

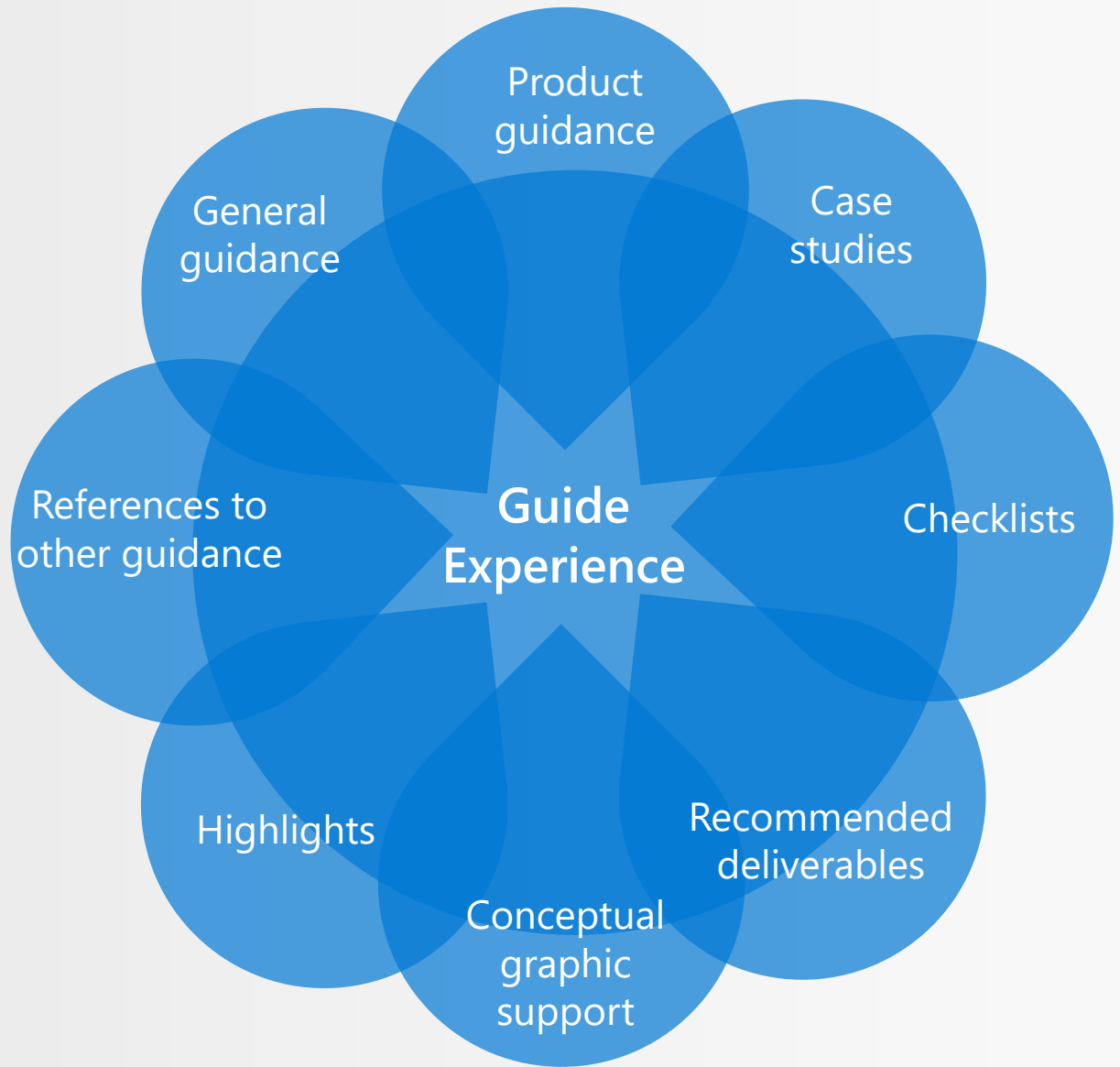
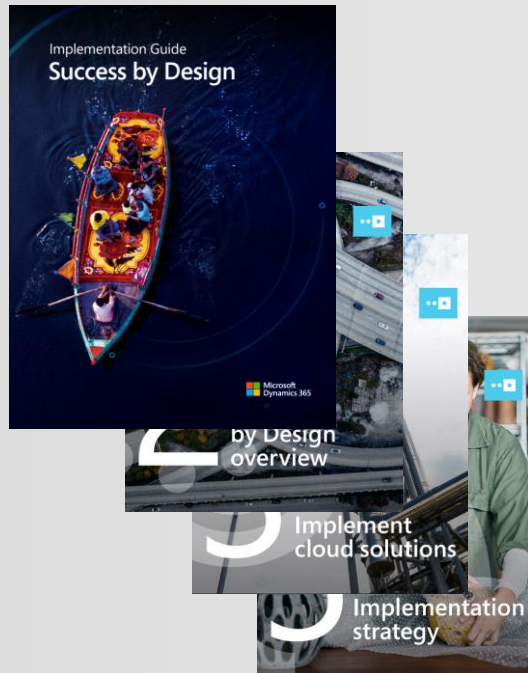
Dynamics 365 Project Operations Deployment Options and Scenarios

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Dynamics 365 Implementation Guide

Collective experience gained through
thousands of Dynamics 365 implementations



Available at: <https://aka.ms/d365implementationguide>



Agenda

Project Operations overview

Project Operations Deployment Types

Project Operations Deployment Scenarios

Resources

Q&A

Dynamics 365 Project Operations Overview

What is Dynamics 365 Project Operations?

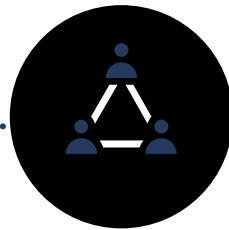
Empower services organizations with the visibility, collaboration and insight needed to drive success across operations – from prospect to cash. **Microsoft Dynamics 365 Project Operations** connects sales, resourcing, project management, and finance teams within a single application to win more deals, accelerate project delivery, and maximize profitability.



Project
Sales



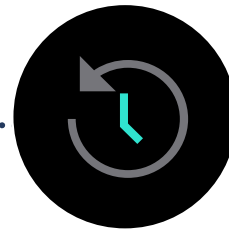
Project
Planning



Resource
Utilization



Team
Collaboration



Time And
Expenses



Project
Accounting



Business
Intelligence



COO /
Practice Director



Account
Manager



Project
Manager



Partner
Manager



Resource
Manager

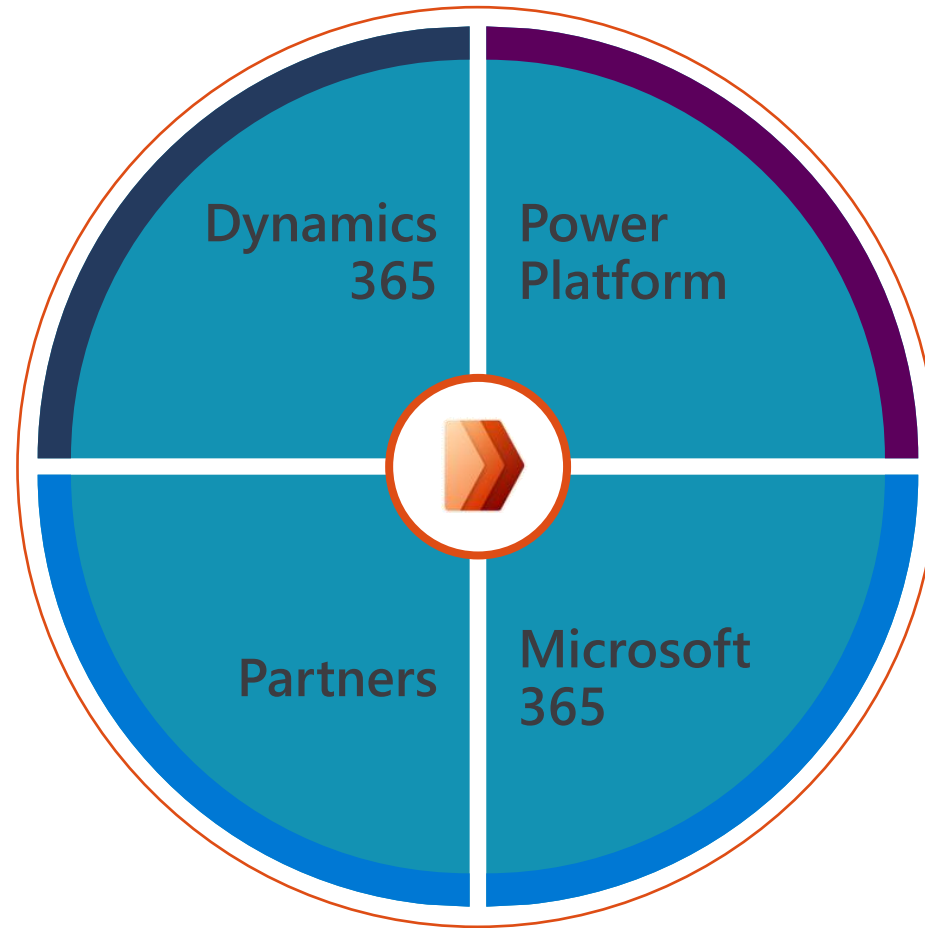


Team
Member

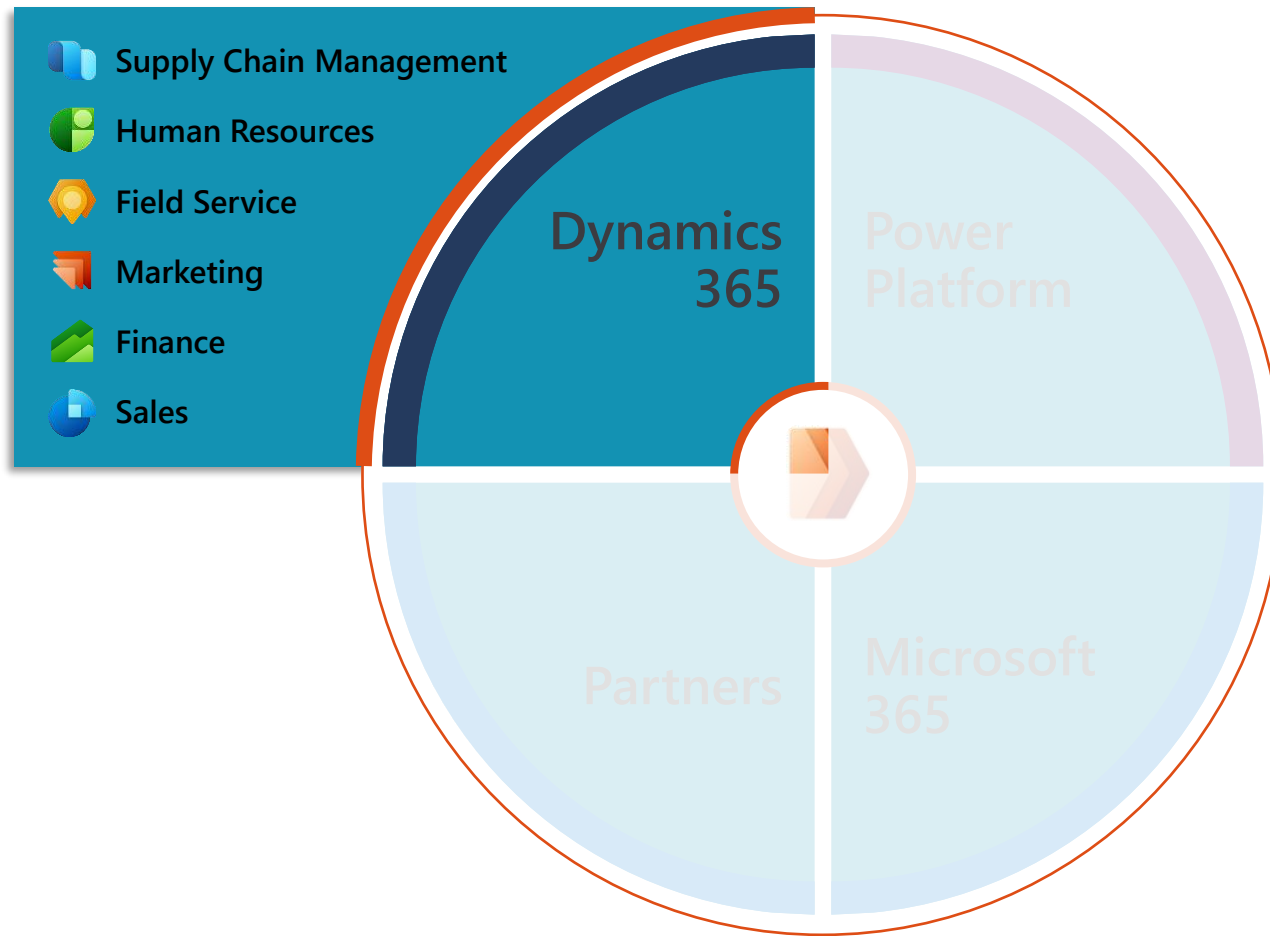


Project
Accountant

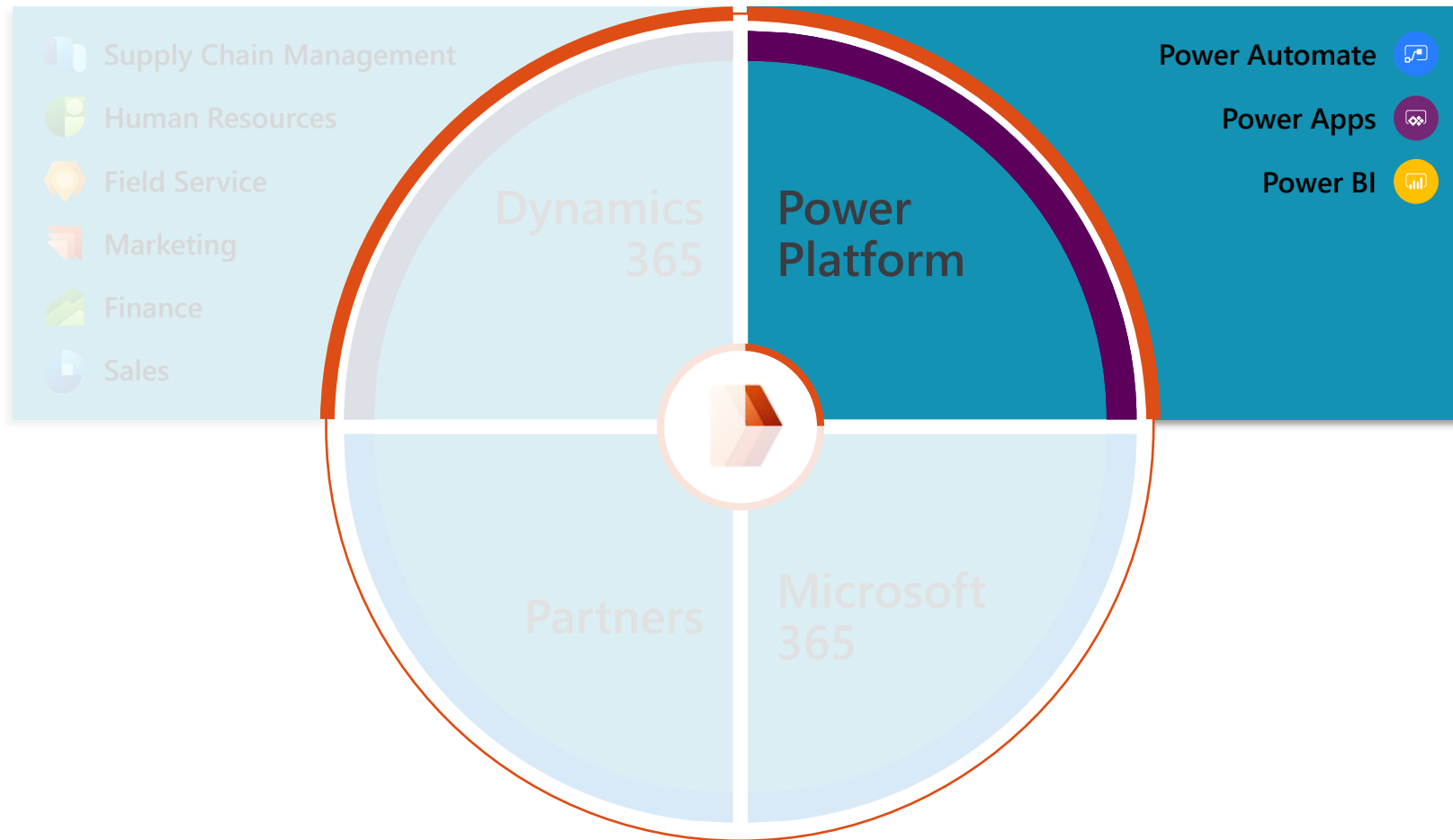
Project Operations, part of the Microsoft Cloud platform



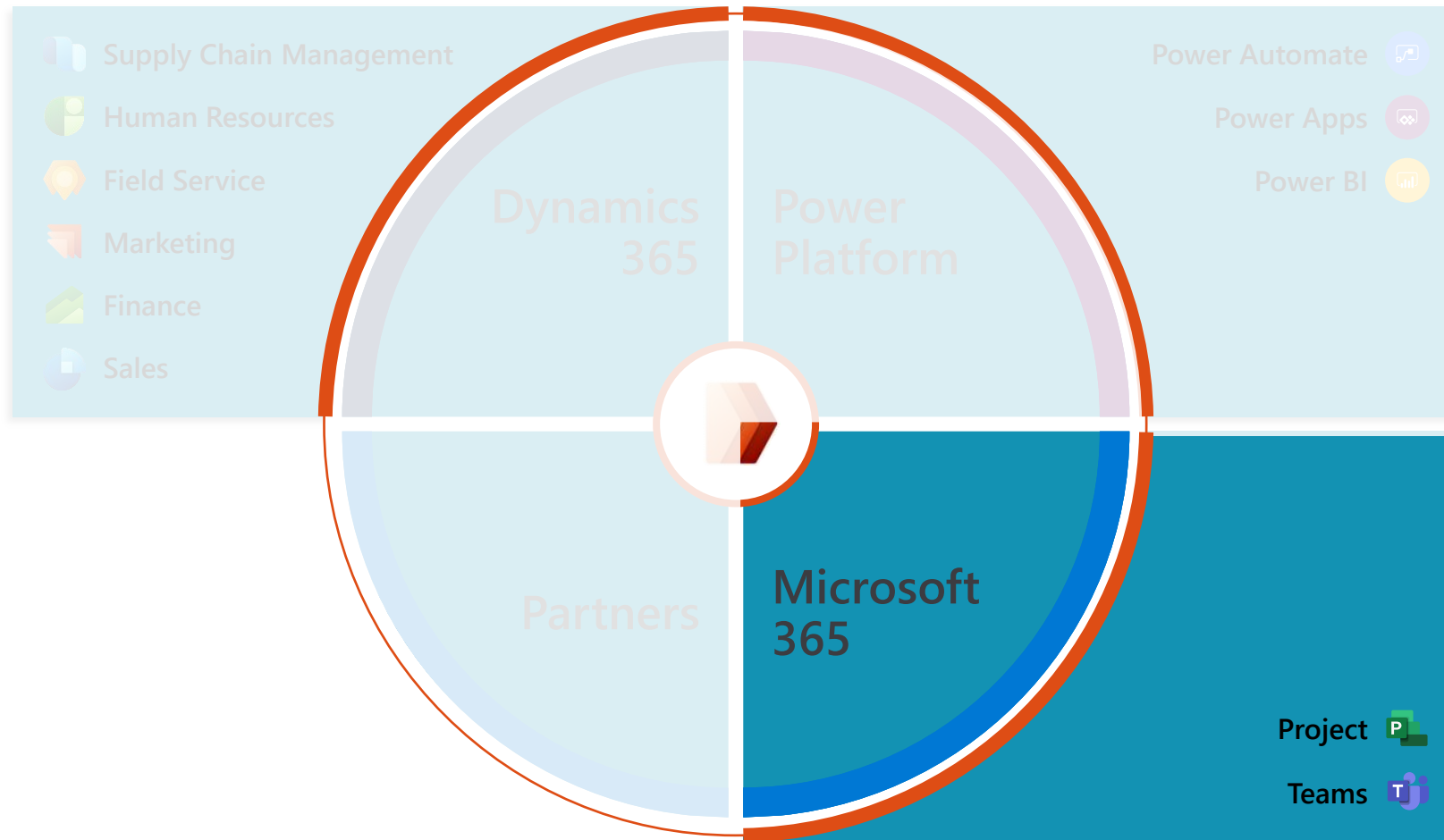
Project Operations, part of the Microsoft Cloud platform



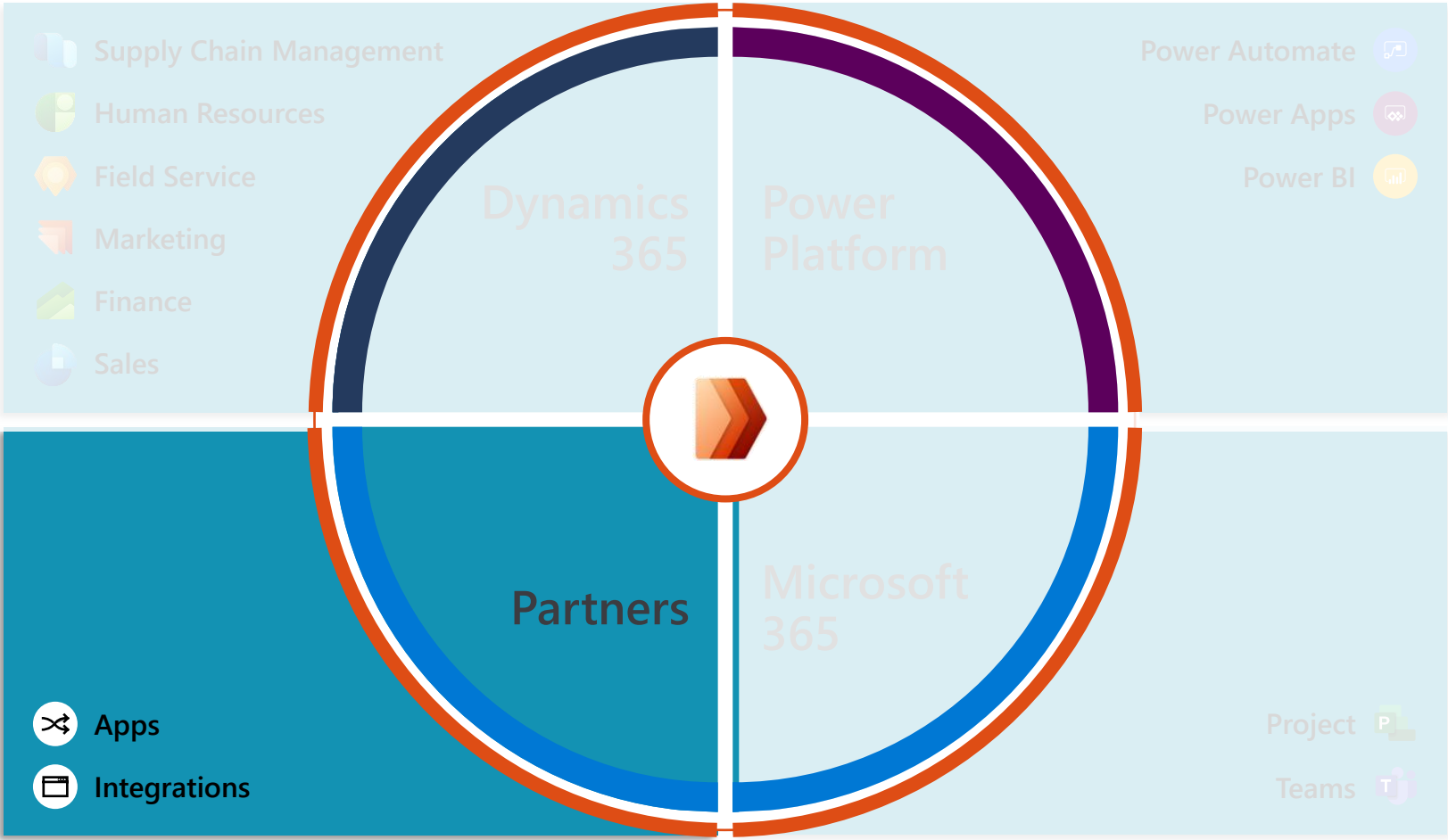
Project Operations, part of the Microsoft Cloud platform



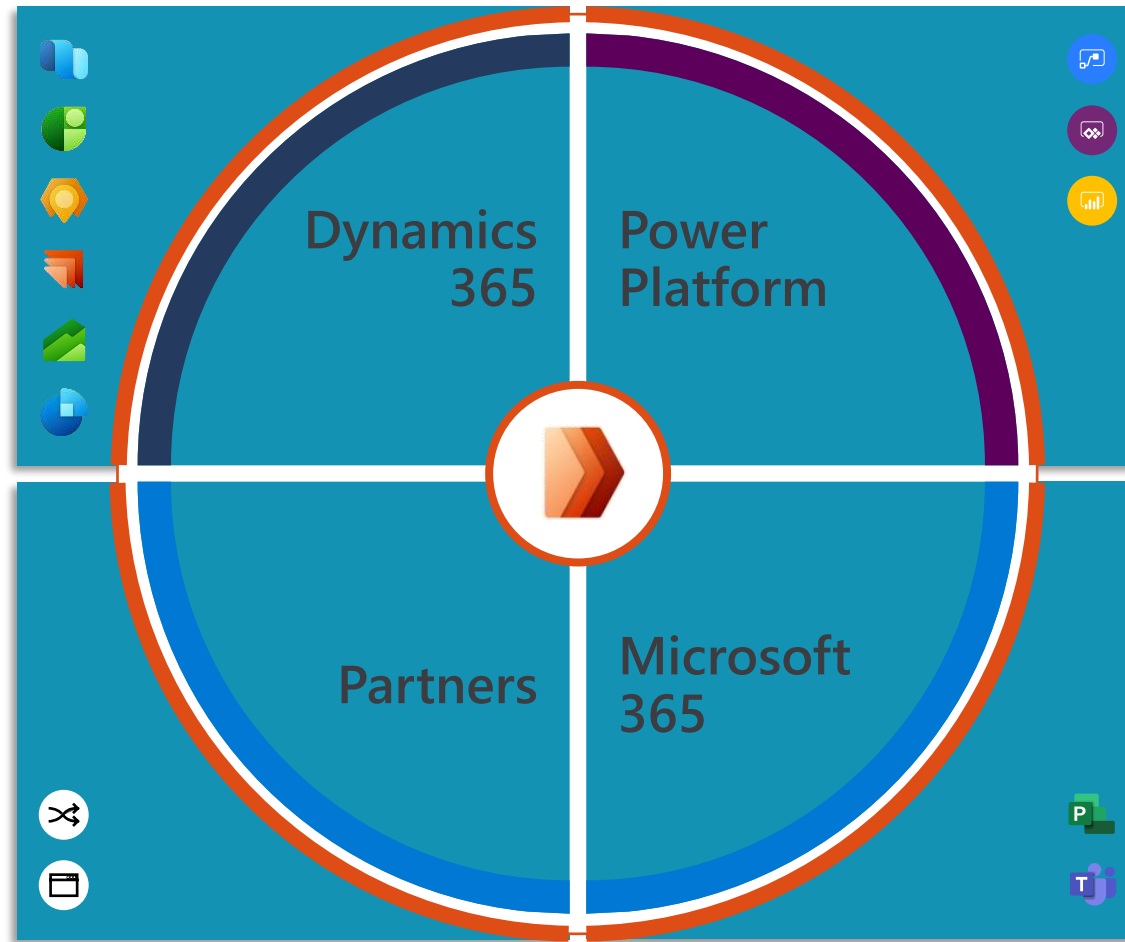
Project Operations, part of the Microsoft Cloud platform



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Project Operations, part of the Microsoft Cloud platform



Project Operations, part of the Microsoft Cloud platform

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- ✓ Health Services
- ✓ Facilities, Utilities, Mining and others



Dynamics 365 Project Operations Deployment Types

Terminology

- Lite deployment – deal to proforma invoicing, **aka** CE-only Project Operations app, **aka** upgrade for PSA
- Project Operations for resource/non-stocked based scenarios, **aka** CE Project Operations app with Dynamics 365 Finance and Operations PMA (Project Management and Accounting), **aka** integrated scenario
- Project Operations for stocked/production-based scenarios, **aka** Dynamics 365 Finance and Operations PMA (Project Management and Accounting) only

*Dynamics 365CE (Customer Engagement) apps are built on Microsoft Power Platform, storing their data in Dataverse

Project Operations Deployment Types

Lite deployment
Resource-based
scenarios with existing
third- party service
centric ERPs



Resource/non-stocked
scenarios



Stocked/production
orders
scenarios



Project Operations Deployment Questionnaire

<https://admin.powerplatform.microsoft.com/projectoperations>

- Identify deployment type:
 - Lite deployment
 - Project Operations for resource/non-stocked scenarios
 - Project Operations for stocked/production order scenarios

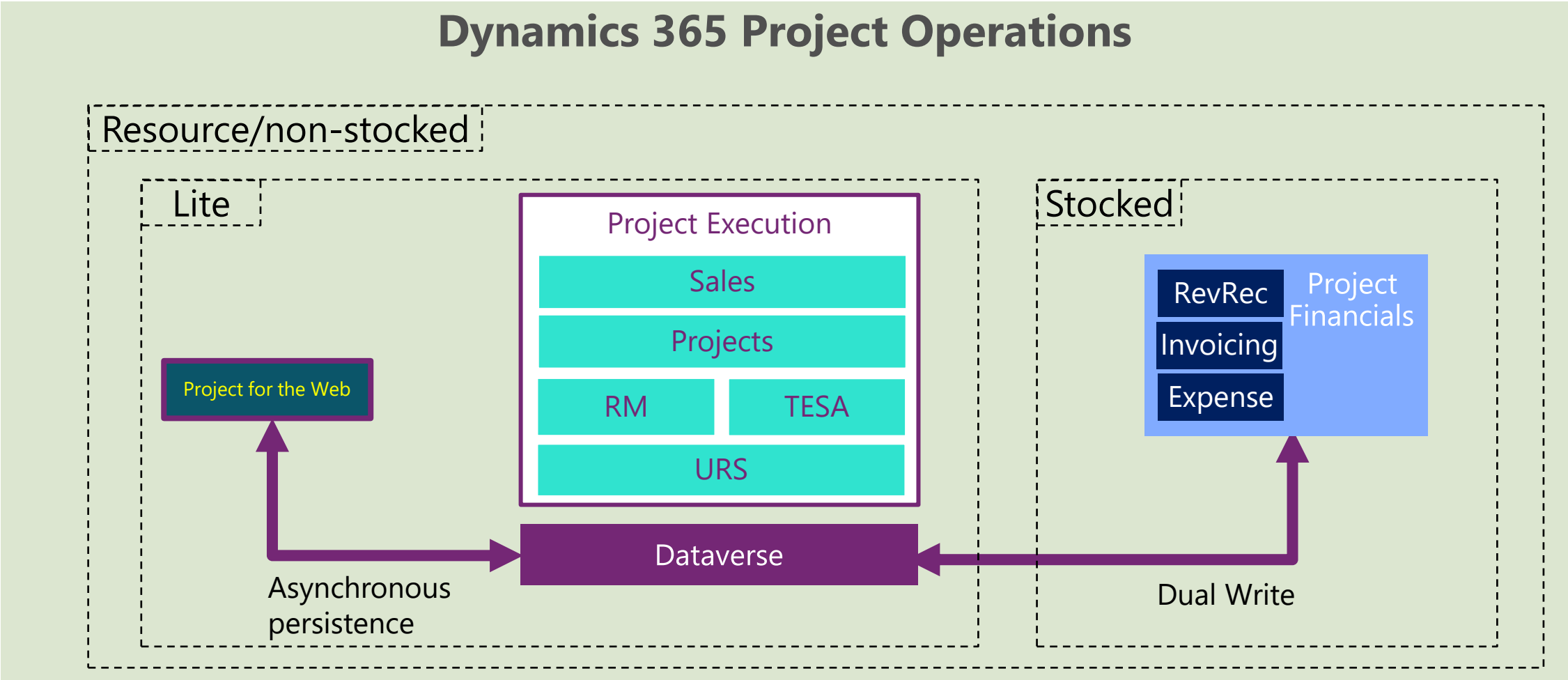
The screenshot displays the Microsoft Power Platform admin center interface. The top navigation bar includes the Microsoft logo, the text "Power Platform admin center", and user profile icons. The main content area is titled "Dynamics 365 Project Operations". On the left, a vertical sidebar lists deployment options: "Deal Management" (selected with a purple dot), "Task and resource planning", "Time and expense", "Accounting and advanced expense", "Non-stocked materials support", "Stocked materials support", and "Select Project Operations". The main panel features an orange arrow icon and the heading "Project Operations scope". Below this, a paragraph states: "Project Operations provides an end-to-end solution for service-based enterprise organizations to manage their projects from lead to revenue recognition." A bold question is posed: "Do you require a way to manage opportunities as they move through the process so that they become project contracts?". A "Learn More" link is provided. At the bottom of the main panel are "Yes" and "No" buttons. A "Back" button is located at the bottom left of the main content area.

Demo

Project Operations Deployment Questionnaire

Dynamics 365 Project Operations Deployment Scenarios

Architecture



Key

M365 Services	D365 CE App
Dataverse	D365 F&O App

RM = Resource Management
TESA = Time, Expense, Status, Approvals
URS = Universal Resource Scheduling
RevRec = Revenue Recognition

Customer needs to consume stocked materials on project

- Considerations

- Do all legal entities require stocked material on project? Note that the deployment model for Project Operations can vary by legal entity (Stocked vs. Non-stocked)
- The modern, Dataverse based project execution experience is not available for customers with stocked item needs.
- Development continues to reach functional parity across deployment models. Microsoft intends to provide a migration path to integrated deployment once parity is reached.

- Recommendation

- Implement Project Operations for stocked/production order scenarios
- To avoid future re-work, as deployment models evolve, minimize extensions on F&O Project Execution functionality

Customer has dependency on PMA-only Features

- Considerations

- Review key functional differences between Integrated vs PMA deployment:
- PMA offers following functionalities that are not yet available in integrated deployment:
 - Project Budgeting
 - Purchase Requisition for Projects
 - Stocked Material consumption on Projects
 - Project Free Text Invoices
 - Project Indirect costs
 - Project production orders
 - Master Planning on Project item requirements
 - Service management
 - Asset management

- Recommendation

- If complexity/cost is reasonable, gaps may be filled by extensions in integrated deployment.
- If complexity/cost is high, implement Project Operations for stocked/production order scenarios.

Customer has dependency on ISV / PMA extensions

- Considerations

- Do you have a PMA based ISV?
 - Perform the necessary Gap/Fit analysis to determine if your ISV is still required given the current application capabilities.
 - If operating in integrated mode, you must ensure that the features that your ISV extends are available. Much of the project execution functionality is implemented on Dataverse in the integrated mode.
- Do you have PMA based extensions?
 - Perform the necessary Gap/Fit analysis to determine if your extension is still required given the current application capabilities.
 - Your Extension may require refactoring on F&O and/or reimplementation on Dataverse to be consistent with your deployment model for Project Operations.
- Feasibility / Timeline of migrating ISV to integrated deployment
- Are there alternative ISVs for your integrated scenario?
- Time-phasing of ISV/PMA-only functionality

- Recommendation

- Implement Project Operations for stocked/production order scenarios if you are highly dependent on PMA ISV/Extensions.

Customer is upgrading from AX 2012

- Considerations

- If you are using Project Management module in AX2012 and are planning an in-place upgrade, you will need to use the stocked/production-order deployment type.
- If you are using Project Management module in AX2012 and will migrate your data to a newly implemented Dynamics 365, then you can determine deployment type based on your functional requirements.
- If you are not using Project Management module in AX2012, then you can determine deployment type and upgrade strategy based on your functional requirements

- Recommendation

- Determine deployment type after reviewing your requirements with considerations above.

Customer wants to add Project Operations to existing CE apps

- Considerations

- Which Project Operations deployment option has been selected for the implementation?
- For Existing Dynamics 365 CE Sales, Marketing and Customer Service apps, data bootstrapping* may be required. Some other updates may be required too, e.g. Accounts of type Customer required.
- PSA app, if any, must be upgraded to ProjOps Lite (more details next) or removed (Lite/Non-stocked).
- Business processes may vary by app. e.g. Procurement for Field Service vs. Project Operations.
- Project Operations for resource/non-stocked deployment type uses standard Dual Write maps to integrate Dynamics 365 Finance and Dynamics 365 CE apps. DW not compatible with Data Integrator (CDS-DI) Prospect to Cash solution.

- Recommendation

- Reevaluate your business process for existing Dynamics 365 CE apps.
- For resource/non-stocked deployments, take advantage of the standard Dual Write maps, for near real-time integration between Dynamics 365 Finance and Dynamics 365 CE. For non-real time integration or bulk data updates**, other appropriate integration technology should be considered.

* Dual Write bootstrapping: <https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/data-entities/dual-write/bootstrap-company-data>

** Dual Write live-sync limits: <https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/data-entities/dual-write/sync-limits>

PSA customer wants to migrate to Project Operations Lite deployment

- Considerations

- Upgrade from PSA to Project Operations Lite without WBS is in Preview as of Dec '21, GA in Feb'22. With WBS expected to be GA in August 2022.
- Feature differences between PSA and Project Operations
- Impact on current business processes and extensions
- Required changes to integrations (especially if schedule affecting – [Scheduling API](#))
- User training
- Number of tasks required in WBS: Currently ≤ 500 , being increased, External planning (BYOS)* is a possible option.

- Recommendation

- Support for this migration is time-phased. See release notes: [Upgrade from Dynamics 365 Project Service Automation to Dynamics 365 Project Operations Lite Deployment - Phase 2](#)

*External planning: <https://docs.microsoft.com/en-us/dynamics365-release-plan/2022wave1/finance-operations/dynamics365-project-operations/external-project-planning>

Migrating customer has dependency on PSA ISV/extensions

- **Considerations**

- Gap/Fit analysis to determine if your ISV/extension is still required given the current application capabilities.
- WBS or other schedule affecting entities are now controlled by Project for the Web. Scheduling API usage will be required as opposed to direct updates to table.
- If operating in integrated mode, review whether some of the functionality that your ISV/extension provides should now be reimplemented as a Dynamics 365 Finance extension.
- Feasibility / Timeline of migrating ISV to integrated deployment.
- Are there alternative ISVs for the integrated deployment type?

- **Recommendation**

- Implement Project Operations for Lite OR resource/non-stocked based deployment types as appropriate.
- Refactor extensions or integrations relying on direct manipulation of schedule affecting tables, unless all projects will be planned externally.

Migrating from Project Operations Lite to Integrated deployment

- Considerations

- Impact on current business processes and extensions
- Schema differences on CE side between Lite and Integrated deployment. There are no OOB migration scripts available.
- [Mapping concepts](#) between CE app and Finance & Operations
- Data bootstrapping on CE side
- What data (e.g. closed/open projects, costs, sales, milestones, invoices) needs to be synchronized between CE and Finance & Operations
- License impact adding Dynamics 365 Finance
- If migrating from a legacy financial system, reconciliation between it and Dynamics 365 Finance
- Required changes to integrations
- Need for change management and user training

- Recommendation

- If possible, implement integrated deployment from the beginning and avoid migration later.
- Otherwise, develop proper implementation plan for new integrated environment, including data migration, functional and performance testing, cut-over, reconciliation, hyper-care, etc.

Migrating from Project Operations Stocked to Integrated deployment

- **Considerations**

- Impact on current business processes and extensions.
- Integrated scenario can only be utilized if there are no stocked item requirements in any integrated legal entity.
- A new legal entity in existing instance or a new Dynamics 365 Finance instance is required to implement integrated scenario.
- Data which needs to be migrated/synchronized between CE and Finance & Operations e.g. closed/open projects, costs, unbilled sales, milestones, invoices.
- License impact on Dynamics 365
- Required changes to integrations
- Comprehensive re-testing is required, including CE and F&O reconciliation.
- User training

- **Recommendation**

- It is recommended to implement integrated deployment from the beginning and avoid migration later.

Time Entry

- Considerations
 - Deployment type
 - Lite
 - CE app for Time Entry
 - Mobile – UCI (Unified Client Interface) apps
 - Integrated
 - CE app for Time Entry
 - Mobile – UCI (Unified Client Interface) apps
 - Stocked
 - F&O app for Timesheets
 - Mobile – Yes, app for mobile workspaces, but expected to be deprecated in favor of Power Apps
 - Recommendation
 - Use the CE app, unless stocked deployment type

Expense Entry

- Considerations
 - Requirements for management control
 - Deployment type
 - Lite
 - Basic Expense Entry on CE app
 - Mobile – UCI (Unified Client Interface) apps
 - Integrated
 - Basic Expense on CE app or F&O for Full Expense management
 - Mobile – UCI (Unified Client Interface) apps
 - Mobile – F&O – Yes, mobile workspaces, but expected to be deprecated in favor of Power Apps
 - Stocked
 - F&O for Full Expense management
 - Mobile – F&O - Yes, mobile workspaces, but expected to be deprecated in favor of Power Apps
- Recommendation
 - Keep it simple, e.g. for a Resource/non-stocked deployment, it is probably best to enter expenses via CE or F&O, not both.

Customer-specific data composition

- Considerations

- Do you have volatile master data?
- How large are individual business transactions? e.g. lines on a single purchase order.
- What will be the peak total transaction volume?
- What data sharing requirements do you have between Dynamics 365 Finance legal entities?
- For resource/non-stocked deployment type
 - [Dual-Write limits for live synchronizations](#)
 - Limits for [initial data synchronization](#) between apps

- Recommendation

- Take non-functional requirements into account. They are nearly as important as functional ones.
- Performance test the solution thoroughly, and with time left to optimize if necessary.

Resources

Resources - General

- [Overview - Dynamics 365 Project Operations | Microsoft Docs](#)
- [Overview - What is Dynamics 365 Project Service Automation? | Microsoft Docs](#)
- [Overview - Finance and Operations application documentation - Finance & Operations | Dynamics 365 | Microsoft Docs](#)
- [Community - Dynamics 365 General - Forums, Blogs, Support](#)
- [Roadmap - Product Updates | Microsoft Dynamics 365](#)
- [Ideas - Ideas \(dynamics.com\)](#)
- [FastTrack - Microsoft FastTrack, move to the cloud with confidence](#)
- [Insider Program - Sign in \(dynamics.com\)](#)

Resources – Documentation and Learning

- [Documentation](#)
- [Developer home page](#)
- TechTalks* [Upcoming](#) / [Recordings](#)
- YouTube [Dynamics 365](#)
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* To receive info about the forthcoming TechTalks, Customers and Partners can subscribe and unsubscribe for themselves respectively, at <https://aka.ms/D365TechTalksSubscribe> and <https://aka.ms/D365TechTalksUnsubscribe>

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- [Trust Center](#) – For information on privacy, compliance, and security procedures
- [Online Services Terms](#) – Terms and Conditions of Microsoft Services
- [Support Options](#)

