

# Shop Floor for Projects - User Guide

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## 1. Introduction

Welcome to the Shop Floor for Projects extension for Microsoft Dynamics 365 Business Central. This guide will help you understand and use the key features for tracking labor and output related to your projects directly from the shop floor.

This extension allows you to:

- Accurately track time spent by resources on specific project tasks.
- Clock in and out of single or multiple projects simultaneously.
- Distinguish between setup time and production time.
- Record output quantities for project tasks.
- Adjust labor entries if corrections are needed.
- Integrate shop floor data seamlessly with Business Central's Project Management module.

## 2. Setup

Before users can effectively utilize the Shop Floor for Projects features, a system administrator needs to configure the necessary settings within Business Central. This involves ensuring standard setups are correct and configuring options specific to this extension.

**Accessing Setup:** Navigate to the **Shop Floor Setup** page (search for "Shop Floor Setup"). This extension adds specific fields and potentially a new section to this standard page.

### Key Configuration Areas:

#### 1. Standard Business Central Setup:

- **Resources:** Ensure all shop floor employees are set up as Resources with appropriate details (Resource No., Name, Base Unit of Measure).
- **Resource Groups:** Define relevant Resource Groups if used.
- **Projects:** Verify that Projects (Jobs) and their corresponding Project Tasks (Job Tasks) are created and active in the Project Management module.

#### 2. Shop Floor for Projects Specific Settings (on Shop Floor Setup page):

- **General Section:**
  - **Indirect Project No. (ICG.SFP.IndirectJobNo.):** Specify the default Project (Job) number to use when users clock into indirect activities (activities not related to a specific project task).
  - **Require Day Punch (ICG.SFP.RequireDayPunch):** Enable this if users must perform a general "Clock In Day" action before they can clock into specific project tasks.
  - **Auto Clock In Day (ICG.SFP.AutoClockInDay):** If enabled, the system might automatically perform the "Clock In Day" action when a user clocks into their first project task of the day.

- **Auto Clock Out Projects** (`ICG.SFP.AutoClockOutJobs`): If enabled, clocking out for the day might automatically clock the user out of any active project tasks they are still clocked into.
    - **Show Open Project Punches Subform** (`ICG.SFP.ShowOpenProjPunchSubf`): Controls the visibility of a subform displaying currently active clock-ins on relevant pages.
  - **Journals Section (Added by this extension)**: This section defines how labor, usage, consumption, and output are posted to the relevant journals.
    - **Post Usage**: Enable if resource usage time should be posted automatically.
    - **Usage Journal Template**: Select the default Job Journal Template for posting resource usage.
    - **Usage Journal Batch**: Select the default Job Journal Batch name for posting resource usage.
    - **Post Consumption**: Enable if material consumption should be posted automatically (related to project tasks).
    - **Consumption Journal Template**: Select the default Item Journal Template for posting material consumption.
    - **Consumption Journal Batch**: Select the default Item Journal Batch name for posting material consumption.
    - **Post Output**: Enable if completed quantities (output) should be posted automatically.
    - **Output Journal Template**: Select the default Job Journal Template for posting output.
    - **Output Journal Batch**: Select the default Job Journal Batch name for posting output.

3. **User Permissions**: Assign the necessary Permission Sets to users (Resources) so they can access the Shop Floor for Projects pages (like Clock In/Out, Labor Adjustments) and perform actions like posting, if required by their role.

Consult your system administrator or implementation partner to ensure these settings are configured according to your company's operational procedures.

## 3. Core Features

### 3.1. Clocking In/Out for Projects

This feature allows resources to record the time they start and stop working on specific project tasks.

#### **Clocking In (Single Project):**

1. Navigate to the "Clock In Project" action (location may vary based on Role Center setup).
2. Select your Resource No. (often defaults based on login).
3. Choose the **Job No.** (Project Number) you are starting work on.
4. Select the specific **Job Task No.** within that project.
5. Confirm the action. Your start time is automatically recorded against the selected project task.

#### **Clocking In (Multiple Projects/Nesting):**

1. Navigate to the "Clock In Multiple Projects" action.
2. Select your Resource No.

3. Add lines for each **Job No.** and **Job Task No.** you will be working on concurrently or switching between frequently (nesting).
4. Confirm the action. Your start time is recorded for the initial set of tasks. You can manage these active tasks via related pages (e.g., "Open Project Punches").

### **Clocking Out:**

1. Navigate to the "Clock Out Project" or "Clock Out Multiple Projects" action.
2. Select the project(s) and task(s) you are stopping work on.
3. Confirm the action. The system calculates the duration based on your clock-in time and records the labor entry.

*Note:* You might also encounter options to clock into "Indirect Labor" activities if configured.

## 3.2. Managing Labor Entries (Adjustments)

If a mistake was made in a labor entry (e.g., wrong task selected, incorrect duration recorded due to missed clock-out), you can adjust it.

1. Navigate to the **Labor Adjustment List** page.
2. Click **+New** to create a new adjustment entry.
3. Specify the **Resource No.**, the **Job No.** and **Job Task No.** the adjustment applies to.
4. Enter the **Adjusted Date** and the correct **Adjusted Hours**. You might need to reference the original incorrect entry (e.g., using **Prev. Line No.**).
5. Fill in any other required fields (e.g., **Work Date**, **Resource Group No.**).
6. Post the adjustment. This will correct the labor time recorded against the project task. *Note: Posting permissions may be restricted.*

## 3.3. Posting Output

When you complete work on a project task and produce a certain quantity, you record this as output.

1. Navigate to the "Post Output" action (often related to the project task or resource activity).
2. Select the **Job No.** and **Job Task No.** for which you are recording output.
3. Enter the **Quantity** completed.
4. Record the **Setup Time** and **Production Time** spent (the system might calculate this automatically based on clock-in/out entries or allow manual entry/override).
5. Confirm the posting. This updates the project task progress and allocates associated labor costs. *Note: Posting permissions may be restricted.*
6. Similarly, a "Post Consumption" action might be available to record materials used for the task.

## 4. Reporting

The extension integrates with standard Business Central reporting, and may also provide specific reports:

- **Labor Details:** Look for reports that show detailed labor entries by resource, project, and task.
- **Project Progress:** Standard Project Management reports will reflect the labor hours and costs posted via the shop floor interface.
- **Resource Utilization:** Reports analyzing how resource time is spent (setup vs. production, direct vs. indirect).

Access these reports through the standard Business Central search or navigation menus, potentially under Project Management or Resource sections.

## 5. Troubleshooting & Support

### Common Issues:

- **Cannot Clock In/Out:** Check if you are already clocked into another task. Verify the selected Project and Task are active and valid. Ensure you have the necessary permissions.
- **Posting Errors:** Ensure the posting dates are within allowed periods. Check if all required dimension information is provided. Verify resource and project statuses.
- **Incorrect Reports:** Double-check the data entered during clock-in/out and output posting. Ensure filters on the report are set correctly.

### Error Messages:

- **"Resource not available":** Check your current clock-in status.
- **"Invalid project task":** Ensure the task exists and is active for the selected project.
- **"Posting period closed":** Contact your administrator; the date might be outside the allowed range for posting transactions.

**Further Assistance:** If you encounter issues you cannot resolve:

1. Consult internal company documentation or guides.
2. Contact your system administrator or designated Business Central support person.
3. Refer to the official Business Central documentation.
4. If directed, use the support portal or contact email provided by your partner/administrator (e.g., [support@infotech-inc.com](mailto:support@infotech-inc.com) as mentioned in technical docs).