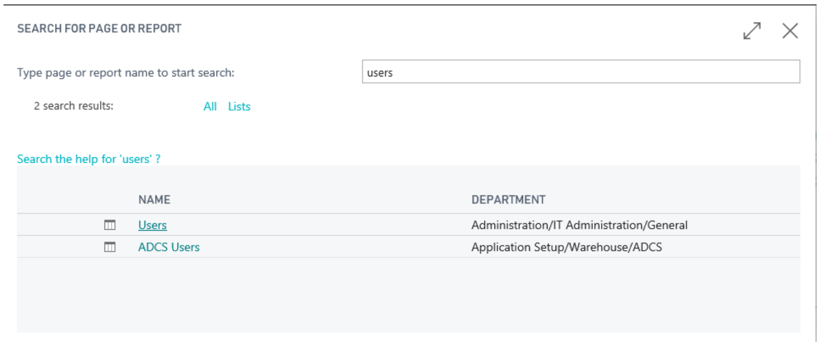
Setting up your Moniroo – Dynamics 365 Business Central environment

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.

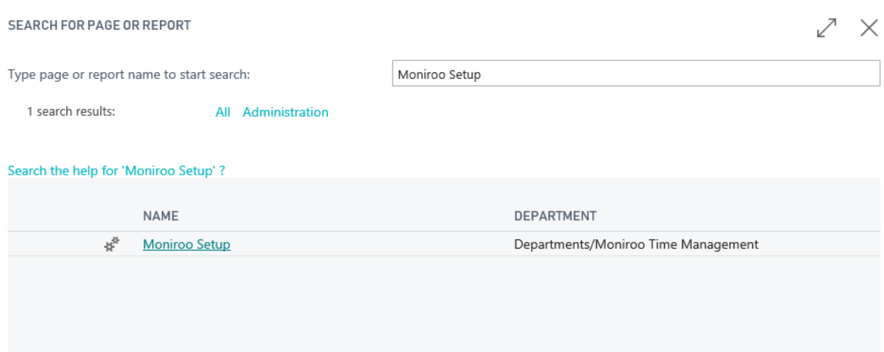


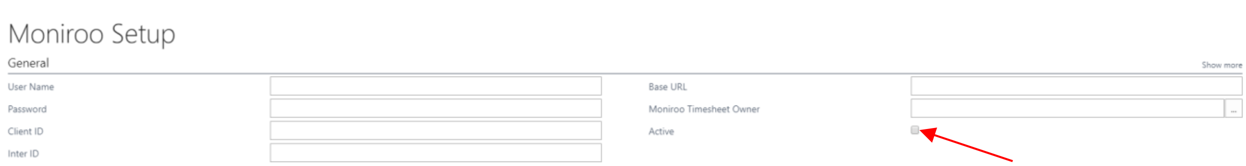
Create a new user that will be the administrator user for all the timesheets. Grant the user the permission 'WS-Moniroo'. Additional users that you do not want to have access to modify your moniroo setup can be given the WS-MONIROOUSR permission. This permission will be available after installing our app.

Environment setup

Contact WebSan at 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. Also, setting "Active" will enable the integration between Business Central and Moniroo.



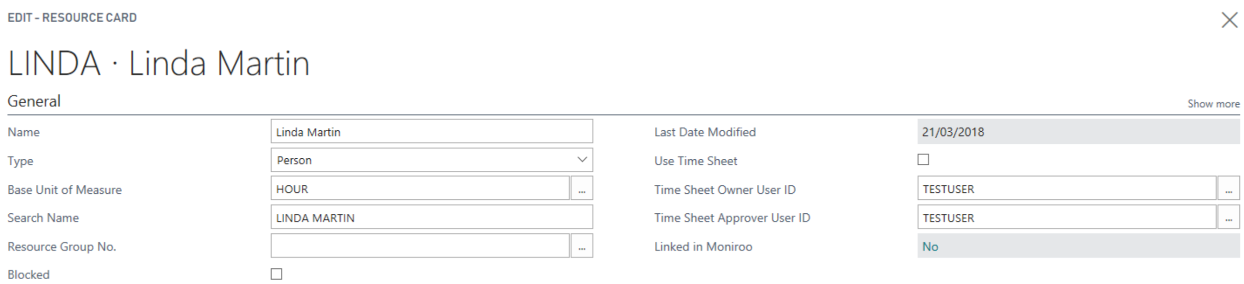


Update the Moniroo Timesheet Owner with the user you created in the first step.

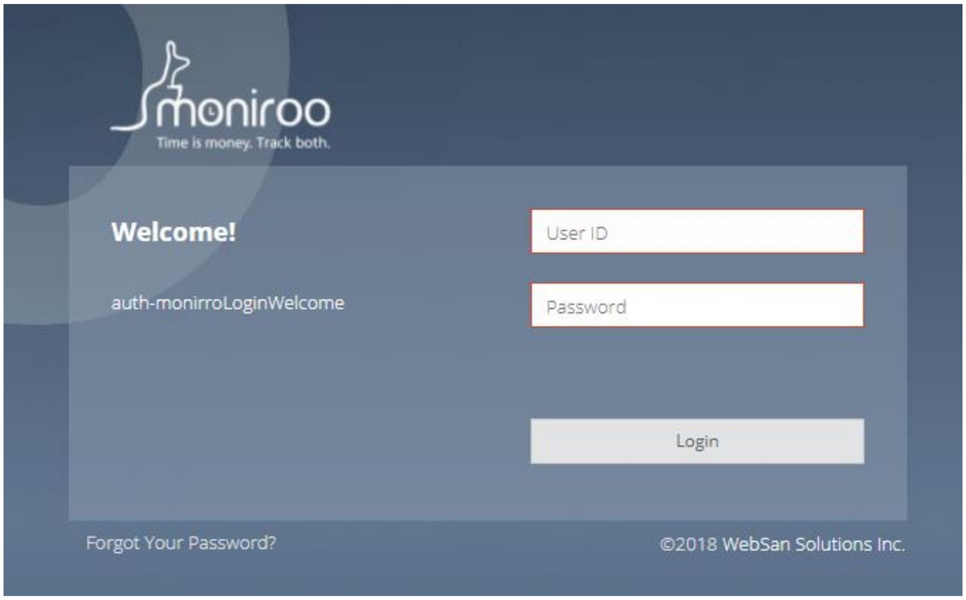
This user will be the owner of all the timesheets created from Moniroo.

Creating Approver Resource

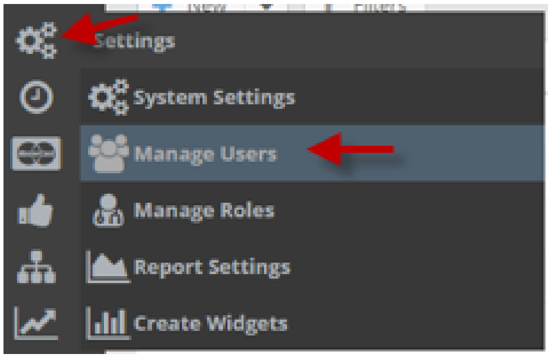
Start by creating a person as a resource in Dynamics 365 Business Central. When this is done and there are no errors, it will create an employee record in Moniroo which you can create as a user.



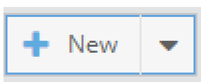
Navigate to your Moniroo environment and log in as the administrator. The URL for the Moniroo, the login and password will be provided after we finish setting up the environment.



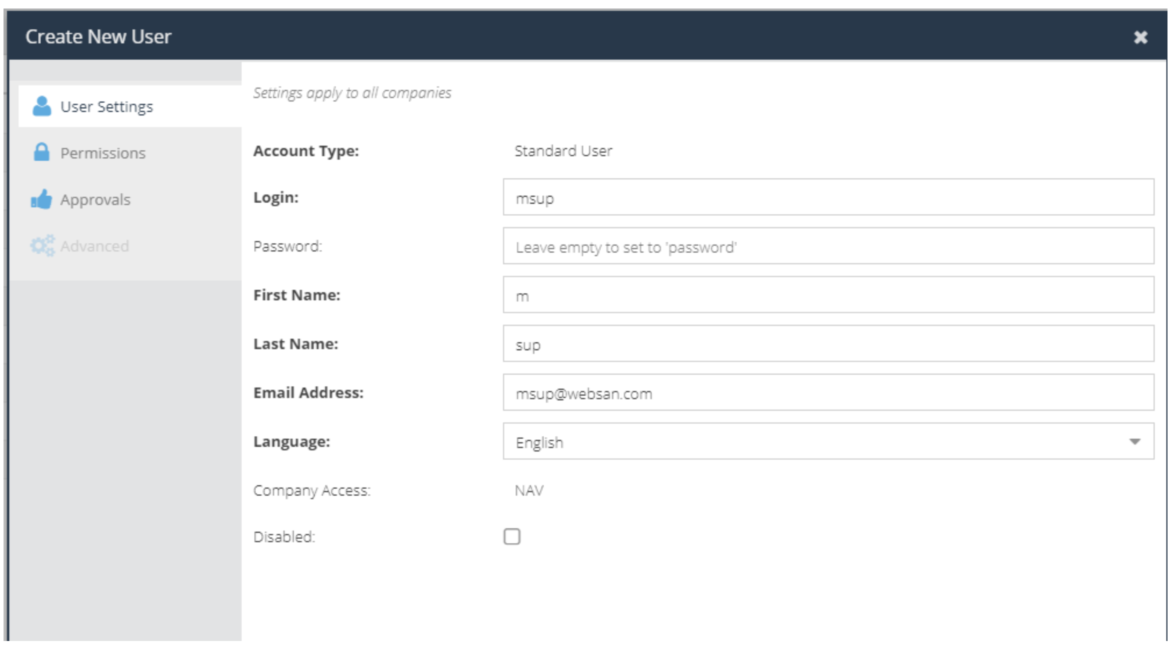
Hover over the Settings icon and click on manage users.



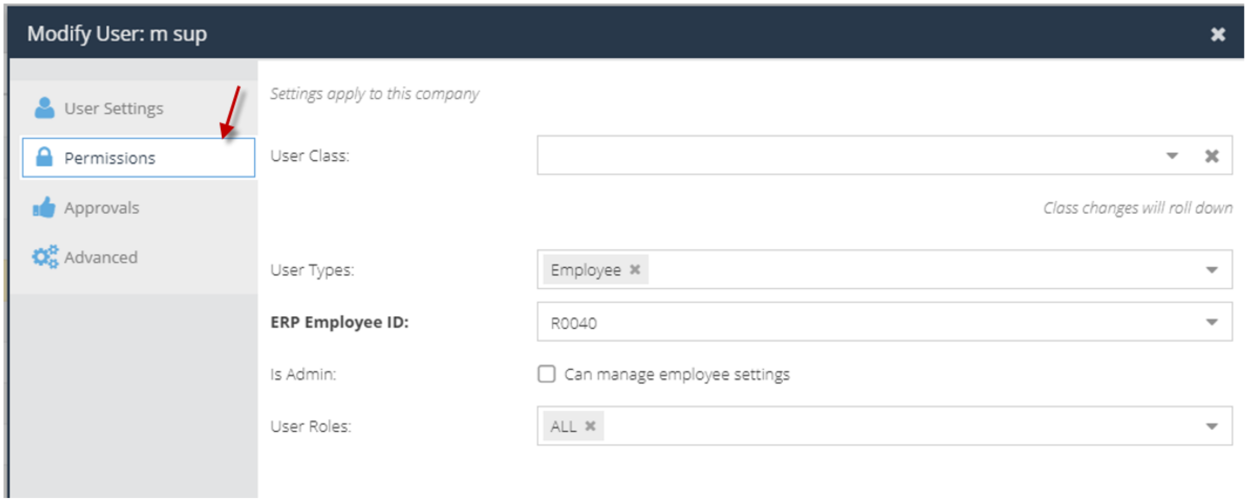
Click on the ‘new’ button



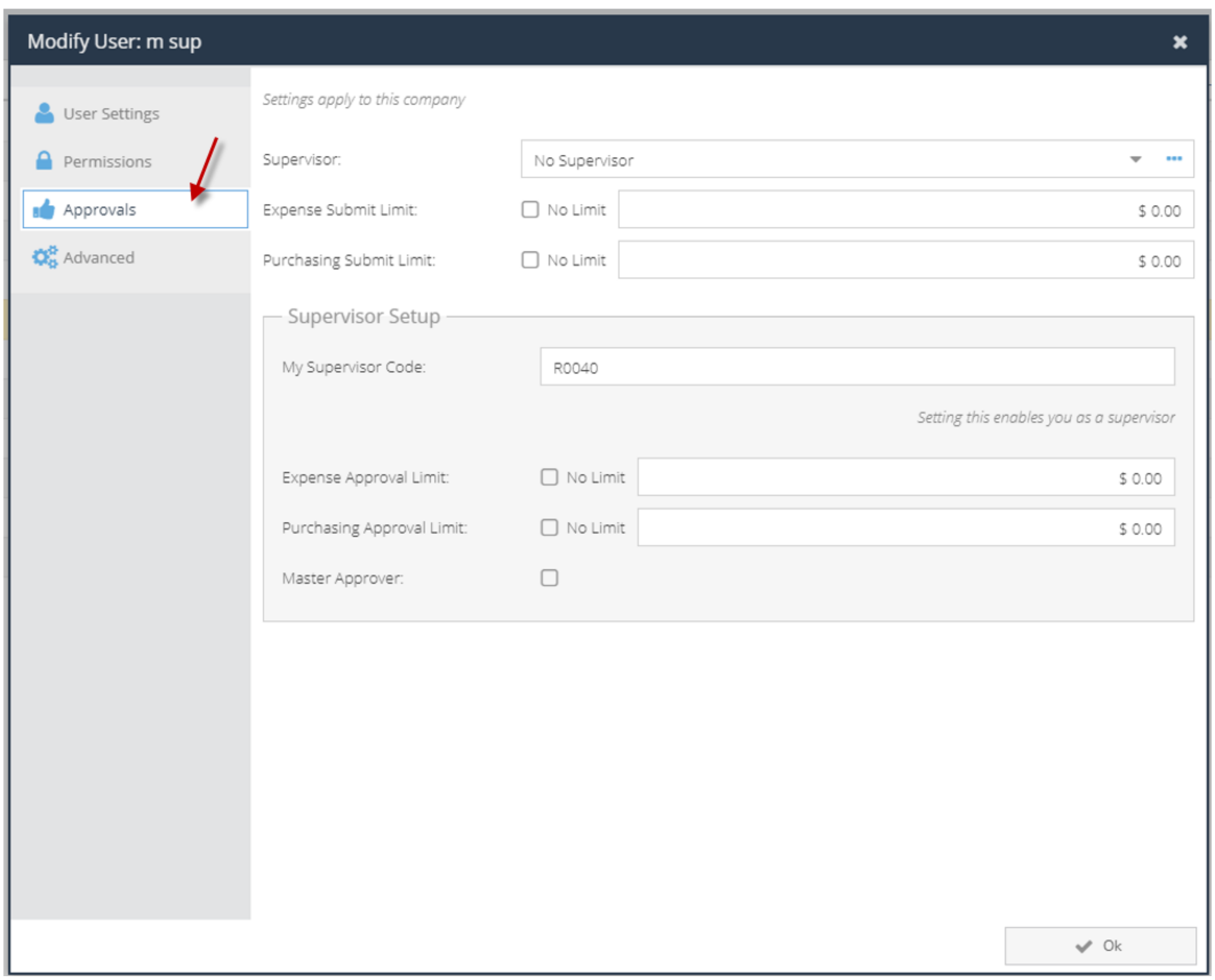
Fill in the user settings. The login will be the information you use to login to the Moniroo portal. The bolded headings are required fields that you must fill in.



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.

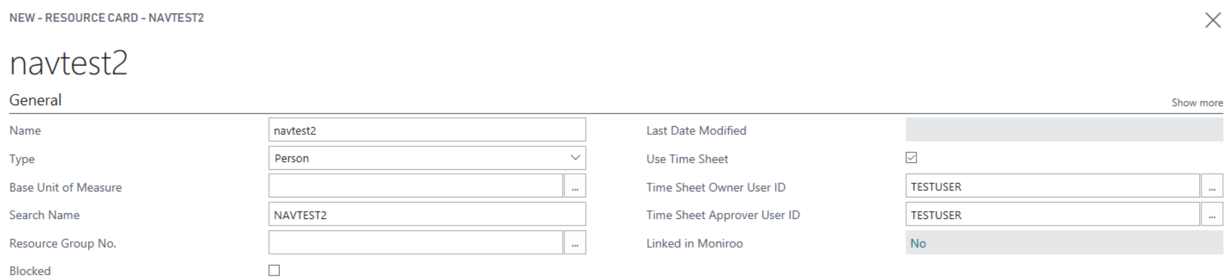


To set the user as a supervisor, go to the approval tab in the user window, and fill in a supervisor code. This supervisor code must be unique and will be tied to the ERP employee ID.

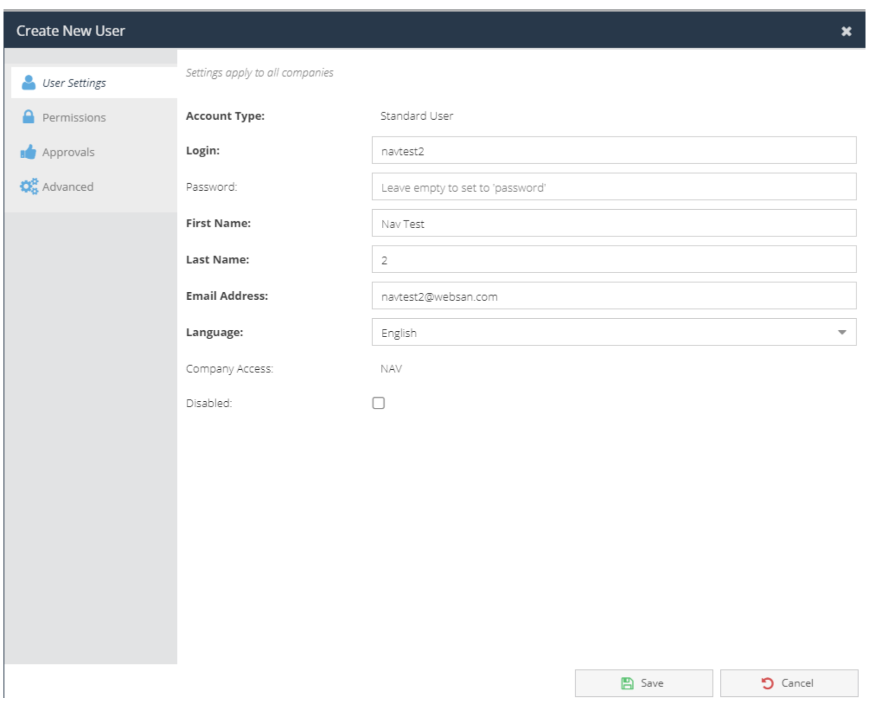


Creating the Employee Resource

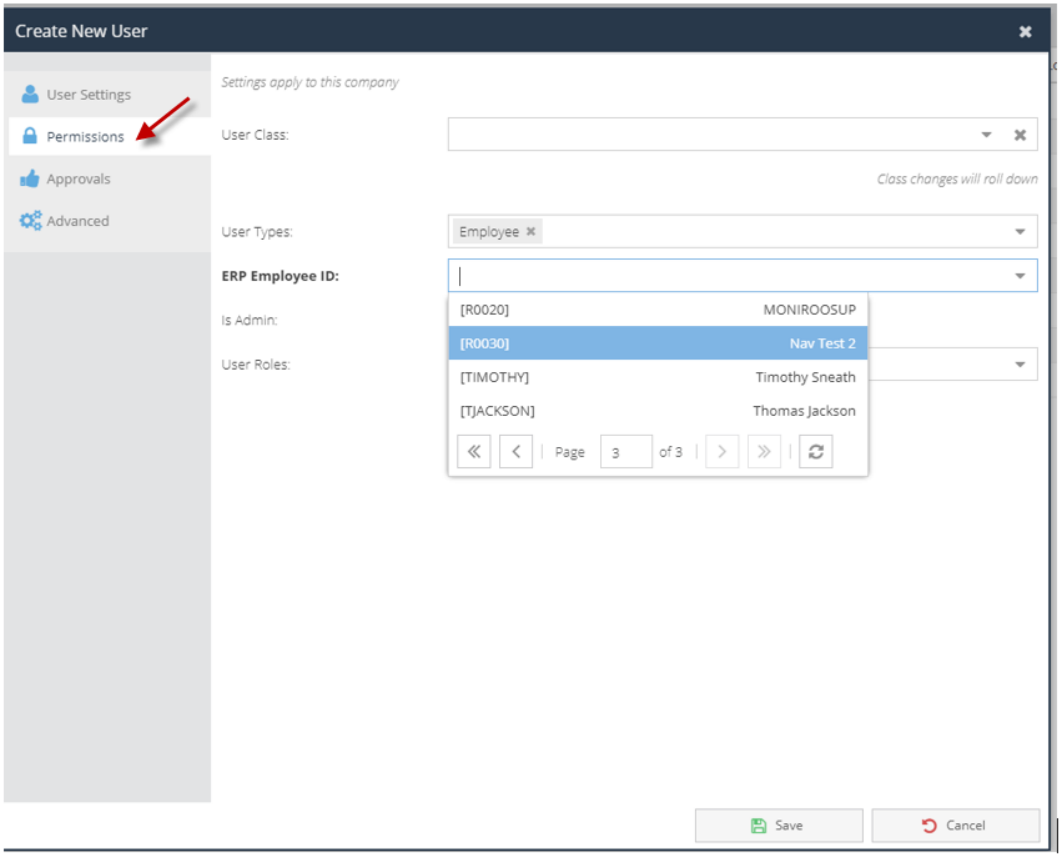
Create a person as a resource in Dynamics 365 Business Central. This will create the employee record in Moniroo.



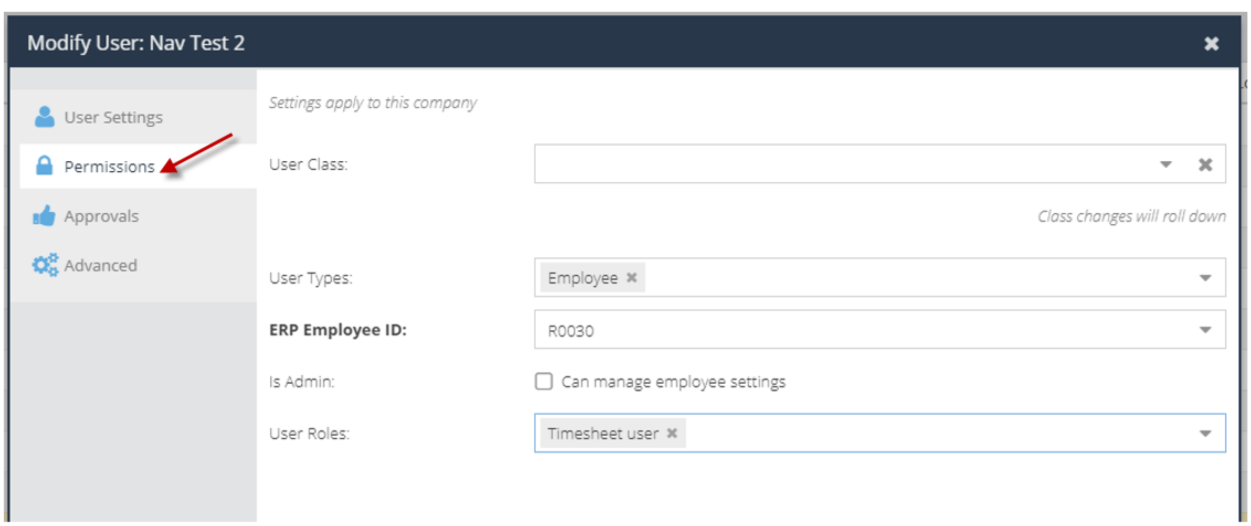
Fill in the user settings similar to when creating the approver.

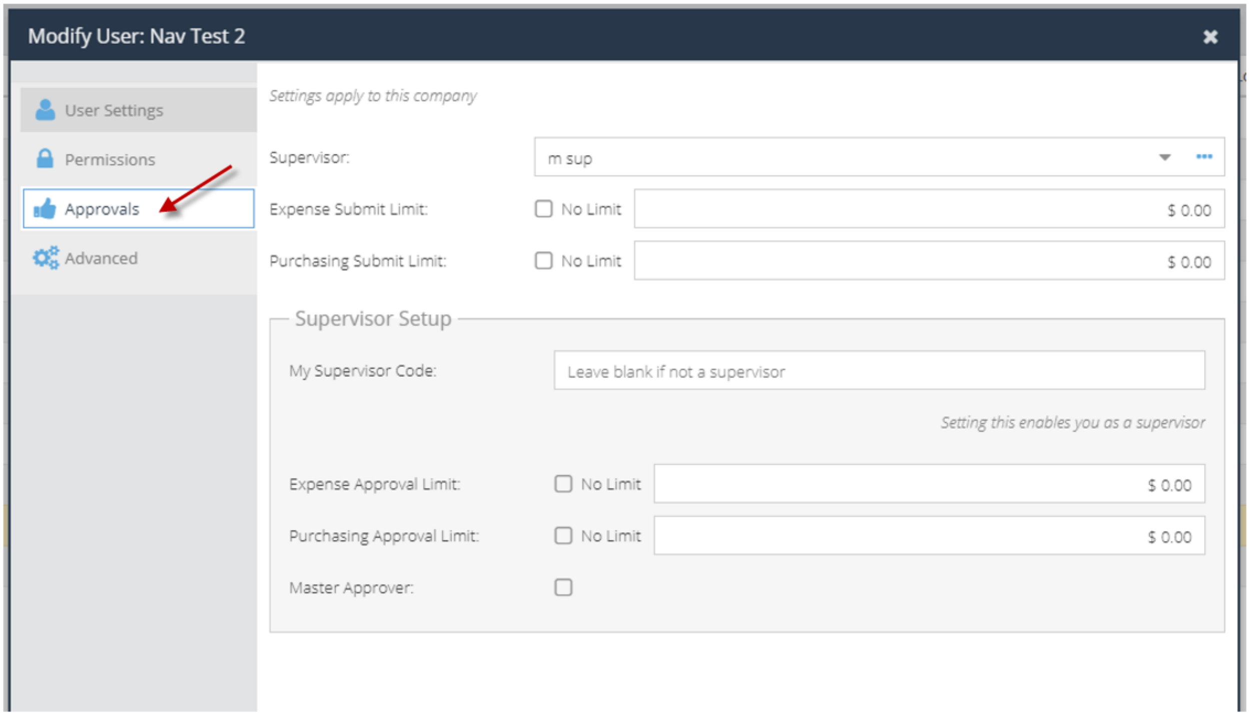


In the permissions tab, choose the Employee user type, and in the ERP Employee ID, select the ID of the resource that you just created in Dynamics 365 Business Central. Setup the user roles so the user has access to approve documents.



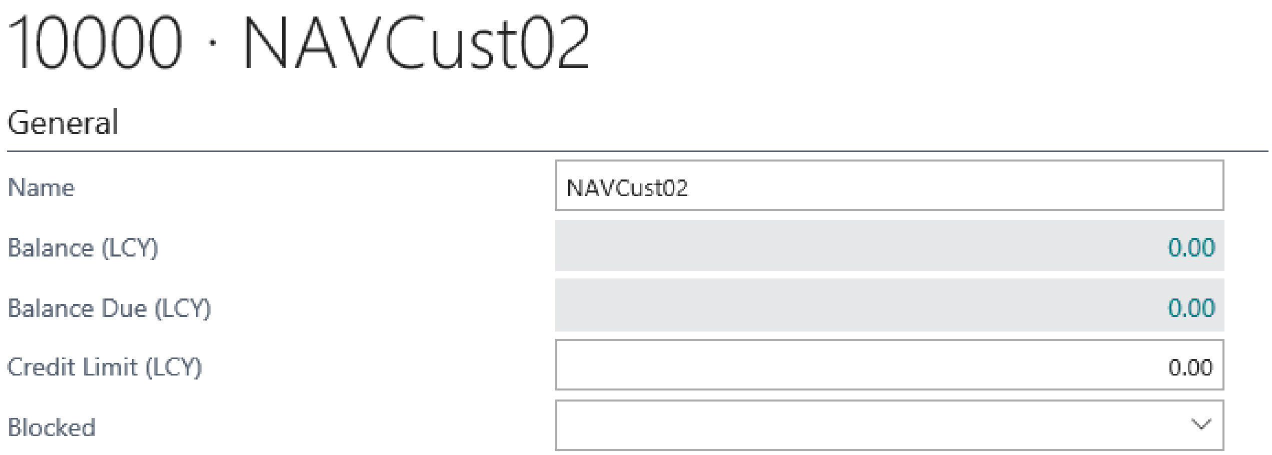
In the Permissions tab, set the user roles to be a timesheet user. Setup the user's supervisor to the user created in the previous step.

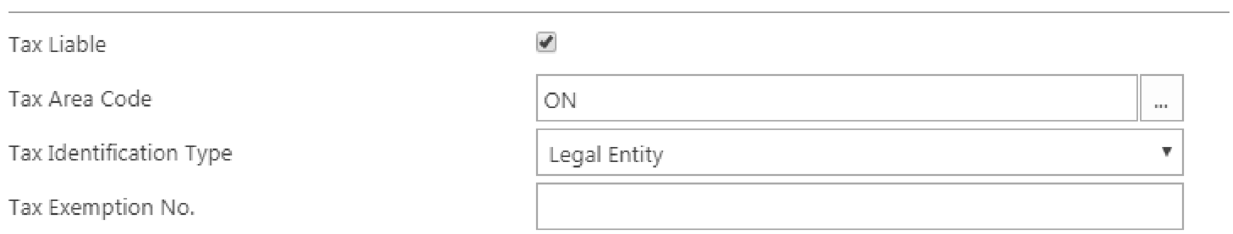



Modify User: Nav Test 2
User Settings
Permissions
Approvals
Advanced
Settings apply to this company
Supervisor:
m sup
Expense Submit Limit:
No Limit
$ 0.00
Purchasing Submit Limit:
No Limit
$ 0.00
Supervisor Setup
My Supervisor Code:
Leave blank if not a supervisor
Setting this enables you as a supervisor
Expense Approval Limit:
No Limit
$ 0.00
Purchasing Approval Limit:
No Limit
$ 0.00
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.





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
Bill-to Contact No.	CT000006
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	

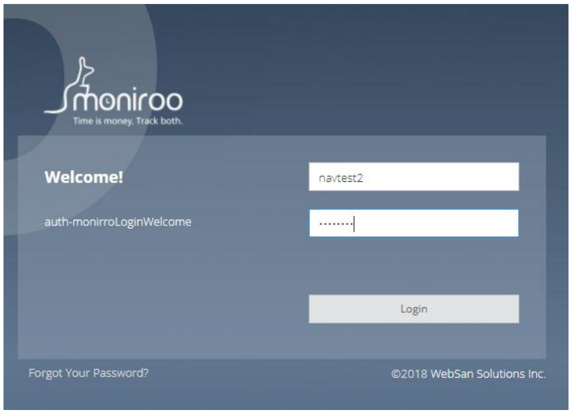
Create a job planning line. This will be used track the budgeted hours for the project in Moniroo.

NEW - JOB PLANNING LINES - J00040 NAVCUST02JOB01 NC2J1_T1 TASK 01 + new

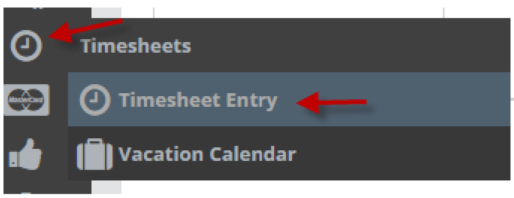
Job Task No.		Line Type	Planning Date	Planned Delivery Date	Document No.	Type	No.	Description	Quantity	Unit Cost	Total Cost	Unit Price	Line Amount	Qty. to Transfer to Journal	Invoiced Amount (LCY)
NC2J1_T1	···	Budget	1/31/2018	1/31/2018		Resource	R0030	Nav Test 2	40	30.00	1,200.00	200.00	8,000.00	40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

Creating timesheets

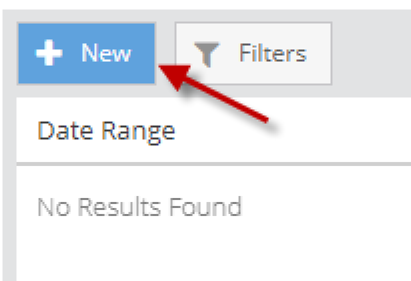
Log into Moniroo with the timesheet user.



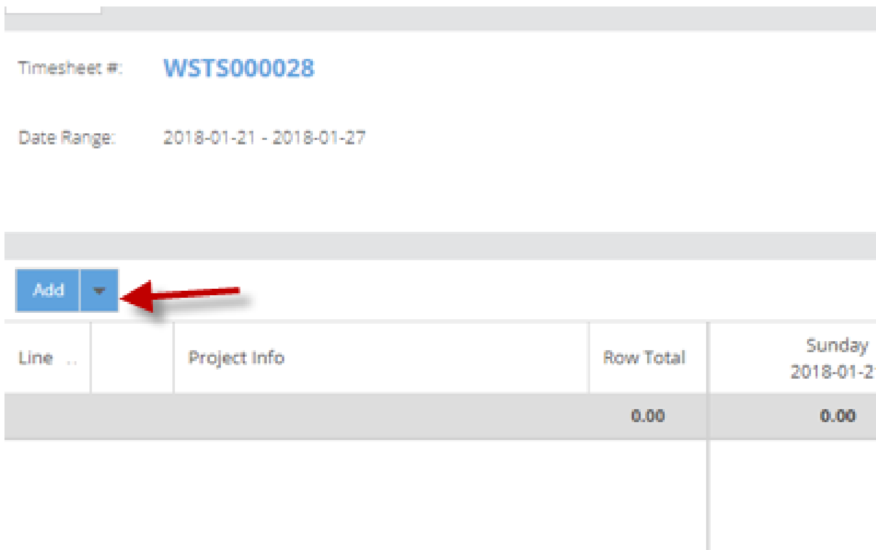
Hover over the timesheet tab and click on the Timesheet Entry button.



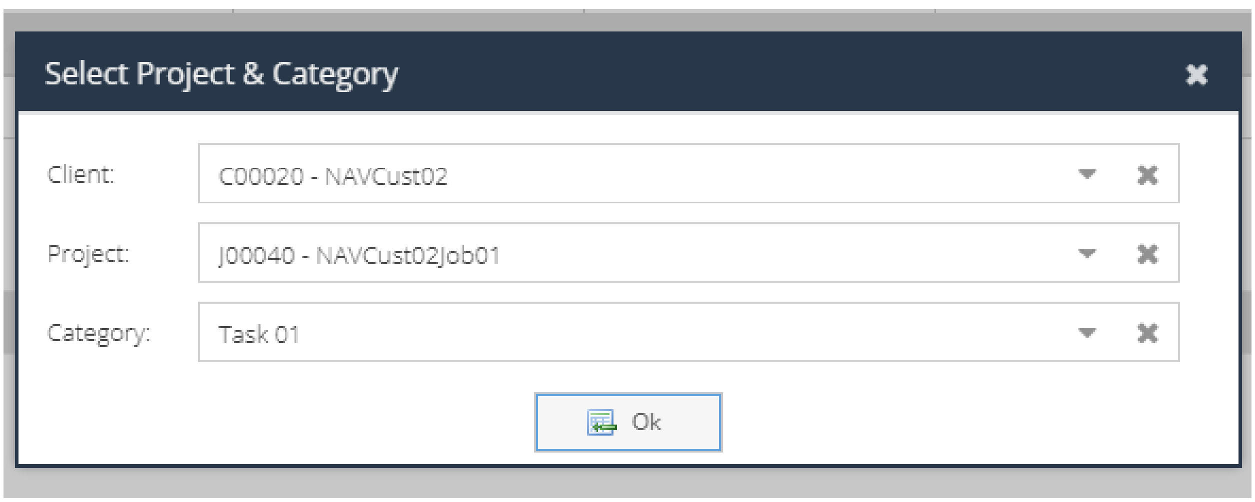
Click on New to create a new timesheet entry.



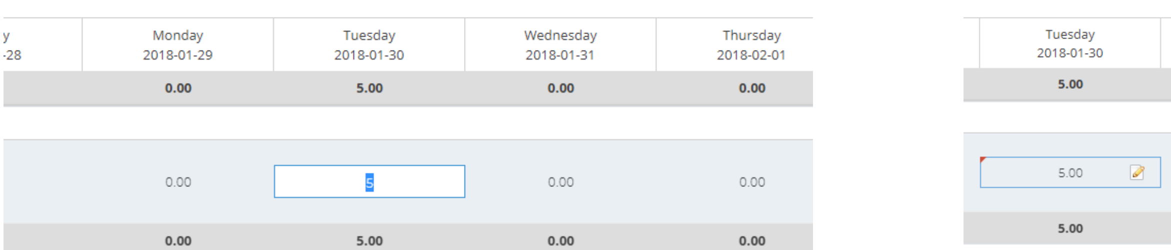
Click on Add to create a new timesheet line.



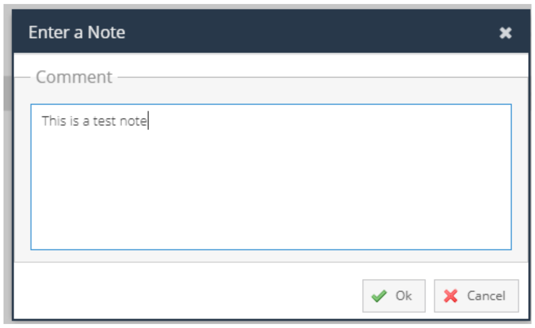
Select the customer/job/job task from the previous steps.

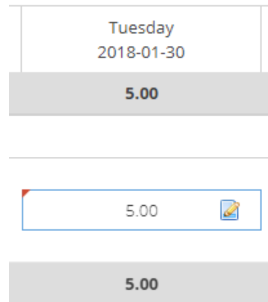


Click on the grid to fill out the length of time(hours) you want to book for the job.

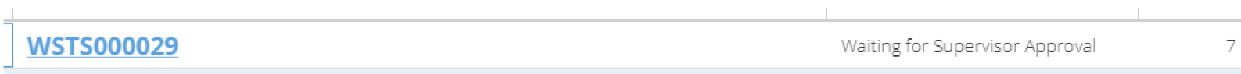


To input notes for this time, press the “n” key and a note window will pop up. You can enter individual notes for each time entry. The icon will change to indicate there is a note for that time entry.



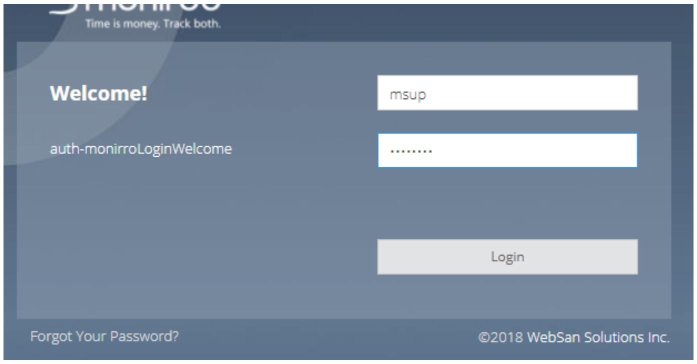


When you are finished inputting time, hit submit and you will see that the timesheet is waiting for a Supervisor Approval on the main screen.

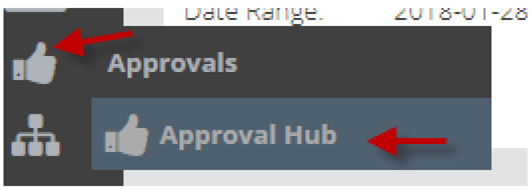


Approving timesheet

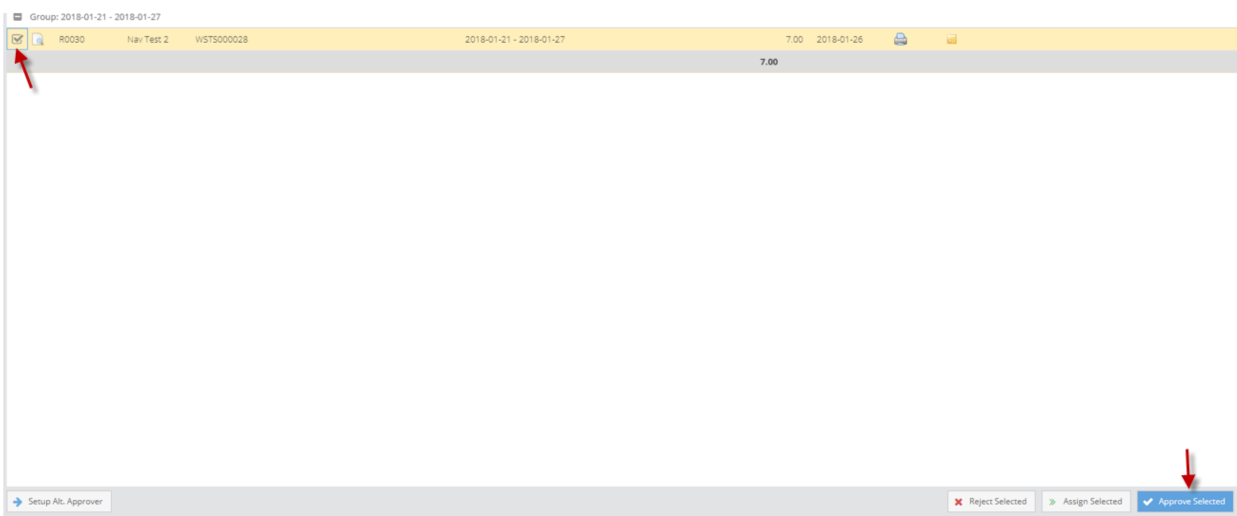
Login with the approver login.



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.