

Dynamics 365 Project Operations – Customization and Development



Cognitive Convergence is Subject Matter Expert in Office 365, Dynamics 365, SharePoint, Project Server, Power Platform: Power Apps-Power BI-Power Automate-Power Virtual Agents. Our Microsoft Dynamics 365 Project Operation Consulting, Development, Customization, Integration services and solutions, can help companies maximize business performance, overcoming market challenges, achieving profitability, and providing best customer service.

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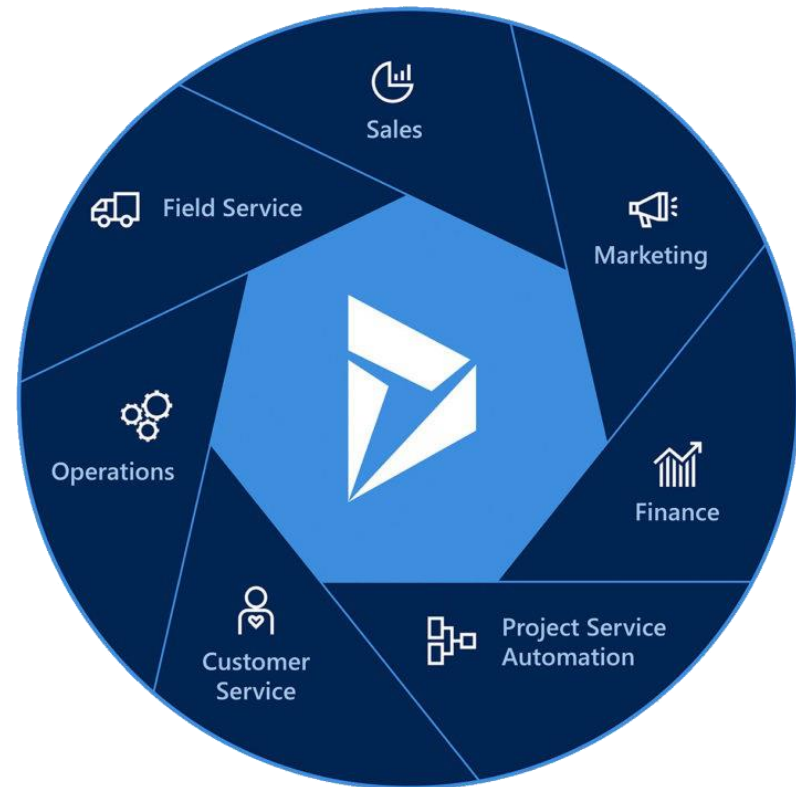
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DYNAMICS 365

Microsoft Dynamics 365 is a product line of enterprise resource planning (ERP) and customer relationship management (CRM) intelligent business applications announced by Microsoft in July 2016 and released in November 2016. Microsoft Dynamics 365 helps organization with their smooth digital transformation including selling journey, customers' understanding to building meaningful relationships with potential leads.

- Understand customers and uncover potential leads
- Stay connected to prospects
- Build meaningful relationships
- Adapt to rapid changes while executing campaigns
- Create exceptional customer journeys with state of art custom templates for promotional emails
- Organize events for planning and managing detailed information about every concerned person.



MODULES OF DYNAMICS 365

It has following modules

- Customer Service
- Field Service
- Finance and Operations
- Marketing
- Project Operations
- Retail
- Sales
- Human Resources
- Supply Chain Management
- Business Central
- Commerce



DYNAMICS 365 ONLINE VS ON-PREMISES

There are several significant differences between Microsoft Dynamics CRM 365 on-premises vs online. Each model should be carefully examined in deciding the best model for business. Microsoft CRM on-premises was released in 2003 and went through several versions (1.2, 4, 2011) before the online model was released in the 2013 version.



ONLINE

VS



ON-PREMISES

Online

The online version is a true cloud/Software as a Service (SaaS) application. SaaS applications are essentially rental models; monthly fee is paid to use the application. This makes the online version an opex or operating expense vs a capex or capital expense. No hardware or supporting software needed – Microsoft Dynamics CRM and 365 Online require no infrastructure hardware or software, users simply run the application through a browser, the Outlook application or mobile application.

On-Premises

Microsoft Dynamics CRM & 365 On-Premise gets installed on servers either in data center or at a hosting partners. The on-premise version is a capex or capital expense; need to pay for the licensing upfront (or over 3 years via the interest free spread pay option Microsoft offers). The hardware and infrastructure related costs are also capex. The on-premise model requires Microsoft SQL server, Windows Server, Internet Information Services and additional supporting requirements.

PROJECT OPERATIONS

Project Operations (formerly known as Project Service Automation) business application targets **Service Organizations** that offer project sampling. It helps them to

- Transform their project lifecycle digitally.
- Create team for projects.
- Assign tasks to the team in every project.
- Track the progress of each project.
- Track progress of each task in project using time entries.
- Create new resources.
- Manage material and expense usage.
- Estimate and track project costs and revenue.
- Use project estimates during the sales process.
- Forecast resource requirements for projects that are in the pipeline.
- Deliver projects successfully by tracking progress and cost consumption.



BENEFITS OF PROJECT OPERATIONS

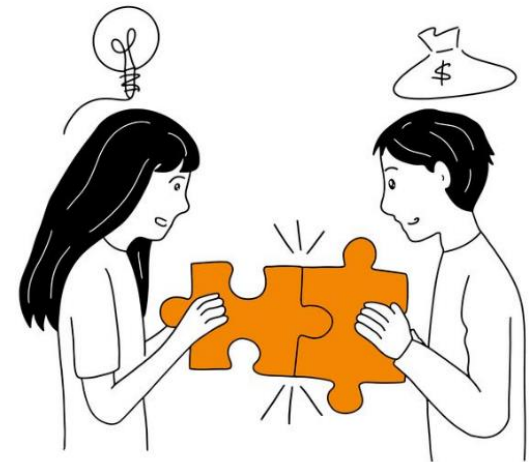
- It enhances customer satisfaction by
 - Helping PMs meet promised deadlines
 - Helping PMs meet budgets
- Helps increase profitability by
 - Using configurable project costing
 - Allowing support to global team through multi-currency, revenue recognition etc.
- Improves productivity and collaboration by
 - Allowing members from different teams to collaborate throughout project lifecycle
 - Integrating the app with Microsoft teams for greater visibility

DEPLOYMENT TYPES

Lite deployment - deal to proforma invoicing

The Lite deployment type of Project Operations has the following capabilities for project-based companies:

- Project planning by using Microsoft Project for the web
- Multi-dimensional pricing and costing for labor resources
- Category based pricing for expense categories
- Project based sales management by using Dynamics 365 Sales capabilities
- Universal resource scheduling that integrates with other apps such as Dynamics 365 Project Operation
- Project progress and time tracking
- Basic expense tracking for project-based expenses
- Performa invoicing that can be reviewed and sent to a financial system for processing
- Extensibility through Microsoft Power Platform



Project Operations for resource/non-stocked scenarios

The deployment type of Project Operations for resource/non-stocked based scenarios has the following capabilities for project-based companies:

- Project planning by using Microsoft Project for the web
- Multi-dimensional pricing and costing for labor resources
- Category-based pricing for expense categories
- Project-based sales management by using Sales capabilities
- Universal resource scheduling that integrates with other apps such as Project Operation
- Project progress and time tracking
- Basic and full expense management experiences for project and non-project expenses.
- Invoicing that extends from proforma to customer-facing and is backed by an enterprise-class sales tax and date-effective exchange rate system
- Configurable project cost, revenue profiles, and rules for work in progress (WIP) accounting and accruals
- Project revenue recognition
- Extensibility through Power Platform



Project Operations for stocked/production order scenarios

The Project Operations for stocked/production order scenarios deployment type has the following capabilities for project-based companies:

- Project planning by using the work breakdown structures
- Procure and consume stocked inventory for projects
- Managing project-based sales by using the Sales and Marketing module in Finance and Operations apps
- Project pricing and costing by using the cost rate and bill rate configurations in Finance and Operations apps
- Resource management for projects in Finance and Operations apps
- Project progress and time tracking in Finance and Operations apps
- Expense management experiences for project and non-project expenses.
- Invoicing by using an enterprise-class sales tax and date-effective exchange rates system
- Configurable project groups for Work in progress (WIP) accounting and accruals
- Project revenue recognition



This deployment type also provides an extension to the functionality that is provided by the Finance and Supply Chain Management apps.

DASHBOARD

A dashboard is a type of graphical user interface which often provides at-a-glance views of key performance indicators relevant to a particular objective. The dashboard in Project Operations has following capabilities

- Dashboards and reports give an understanding of where the business stands.
- Shows cost, duration, and value offered to customer.

- The **Practice Management dashboard** gives an all-up view of
 - Costs
 - Gross margin
 - Role utilization.
- Lets practice managers slice the information by various dimensions as
 - Customer
 - Project
 - Role etc.
- Tracks sales numbers with the Sales Activity Social dashboard.
- The **Resource Manager Dashboard** gives graphical dashboard experience for
 - Monitoring resource requests
 - Resource demand and utilization



TIME ENTRIES

- Process of recording the actual time that a resource consumes.
- Allow cost and sales prices to be calculated as tasks progress.
- Create records against each task in the project
- Tell when a particular project will Start and End
- Also have information of type of project task
- Also tell the resource allocated to a particular project task.

Types

Type section shows the dimensions that time can be entered against

- Out of the box supported types
 - On Break



- Travel
- Overtime
- Work
- Absence
- Vacation
- Do not allow inline editing

Entry Status

- **Draft:** New time entries are automatically assigned a status of Draft. Only time entries that have a status of Draft can be modified or deleted.
- **Submitted:** When a time entry is submitted, the status is updated to Submitted.
- **Approved:** When a submitted time entry is approved, the status is updated to Approved.
- **Returned:** If a time entry is rejected, the status is updated to Returned, and the entry becomes available for correction and resubmission.



Approvals

- When a time, expense or material usage entry is submitted, an approval record is created.
- Records are approved or rejected by the project manager once reviewed.

Views

- Each submitted entry goes to their respective view in Approvals table i.e.,
 - Submitted time entries can be found in the Time Entries for Approval view.
 - Submitted Material Usage entries can be found in Material Usage for Approval view.
 - Submitted expense entries can be found in the Expense Entries for Approval view.
- Each view has different columns, the most common ones are
 - Date
 - Submitted by
 - Resource
 - External comments
 - Project



MATERIAL USAGE

As a project team works through tasks on a project, they consume or use materials.

- Provides a way to record this usage to be approved by the project manager.
- Also tells the project that the material is used for.
- Gives information about resource for the material
- The cost for each material is also calculated for the quantity and unit cost (unit cost * quantity)

Views

There are different views in Material usage based on the products

- Active Material Usage Logs shows the details of all the material that is currently in use.
- Inactive Material Usage Logs shows the details of all the material that is not currently in use.
- My Material Usage shows the details of all the material being used by the current user.

PROJECT

Shows details about

- Name of the project
- Customer
- Start and End date
- Effort hours
- Estimated and Actual cost
- When clicked on any project, there is detail about the project in different tabs as
 - **Summary:** shows some general information about the project (name, description, project manager)



- **Estimates** that contains the estimated cost of the project
- **Actuals** that contains the actual cost of the project.
- **Tasks:** contains the information about the tasks in that project and the resource assigned to it.
- **Team:** contains the bookable resource, its role and the task assigned to it.
- **Resource Assignments:** contains the tasks assigned to every team member of the project.
- Start and End date of task, quantity, and cost also.

RESOURCES

Shows details about the resources available

Bookable Resource

- Anything that needs to be scheduled is classified as a bookable resource.
- Individuals who may be users, contacts, and accounts.
- Includes company assets and crews of workers

Bookable Resource types

Each bookable resource can be grouped by type as:

- Generic
- Contact
- User
- Equipment
- Account
- Crew
- Facility
- Pool

Views

The Bookable Resource entity has following views

- Active Bookable Resources
- Contact Resources
- Inactive Bookable Resources
- My Possible Delegates
- Resources
- Resources without role
- User Resources



SCHEDULE BOARD

Schedule board can be handy for the following

- Resource and operation managers need to be able to monitor key operational metrics so that they can gauge resource and scheduling performance.
- Resources can be booked directly from Schedule board onto a project.
- There are three ways to do this
 - Book from a generated resource requirement
 - Book from the primary requirement
 - Book from a new resource requirement

Book from a generated resource requirement

- A generic resource can be created and assigned to one or more tasks within a project.
- A resource requirement can be generated from generic team member.
- A schedule assistant mode filters the available resources for that requirement.
- Selecting **Book** will book the resource onto the project.

Book from the primary requirement

- Creating a project automatically creates a resource requirement called Primary Requirement.
- This is an empty requirement used to quickly book a resource with schedule board.
- It is done without generating a requirement or creating one from scratch.

Whom does this feature benefit

This feature benefits the following

- Management team and the dispatchers
- Company resources
- Your business.

Usability and Accessibility

- Schedule board is made up of PowerApps Component Framework.
- Control based on the Unified Client Interface
- More flexible, supportable, and accessible.
- Works better on different screen sizes and across form factors.



We have subject matter experts who have the knowledge of all the data entities of PO and can help provide the best possible solution to your requirements

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PROJECT STAGES

Project stages are designed to reflect the state of the project as it progresses. Customizations can be used to automatically update the stages with business process flows, Power Automate, or plug-in extensions.

Following stages are defined in default business process flow

- New
- Quote
- Plan
- Deliver
- Complete
- Close

New

When you create a project, the project stage is set to New. If the project was created from a template, it might have schedule, estimate, and team data. Otherwise, it's just an outline of the project, and the remaining components must be entered.

Quote

When you associate a project with a quote, or when you create a project from a quote, the project stage is set to Quote, and the estimated start and end dates are updated. While the project is in the Quote stage, the Sales tab on the Project Entity page shows details of the quote.

Plan

When you win a quote that is associated with a project, and the project is moved to the Contract phase, the project stage is updated to Plan. While the project is in the Plan stage, the Project Entity page shows details of the contract.

Deliver

When the project plan is completed, and you're ready to start the project, the project manager should update the project stage to Deliver to show that the project has started.

Complete

When the work for the project is completed, the project manager can update the stage to Complete. By updating the project stage to Complete, the project manager indicates that the work is 100-percent completed, but that the project is being kept open so that any pending time or expense entries can be recorded.

Close

When all transactions are recorded for the project, the project manager can update the stage to Close. At that point, no transactions can be recorded, and the project is set to read-only.

DYNAMICS 365 NO CODE SOLUTIONS

Dynamics 365 includes preconfigured entities, fields, forms, views, security models, reports, and workflows that help businesses manage their sales, marketing, and customer service needs. These out-of-the-box features are designed to provide functionality that is common to most sales, marketing, and service processes.

Microsoft Dynamics 365 includes many out-of-the-box tools to customize business logic into Dynamics 365, including the ability to build custom entities, fields, forms, views, security models, and workflow to inject specific business needs into Dynamics 365.

Common Data Service

The Common Data Model is a secure business database implemented by Microsoft as a service as the Common Data Service. The model holds typical business entities such as Accounts, Contacts, Opportunities, Products, etc. and those entities hold typical fields such as addresses, phone numbers etc. A business can then take this model and extend it as needed – add custom fields, create custom entities etc. The idea is that having a common data model as a service allows for out of the box integrations to many other products and services, such as PowerApps, Flow etc.

The Common Data Service was previously implemented as a database/schema service separated from Dynamics 365 but is now tightly coupled with Dynamics 365.

Business Process Flows

A **Business Process Flow** in Microsoft Dynamics 365 is a tool which is meant to help guide users through a business process in the system. Business process flows are representations of business processes and are displayed visually in Dynamics 365 as a heading across the top of an entity form.

A business process flow is composed of Stages, and within each stage there are Steps to complete which are fields. In the business process flow heading, a user can see which stage they are at in the process, and which steps they need to complete before they proceed in the process.

Business process flows require users to complete certain steps before completing the process and if needed users can also be allowed to jump stages. They are available for out-of-the-box entities and even for custom entities. Additionally, an entity can have many business process flows associated with it. They are highly configurable to fit organizational needs.

The screenshot displays a Microsoft Dynamics 365 case form for 'Case: Case for Interactive experience' with ID 'Test 1402'. The form is titled 'Phone to Case Process' and is 'Active for 22 minutes'. The Business Process Flow (BPF) is visible at the top, showing three stages: 'Identify (22 Min)' (current stage, marked with a red target icon), 'Research', and 'Resolve'. The 'Identify' stage has a step 'Find Customer*' which is completed, showing 'testAccount1' in a search box. Below the BPF, the 'Summary' tab is active, showing 'GENERAL INFORMATION' with 'Account testAccount1'. A 'Find Contact' step is also visible. The right sidebar shows 'RELATED' and 'RECENT CASES' with 'Test 1402 Active' listed.

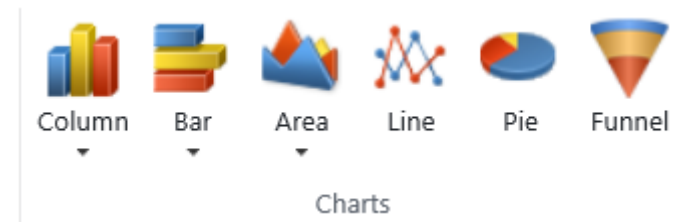
Business Rules

Business rules are provided in a simple to use drag-and-drop interface which allows to quickly implement and easily change some of the most commonly used rules. The good thing with this is that a business rule runs in real-time so user will be able to see the action as soon as the condition has been met (unlike a workflow that will run on form save). Business rules can be applied on a Main Form or Quick Create Form. They will also work online on Microsoft Dynamics 365 for Tablets and Dynamics 365 for Outlook.

Here are the actions can be taken by configuring a simple drag-and-drop Business Rule on a form:

- Set Field Value

- Clear Field Values
- Set Field Requirement Levels
- Validate Data & Show Error Messages
- Show Fields
- Hide Fields
- Enable Fields
- Disable Fields
- Create Business Recommendations



Charts and Dashboards

A chart is a graphic representation of data from multiple records of an entity. Charts are integrated with grids in the web application. They are built from the query on the data. When the query is updated for the data, the associated charts also get updated automatically.

Several different types of charts can be created within Microsoft Dynamics Project Operations:

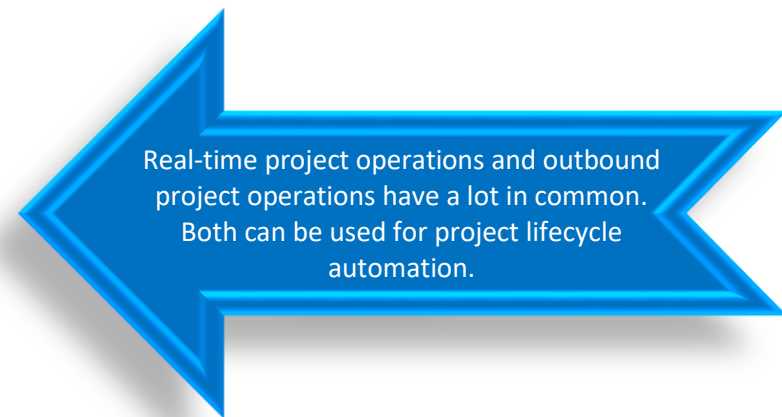
Charts are available for all views on CRM. There are 2 types of charts: system and personal.

- **System Charts.** System charts can only be created by users with the security roles of System Administrator or System Customizer. These charts are by default visible to all users. These charts can be customized by going on to the settings area and customizing the system.
- **User Charts.** Personal charts can only be seen by the users that create them or the ones to whom these charts are shared with. These charts can only be shared if the owner has sharing privileges.

Dashboards host vast set of information in forms of charts and tasks. Dashboards can be created and customized, and users can also create their own personal dashboards.

Out-of-the-box dashboards for Microsoft Dynamics Marketing CRM are as follows:

- Customer Service Operations
- Customer Service Performance



- Customer Service Representative
- Marketing
- Sales Activity
- Sales Performance

Customizing Entities, Fields, Forms and Views

Entities are used to model and store business data in a Model-Driven Apps. Conceptually they are like tables in a relational database. The Common Data Model defines quite some build-in entities like contact, account, case... but almost always customizers will have to create new entities. Customizing entities includes adding fields to entities, changing the schema, and creating custom entities.

Fields are the equivalent of columns in the database table, just as an entity correlates to a table. Administrators have the ability to customize fields in a number of ways. They can define a field's name, data type, requirement level, search ability, security, and auditing. Remember: fields are specific to an entity, and a field created in one entity is not available in other entities. Fields are classified as either of the following:

- **System fields:** These are out-of-the-box fields that cannot be deleted but can be modified to some extent.
- **Custom fields:** These are fields that are built within the system and can be modified and deleted.

Forms can be modified to show only those fields that are necessary for business processes. There are several types of forms available: **Main, Main – Interactive, Mobile, Card, Quick Create, and Quick View**. The Main, Main – Interactive, Card, Quick Create, and Quick View forms are available in the web application, Dynamics 365 for Outlook, and Dynamics 365 for tablets. The Mobile form is used for Dynamics 365 for phones.

Views are grids with records listed under select column headings. It is a type of saved query. Users can select different views to look at a subset of records of the same entity that fit into pre-specified filter conditions. There are three main types of views: public, system, and personal.

- **Public Views**

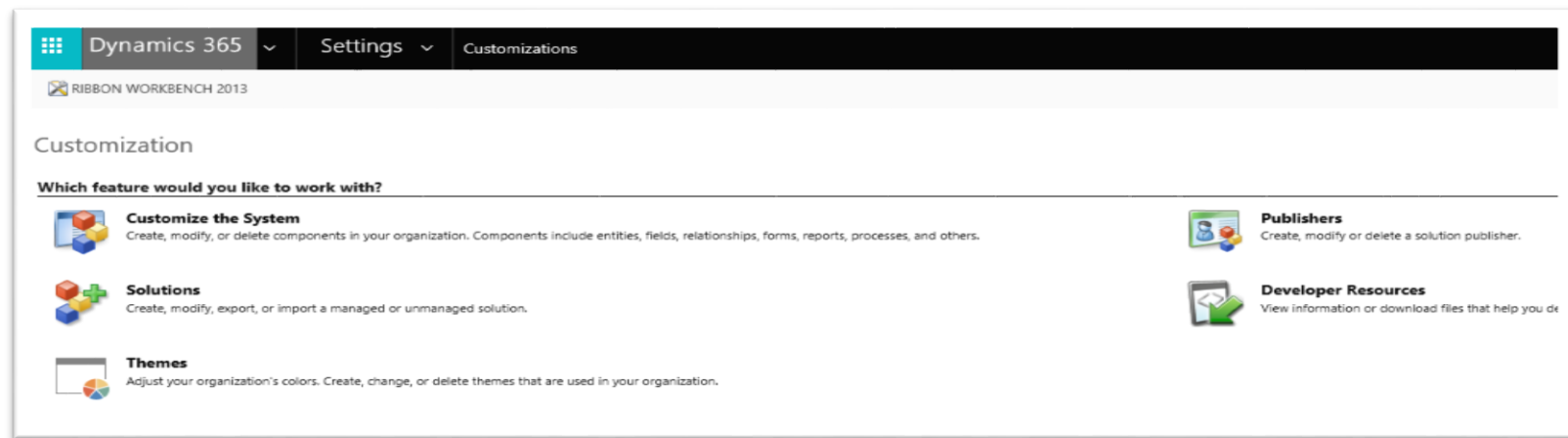
These are the views that come with the application. Custom views that an organization creates are also public views. One of these public views can be defined as a default view. When a user selects an entity by clicking on it in the navigation pane, the default view is what gets displayed.

- **System Views**

These views, similar to public views, are automatically created by CRM on installation. They are used for unique situations within the application. System Views include Associated View, Advanced Find View, Lookup View, and Quick Find View

- **Personal Views**

Users can create their own views using the Advanced Find tool and save them as personal views.



All these customizations can be made through Dynamics 365 Settings > Customizations > Customize the System:

DYNAMICS 365 DEVELOPMENT SOLUTIONS

Web API

The Dynamics 365 Web API provides a development experience that can be used across a wide variety of programming languages, platforms, and devices to access Dynamics 365. The Web API implements the OData (Open Data Protocol), an OASIS standard for building and consuming RESTful APIs over rich data sources. Because the Web API is built on open standards, no assemblies are required for a specific developer experience. HTTP requests can compose for specific operations or use third-party libraries to generate classes. It uses **JSON** in the body of the HTTP requests and response.

Using Web API following CRUD operations, Actions and Functions can be executed:

- **Basic Operations** (Create, Update, Delete)
- **Retrieve Operations** (Retrieve, Retrieve Multiple, Change Tracking)
- **Batch Operations**
- **Functions** (Bound/unbound functions with/without parameters)

- **Actions** (Bound/unbound actions with/without parameters)
- **Metadata** (Retrieve entity/attribute metadata)

SOAP Web Service

The Organization service, also sometimes known as the “SOAP endpoint,” has been available since Microsoft Dynamics CRM 2011. The HTTP requests and responses are sent using **XML**, which must conform to specific schema and namespaces. The Organization service is optimized for use with **.NET**. The Microsoft Dynamics 365 SDK provides a set of assemblies and tools which allow to generate strongly typed classes and proxies that streamline the development process and enjoy a better development experience using Microsoft Visual Studio.

Business logic that runs in plug-ins or workflow assemblies on the server expect to use the Organization service. Input and output parameters use specific classes defined with the assemblies that support the Organization service.

FetchXML

FetchXML is a proprietary **query language** that is used in Common Data Service. It's based on a schema that describes the capabilities of the language. The FetchXML language supports similar query capabilities as query expressions.

In Dynamics 365 WebAPI, data can be retrieved using OData queries, but if there is some complex requirement, it's better to query using fetchXML. FetchXML have two main advantages - it can be easily generated using Advanced Find, and it is more readable. Even Joins and Aggregate functions can be used in fetchXML queries.

Web Resources

Web resources represent files that can be used to extend the Microsoft Dynamics 365 web application such as html files, JavaScript, and Silverlight applications. Organizations can use web resources in form customizations, the SiteMap, or the application ribbon because they can be referenced by using URL syntax.

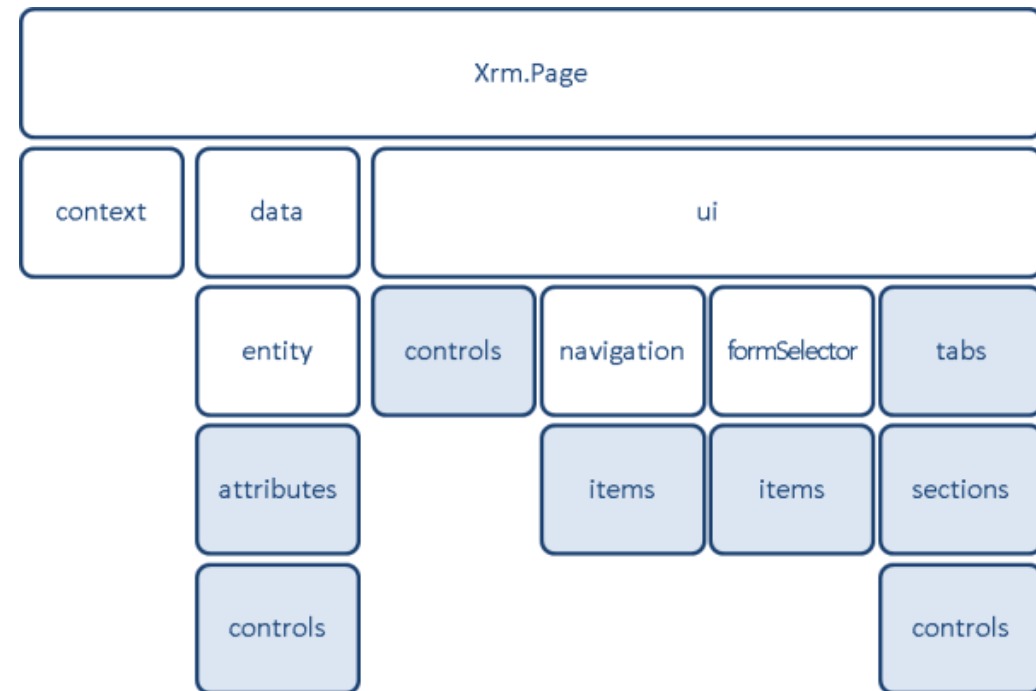


Web resources are stored as records in the database, they can be managed programmatically by using the standard techniques to create, retrieve, and update records. Text-based web resources (JScript, CSS, XML, XSL, and HTML) can be edited and saved in the application.

Client-Side JavaScript programming

The use of JavaScript in Dynamics CRM allows to manipulate CRM forms and data in real time using lightweight and easy to use syntax. Because JavaScript is commonly used in web development, it has been heavily extended with methods that allow developers virtually limitless possibilities. This does not, however, mean that all tools available should be applied to Dynamics CRM environments.

Microsoft Dynamics CRM uses the XRM Page Hierarchy JavaScript model as displayed.



The Xrm.Page object serves as a namespace object to consolidate three objects on the form:

Xrm.Page.context: Xrm.Page.context provides methods to retrieve information specific to an organization, a user, or parameters that were passed to the form in a query string.

Xrm.Page.data.entity: Xrm.Page.data provides an entity object that provides collections and methods to manage data within the entity form.

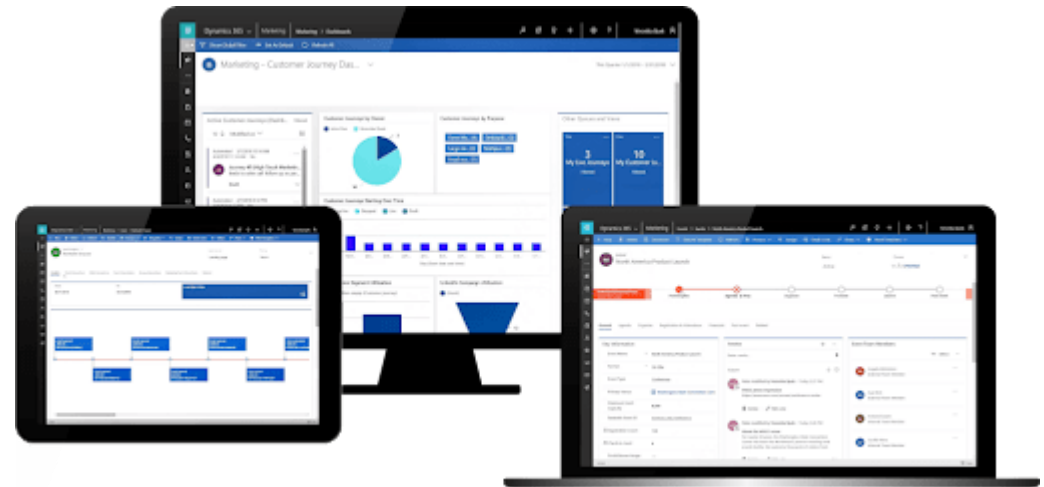
Xrm.Page.ui: Xrm.Page.ui provides collections and methods to manage the user interface of the form.

Plug-ins

A plug-in is a custom business logic that integrates with Microsoft Dynamics CRM to modify or extend the standard behavior of the platform. Plug-ins act as event handlers and are registered to execute on a particular event in CRM. Plugins are written in either C# or VB and can run either in synchronous or asynchronous mode.

Some scenarios where plugins can help are:

- Execute some business logic such as updating certain fields of a record or updating related records, etc. when a specific record is created or updated.
- Call an external web service on certain events such as saving or updating a record.
- Dynamically calculate the field values when any record is opened.
- Automate processes such as sending e-mails to customers on certain events in CRM.



CUSTOMIZATION & DEVELOPMENT VIA POWER PLATFORM

Customizations in Dynamics 365 Project Operations range from minor field customizations to even a complete functionality that replicates a built-in functionality.

Power Automate

Power Automate is a service that helps you create automated workflows between your favorite apps and services to synchronize files, get notifications, collect data, and more. Here are a few examples of what you can do with Power Automate.

- Automate business processes
- Send automatic reminders for past due tasks
- Move business data between systems on a schedule
- Connect to more than 500 data sources or any publicly available API
- You can even automate tasks on your local computer like computing data in Excel.

In PO

- You can implement CRUD using Power Automate.
- You can implement it on any entity of PO and create, update, and delete records.
- You can implement copy data functionality
- You can use any other module to integrate it with PO.

Power Apps

Power Apps is a suite of apps, services, and connectors, as well as a data platform, that provides a rapid development environment to build custom apps for your business needs. Using Power Apps, you can quickly build custom business apps that connect to your data stored either in the underlying data platform (Microsoft DataVerse) or in various online and on-premises data sources (such as SharePoint, Microsoft 365, Dynamics 365, SQL Server, and so on).

Power Apps is a high-productivity development platform for business apps, and has four major components:

- Canvas apps
- Model-driven apps

- Portals
- Microsoft DataVerse

Just like in any other Dynamics 365 module, Power Apps plays the most important role when it comes to customization.

- Custom Canvas Apps can be built
- These apps can be easily embedded with PO
- The app can be launched, and the required functionality can be achieved from within Project Operations
- Custom fields can be created in any entity of Project Operations
- There can be custom toggle fields to allow Power Automate flow trigger from within PO
- Ribbon menu customization is also possible
- This allows to make buttons for any ribbon of the module
- The custom created Canvas App can be attached to run with these ribbon menu buttons
- These buttons can help trigger Power Automate Flows as well

Power BI

Power BI is a collection of software services, apps, and connectors that work together to turn your unrelated sources of data into coherent, visually immersive, and interactive insights. Your data may be an Excel spreadsheet, or a collection of cloud-based and on-premises hybrid data warehouses. Power BI lets you easily connect to your data sources, visualize, and discover what's important, and share that with anyone or everyone you want.

- Power BI allows you to build reports and dashboards using the data from your DataVerse.
- These dashboards and reports can then be added to PO.
- In the views dropdown, these custom dashboards and reports are shown in a separate block.

PRICING

Dynamics 365 Project Operations

\$120

Per user/month

Get the visibility, collaboration, and agility
needed to drive success across your
project-centric business.

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CONCLUSION

Dynamics 365 for Project Operations features a lot of intensive tools, and in-depth tracking of project lifecycle, making it far more powerful than many entry-level cloud project management platforms. It is an evolution of the existing project management and accounting modules inside Dynamics 365 Finance as well as the previous Project Service Automation (PSA) solution from Microsoft.

Dynamics 365 for Project Operations provides a complete suite for not only the projects, but also allows you to manage the resources, tasks assigned to them, the expense and all the real and estimated time.

The module is customization friendly, and all the entities can be customized. The customizations also allow the end user to make Power BI reports and add them to the Dashboard section just to get the desired insights apart from the built-in dashboards.



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