ATACHH

PROJECTIVITY

TIMESHEET MANAGEMENT

INSTALLATION

&

USER GUIDE

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1. **Prerequisites**
   Ensure My Domain is enabled.
   Follow Salesforce Documentation to enable My Domain:
   https://help.salesforce.com/s/articleView?id=sf.domain_name_settings.htm&type=5

2. **Installation Links**
   Use the below URL to install into an organisation:

   INSTALLATION LINK

   Note: If you are installing into a sandbox organisation you must replace the initial portion of the URL with http://test.salesforce.com or use the My Domain URL.

   Open the URL based on your org Production or Sandbox.
   - Select Option “Install for Admins Only”
   - Select “I acknowledge…” and click install.

3. **Post Install**
   Assign the Permission Set "Revenue Scheduler Admin" to users or other permission sets as applicable.

   - PSA Admin → Complete Control Setup & Administration
   - Time & Expenses Permissions → General Permissions to create Project and log time.

4. **Regions**
   Regions represent the geographical locations from where Business can be operated.

   E.g.: AManagement Consulting Organisation which operates in the United States, United Kingdom and APAC. These will be setup as three regions in Projectivity.

   A. In your org, click the App Launcher ( ), and click the “Projectivity” tile.
   B. Select the Regions tab and click New.
   C. Set value in the Name field and click Save.
   D. Repeat the steps B & C for every region required.

5. Skills

Skills represents the catalogue of capabilities of resources such as Development, Recruitment, Client Management as well as Industry Certifications like PMP, ITIL, Salesforce Certifications etc.

A. In your org, click the App Launcher ( ), and click the “Projectivity” tile.
B. Select the Skills tab and click New.
C. Enter the Skill Name.
D. Set Is Certification = true if it is certification.
E. Click Save.
F. Repeat steps B to E to set up all the Skills as required.

6. Roles & Rate Cards

Every organisation and its employees perform a certain type of job function for the end client.

E.g.
A recruitment company has job functions such as Recruiter, Recruitment Lead etc.
Software Consulting has Developers, Architects, Project Managers etc

6.1. Create Role

Roles represent the job function an organisation offers to its customers.

A. In your org, click the App Launcher ( ), and click the “Projectivity” tile.
B. Select the Roles tab and click New.
C. Enter Role Name.
D. Select Type = Internal or Partner depending on job function provided directly by organisation or by a partner.
E. Leave Partner Account blank if Type=Internal or if Type = Partner then it is recommended to populate with Partner Account but it can be left blank.
F. Set the Description as required and click Save.
G. Repeat steps B to F for various Roles required.

6.2. Create Rate Card

Rate Cards represent the amount an organisation charges to their customer for a certain Role.

Define Rate Card for each Role as follows:

A. Navigate to the Roles tab and select the Role for which Rate Card has to be defined.
B. Click on the Related tab and click “New” in the Rate Card section.
C. Populate the fields as:
   - Rate Card Name = <Provide a logical name such as Developer Rate 2022>
   - Role = <Automatically populated>
   - Select Type = T&M, Fixed or Cap. The type enables to define process like certain Rate Cards is only applicable for T&M projects etc
   - Region = <Select the Region to which the Rate Card is applicable>
   - Rate Per Hour = <Enter Per Hour Rate for Role>
   - Currency = <Select currency>
D. Click Save.
E. Repeat Steps B to D in order to create Rate Cards for various Roles.

7. Resources : Setting up CV

Resources represent the company full-time Employee or Contractors. A resource is essentially an individual CV. The records allows to define following key information:

- Personal Information(First Name, Last Name, Employment Dates)
- Organisational Information (Line Manager, Full Time or Contractor etc)
- Skills & Certifications
- Roles an Individual can play. E.g. Developer, Tech Lead etc.
- Work Schedule

7.1. Create Resource

The first set to set a CV is to create a Resource as follows:

A. In your org, click the App Launcher ( ), and click the “Projectivity” tile.
B. Select the Resources tab and click New.
C. Populate fields as:
   - Resource Short Name = <Short Name like Alias for Resource>
   - First Name = <First Name of Individual>
   - Last Name = <Last Name of Individual>
   - Start Date = <Employment Start Date>. Note: Start Date determines when an Individual can log a timesheet. Timesheets cannot be logged by an Individual prior to Start Date
   - End Date = <Leave Blank>
   - User = <Populate with Salesforce User>.
   - Type = Full Time or Contractor.
   - Line Manager = <Select as required>

- Cost Per Hour = <Enter per hour cost of the Resource. It is highly recommended to set a value in order for Margin calculations to work properly.>
- Send Timesheet Reminders = <True or False as required>

D. Click Save.
E. Repeat Step B to D in order to create all the Resource records.

7.2. Create Resource Skills

Once the Resource record is created, the next step to setup CV is define skills for the Resource from the list of Skills setup earlier.

A. Navigate to the Resource tab and select the Resource for which Skills have to be defined.
B. Go to the Related tab and click New in the Resource Skills section.
C. Populate fields as:
  - Resource = <Auto-populated>
  - Skills = <Select the Skill from the lookup.>
  - Proficiency Rating = <Select the Proficiency from 1-10.>

D. Click Save.
E. Repeat Steps B to D in order to define more Resource Skills.

7.3. Create Resource Roles

Resource Roles are the job functions that a Resource can perform by selecting from the catalogue of Roles defined earlier in the setup.

A. Navigate to the Resource tab and select the Resource for which Roles have to be defined.
B. Go to the Related tab and click New in the Resource Roles section.
C. Populate fields as:
  - Resource = <Auto-Populated>
  - Role = <Select the Role from the lookup.>

D. Click Save.
E. Repeat Step B to D in order to assign various Roles for the Resource.

7.4. Create Work Schedule

The Final step to define the CV is to create a Work Schedule for Resources. Work Schedule represents the working pattern that an Individual is allowed to work per day. It controls the total hours that can be logged for a day in the timesheet across Projects.

E.g.: **If the Work Schedule for Monday is 4 hours then the system will not allow individuals to log more than a total of 4 hours for the day.**

A. Navigate to the Resource tab and select the Resource for which Work Schedule has to be defined.
B. Go to the Related tab and click New in the Work Schedule section.
C. Define Hours for each of the days Sun to Sat.
D. Type = Resource <Ensure this is selected, do not select other value.>
E. Click Save.

Note: Do not define more than one Work Schedule of Type = Resource for a Resource record.

8. Setting up Project

We are ready to set up a Project after setting up Region, Roles, Skills, Rate Card, Resources. The key element required to create a Project before resource allocation can be performed are:

- Define Project Information
- Create Workstream
- Setup Project Regions
- Define Project Roles

8.1. Define Project Information

A. In your org, click the App Launcher ( ), and click the “Projectivity” tile.
B. Select the Projects tab and click New.
C. Populate fields as:
   - Name = <Project Name>
   - Account = <Customer Account>
   - Opportunity = <Customer Opportunity>
   - Start Date = <Project Start Date> Note: The value drive when Project is available for logging time against it.
   - End Date = <Project End Date>
   - PO Number = <As required, can leave blank>
   - Customer Number = <As required, can leave blank>
   - Type = <Standard or Operation> Use “Standard” for regular Project, “Operation” is used for Vacation Projects.
   - Budgeted Amount = <As Required>
   - Budgets Hours = <As Required>
D. Click Save.

The following Project fields are system calculated based on the Resources allocated to Project and Timecards logged.

Field	Description
Hours Logged	Total number of hours from all the Timecards logged against the Projects
Approved Hours	Total number of hours from Approved Timesheets
Billable Amount	Sum of Billable Amount from Approved Timecard Hours. Timecard Billable Amount = Total Hours * Rate Per Hour for Assigned Role
Total Cost	Total Cost of Hours from Approved Timecards from various Resources Cost = Total Hours * Resource Cost
Margin %	(Billable Amount - Total Cost)/Billable Amount

8.2. Create Workstream

Workstream represent teams or different sub-divisions of work within the Projects.

A. Navigate to the Projects tab and select the Project for which Workstream has to be defined.
B. On the right hand section click “New” in the workstream section.
C. Populate the Workstream Name.
D. Click Save.

8.3. Setup Project Regions

Project Regions is used to define various geographic regions from where Project is operated. The Project Region controls the Rate Cards and Role available for the Project.

A. Navigate to the Projects tab and select the Project for which Project Region has to be defined.
B. On the right hand section click “New” in the Project Region section.
C. Populate the Project Region Name like Onsite, Offshore etc. The name is essentially the Project Level name for the geographic region to which Project is associated.

E.g. A Project can be related to the APAC region and the Project Region can be called Onsite, or the same APAC Region can be named as Offshore.

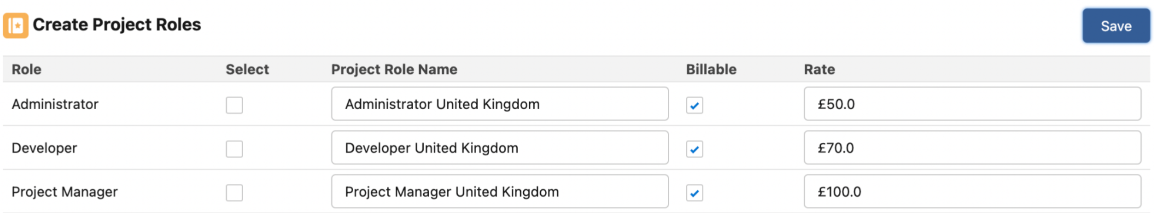
D. Select the Region from the lookup.
E. Click Save.

8.4. Define Project Roles

Project Roles is used to define the different kinds of job functions/roles that will be required to operate a Project.

E.g. A Software consulting company can require a Project Manager, Developer, Administrator for a Project.

A. Navigate to the Projects tab and click the Project for which Project Roles have to be defined.
B. Click the “Create Project Roles” button in the header.
C. Following screen will be presented as shown below and it shows the list of roles that can be added to the Project. It only displays the list of Roles that have a Rate card defined for the Region associated with Project Region defined in the Project.



D. The screen allows to select/define values as:
   - Select ⟶ Mark the checkbox in order to add Role to the Project.
   - Project Role Name ⟶ System populates it with Role Name + Region but can be overridden as required.
   - Billable ⟶ Select/Deselect the checkbox to mark the role as Billable or non-billable.
   - Rate ⟶ System populates it with Rate from Rate Card defined for the Role and Region combination but can be overridden as required.

F. Click save after selecting required Role rows.

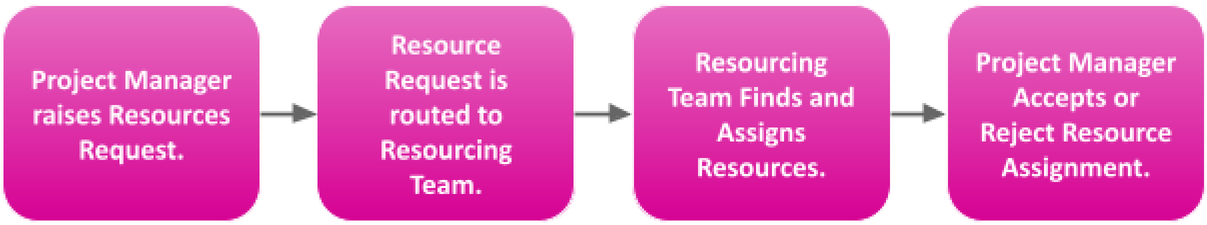
9. Finding & Assigning Resources for Project

Once the Project is set up, the next task is to find and assign resources. There are two ways the system allows to assign resources to Projects.

- Engage Resourcing Team ⟶ This process for an organisation which has a dedicated team to find resources and soft assign as per the requirements of the Project.
- Direct Assignment ⟶ This process for an organisation or use cases where Project Manager needs to assign resources directly to the Project without engaging the resourcing team.

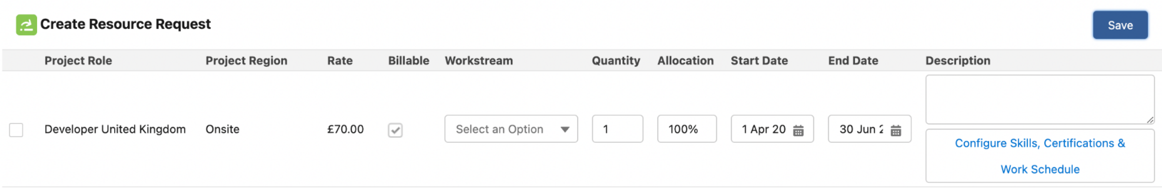
9.1. Engage Resourcing Team

The flow is as follows:



Raise Resource Request

A. Navigate to the Projects tab and select the Project for which Resource Request has to be raised.
B. Click the “Create Resource Request” button in the header.
C. Following screen will be displayed. It displayed the list of Project Roles which have been defined for the Project.



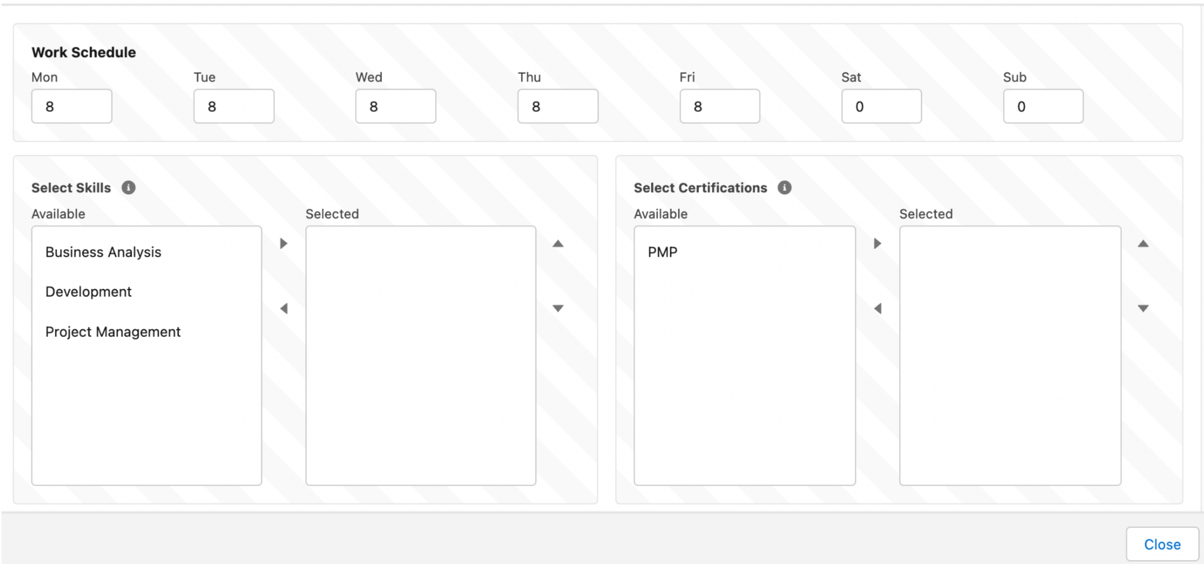
D. Select the checkbox against the Role for which request has to be raised.
E. Select the Workstream from the picklist. The picklist displays the list of Workstreams defined for the Project.
F. Setup Allocation as percentage. Default is 100% but can be overridden.
G. Start and End Date are defaulted from the Project Start and End Date but can be overridden for specific resource requirements. E.g. Project is from 1-Apr-2022 to

31-Dec-2022 but we need an Enterprise Architect only for initial 3 months then Start Date and End Date on this can be adjusted accordingly.

H. Provide Description as required.

I. Click the “Configure Skills,Certifications & Work Schedule button” to define Skills that are required, any certification and Work Schedule that Resource will be working on Project. Following popup is displayed upon clicking the button.

Select Skills & Certifications



- This screen displayed the Skills and Certifications setup in the system.
- The system will use Skills/Certifications selected here to find resources i.e. it matches the skills from Resource Request to the Skills related to a Resource.
- Define Work Schedule. This Project Level Work Schedule is different from the Resource Level Work Schedule. The value defined here controls how many hours can be logged for a certain day on the Project.

  E.g. Resource has a Work Schedule which has 8 for Monday but on Project A Work Schedule of 5 is defined for Monday.

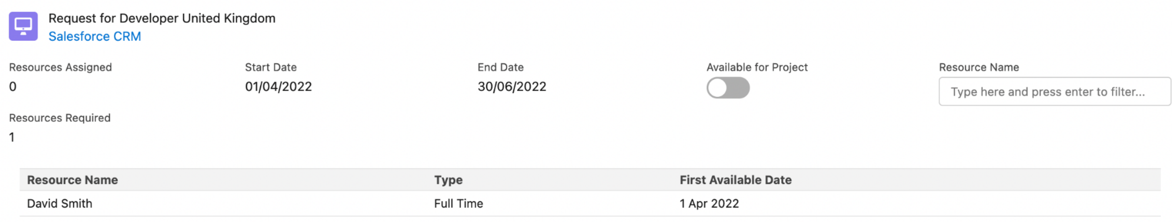
  In this case users cannot log 6 hours for the Project on Monday but can log max 5 hours on Project A and 3 Hours on some other Project B which also has a Work Schedule of 5 hours for Monday.

  Also the system prevents the users to log 5 hours each on Project A and Project B because the Project Level is valid as per Project Work Schedule of 5 each for Monday but total 10 is not valid against the 8 defined for Monday at Resource Work Schedule.

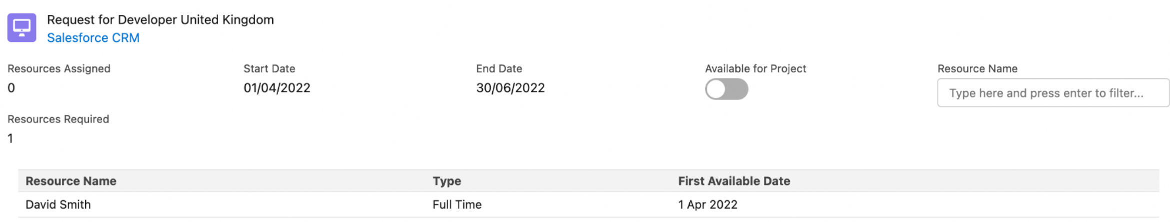
J. Close the popup and click on Save.

Find Resources for Resource Request

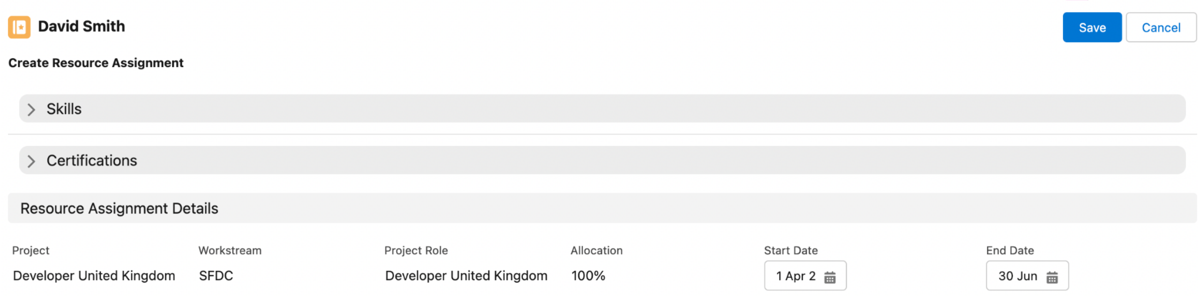
A. Navigate to the Resource Request tab.
B. Find and click the Resource Request record.
C. Click the Find Resource button in the header and the following screen is displayed.



D. Behind the screen system executing logic to match Skills from Resource Request to Resource who have the same related skills and presents with the list of records.
E. Click the name of Resource and skills, certification and any existing assignment details will be displayed on the right side.



F. Click “Assign” to allocate the resource.
G. Edit Date as required and click Save on the next screen.



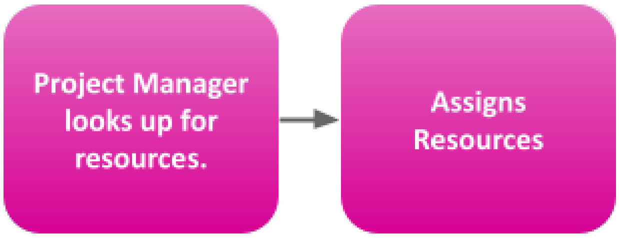
H. Close the Popup and go to the Details tab.
I. The “Status” is still draft, **the value of Status should be “Approved Staffed” in order for a user to log time against the Project**. There are multiple ways to set value to Approved Staffed depending on the business process of the organization. One approach is:
   - Create a Process Builder and flow to notify Project Manager when Resource Assignment for Resource Request is created.

- The Find Resources screen creates a Resource Assignment record for the Resource Request.
- Project Manager reviews the Resource Assignment and sets the Status on Resource Request to “Approved Staffed”.

<u>System does not provide a fixed flow as processes can vary from organization to organization but it provides a set of building blocks which are flexible to create any business flow as required.</u>

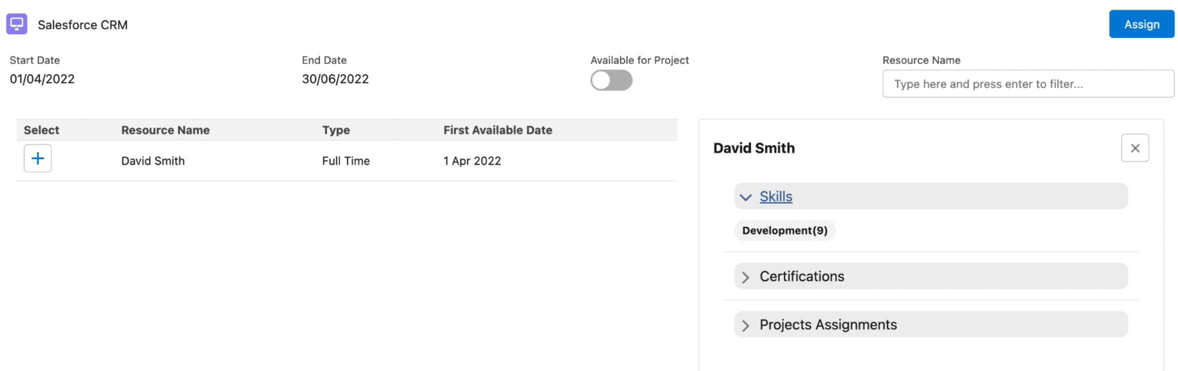
9.2. Direct Assignment

The flow is as follows:

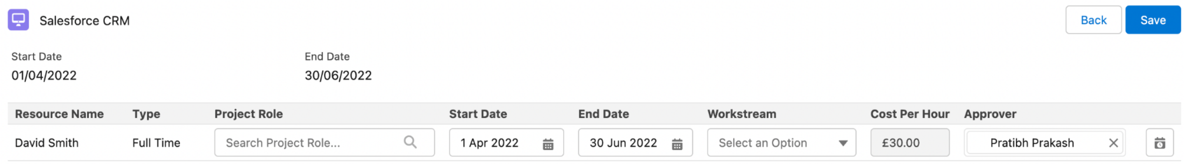


This approach is applicable for Project Managers where they want to assign resources directly on Project without engaging the resourcing team.

A. Navigate to Projects tab.
B. Find and click the Project record.
C. Click the “Assign Resources” button in the header.
D. The screen is displayed with the list of Resources. Note: The system does perform any matching logic similar to “Find Resources” in Resource Request.
E. Click the name of Resource and skills, certification and any existing assignment details will be displayed on the right side.



F. Select the **+** to select resource and then click "Assign" then popup is displayed.



G. In the Project Role column either press space bar to look at all the Project Roles or type value to search and then select.
H. Start and End Date are defaulted from Project, edit if required.
I. Select Work Stream, the picklist displays a list of WorkStreams defined for the Project.
J. Cost field is disabled to Resource Type is Full Type and editable to Resource Type = Contractor. The value in this field is default from Cost Per Hour defined on Resource Record.
K. The Approver field is default as Project Owner but can be changed to another user. Purpose of this field is to define the Timesheet approver for the resource assigned to the Project.
L. Click the clock icon to define Project Level Work Schedule for Resource.
M. Click save. Upon save Resource Request and related Resource Assignment record is created.
N. Navigate to the Resource Request record created and notice the Status = "Draft". **The value of Status should be "Approved Staffed" in order for a user to log time against the Project.**
O. There are multiple ways to set value to Approved Staffed depending on the business process of the organization. Few approaches are:

  - Project Manager manually updates the Status = "Approved Staffed"
  - Another approach is create Process Builder/Flow to with business logic to autoset Status = Approved Staffed when Direct Assignment is performed by Project Manager i.e. Resource Request.CreatedBy = Project.Owner. Essentially create criteria to identify the Direct Assignment.

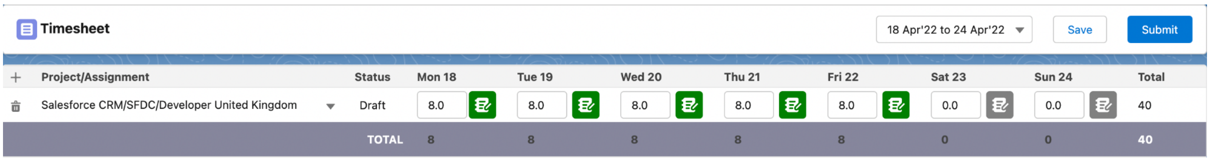
10. Enable and Log Timecards

The Timesheets can be logged by the user when the Project Setup, Resource Assignment with respective Request Request Status is set to Approved Staffed.

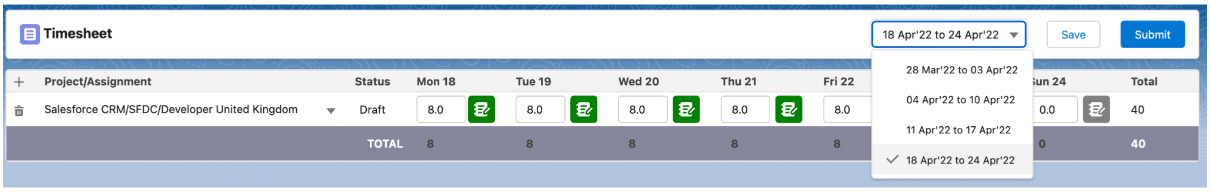
Ensure the permission set named "Time & Expenses" is assigned to the user.

A. In your org, click the App Launcher ( ), and click the “Projectivity” tile.

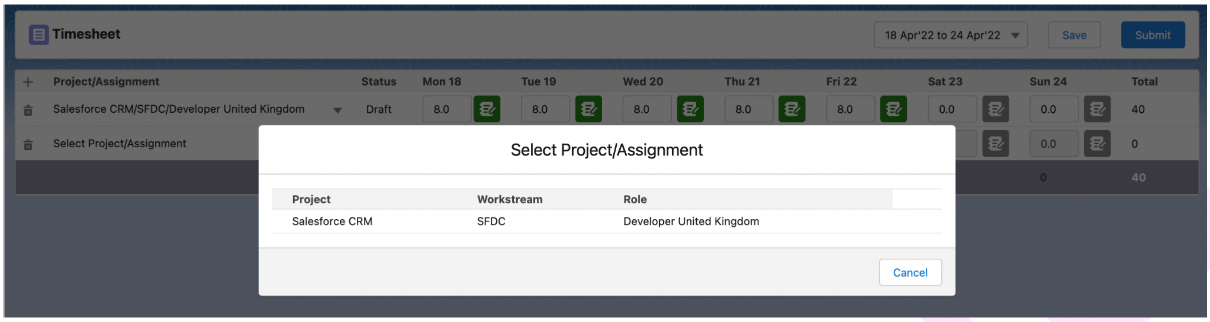
B. Select the Timesheets tab and following screen is displayed:



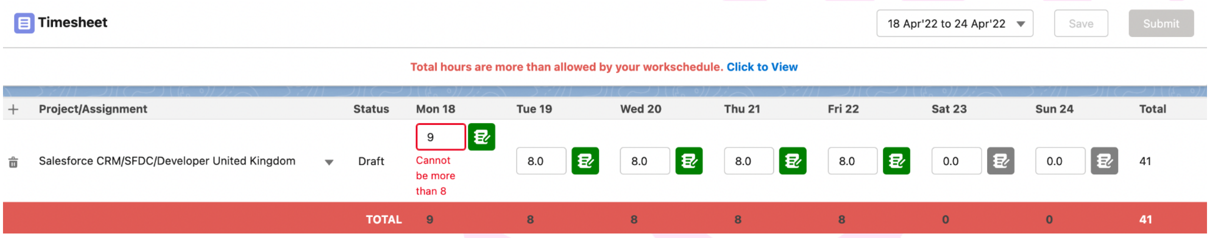
- The Project/Assignment column displays the name of Project, Workstream and Role.
- The Status column displays the Status of the Timecard row.
- Enter hours in each of the text boxes as required.
- The dropdown in the top right corner displays the week date for the Timecard.



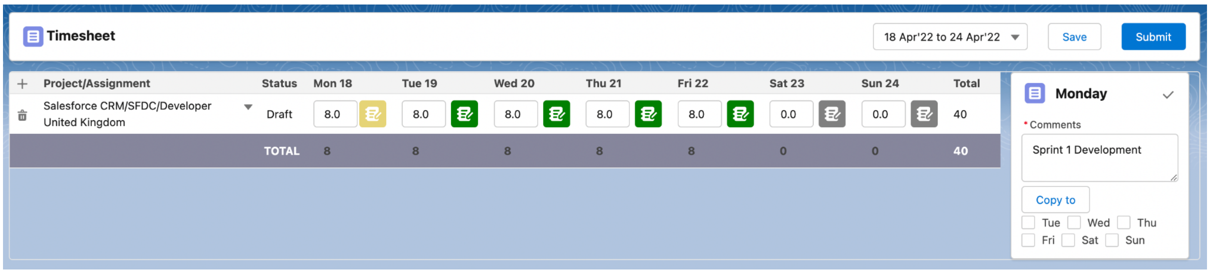
- System automatically adds the Projects for Timecards which are active for the selected week date range.
- Click the **+** to select add another Project for Timecard row.



- If the user adds more hours than allowed by the Project or Resource Work Schedule error is displayed.



- ○ Click icon to add comments or copy comments from one day to another.



- ○ Click Save to save Timecard as Draft or Submit to submit the Timecard for Approval.

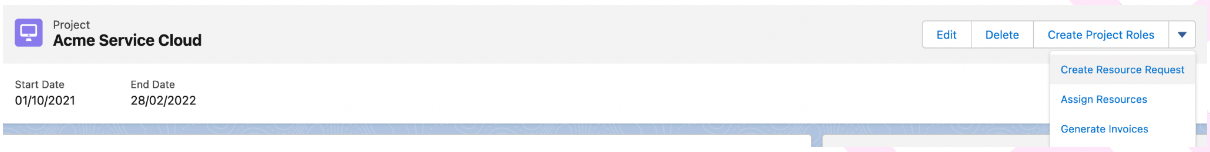
11. Invoice Timesheets

Projectivity provides a headless invoicing architecture that generates Invoice data with its related Invoice Line Item. This data in turn can be used with different system as:

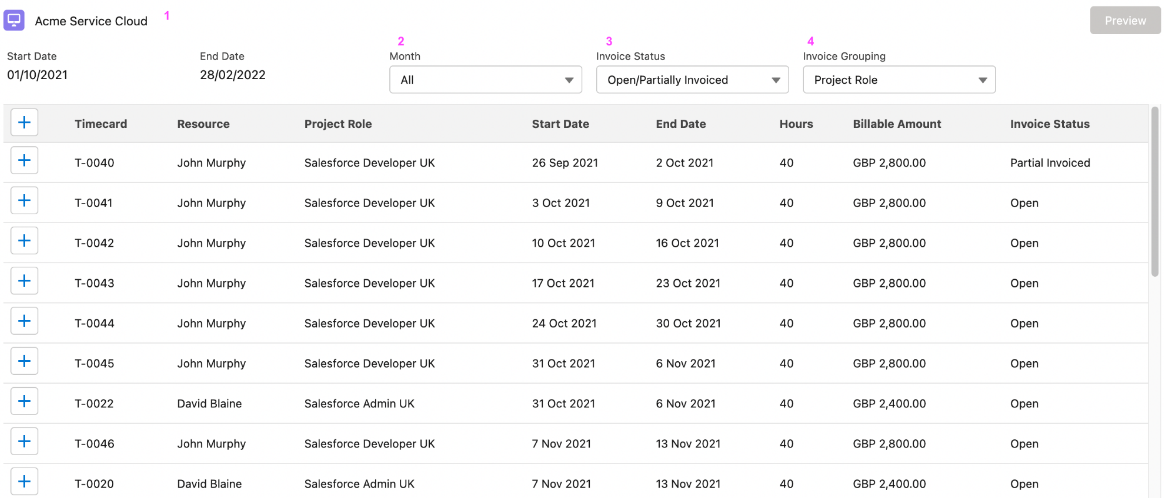
- Document Generation Tools ⟶ Adobe Sign, DocuSign etc to create customer facing Invoice documents.
- Custom Invoice Documents ⟶ The invoice data generated by application is JSON format and can be used to create custom Invoice Templates like using visualforce, LWC etc.
- Accounting Integration ⟶ As data is loosely coupled in JSON format, it can be used to integrate with backend systems such as Account Ledger etc.

Follow below steps to generate invoice:

- In your org, click the App Launcher ( ), and click the “Projectivity” tile.
- Select the Projects tab and click the “Generate Invoices” button.

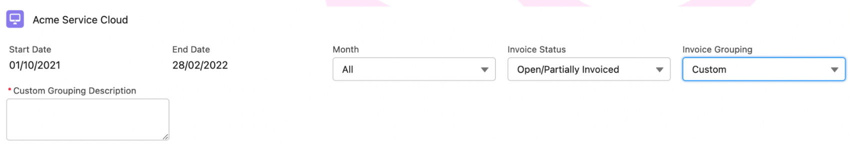


- The popup screen will display as follows:

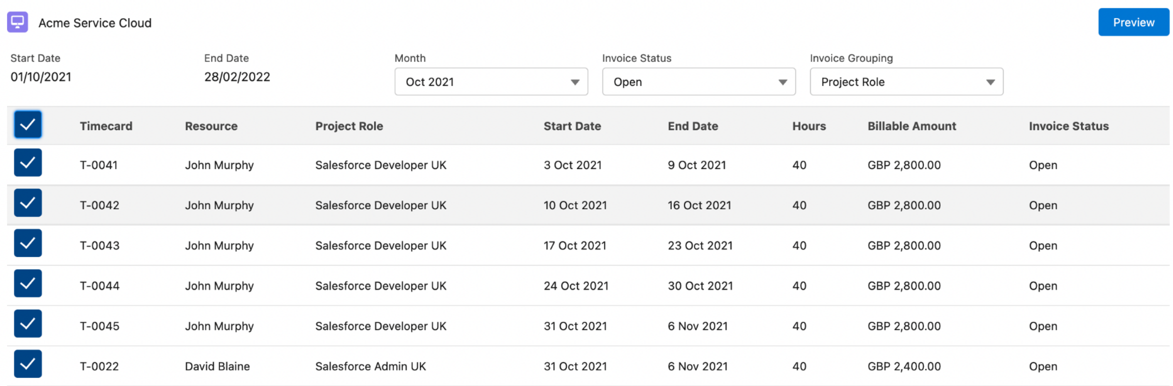


Timecard	Resource	Project Role	Start Date	End Date	Hours	Billable Amount	Invoice Status
T-0040	John Murphy	Salesforce Developer UK	26 Sep 2021	2 Oct 2021	40	GBP 2,800.00	Partial Invoiced
T-0041	John Murphy	Salesforce Developer UK	3 Oct 2021	9 Oct 2021	40	GBP 2,800.00	Open
T-0042	John Murphy	Salesforce Developer UK	10 Oct 2021	16 Oct 2021	40	GBP 2,800.00	Open
T-0043	John Murphy	Salesforce Developer UK	17 Oct 2021	23 Oct 2021	40	GBP 2,800.00	Open
T-0044	John Murphy	Salesforce Developer UK	24 Oct 2021	30 Oct 2021	40	GBP 2,800.00	Open
T-0045	John Murphy	Salesforce Developer UK	31 Oct 2021	6 Nov 2021	40	GBP 2,800.00	Open
T-0022	David Blaine	Salesforce Admin UK	31 Oct 2021	6 Nov 2021	40	GBP 2,400.00	Open
T-0046	John Murphy	Salesforce Developer UK	7 Nov 2021	13 Nov 2021	40	GBP 2,800.00	Open
T-0020	David Blaine	Salesforce Admin UK	7 Nov 2021	13 Nov 2021	40	GBP 2,400.00	Open

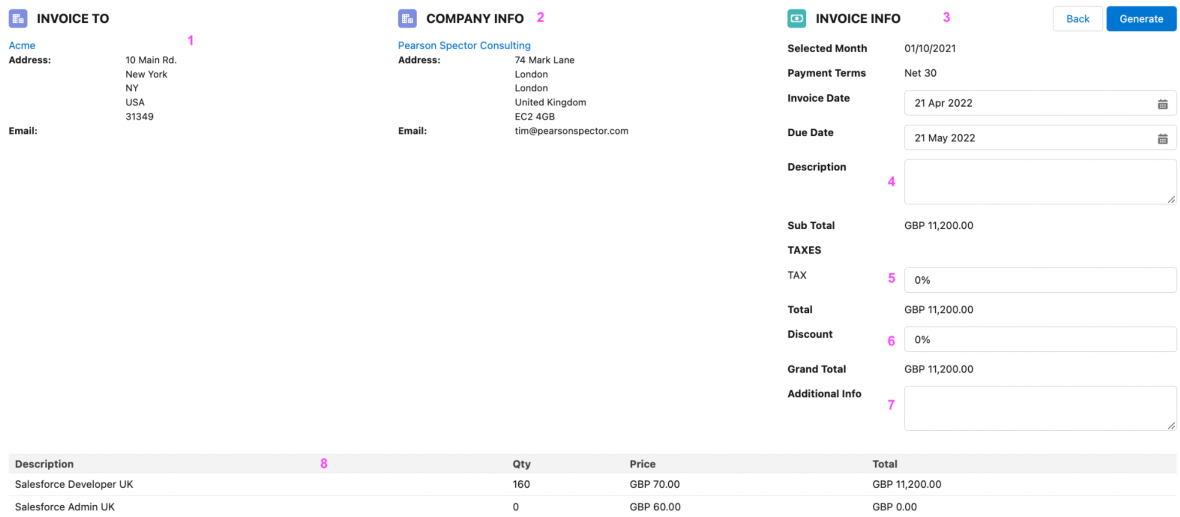
- Project Information(**1**) is displayed in the header.
- The table displays a list of Approved Timecards.
- Month picklist(**2**) displays all the months with year picklist values to filter Timecards by month.
- Invoice Status (**3**) picklist allows to filter Timecards by their Invoice Status as:
  - Open/Partially Invoiced ⟶ Timecards which are not invoiced or which are partially Invoiced. Partial Invoicing is applicable to Timecards which span across two different months. E.g. Timecard for week of 30-Aug-2021 to 5-Sep-2021 is across two different months. If this Timecard is Invoiced for August-2021 then Invoice is generated for days from this week in the month of Aug-2021 and Invoice Status for this Timecard is set to “Partial Invoiced”
  - Open ⟶ Timecards which are not invoiced.
  - Partial Invoiced ⟶ Timecards which are partially invoiced as explained earlier.
  - Invoiced ⟶ Timecards which are fully Invoiced.
- Invoice Grouping (**4**) picklist is used define grouping on Invoice Line Items as:
  - Project Role ⟶ Group by Project Role from the Roles of the Timecards selected for Invoicing
  - Resource ⟶ Group by Resource from the Resources of the Timecards selected for Invoicing.
  - Custom ⟶ Create a custom grouping name and all the selected Timecards are added as one Invoice Line Item with the grouping name as defined. When this picklist value is selected an additional text area field is displayed to enter custom grouping description.



- Select the value in the Month picklist. The “Preview” button is only enabled when a value other than “All” is selected in the Month picklist.
- Select picklist value in Invoice Status and Invoice Grouping picklist as required.
- Click the **+** icon in the header of the first column to select all the rows or click + icon in each row as required.

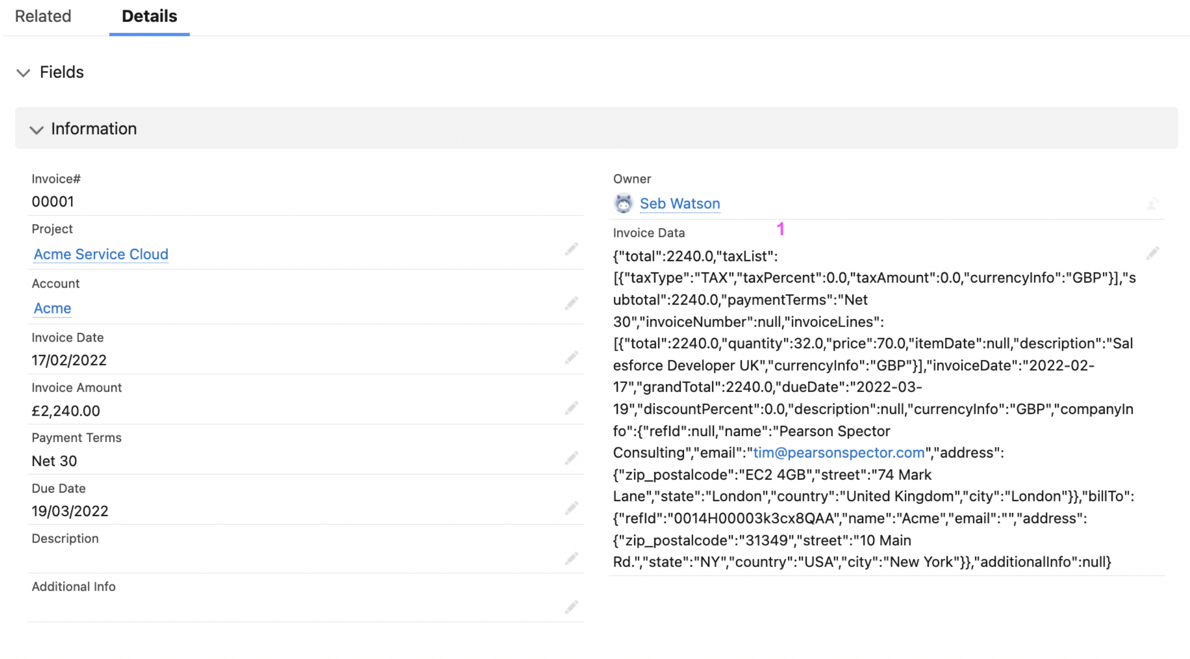


- Click the “Preview” button and next screen is displayed as shown below:



  - Invoice To (**1**) is the information of the Account record related to the Project.
  - Company Info(**2**) is the Company Information as set up in the Admin Console(explained in the Administration section).
  - Invoice Info(**3**) is the Invoice Summary. Edit the Invoice Date and Due Date as required.
  - Add Invoice Description(**4**) as required.
  - Add Tax(**5**) percentage as required. Currently the system defaults to zero and users can enter tax value manually. Tax Rules configuration is in Product Road for future releases and will allow configure tax rules which in turn auto populate the tax value instead of zero.

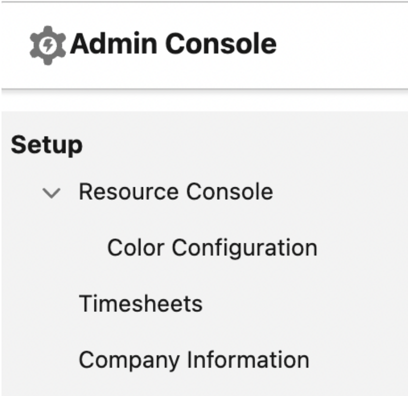
- Edit Discount(**6**) as required.
- Enter Additional Info(**7**) if applicable.
- Invoice Line Item(**8**) display list of Invoice Items grouped as per Invoice Grouping selected in previous screen.
- Click “Generate” to create Invoice data.
- Once Invoice is generated, go to the Project record and navigate to Invoices related list then select an Invoice record.



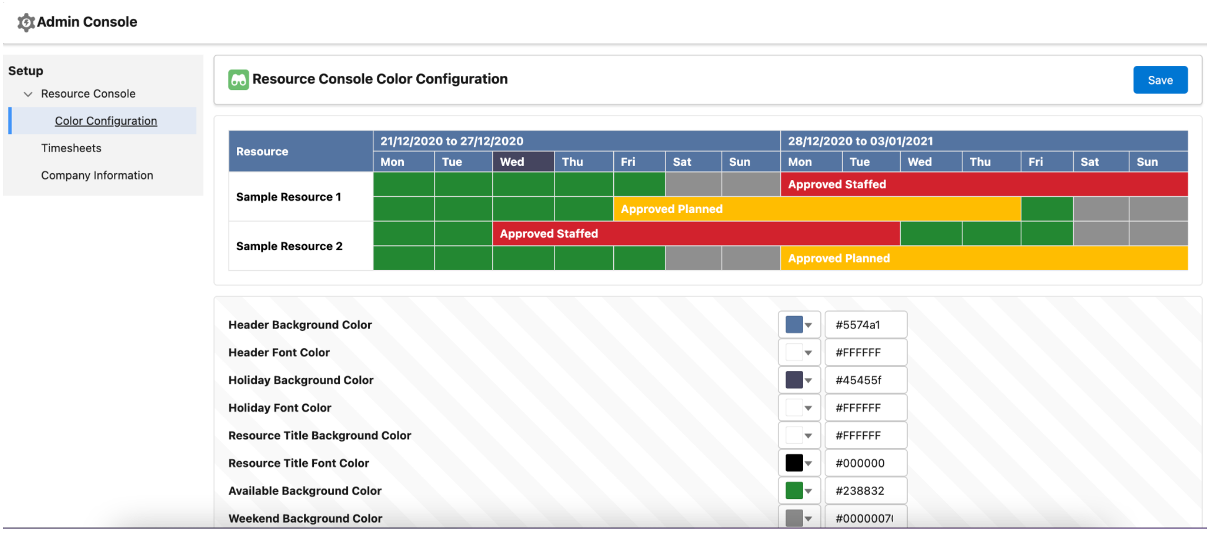
  - This record has all the invoice information that was generated.
  - Notice the Invoice Data(**1**) field it has all the information of Invoice Header, Tax, Discounts etc and Invoice Line Items in JSON format.
  - This JSON can be used to generate customer facing invoice documents using tools like AdobeSign, DocuSign etc . Essentially any tool can read JSON as input.
  - The invoice record and the JSON can also be used to integrate with backend Accounting systems.

12. Administration

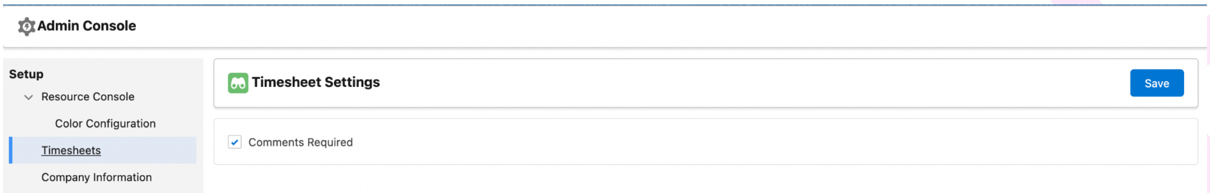
A. In your org, click the App Launcher ( ), and click the “Projectivity” tile.
B. Select the “Admin” tab.
C. The Admin Console allows administrators to control various set aspects of the Application.



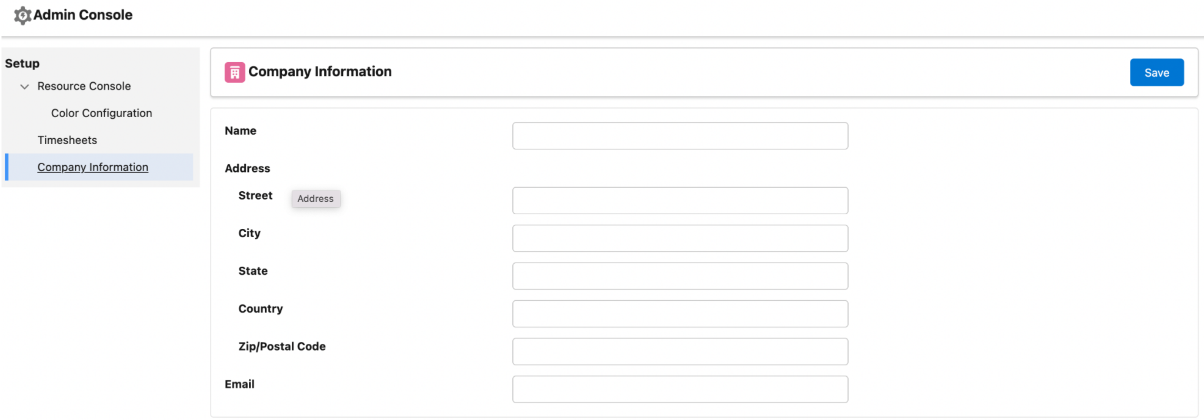
D. “Color Configuration” allows control the color scheme of the Resource Console.



E. Timesheets allow you to control Timecard settings such as whether Comments are required or not during submitting Timesheets.



F. Company Information is used to set the Billing Information required for Invoicing.



13. Essential Batch Jobs

A batch job has to be scheduled in order for various reporting metrics like Margin%, Utilisation etc to work properly.

A. Navigate to Setup ⟶ Develop ⟶ Apex Classes
B. Click Schedule Apex and populate values as:
   - Name = Calculate Workable Hours
   - Apex Class = ResourceWorkableHoursSchedule
   - Frequency = Weekly and select all days.
   - Start Date = <First of Current Month>
   - End Date = 31-Dec-2099
   - Preferred Start Time = 00:00
C. Click Save.