0 0 0 0 0 0 0 0	DISP 32	PM 0 % 0 0 0 0 0 0	EMP 0 96 0 0 0 0 0 0 0 0 0 0 0 0 0	ISP PN 32 09 0 0 0 0 0 0 0	4 EMP 6 0 % 0 0 0 0 0 0	DISP 40	PM 0% 0 0 0 0 0 0	EMP 0% 0 0 0 0 0 0 0 0	DISP 40	PM 0% 0 0 0 0 0 0 0 0	EMP 0 % 0 % 0 0 0 0 0 0 0 0 0 0	DISP 40	PM 0% 0 0 0 0 0	EMP D 0% · 0 · 0 · 0 · 0 · 0 · 0 ·
DA	PE PM 80 % 16 0 0 12 4 0	EMP 0 0% 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	ISP PM 40 70 % 16 0 0 12 0 0 0 0 0 0	EMP D 0% · 0 0 0 0 0 0 0	ISP         P           40         88           1         0           0         0           0         0           0         0           0         0           0         0           0         0           0         0           0         0           0         0           0         0           0         0           0         0           0         0           0         0           0         0           0         0	EMP           8 %         0 %           16         0           0         0           12         0           0         0           0         0           0         0	DISP	PM 88 % 16 0 12 0 0 0	EMP         DISP           0 %         32           0         -           0         -           0         -           0         -           0         -           0         -           0         -           0         -           0         -           0         -           0         -           0         -           0         -	PM 80 % 16 0 0 16 0 0 70 %	EMP   0%   0%   0 0 0 0	40 75	M E 6	MP         DISI           196         40           0         -           0         -           0         -           0         -           0         -           0         -           0         -           0         -           0         -           0         -           0         -           0         -           0         -           0         -           0         -           0         -           0         -           0         -	PM 0% 0 0 0 0 0 0 0 0 0 0 0 0 0	EMP 0% 0 0 0 0 0 0 0 0	DISP 32	PM 0 % 0 0 0 0 0 0	EMP [ 0% ] 0 . 0 . 0 . 0 .	ISP PN 32 09 0 0 0 0 0 0 0	Image: Marked bit with the second s	DISP 40	PM 0 % 0 0 0 0 0	EMP 0% 0 0 0 0 0 0 0 0	DISP 40	PM 0% 0 0 0 0 0 0 0 0	EMP 0% 0 0 0 0 0 0 0	DISP 40	PM 0% 0 0 0 0 0	EMP         D           0 %         -           0         -           0         -           0         -           0         -           0         -           0         -           0         -           0         -           0         -           0         -           0         -

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

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



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

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



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).

proxius_project+	Q Search 🖈 🛡 🚦 🚓 📍 🔅 🖈
proxiuss project + Home Employees V Absences V Absence Balances V Projects V	Project Tasks v Registered Hours v Reports v Dashboards v Time Tracking Approve Time Personal Resource Planner Acceptance Protocols v More
Acceptance Protocol Acceptance Protocol v1	Print Acceptance Protocol Edit in Report Edit Clone
Acceptance Protocol Vime Acceptance Protocol V1 Project Tak Task V1 Reported Status  Send To Customer Mildiatore Riverue Sum 1 550.00 Title Name ACCEPTANCE PROTOCOL	Customer       2         Account v1       2         Context       3         As of the date       3         Date of issue       4         17.07.2023       5         Subject OF ACCEPTANCE       5         Subject OF ACCEPTANCE <t< th=""></t<>
<ul> <li>Additional Customer Information</li> <li>Customer Id number</li> </ul>	
Customer tax Id number	
Company register	
Created By	Last Modified By

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

#### **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).

proxius_project+		Q Search						*• 🖩 🎕 ? 🌣 🐥 🔇
proxiuss project+ Home Employee	s 🗸 Absences 🗸 Absence Balan	es ∨ Projects ∨ Project	Tasks 🗸 Registered	Hours 🗸 Reports 🗸	Dashboards	<ul> <li>Time Tracking Approve Ti</li> </ul>	me Personal Resource Plann	er Activity Reports 🗸 More 🔻
Activity Report a047Z00000H8hxz							Print Activity Report	Edit in Report Edit Clone Delete
Actinly Report Name a047200000H8hvz Project Manager Project Reported Satur Send to Customer Tridt Name ACTIVITY REPORT Show Hous Show Hous Show MD Rate				Customer Manager Customer Contract Contract Name v1 As of the date 11.07.2023 Subject SCOPE OF WORK Invoice URL Group by Tasks Group by Employees		- 0	6	
Created By  Test Manager. 06.07.2023 15:53  Reported Tasks (1)				Last Modified By	2023 16:45			¢ ۰) ۲ New Change Owner
1 item • Updated 9 minutes ago Reported Task Name								~
1 Manager Main Task 2			Vie	w All				
C Transactions (1) 6								\$ • C' New
	✓ Registered Hours	$\checkmark$ Reported Hou $\checkmark$	MD Rate	<ul> <li>✓ Accept</li> </ul>	stance Revenue	<ul> <li>✓ Acceptance comm</li> </ul>	ent v Reported Status	~
1 RH-T-000020	RH-00000011	16,0	EUR 100,00	EUR 2	00,00	RH MT2	Send to Customer	¥
			Vie	w All				
Expenses (0)								New
Files (0)								Add Files
				load Files				



# 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.

proxius_project+	Q, Search 🔹 🔹 🗘 🔅
proxiuss project+ Home Employees V Absences V Absence Balances V	Projects v Project Tasks v Registered Hours v Reports v Dashboards v Time Tracking Approve Time Personal Resource Planner Transactions v More V
Transaction RH-T-000020	Dekte
Transaction Name RH-T-00020 Registred Hours RH-0000011	
Registered Hours Code RH-00000011 Date	
06.07.2023 Comments RH MT2	
Resource Test Manager Reported Hours (h)	
16.0 Reported Personnel Revenue	
200.00 Activity Report a047200000HBhxz	
Reported Status Send to Customer	
Reported Task Manager Main Task 2	
Created By           Test Manager. 06.07.2023 15:53	Last Modified By  Test Manager, 06:07:2023 15:53

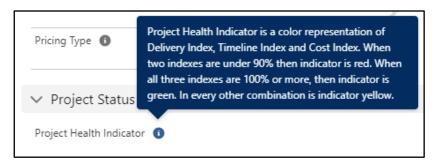


# 17. Budget Control

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

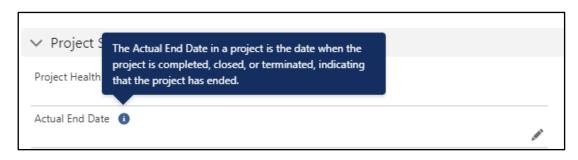
Specifically, you will find the following attributes within the Project Status Summary:

#### **Project Health Indicator**



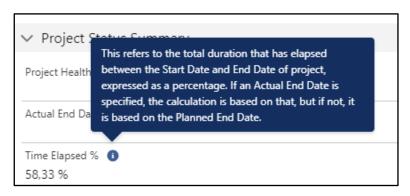
Project Health Indicator is a colored bar representing the project's overall health. This attribute only considers data from the Project Health attribute.

#### **Actual End Date**



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

#### Time Elapsed %



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



#### **Completion Rate Auto-Calculated**



Do Not Count Task Completion Estimated	0	
		/

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

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

#### **Completion Rate Manual**

Time Elapsed % 🕚 58,33 %	Estimated Project Progression by PM. Completion Rate Manual has a higher priority than the automatic	
Completion Rate (Est.)	calculation of Completion Rate (Est.) and overwrites the value in the Completion Rate field.	
Completion Rate Manu	al 🚺	1

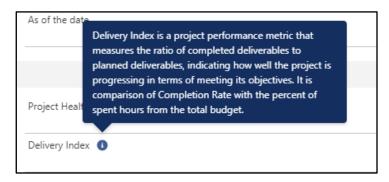
This attribute serves as a manual override for the automatic Completion Rate (Est.) when disparities exist between system data and actual data.

#### **Completion Rate Estimated On**



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

#### **Delivery Index**

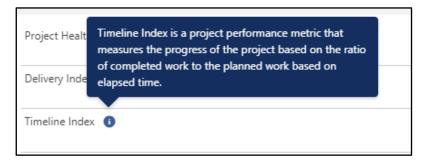


This attribute operates through automated calculations based on the Completion Rate and Hours Spent % ratio. When the index registers at 100%, it signifies that the project is adhering to the



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**



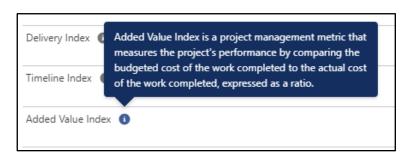
Timeline Index is calculated automatically as the ratio between the Completion Rate and Time Elapsed. When the index shows 100%, we go as planned. If the index reads less than 100%, we are behind schedule, whereas above 100% indicates that we are doing better than schedule.

#### **Cost Index**

Delivery Index ()	✓ Project Finances	
1,072.50 Cost Index is a field that calculates the completion Timeline estimation of a project with the actual cost spent.	Budget €37,800.00	Revenue €360.00
61.25%	Planned Costs Total €22,000.00	Actual Costs Total €115.00
Cost Index ① 2,869.57%	Planned Personnel Costs	Actual Personnel Costs €115.00

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

#### Added Value Index



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 20,00 %	Spent Indicator
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 11 100,00 €	Revenue 13 000,00 €
Planned Costs Total 4 650,00 €	Actual Costs Total 800,00 €
Planned Personnel Costs 4 700,00 €	Actual Personnel Costs 800,00 €
Planned External Costs 750,00 €	Actual External Costs
Planned Material Costs	Actual Material Costs
Planned Other Costs	Actual Other Costs

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

#### **Project Status Report**

٢	Report: Projects Project Stat	us - Rates&Inde	exes Extended													<ul> <li>Enable Freid Er</li> </ul>	iting Q Add	Chart T	Edit 🔻
nge T 8.295	limeline Index %			•	0	0	0	0		6	0	0			9	0		•	1
	% Hours Spent	Completion Rate	Delivery Index *	Delivery Index Indicator	Hours Forecast *	% Hours Change *	Project Duration *	% Time flapsed	Timeline Index (*	Timeline Index Indicator *	Duration Forecast (*	% Duration Change	Planned Costs Total *	Actual Costs Total	% Cost Spent	Cost Index	Cost Index Indicator	Cost Forecast	% Cost Change *
31	103,51%	100.00%	95.01%		295.00	3.51%	69.00	78.62%	127.14%		70.00	-21.25%	69,700.00	69,187.50	94.72%	105.58%		9,187.50	-5.28%
23	94,42%	93.00%	100.01%		338.95	-0.69%	356.00	70.79%	134,21%		265.26	-25.49%	\$5,600.00	65,187.50	92.63%	102.55%		5,400.53	-2.49%
3	58.52%	40.00%	68.30%		957.50	46.29%	214.00	50.93%	78.53%		272.50	27,34%	621,715.00	e12,718.75	58.57%	68.29%		31,796.93	46.43%
4	Avg: 65.49%	Arg 7833%	Arg 86.52%			Arg: 10.40%			Avg: 113.29%			Avg: -6.50%	¢37,015.00	427,093.75		Avg: 92.14%		45,444,91	38.60% Avg 12.095

Delivery Index Indicator (1) provides a visual representation of the Delivery Index. It employs a colorcoded 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: <a href="https://www.proxiuss.com/">https://www.proxiuss.com/</a>

Youtube: Proxiuss Project+ Channel

LinkedIn: <a href="https://www.linkedin.com/company/proxiuss/">https://www.linkedin.com/company/proxiuss/</a>

# 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: <a href="mailto:support@proxiuss.com">support@proxiuss.com</a>
- Request Sales/Marketing information: <u>sales@proxiuss.com</u>

