

# **Setting up your Moniroo – Dynamics 365 Business Central environment**

## Assign App Permissions

After installing our app, you will need to create a user with the proper app permissions. First, create a new user by typing users in the search field.

SEARCH FOR PAGE OR REPORT ↗ ✕

Type page or report name to start search:

2 search results: [All](#) [Lists](#)

[Search the help for 'users' ?](#)

NAME	DEPARTMENT
<input type="checkbox"/> <a href="#">Users</a>	Administration/IT Administration/General
<input type="checkbox"/> <a href="#">ADCS Users</a>	Application Setup/Warehouse/ADCS

Create a new user that will be the administrator user for all the timesheets. Grant the user the permission 'WS-Moniroo'. This permission will be available after installing our app.

## Environment setup

Contact WebSan at [support@websan.com](mailto:support@websan.com). We will set up your Moniroo environment, and give you the necessary information to connect your Dynamics 365 Business Central environment to your Moniroo environment.

After contacting WebSan, we will provide you with these values to setup your Dynamics 365 Business Central to Moniroo connection.

SEARCH FOR PAGE OR REPORT ↗ ✕

Type page or report name to start search:

1 search results: [All](#) [Administration](#)

[Search the help for 'Moniroo Setup' ?](#)

NAME	DEPARTMENT
<input type="checkbox"/> <a href="#">Moniroo Setup</a>	Departments/Moniroo Time Management

EDIT - MONIROO SETUP ✕

### Moniroo Setup

General Show more

User Name	<input type="text"/>	Inter ID	<input type="text"/>
Password	<input type="text"/>	Base URL	<input type="text"/>
Client ID	<input type="text"/>	Moniroo Timesheet Owner	<input type="text"/>

Update the Moniroom Timesheet Owner with the user you created in the first step.

Moniroom Timesheet Owner	TESTUSER	...
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This user will be the owner of all the timesheets created from Moniroom.

### Creating Approver Resource

Start by creating a person as a resource in Dynamics 365 Business Central. When this is done and there are no errors, it will create an employee record in Moniroom which you can create as a user.

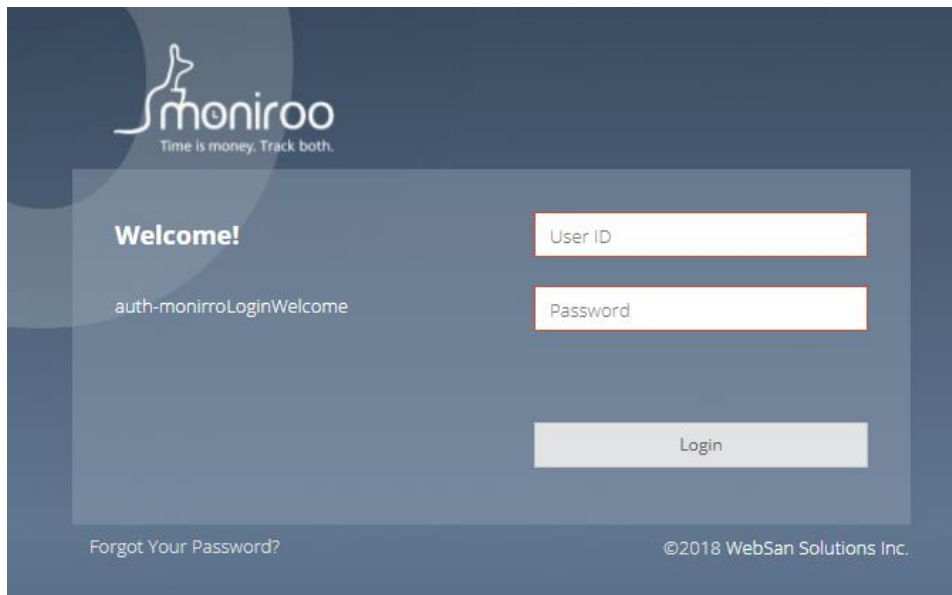
EDIT - RESOURCE CARD ×

LINDA · Linda Martin

General Show more

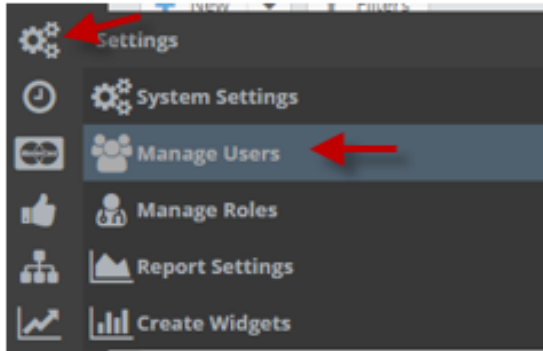
Name	Linda Martin	Last Date Modified	21/03/2018
Type	Person	Use Time Sheet	<input type="checkbox"/>
Base Unit of Measure	HOUR	Time Sheet Owner User ID	TESTUSER
Search Name	LINDA MARTIN	Time Sheet Approver User ID	TESTUSER
Resource Group No.		Linked in Moniroom	No
Blocked	<input type="checkbox"/>		

Navigate to your Moniroom environment and log in as the administrator. The URL for the Moniroom, the login and password will be provided after we finish setting up the environment.

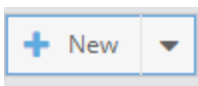


The image shows the Moniroom login interface. At the top left is the Moniroom logo with the tagline "Time is money. Track both." Below the logo, the text "Welcome!" is displayed. Underneath, there is a session identifier "auth-moniroomLoginWelcome". The main login area contains two input fields: "User ID" and "Password". Below these fields is a "Login" button. At the bottom left, there is a link for "Forgot Your Password?". At the bottom right, the copyright notice "©2018 WebSan Solutions Inc." is visible.

Hover over the Settings icon and click on manage users.



Click on the 'new' button



Fill in the user settings. The login will be the information you use to login to the Moniroo portal. The bolded headings are required fields that you must fill in.

A screenshot of a 'Create New User' form. The form has a dark header with the title 'Create New User' and a close button. Below the header is a sidebar with navigation options: 'User Settings' (selected), 'Permissions', 'Approvals', and 'Advanced'. The main content area is titled 'Settings apply to all companies' and contains several fields: 'Account Type' (Standard User), 'Login' (msup), 'Password' (Leave empty to set to 'password'), 'First Name' (m), 'Last Name' (sup), 'Email Address' (msup@websan.com), 'Language' (English), 'Company Access' (NAV), and 'Disabled' (checkbox). The 'Login', 'First Name', 'Last Name', and 'Email Address' fields are bolded in the original image.

In the permissions tab, choose the "Employee" user type, and in the ERP Employee ID, select the ID of the resource that you just created in Dynamics 365 Business Central. Setup the user roles so the user has access to approve documents. We will have some roles setup already when creating your environment.

**Modify User: m sup** [Close]

*Settings apply to this company*

User Settings  
**Permissions**  
 Approvals  
 Advanced

User Class: [ ] [X]

*Class changes will roll down*

User Types: [Employee X]

**ERP Employee ID:** [R0040]

Is Admin:  Can manage employee settings

User Roles: [ALL X]

To set the user as a supervisor, go to the approval tab in the user window, and fill in a supervisor code. This supervisor code must be unique and will be tied to the ERP employee ID.

**Modify User: m sup** [Close]

*Settings apply to this company*

User Settings  
 Permissions  
**Approvals**  
 Advanced

Supervisor: [No Supervisor] [More]

Expense Submit Limit:  No Limit [ \$ 0.00 ]

Purchasing Submit Limit:  No Limit [ \$ 0.00 ]

**Supervisor Setup**

My Supervisor Code: [R0040]

*Setting this enables you as a supervisor*

Expense Approval Limit:  No Limit [ \$ 0.00 ]

Purchasing Approval Limit:  No Limit [ \$ 0.00 ]

Master Approver:

[Ok]

## Creating the Employee Resource

Create a person as a resource in Dynamics 365 Business Central. This will create the employee record in Moniroo.

NEW - RESOURCE CARD - NAVTEST2 ✕

### navtest2

General Show more

Name	navtest2	Last Date Modified	
Type	Person	Use Time Sheet	<input checked="" type="checkbox"/>
Base Unit of Measure		Time Sheet Owner User ID	TESTUSER
Search Name	NAVTEST2	Time Sheet Approver User ID	TESTUSER
Resource Group No.		Linked in Moniroo	No
Blocked	<input type="checkbox"/>		

Base Unit of Measure: HOUR

Fill in the user settings similar to when creating the approver.

Create New User ✕

Settings apply to all companies

- User Settings
- Permissions
- Approvals
- Advanced

<b>Account Type:</b>	Standard User
<b>Login:</b>	navtest2
<b>Password:</b>	Leave empty to set to 'password'
<b>First Name:</b>	Nav Test
<b>Last Name:</b>	2
<b>Email Address:</b>	navtest2@websan.com
<b>Language:</b>	English
<b>Company Access:</b>	NAV
<b>Disabled:</b>	<input type="checkbox"/>

In the permissions tab, choose the Employee user type, and in the ERP Employee ID, select the ID of the resource that you just created in Dynamics 365 Business Central. Setup the user roles so the user has access to approve documents.

**Create New User**

Settings apply to this company

User Class: [Empty]

User Types: Employee

**ERP Employee ID:** [Empty]

Is Admin: [Empty]

User Roles: [Empty]

[R0020]	MONIROOSUP
[R0030]	Nav Test 2
[TIMOTHY]	Timothy Sneath
[TJACKSON]	Thomas Jackson

Page 3 of 3

Save Cancel

In the Permissions tab, set the user roles to be a timesheet user. Setup the user's supervisor to the user created in the previous step.

**Modify User: Nav Test 2**

Settings apply to this company

User Class: [Empty]

User Types: Employee

**ERP Employee ID:** R0030

Is Admin:  Can manage employee settings

User Roles: Timesheet user

Save Cancel

Modify User: Nav Test 2



User Settings

Permissions

Approvals

Advanced

Settings apply to this company

Supervisor:

Expense Submit Limit:  No Limit

Purchasing Submit Limit:  No Limit

Supervisor Setup

My Supervisor Code:

Setting this enables you as a supervisor

Expense Approval Limit:  No Limit

Purchasing Approval Limit:  No Limit

Master Approver:



## Customer

Create a customer in Dynamics 365 Business Central that will link to a job/job task in Dynamics 365 Business Central. When this is created, it will create a client record in Moniroo.

# 10000 · NAVCust02

## General

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Name	NAVCust02
Balance (LCY)	0.00
Balance Due (LCY)	0.00
Credit Limit (LCY)	0.00
Blocked	▼

---

Tax Liable	<input checked="" type="checkbox"/>
Tax Area Code	ON ...
Tax Identification Type	Legal Entity ▼
Tax Exemption No.	

## Jobs

Create a job record in Dynamics 365 Business Central. This will create a project record in Moniroo. It will be linked to the client in Moniroo the same way it is being linked to the customer in Dynamics 365 Business Central.

### EDIT - JOB CARD

# JOB00010 · NAVCust02Job01

## General

Description	NAVCust02Job01
Bill-to Customer No.	10000 <span>×</span> <span>...</span>
Bill-to Contact No.	CT000006 <span>...</span>
Bill-to Name	NAVCust02
Bill-to State / ZIP Code	ON

## Job Task

Create a job task line in Dynamics 365 Business Central. This will create a category record in Moniroo that a user can book time against.

NC2J1_T1	...	Task 01	Posting	
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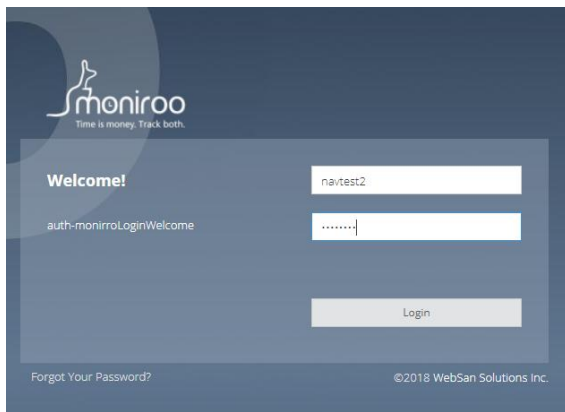
Create a job planning line. This will be used track the budgeted hours for the project in Moniroo.

NEW - JOB PLANNING LINES - J00040 NAVCUST02JOB01 NC2J1\_T1 TASK 01 [+ new](#)

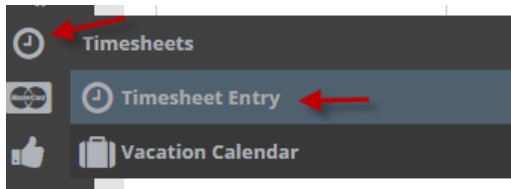
Job Task No. ▼	Line Type	Planning Date	Planned Delivery Date	Document No.	Type	No.	Description	Quantity	Unit Cost	Total Cost	Unit Price	Line Amount	Qty. to Transfer to Journal	Invoiced Amount (LCY)	
NC2J1_T1	...	Budget	1/31/2018	1/31/2018		Resource	R0030	Nav Test 2	40	30.00	1,200.00	200.00	8,000.00	40	0.00

## Creating timesheets

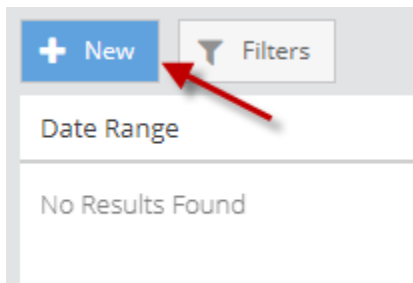
Log into Moniroo with the timesheet user.



Hover over the timesheet tab and click on the Timesheet Entry button.




Click on New to create a new timesheet entry.



Click on Add to create a new timesheet line.

Timesheet #: **WSTS000028**

Date Range: 2018-01-21 - 2018-01-27

**Add** 

Line ..	Project Info	Row Total	Sunday 2018-01-2
		0.00	0.00


Select the customer/job/job task from the previous steps.

**Select Project & Category** ✕

Client: C00020 - NAVCust02 ▼ ✕

Project: J00040 - NAVCust02Job01 ▼ ✕

Category: Task 01 ▼ ✕

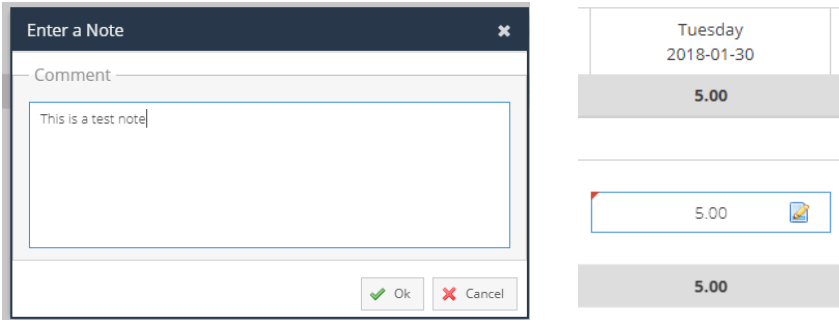
 Ok

Click on the grid to fill out the length of time(hours) you want to book for the job.

Monday 2018-01-29	Tuesday 2018-01-30	Wednesday 2018-01-31	Thursday 2018-02-01
0.00	5.00	0.00	0.00
0.00	<input type="text" value="5.00"/>	0.00	0.00
0.00	5.00	0.00	0.00

Tuesday 2018-01-30
5.00
<input type="text" value="5.00"/>
5.00

To input notes for this time, press the “n” key and a note window will pop up. You can enter individual notes for each time entry. The icon will change to indicate there is a note for that time entry.

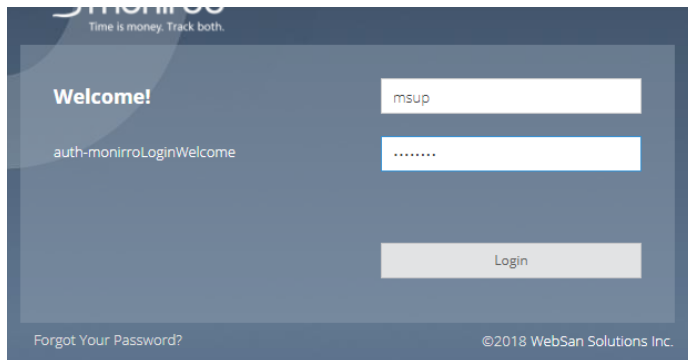


When you are finished inputting time, hit submit and you will see that the timesheet is waiting for a Supervisor Approval on the main screen.

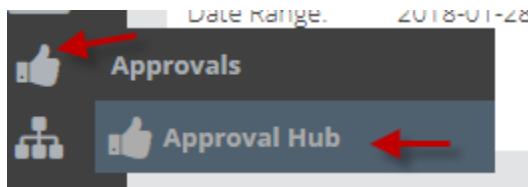
<a href="#">WSTS000029</a>	Waiting for Supervisor Approval	7
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## Approving timesheet

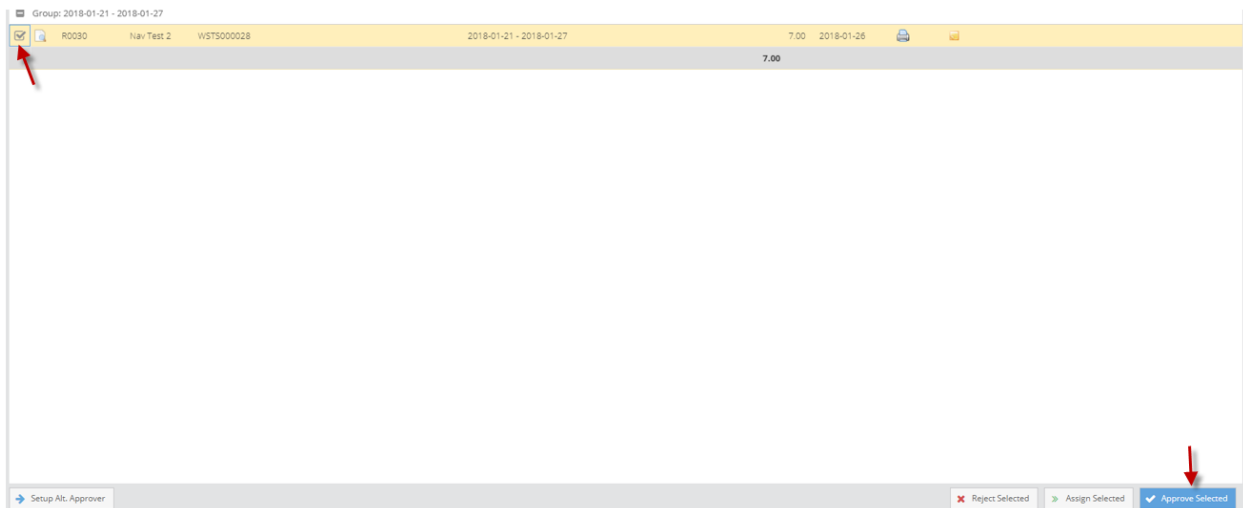
Login with the approver login.



Hover over the approver tab and select the Approval Hub.



Check off the timesheet and hit the Approve Selected button.



If there were no errors, you will see the timesheet in the approved time sheets in Dynamics 365 Business Central.

EDIT - TIME SHEET X >

Time Sheet No.  Starting Date

Resource No.  Ending Date

Type	Description	21 Sun	22 Mon	23 Tue	24 Wed	25 Thu	Status
Job	J00040 - NC2J1_T1			5			Open
Job	J00040 - NC2J1_T1				2		Open

Tfr  
 Op  
 Sut  
 Rej  
 Apv  
 Tot  
 Pos  
 AC  
 21  
 22  
 23  
 24