# BEYOND

## SERVICETIMETRACKING

# User Guide

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# Table of Contents


About BEYOND ServiceTimeTracking
Setup
  Assign User Permissions
  Setup Beyond ServiceTimeTracking
  Create User Account
Features
  Track Times
  Edit Recorded Times
    Edit Start Time
    Edit End Time
    Assign Recorded Times to Different Worksheet
  Transfer Recorded Times to Document

# About BEYOND ServiceTimeTracking

## About this Extension

BEYOND ServiceTimeTracking is an extension for Microsoft Dynamics 365 Business Central.
It was developed by:

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**Beyond ServiceTimeTracking** makes it possible to record times required to complete a service on a service item.
The app provides a special user login for resources working on lines in a service document.

The latest version of this documentation can be found at the following link: BEYOND ServiceTimeTracking Documentation.

**NOTE**

**No dependencies on or to other apps**

No dependent applications are required to use BEYOND ServiceTimeTracking, i.e. you do not need to install any additional applications.

| Version | Date | Author | Comment |
|---|---|---|---|
| 1.0 | 22.01.2024 | Jannic Weidel | Initial version of the documentation |
| Access | | public | |

Next chapter

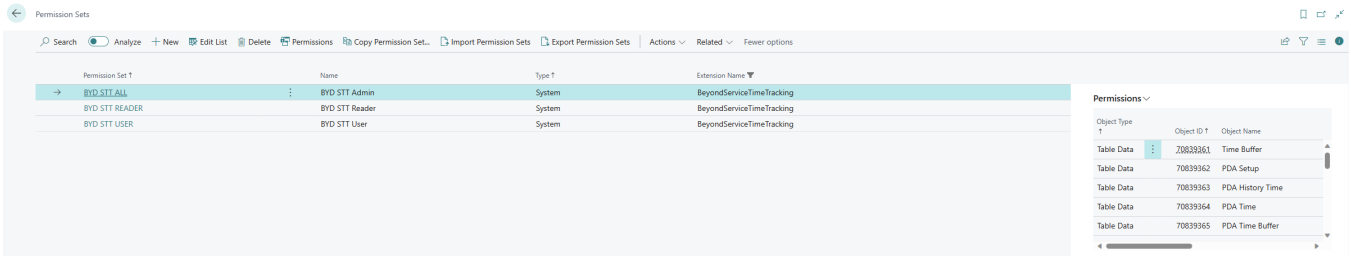
# Assign User Permissions

The following description shows how to assign user permissions for the **BEYOND ServiceTimeTracking** extension. The permission sets provided are:

| Permission Set | Description |
|---|---|
| **BYD SST Reader** | This permission set enables the use of the **BeyondServiceTimeTracking** extension. |
| **BYD SST User** | This permission set enables the use of the **Beyond ServiceTimeTracking** extension at user level. In this permission set, the setup is excluded, i.e. the user has access to the functions, but not to the setup of the app. |
| **BYD SST Admin** | This permission set gives the assigned user administrative access to the **Beyond ServiceTimeTracking** extension and the associated setup page. |

To assign the permission set for **BEYOND ServiceTimeTracking** to a user, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Permission Sets** and click on the appropriate search result.
3. The **Permission Sets** page is displayed.
4. Select one of the above permission sets from the list.
5. Click **Related** > **Permissions** > **Permission Set by User** in the menu bar.



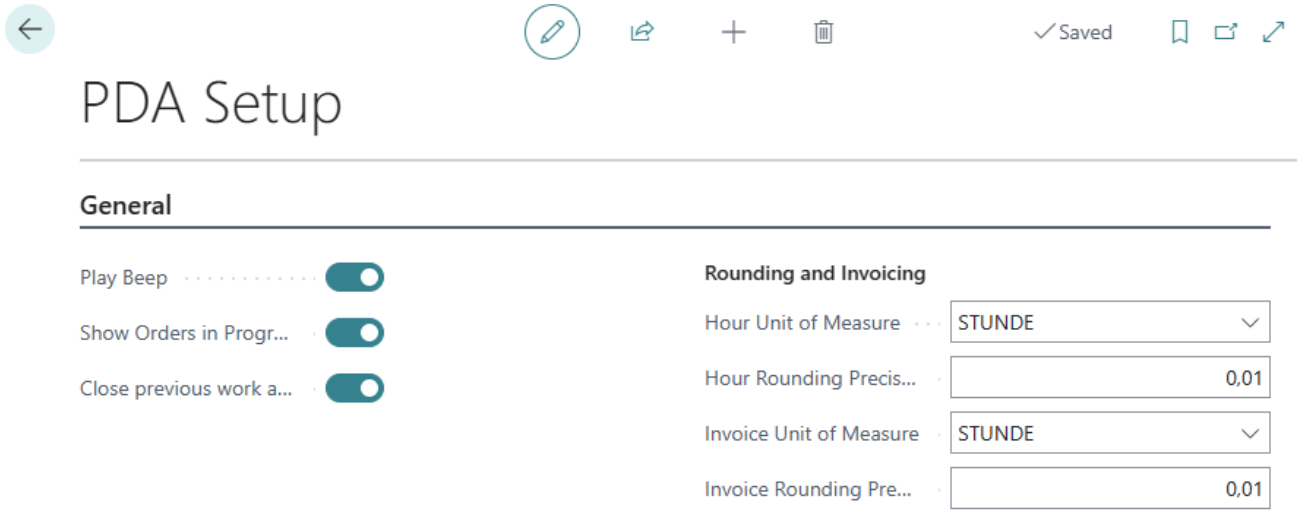

6. The **Permission Set by User** page is displayed.
7. Show the filter area (**SHIFT+F3**) and pick **Extension Name** and the value **BeyondServiceTimeTracking** as filter criteria.
8. The list is filtered to the permission sets of **BeyondServiceTimeTracking**.
9. Select the check box on the right side of the page for the user or users to whom you want to assign the permission set.

You have assigned a permission set for **BEYOND ServiceTimeTracking** to a user. Note that users with the **SUPER** permission set have all rights, i.e. you do not need to give this user any additional rights.

# Setup Beyond ServiceTimeTracking

This chapter describes how to set up **Beyond ServiceTimeTracking**.
To set up **Beyond ServiceTimeTracking**, proceed as follows:

1. Open the search function from the role center (**ALT+Q**) .
2. Search for the page **PDA Setup** and click on the corresponding search result.
3. The **PDA Setup** page is displayed.




4. In the **General** section, you can use the **Play Beep** slider to set whether a sound should be played when time recording is started.
5. Activate the **Display current orders** slider if you want to display orders for which times are already being recorded.
6. Activate the **Close previous work after starting new one** slider if you want to stop recording times when changing jobs for the original job.
7. In the **Rounding and Invoicing** section, you can set the unit of measurement in which times are recorded. Click in the **Hour Unit of Measure** field to specify the unit of measure in which the times are recorded from the dropdown list.
8. In the **Hour Rounding Precision** field, you can define when hours are rounded when they are recorded.
9. In the **Invoice Unit of Measure** field, you can specify which unit of measure is used for the invoice.
10. In the **Invoice Rounding Precision** field, you can define how the invoice is rounded.

You have set up **Beyond ServiceTimeTracking**.

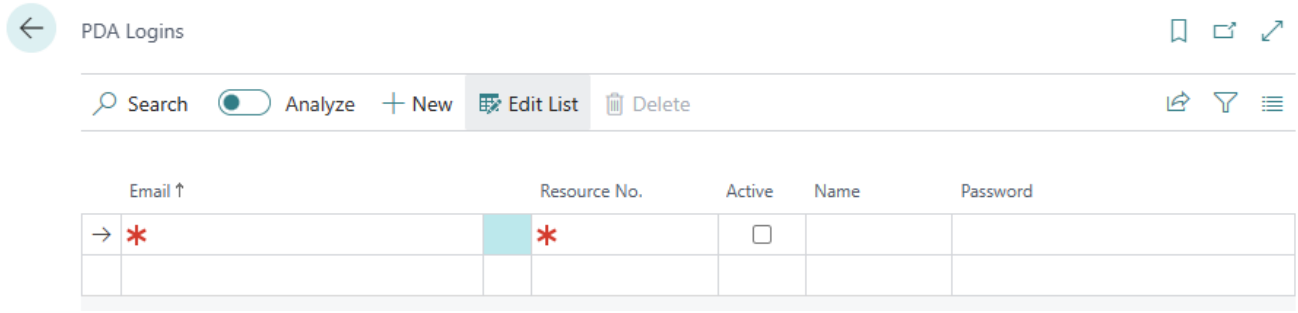
Next Chapter

# Create User Account

This chapter describes how to create a user account for the PDA. The user account is used to record and assign times.

To create a user account for recording times, proceed as follows:

1. Open the search function from the role center (**ALT+Q**) .
2. Search for the page **PDA Logins** and click on the corresponding search result.
3. The **PDA Logins** page is displayed.




4. To add a new user account to the system, click on the **New** option in the menu bar.
5. Enter the user's e-mail address in the new line under the **Email** column.
6. Under the **Resource No.** column, enter the number of the corresponding resource that is assigned to the user.
7. Activate the **Active** checkbox to activate the user account.
8. Enter the name of the resource in the **Name** column. This name will be used as the login user name.
9. Enter the password for the user account in the **Password** column.

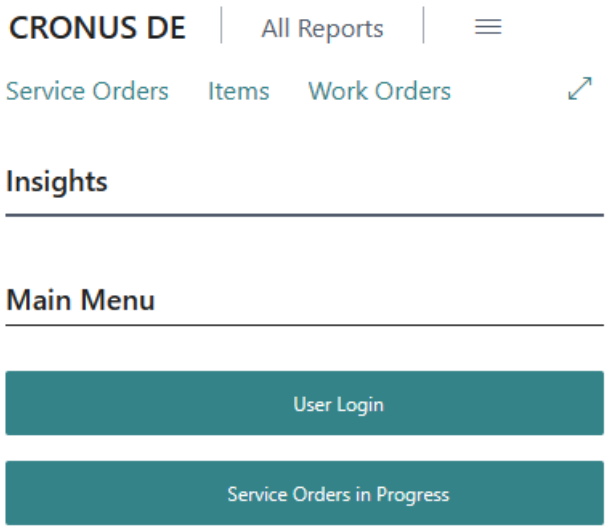
You have created a user account and assigned it to a resource.

Next Chapter

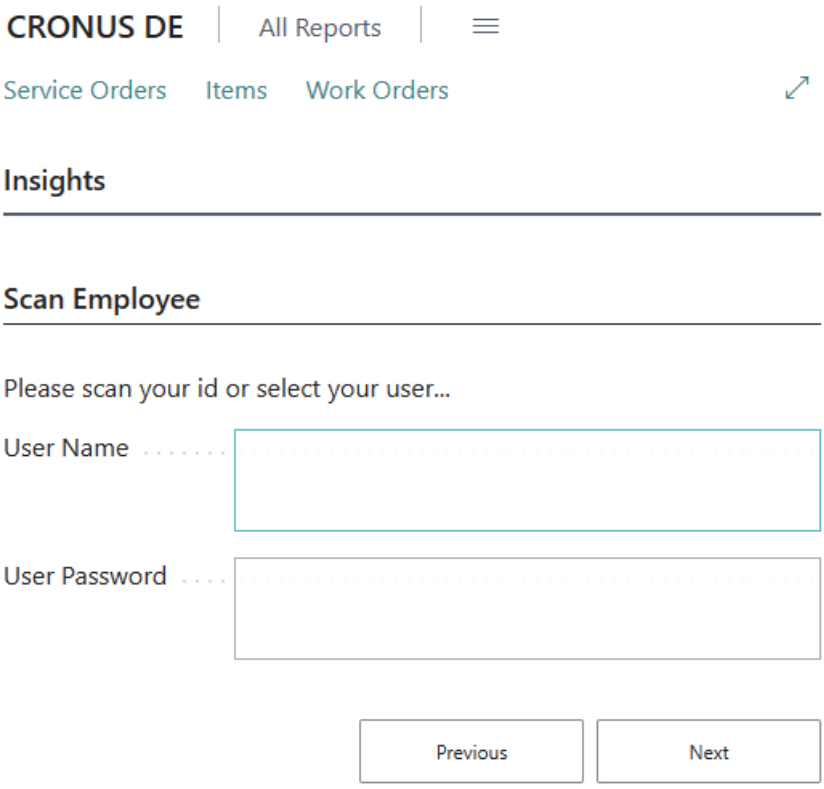
# Track Times

This chapter describes how to record times for a service document.
To record times for a service document, proceed as follows:

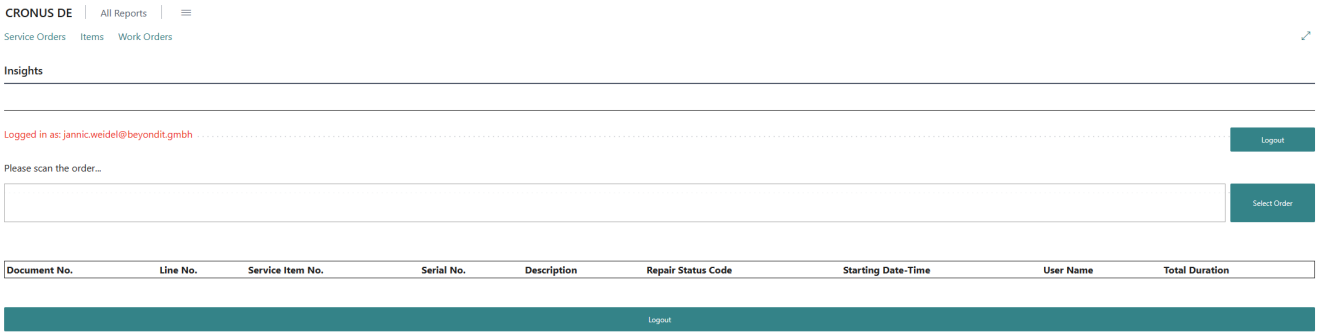
1. Switch on the PDA station or the computer and start Business Central.
2. The login page for **Beyond ServiceTimeTracking** is displayed.



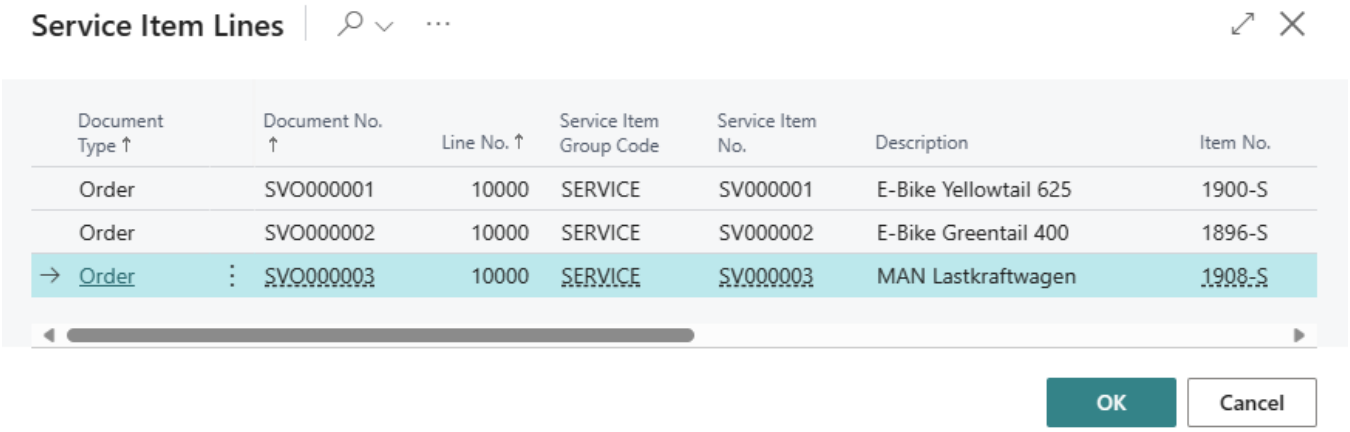

3. Click on the **User Login** button.
4. The **User Name** and **User Password** fields are displayed.



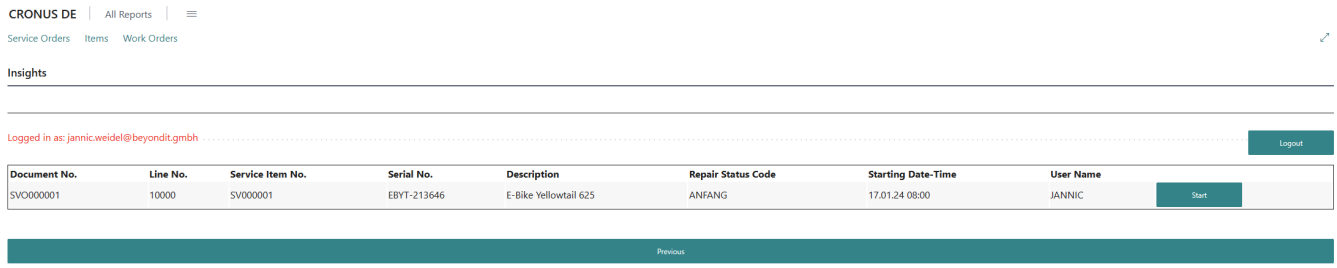

5. Enter the user name and the corresponding password.
6. To log in, click on the **Next** button.




7. Click on the **Select Order** button to select a service item line and start time recording.




8. A window is displayed showing all available service item lines on which times can be recorded.
9. To select an order for time recording, click on the corresponding line and then on **OK**. If you have activated the **Play Beep** option in the setup, an acoustic signal is emitted.
10. The document is displayed on the login screen.




11. Click on **Start** to record the time required to complete the work.
12. After starting, the **End** button is displayed, click on this button after completing the work on the service item.
13. The total duration is calculated. You can confirm the recorded time using the **Confirm** button.

You have recorded a time for a service order.

Next Chapter

# Edit Recorded Times

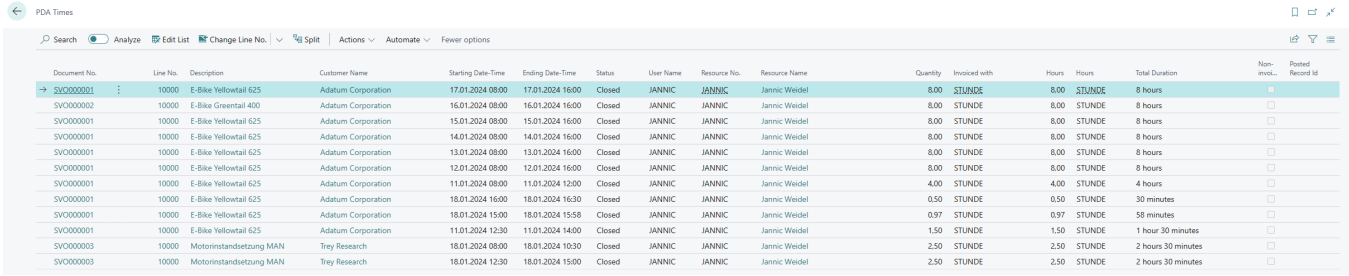
This chapter describes how you can edit recorded times. In addition to changes to the start and end times, you can also assign the recorded times to a different work sheet. The contents of this chapter are divided into the following sections:


- Edit Start Time
- Edit End Time
- Assign Recorded Times to Different Worksheet

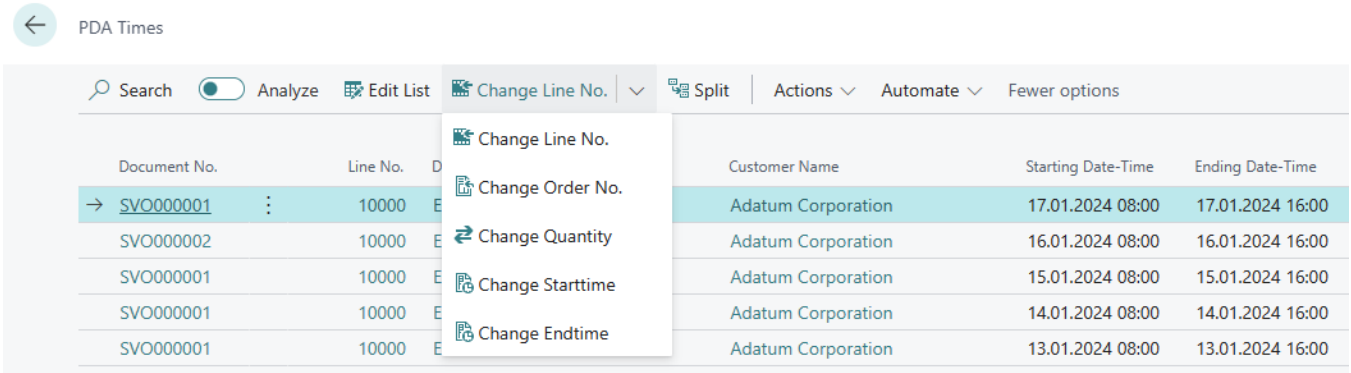

## Edit Start Time

This section describes how you can edit the start time of a recorded time.
To edit the start time, proceed as follows:

1. Open the search function from the role center (**ALT+Q**) .
2. Search for the page **PDA Times** and click on the corresponding search result.
3. The **PDA Times** page is displayed.




4. Select the line for which you want to change the start time.
5. Expand the dropdown menu for the **Change Line No.** menu option.



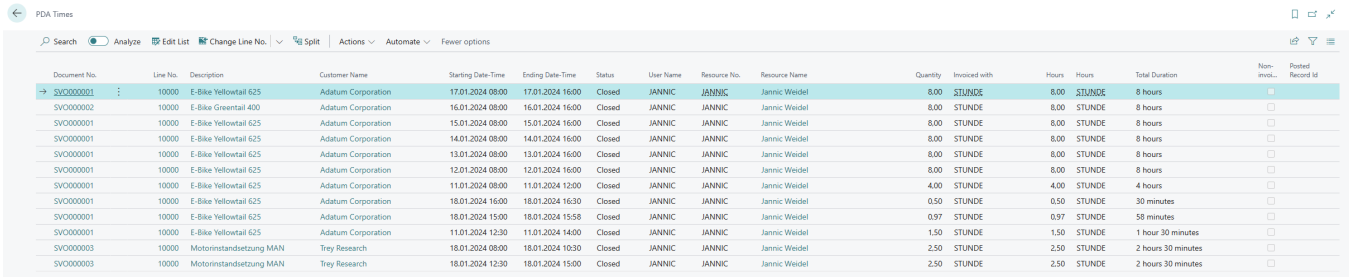

6. Click on the **Change Starttime** option in the dropdown menu.
7. A window is displayed.
8. Enter the start date for the line in the **Date** field.
9. Enter the start time for the line in the **Time** field.
10. Confirm the changes by closing the window using the **OK** button.

You have changed the start time for the line.

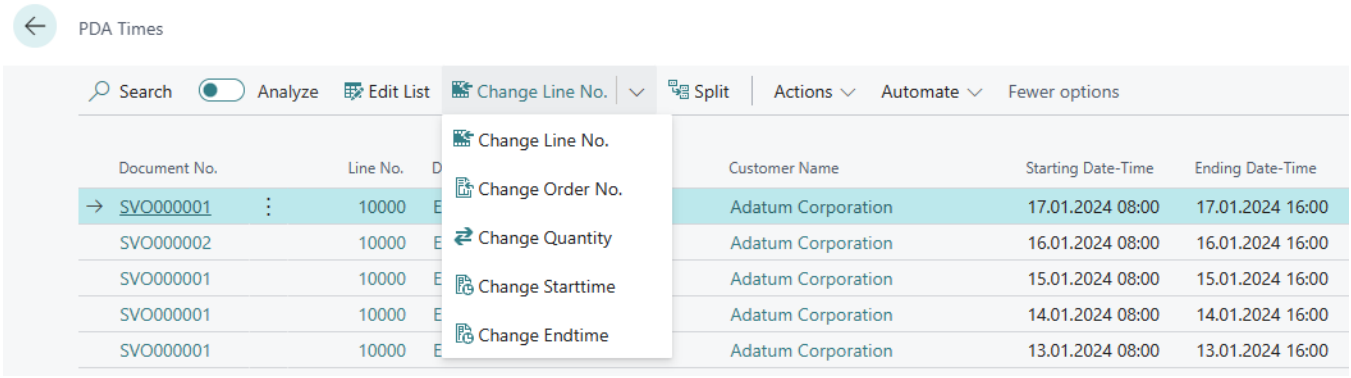
## Edit End Time

This section describes how you can edit the end time of a recorded time.
To edit the end time, proceed as follows:

1. Open the search function from the role center (**ALT+Q**) .
2. Search for the page **PDA Times** and click on the corresponding search result.
3. The **PDA Times** page is displayed.




4. Select the line for which you want to change the end time.
5. Expand the dropdown menu for the **Change Line No.** menu option.



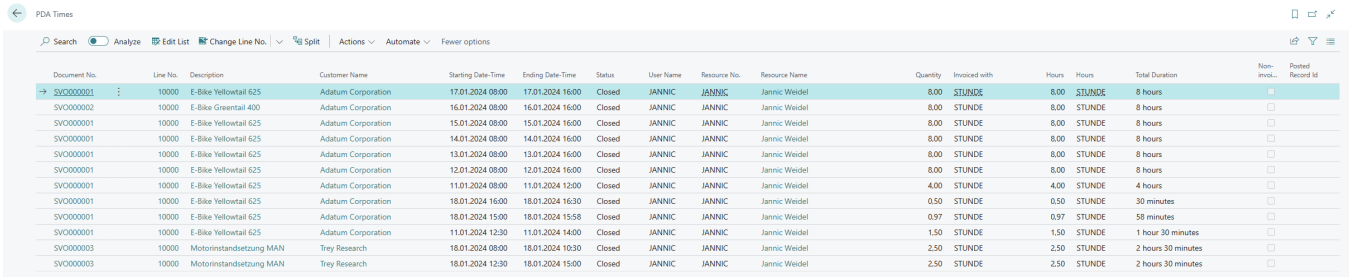

6. Click on the **Change Endtime** option in the dropdown menu.
7. A window is displayed.
8. Enter the end date for the line in the **Date** field.
9. Enter the end time for the line in the **Time** field.
10. Confirm the changes by closing the window using the **OK** button.

You have changed the end time for the line.

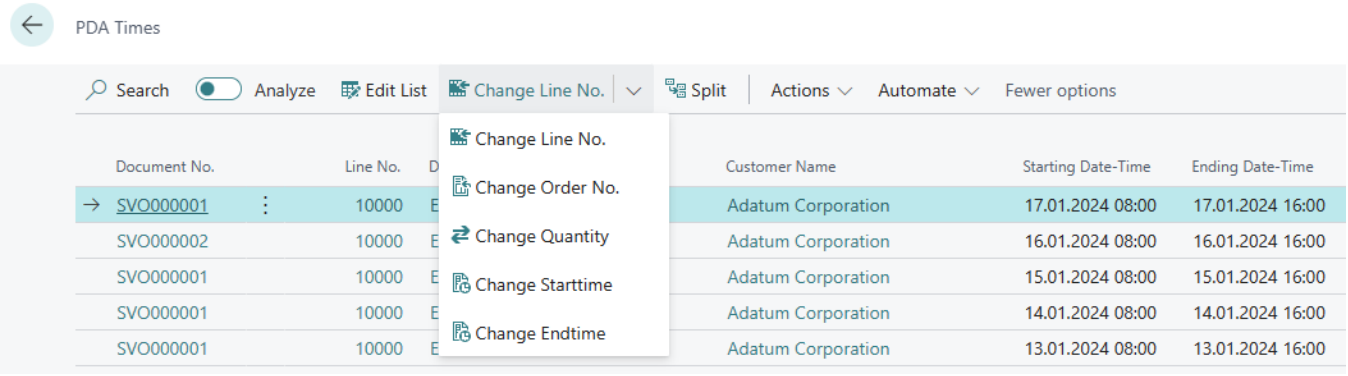
# Assign Recorded Times to Different Worksheet

This section describes how you can assign the recorded times to another worksheet.
To assign the recorded times to another worksheet, proceed as follows:

1. Open the search function from the role center (**ALT+Q**) .
2. Search for the page **PDA Times** and click on the corresponding search result.
3. The **PDA Times** page is displayed.




4. Select the line whose recorded times you would like to assign to another worksheet.
5. Expand the dropdown menu for the **Change Line No.** menu option.




6. Click on the **Change Order No.** option in the dropdown menu.
7. A window is displayed.
8. Enter the number of the new service document in the **Document No.** field. To display an overview of all available documents, click on the ellipsis (**...**).
9. Enter the service line of the document in the **Line No.** field. The recorded times are transferred to this line.
10. Confirm the changes by closing the window using the **OK** button.

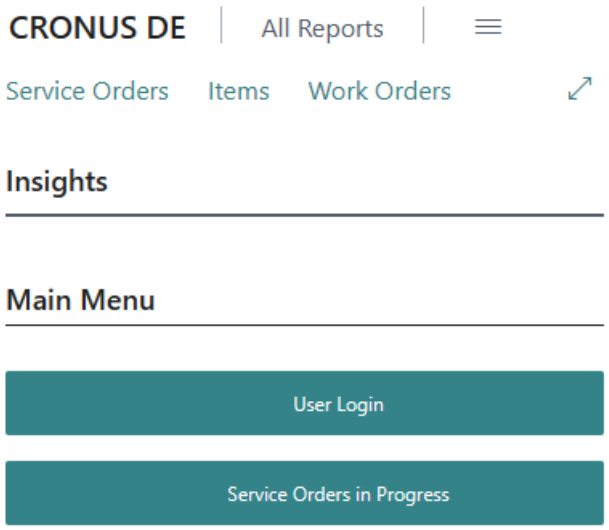
You have assigned the recorded times to another service worksheet.

Next Chapter

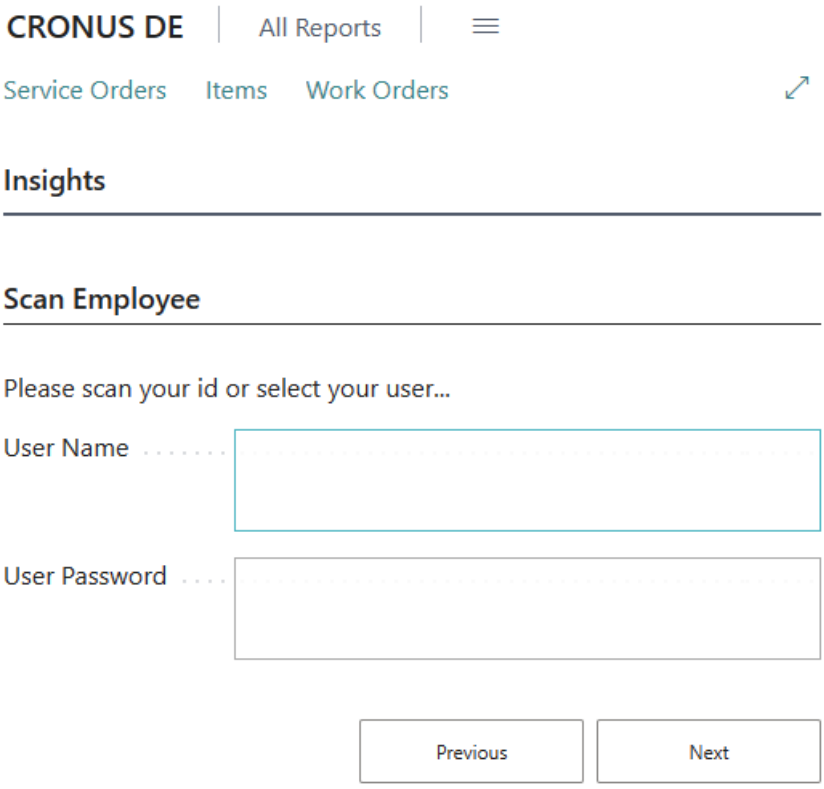
# Transfer Recorded Times to Document

This chapter describes how you can transfer the recorded times of one or more employees to the document.
To transfer the recorded times to the document, proceed as follows:

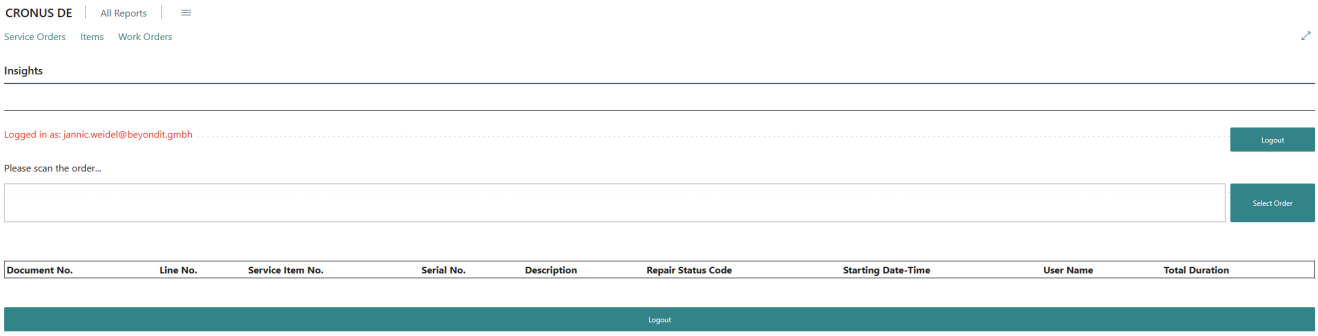
1. Switch on the PDA station or the computer and start Business Central.
2. The login page for **Beyond ServiceTimeTracking** is displayed.



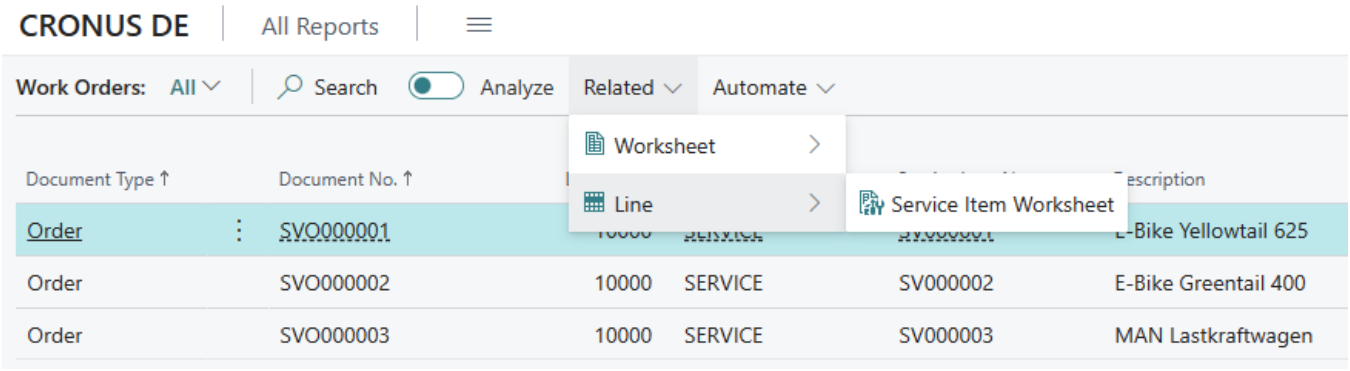

3. Click on the **User Login** button.
4. The **User Name** and **User Password** fields are displayed.



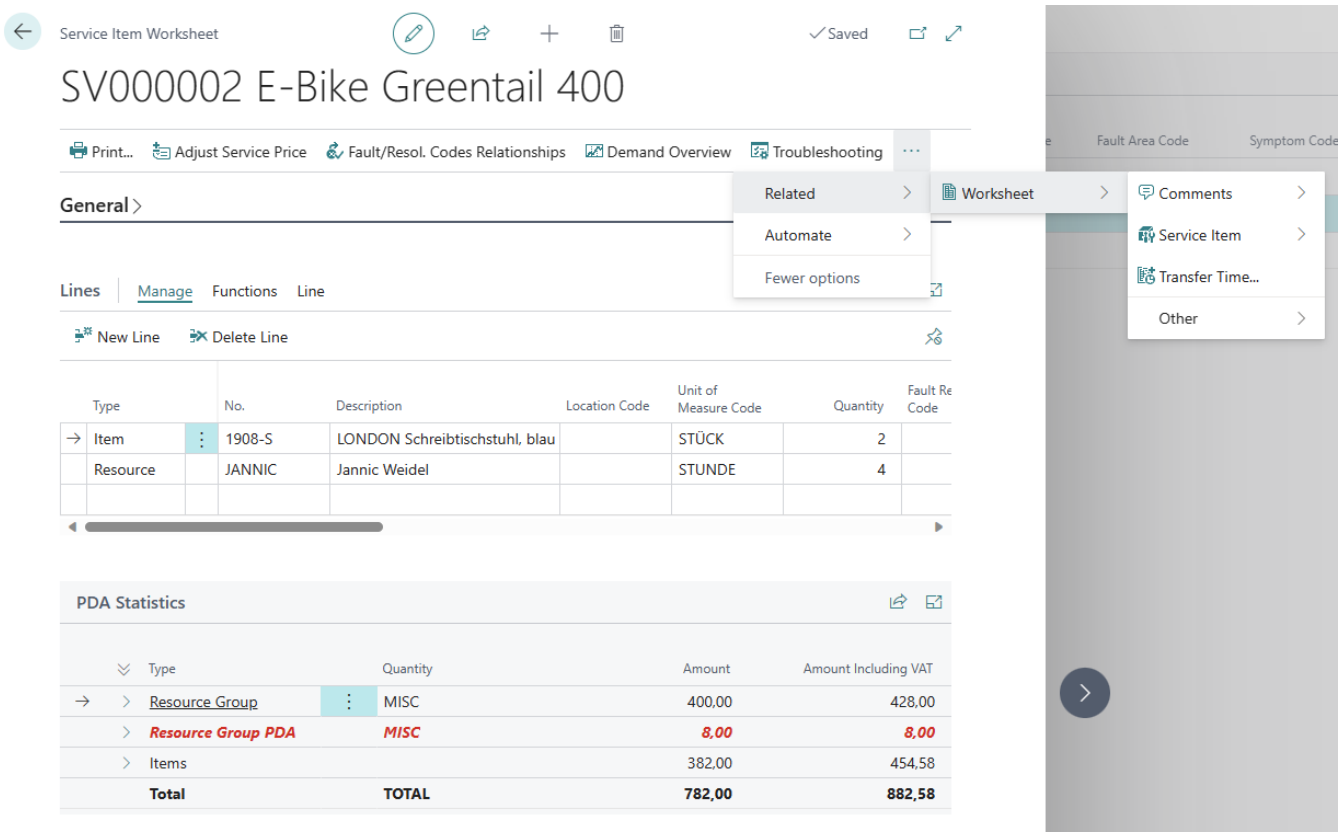

5. Enter the user name and the corresponding password.
6. To log in, click on the **Next** button.




7. You have logged in.
8. Click on the **Work Orders** option in the menu bar.
9. A list is displayed in which all work orders are shown.
10. Select the work order for which you want to transfer the recorded times as a resource line.
11. In the menu bar, click **Related** > **Line** > **Service Item Worksheet**.




12. The **Service Item Worksheet** page for the corresponding line is displayed.
13. In the **PDA Statistics** area, you can view the recorded times. Lines formatted in red have been recorded but have not yet been transferred to the document.




14. To transfer the recorded times to the document, click on **Related** > **Worksheet** > **Transfer Time…** in the menu bar.
15. The lines with the type **PDA** from the **Statistics** area are transferred to the **Lines** area as a resource line. In addition, a dialog box is displayed indicating that lines have been added and that you need to post the document again.

You have transferred the recorded times to the document.

Back to Start