

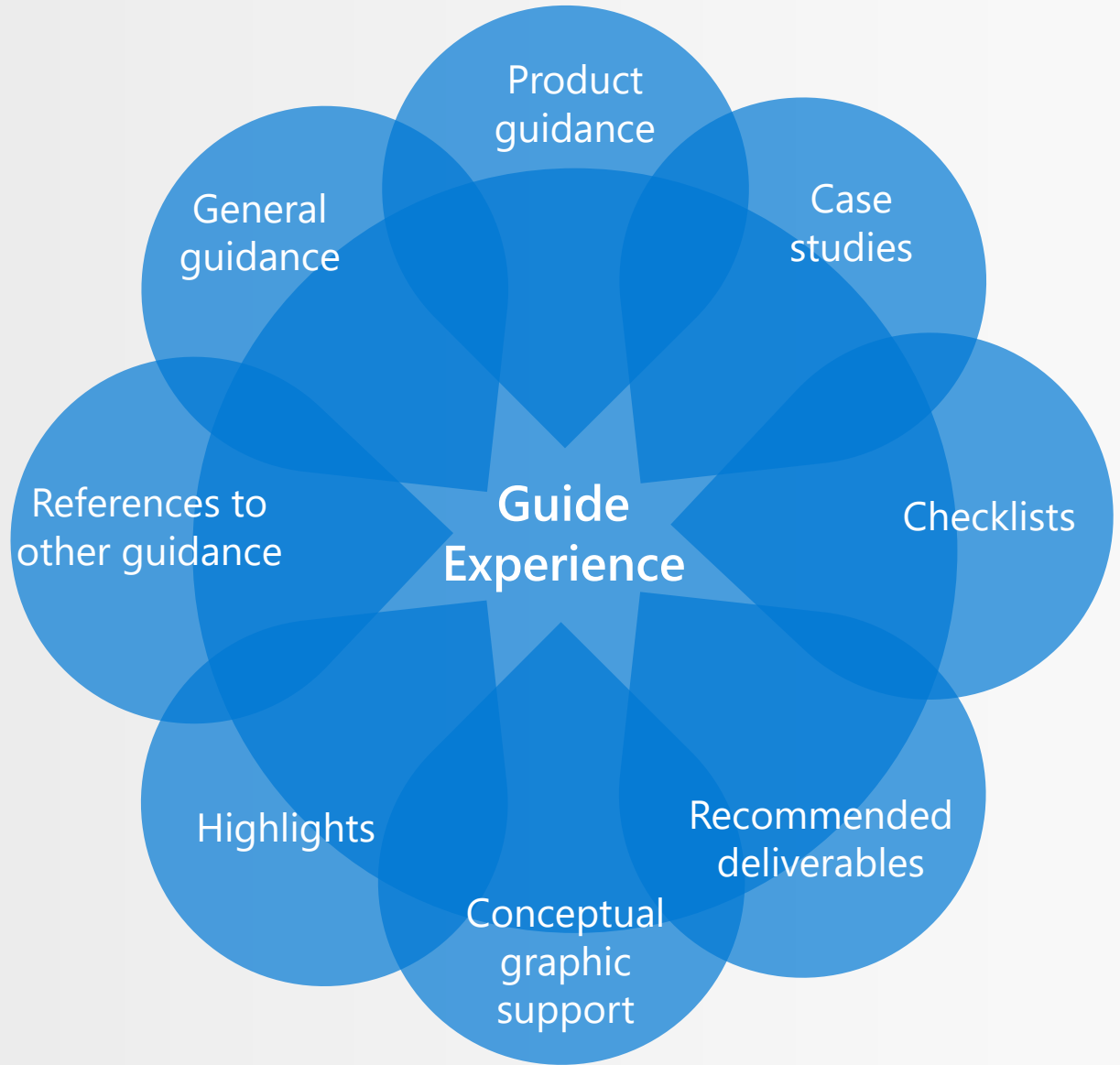
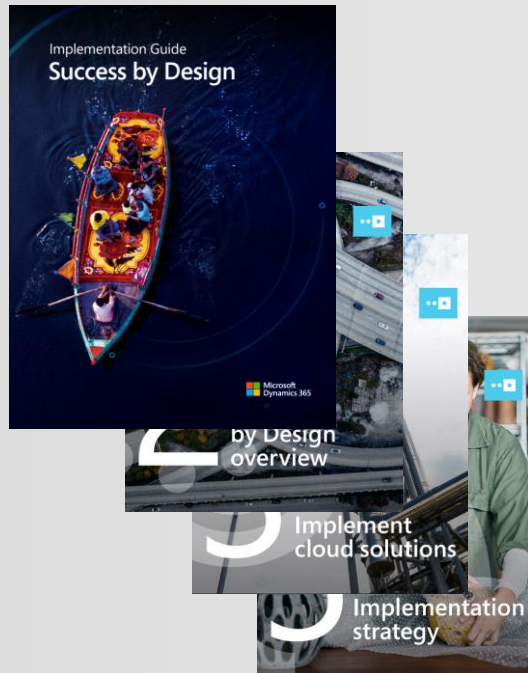
Dynamics 365 Project Operations – Project Management , Time Entry, Approvals and Actuals

Satish Panwar
Martin Walker



Dynamics 365 Implementation Guide

Collective experience gained through
thousands of Dynamics 365 implementations



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



Objectives of this TechTalk

1. Project Management
2. Project Execution

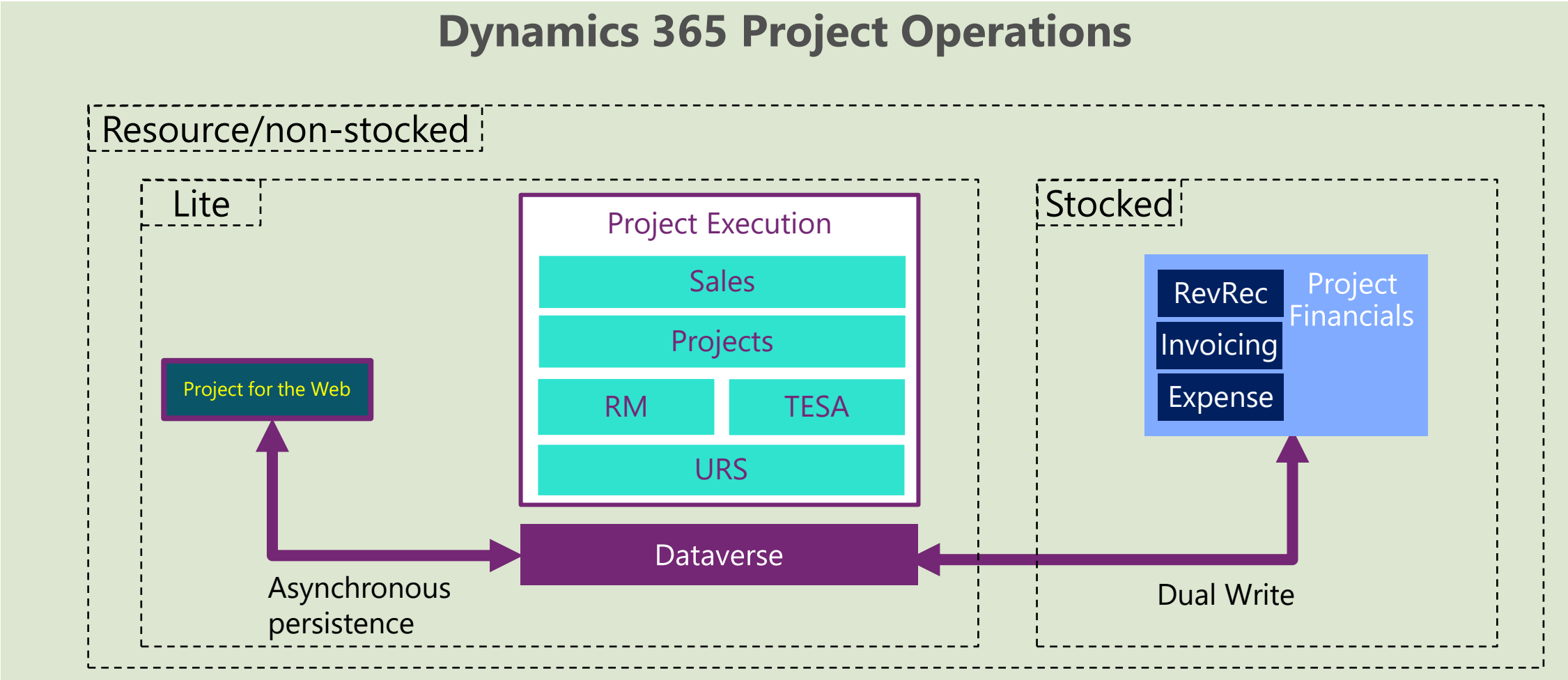
What it doesn't cover

1. Deployment considerations
2. Detailed aspects of Data Migration/Integrations
3. Comparison with other Dynamics 365 Customer Engagement Apps
4. Licensing considerations
5. Technical details

Agenda

-
1. Project Management process
 2. Time Entry process
 3. Approvals
 4. Actuals
 5. Resources

Architecture

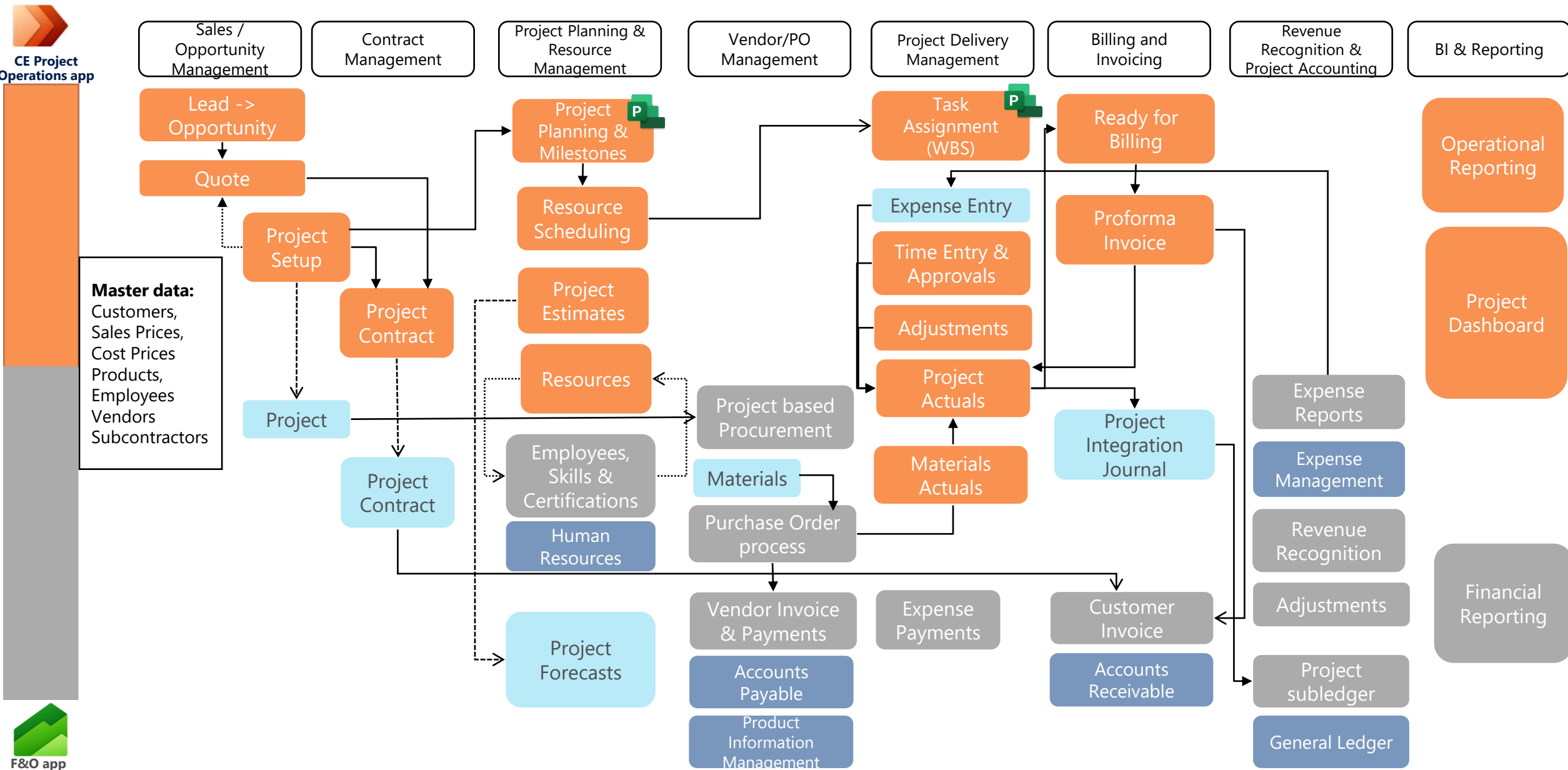


Key

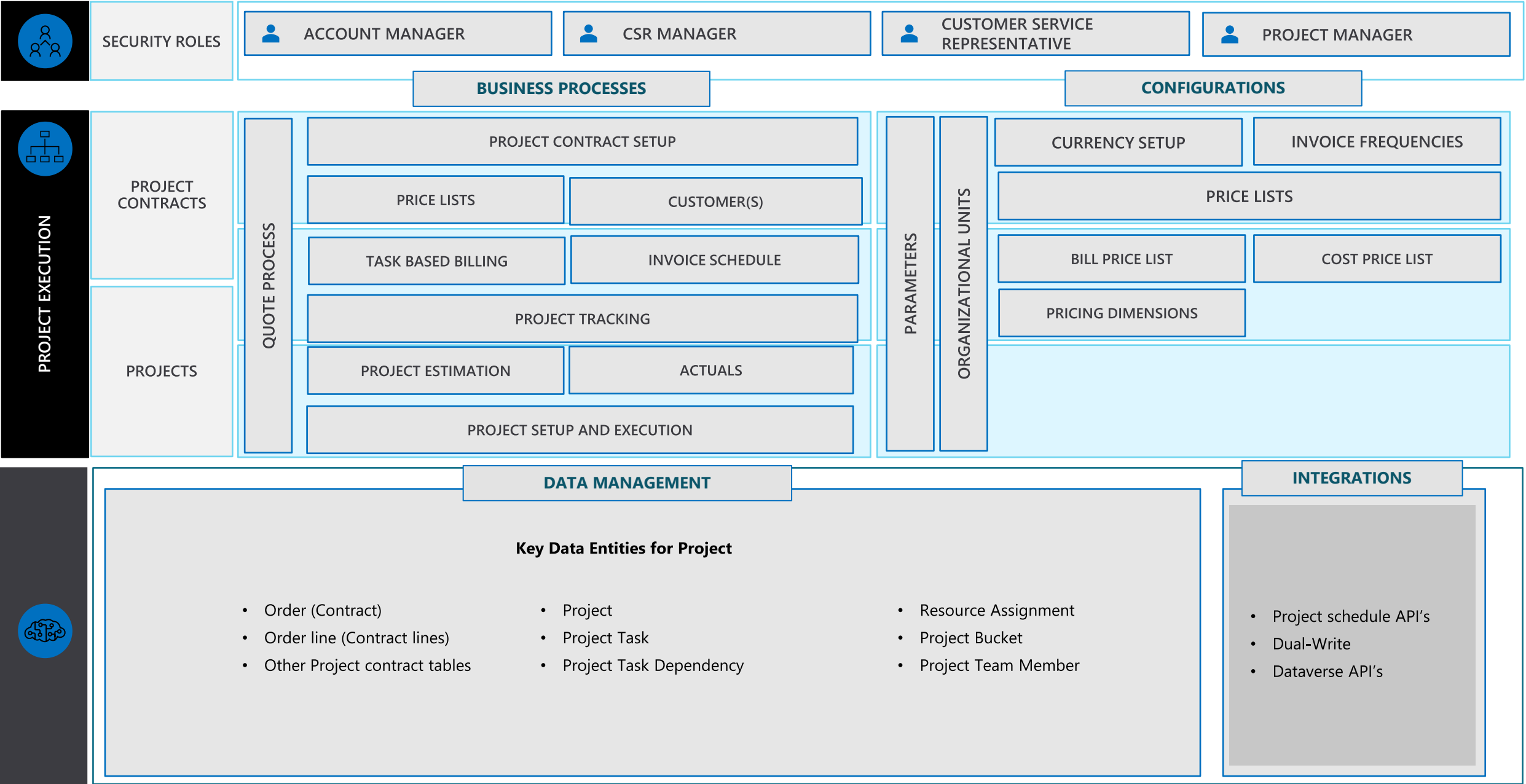
M365 Services	D365 CE App
Dataverse	D365 F&O App

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

End to End Process flow



Project Management – Process Catalog



Project Management Processes

Project Contracts

Dynamics 365

Project Operations

Home

Recent

Pinned

Customers

Customers

Contacts

Price Lists

Sales

Leads

Opportunities

Quotes

Project Contracts

Transactions

Approved Time

Approved Expenses

Journals

Actuals

Billing

Fixed Price Milestones

Retainers and Advan...

Time and Material Bil...

Available Retainers a...

Invoices

Save

Save & Close

New

Copy

Confirm

Close as Lost

Delete

Refresh

Check Access

Collaborate

Create Invoice

Process

Recalculate

Look Up Address

Assign

Demo Project - Adatum

Order

\$215.00

Total Amount

Draft

Status

Draft

Status Reason

Satish Panwar

Owner

Summary

Contract Lines

Project Price Lists

Contract Performance

Customers

Advances and Retainers

Related

Sales Order Number

*

ORD-01069-X3M4J0

Owning Company

*

USPM

Name

*

Demo Project - Adatum

Customer

*

Adatum Corporation

Account Manager

+

Satish Panwar

Product Price List

*

US Bill Rates

Opportunity

Adatum pricing demo

Quote

Adatum pricing demo

Contracting Unit

*

Contoso Robotics US

Currency

*

US Dollar

Requested Delivery Date

8/31/2022

Contract Status Reason

*

Draft

Not-to-exceed Limit

\$500,000.00

Committed Amount

\$0.00

Last updated:

7/19/2022 12:22 AM

Spent Amount

\$0.00

Last updated:

7/19/2022 12:22 AM

Remaining Amount

\$500,000.00

Timeline

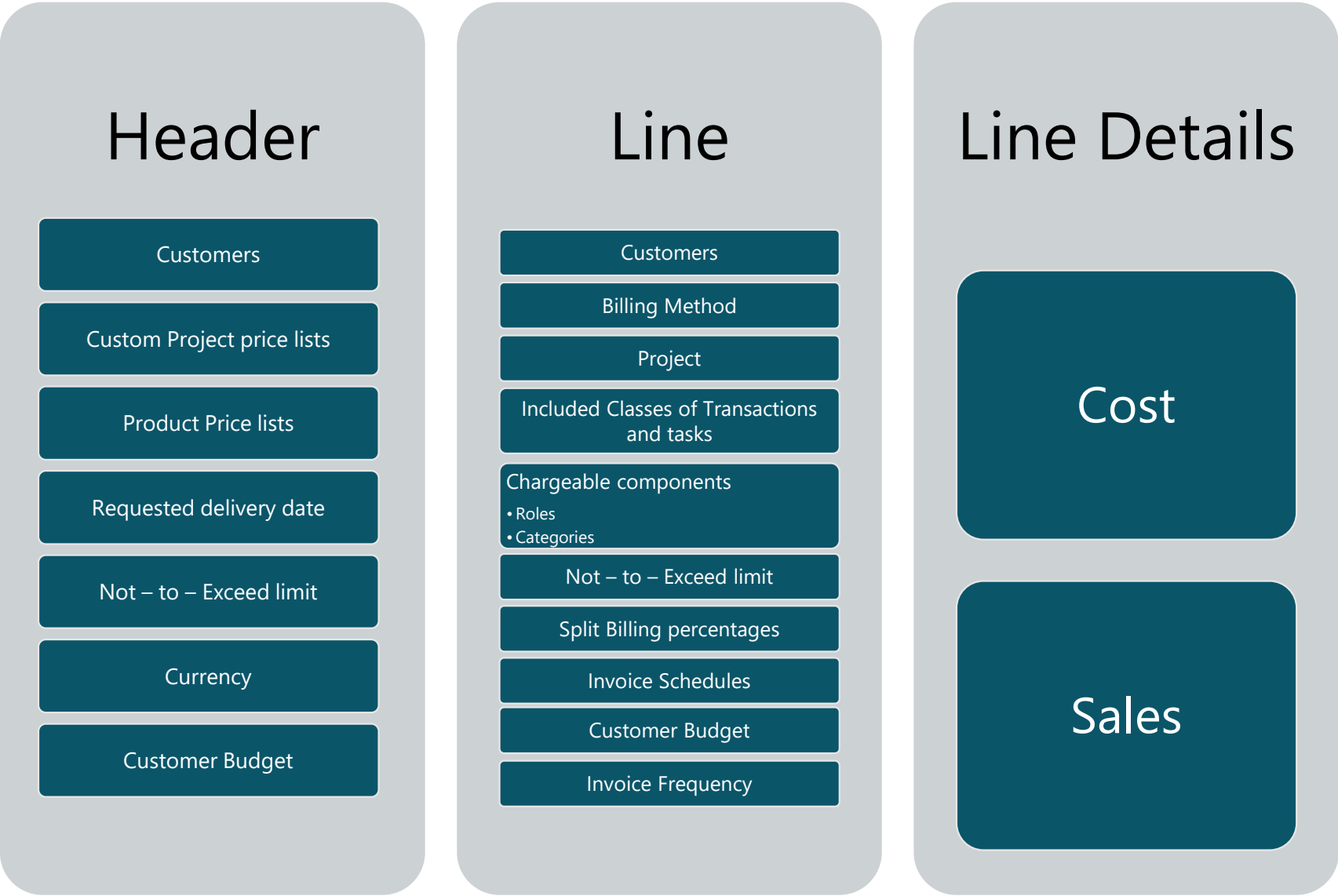
Search timeline

Enter a note...

Get started

Capture and manage all records in your timeline.

Contracts: Structure & Key concepts



Project Contract Stages

- Draft
- In Review
- On hold
- Confirmed – Read-only. No revisions/CR's
- Lost

Project

Dynamics 365 | Project Operations

Home Recent Pinned My Work Dashboards Time Entries Expenses Approvals Material Usage Projects Schedule Board Resource Utilization Resources Roles

Project Stages Active for 3 days New Quote Plan (3 D) Deliver Complete Close

Demo Project - Adatum - Saved Project

7/25/2022 8:00 AM Due Date \$39,383.00 Estimated Labor Cost 29.29 Cost Consumption % 31.68 Progress %

Summary Tasks Team Resource Assignments Resource Reconciliation Estimates Tracking Sales Task Billing Setup Expense Estimates Material Estimates Related

General

Project ID	* P-001084-T
Name	* Demo Project - Adatum
Description	---
Owning Company	* USPM
Customer	Adatum Corporation
Calendar template	* Default Work Template
Schedule Mode	* Fixed effort
Currency	* US Dollar
Contracting Unit	* Contoso Robotics US
Project manager	* Satish Panwar

Status

Overall Project Status	Red
Comments	---
Status Updated On	7/15/2022 5:05 PM
Schedule Performance	Ahead
Cost Performance	Over Budget

Estimates

Estimated Start Date	7/4/2022
Finish Date	7/25/2022 8:00 AM
Effort (Hours)	129.00
Estimated Labor Cost	\$39,383.00
Estimated Expense Cost	\$2,000.00
Estimated Material Cost	\$0.00
Estimated Total Cost	\$41,383.00

Actuals

Actual Start	---
Actual Finish	---
Actual Labor Cost	\$13,790.40
Actual Expense Cost	\$0.00
Actual Material Cost	\$0.00
Actual Total Cost	\$13,790.40
Effort Completed (Hours)	40.80

Project Stages

Dynamics 365 | Project Operations

Save Save & Close New Project Deactivate Book Delete Refresh Project Totals Refresh Check Access Collaborate Process Share

Pricing Quote 05 - Saved

Project

Due Date --- Estimated Labor Cost \$0.00 Cost Consumption % --- Progress % 0.00

Project Stages

New (< 1 Min) Quote Plan Deliver Complete Close

Summary Tasks Team Resource Assignments Resource Reconciliation Estimates Tracking Sales Task Billing Setup Expense Estimates Material Estimates Related

General	
Project ID	* P-001101-B
Name	* Pricing Quote 05
Description	---
Owning Company	* USPM
Customer	Adatum Corporation
Calendar template	* Calendar template for this techtalk
Schedule Mode	* Fixed effort
Currency	* US Dollar
Contracting Unit	* Contoso Robotics US
Project manager	* Satish Panwar

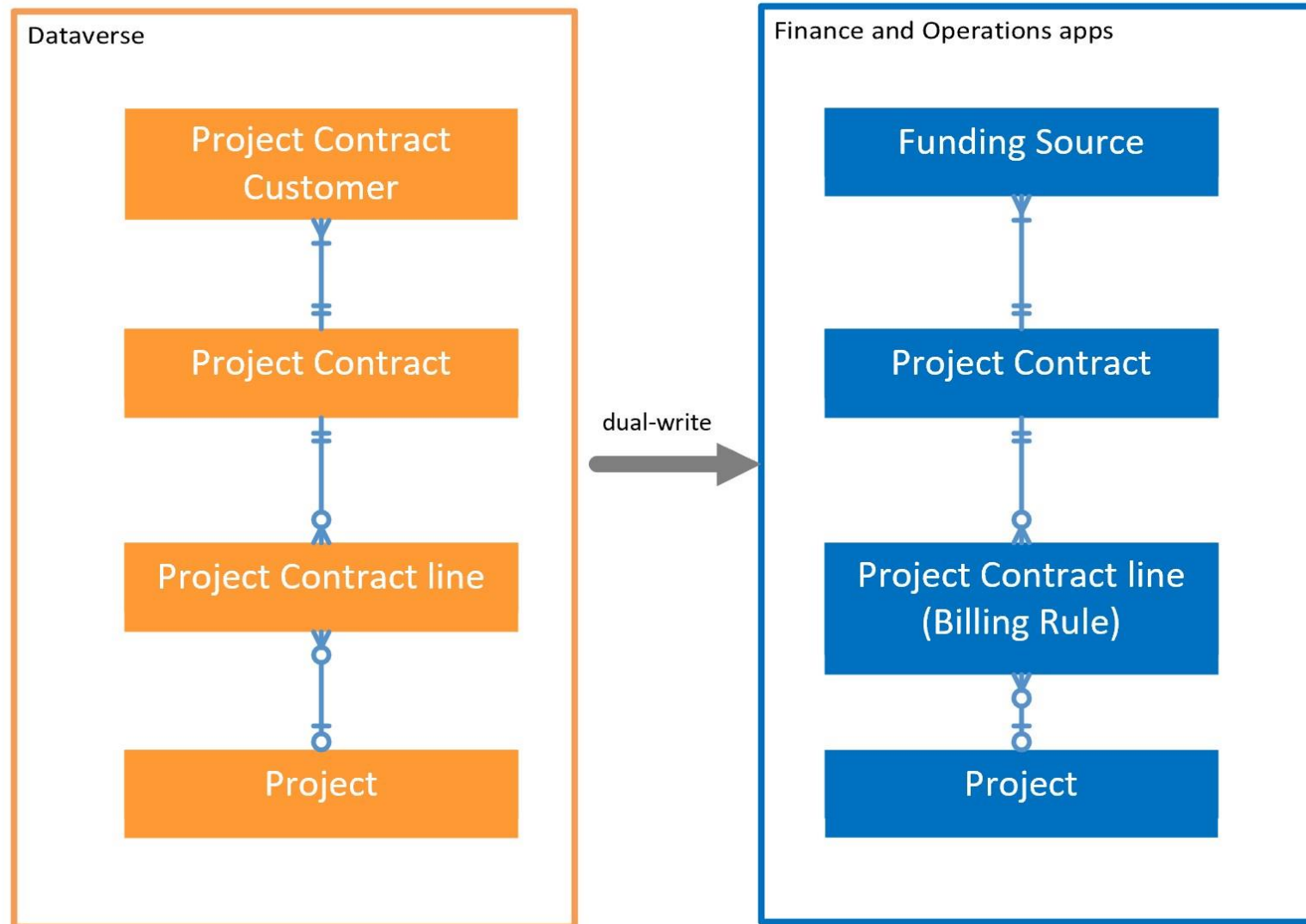
Estimates	
Estimated Start Date	7/19/2022
Finish Date	---
Effort (Hours)	0.00
Estimated Labor Cost	\$0.00
Estimated Expense Cost	\$0.00
Estimated Material Cost	\$0.00
Estimated Total Cost	\$0.00

Actuals	
Actual Start	---
Actual Finish	---
Actual Labor Cost	\$0.00
Actual Expense Cost	\$0.00
Actual Material Cost	\$0.00
Actual Total Cost	\$0.00
Effort Completed (Hours)	0.00

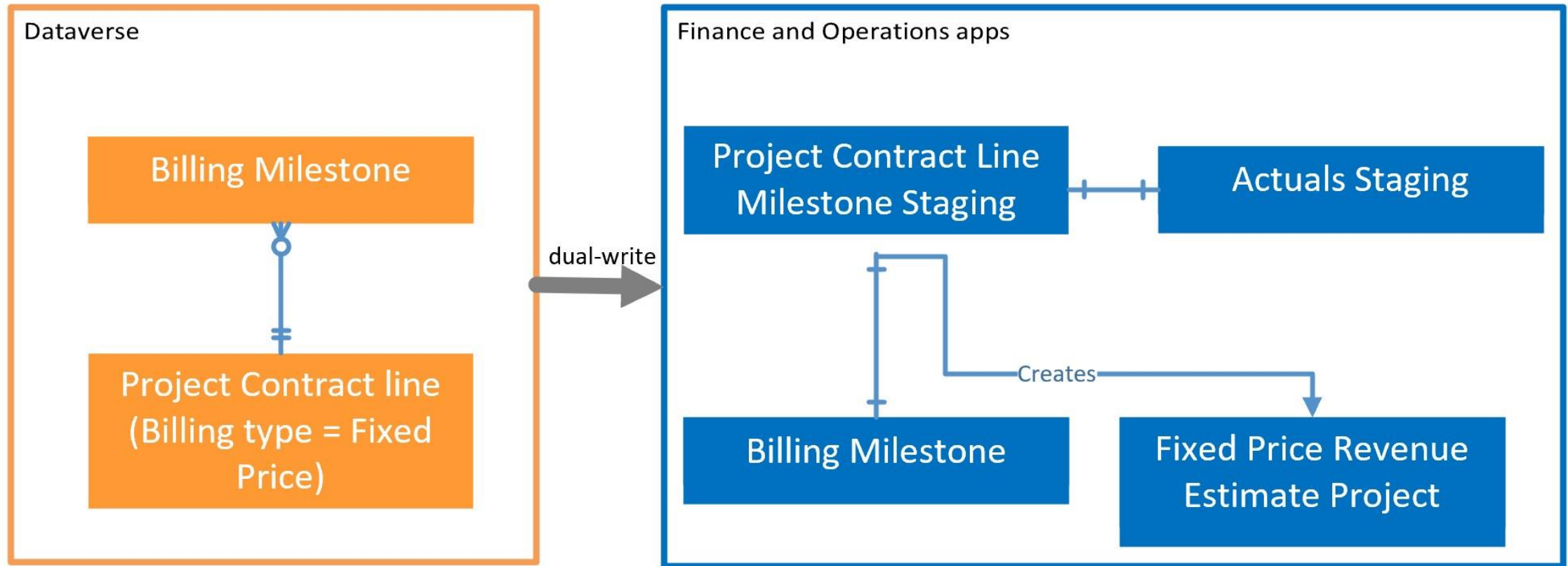
Demo – Project Contracts and Projects

Data Architecture – Integrated entities

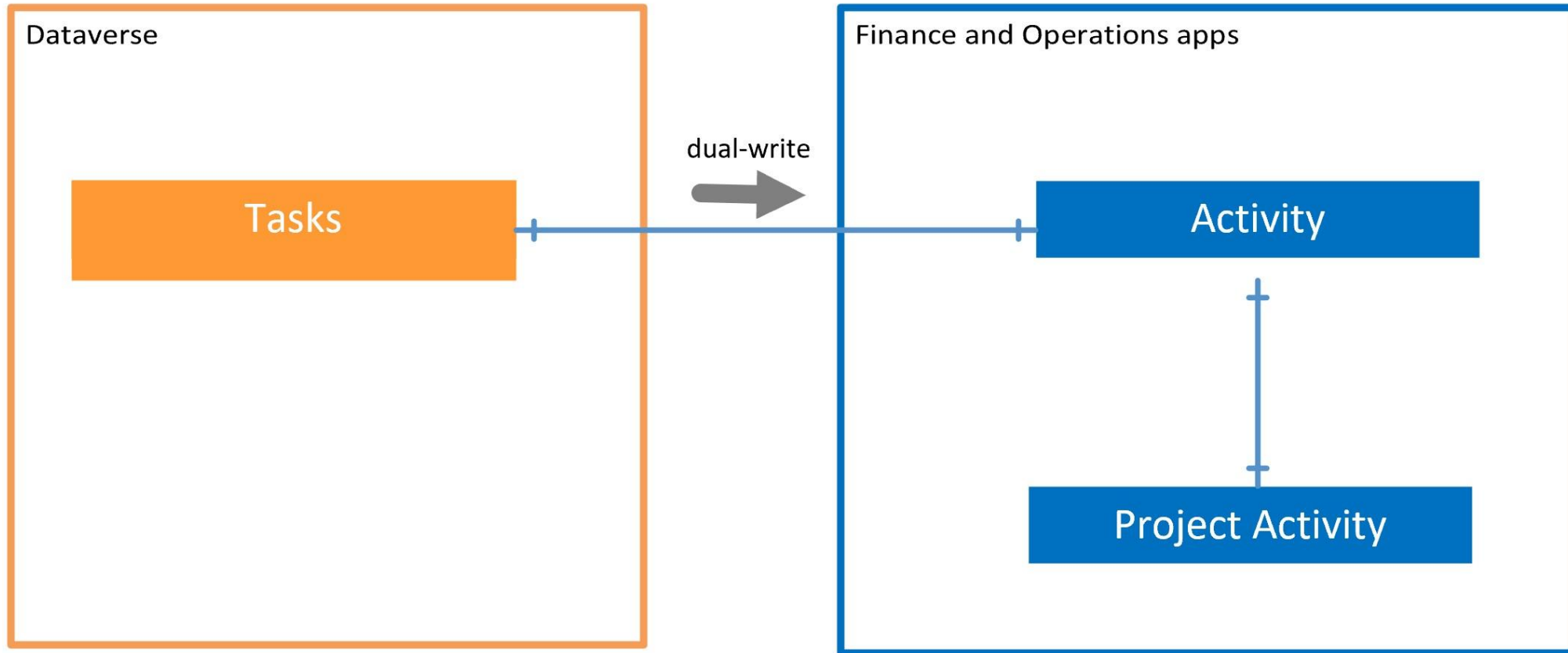
Contracts, lines and projects – Dataverse to F&O



Fixed Price Billing Milestones – Dataverse to F&O

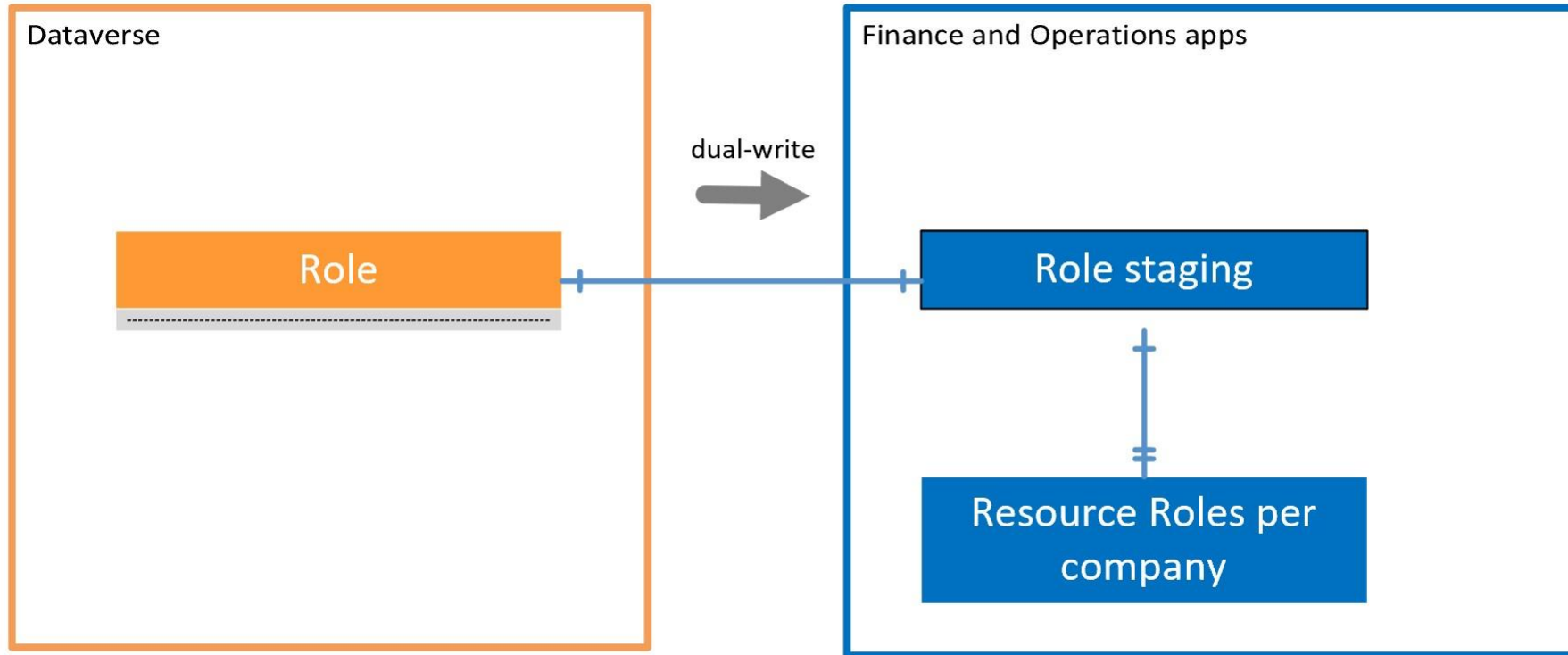


Project Tasks – Dataverse to F&O



*Not full WBS integration – reference only, e.g. activity on expense line.

Project Resources – Dataverse to F&O



Demo – Projects and Accounting setup

Common Contract and Billing Scenarios

Scenario	Feature	Explanation
Time on a project is fixed fee while Expense are T&M	Select applicable transaction classes on each contract line	Select a Fixed fee or T&M billing method on the contract line and associate the same project but distinct classes or transactions to the contract line
Some part of the work on a project is T&M and another part of the work needs to be fixed fee	Task- based billing	Create distinct nodes in your project plan for each part of the work and associate those tasks to different contract lines.
Pre-sales costs are non-billable but need to be collected and reported to understand the overall margin of this contract	Task- based billing	Create a node for pre-sales tasks on your project plan and mark those tasks as non-chargeable
Project work is distinctly divided between teams with each team being managed by a dedicated Project Manager and the teams should securely access only their part of the work	Associate different projects to different contract lines	Create separate projects but bring under the same overall contract by associating the projects distinctly to each line on the contract
Different invoice schedules for different portions of the work	Invoice schedules at the contract line	Setup invoice schedules at the contract line level and then associate project components to the contract line like say, a specific set of tasks
Different customers paying for different components of the work	Split billing setup at the contract line level	Identify the paying customer on the contract line and then associate project components to the contract line like say, a specific set of tasks
Ability to roll up overall costs and margins across all sub-components or projects at the header level.	Reporting and roll – up using Contract as the header	All estimates and actual transactions are stamped with the contract line as well as project enabling reporting and roll-up at the project level and at the contract level

Collaboration via Microsoft Teams

Teams integration

The screenshot displays the Power Platform admin center interface. The top navigation bar includes the Microsoft Dynamics 365 for Operations Lab logo, the title "Power Platform admin center", and user controls (gear, question mark, and "SA" profile). The left sidebar contains a menu with "Home", "Environments" (selected), "Analytics", "Resources", "Capacity", "Dynamics 365 apps", "Portals", "Help + support", "Data integration", "Data (preview)", "Policies", and "Admin centers". The main content area shows the breadcrumb "Environments > D365rsatlab > Settings" and a search bar. The settings are organized into sections: Product, Business, Users + permissions, Audit and logs, Templates, Updates, Email, Integration, Data management, Encryption, and Resources. The "Integration" section is expanded, showing "Document management settings", "Synchronization", "Teams integration settings" (highlighted in purple), and "Yammer".

Microsoft Dynamics 365 for Operations Lab

Power Platform admin center

Environments > D365rsatlab > Settings

Search for a setting

- Product
 - Behavior, Features, Languages, Privacy + Security
- Business
 - Business closures, Calendar, Connection roles, Currencies
- Users + permissions
 - Application users, Business units, Hierarchy security, License to role mapping
- Audit and logs
 - Audit settings, Audit summary view, Entity and field audit settings, System jobs
- Templates
 - Access team templates, Article templates, Contract templates, Data import templates
- Updates
 - App update settings (Preview)
- Email
 - Email settings, Email tracking, Mailboxes, Server profiles
- Integration
 - Document management settings
 - Synchronization
 - Teams integration settings
 - Yammer
- Data management
 - Auto numbering, Automatic record creation policies, Bulk deletion, Data import wizard
- Encryption
 - Data encryption
- Resources
 - All legacy settings, Dynamics 365 App for Outlook

Teams collaboration and chat

Dynamics 365

SP

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For the best experience viewing this content, open it in a specific application.

Choose an app

Microsoft Teams collaboration and chat

Seamlessly collaborate with Dynamics 365 team members.

Turn on the linking of Dynamics 365 records to Microsoft Teams channels

Allows pinning of records and views in the Dynamics 365 model-driven app to Teams channels as well as integration of Dynamics 365 and Teams documents. [Learn more](#)

Turn on Enhanced Microsoft Teams Integration

Allows pinning of records and views to a Teams channel directly from Dynamics 365 and suggests members to be added. Requires tenant admin permissions. [Learn more](#)

Turn on Confidential Labels

Create private Teams and add sensitivity/confidentiality labels in the Enhanced Microsoft Teams Integration.

Yes

Yes

No

Turn on Microsoft Teams chats inside Dynamics 365 (preview)

Engage in Teams chats with coworkers right from Dynamics 365. [Learn more](#). This feature is in preview and subject to [preview terms](#).

Yes

Link chats to Dynamics 365 records

The user can link chats to different record types. Select the areas where you'd like to turn on linked chats. [Learn more](#)

Project

...

Competitor

...

Lead

...

Teams collaboration – Record settings

Dynamics 365

ⓘ

For the best experience viewing this content, open it in a specific application.

Turn on Confidential Labels

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Link chats to Dynamics 365 records

The user can link chats to different record types. Select the areas where you'd like to turn on linked chats. [Learn more](#)

Project

...

Competitor

...

Lead

...

Email

...

Account

...

Knowledge Article

...

Quote

...

Order

...

Invoice

...

Case

...

Project settings

×

Update settings for chats related to record types. [Learn more](#)

Link Chat

Join chat ⓘ ☒ On

Auto-naming ⓘ ☒ On

Unlink chats

Record owner can unlink ⓘ ☐ Off

Recent chat linker can unlink ⓘ ☐ Off

Provide context for new linked chats

Introduction message ⓘ ☒ On

Message view ⓘ

All Active Projects

🔍

Suggest contacts

Rules-based suggested contacts ⓘ ☐ Off

Save

Cancel

Demo – Teams integration

Teams collaboration – Chats

The screenshot displays the Dynamics 365 Project Operations interface. The top navigation bar includes the Dynamics 365 logo and the 'Project Operations' title. The left sidebar contains navigation options: Home, Recent, Pinned, My Work, Dashboards, Time Entries, Expenses, Approvals, Material Usage, Projects, Schedule Board, Resource Utilization, Resources, and Roles. The main content area shows the 'Demo Project - Adatum' project details, including a timeline with stages: New, Quote, Plan (5 D), and Deliver. The project is currently in the 'Plan' stage. The right sidebar shows the 'Teams chats (Preview)' section, which lists chats linked to the project. A chat titled 'Demo Project - Adatum' is highlighted, showing a message from Martin Walker: 'You: Please check the contract details on this ...'. A 'New linked chat' button is visible below the chat list. A chat window is overlaid on the main content area, showing the chat history and a message from Satish Panwar: 'Please check the contract details on this project'. The chat window also includes a text input field for sending new messages.

Dynamics 365 | Project Operations

Demo Project - Adatum - Saved

Project

7/12/2022 5:00 AM Due Date | \$36,003.00 Estimated Labor Cost | 38.99 Cost Consumption % | 35.95 Progress %

Project Stages Active for 5 days

New Quote Plan (5 D) Deliver

General

Project ID * P-001084-T

Name * Demo Project - Adatum

Description ---

Owning Company * USPM

Customer Adatum Corporation

Calendar template * Default Work Template

Schedule Mode * Fixed effort

Currency * US Dollar

Contracting Unit * Contoso Robotics US

Project manager * Satish Panwar

Estimates

Estimated Start Date 7/4/2022

Finish Date 7/12/2022

Effort (Hours)

Estimated Labor Cost

Estimated Expense Cost

Estimated Material Cost

Estimated Total Cost

Teams chats (Preview)

Chat Channels

Chats linked to Demo Project - Adatum

Demo Project - Adatum 7/19

You: Please check the contract details on this ...

New linked chat

Other chats

Demo Project - Adatum

2

Satish Panwar added Martin Walker to the chat.

Satish Panwar changed the group name to Demo Project - Adatum.

Yesterday 5:37 PM

Please check the contract details on this project

Type a new message

Teams collaboration – Channel

The screenshot displays the Microsoft Teams interface for a project channel named "Demo Project - Adatum 1". The left sidebar shows the "Teams" section with a list of teams, including "Product R&D", "General", "Demo price", "Demo Project - Adatum 1" (selected), "MWTestProject", "Sales and Inception demo", and "ProjOps P_Crew". The main content area shows the project details for "Demo Project - Adatum 1".

Project Stages: The project is currently in the "Plan (5 D)" stage, which is highlighted with a red circle. The stages are: New, Quote, Plan (5 D), Deliver, Complete, and Close. The "Plan (5 D)" stage is active for 5 days.

Summary: The summary section provides key project information:

- Project ID: P-001084-T
- Name: Demo Project - Adatum
- Description: ---
- Owning Company: USPM
- Customer: Adatum Corporation
- Calendar template: Default Work Template
- Schedule Mode: Fixed effort
- Currency: US Dollar
- Contracting Unit: Contoso Robotics US
- Project manager: Satish Panwar

Estimates: The estimates section shows the following data:

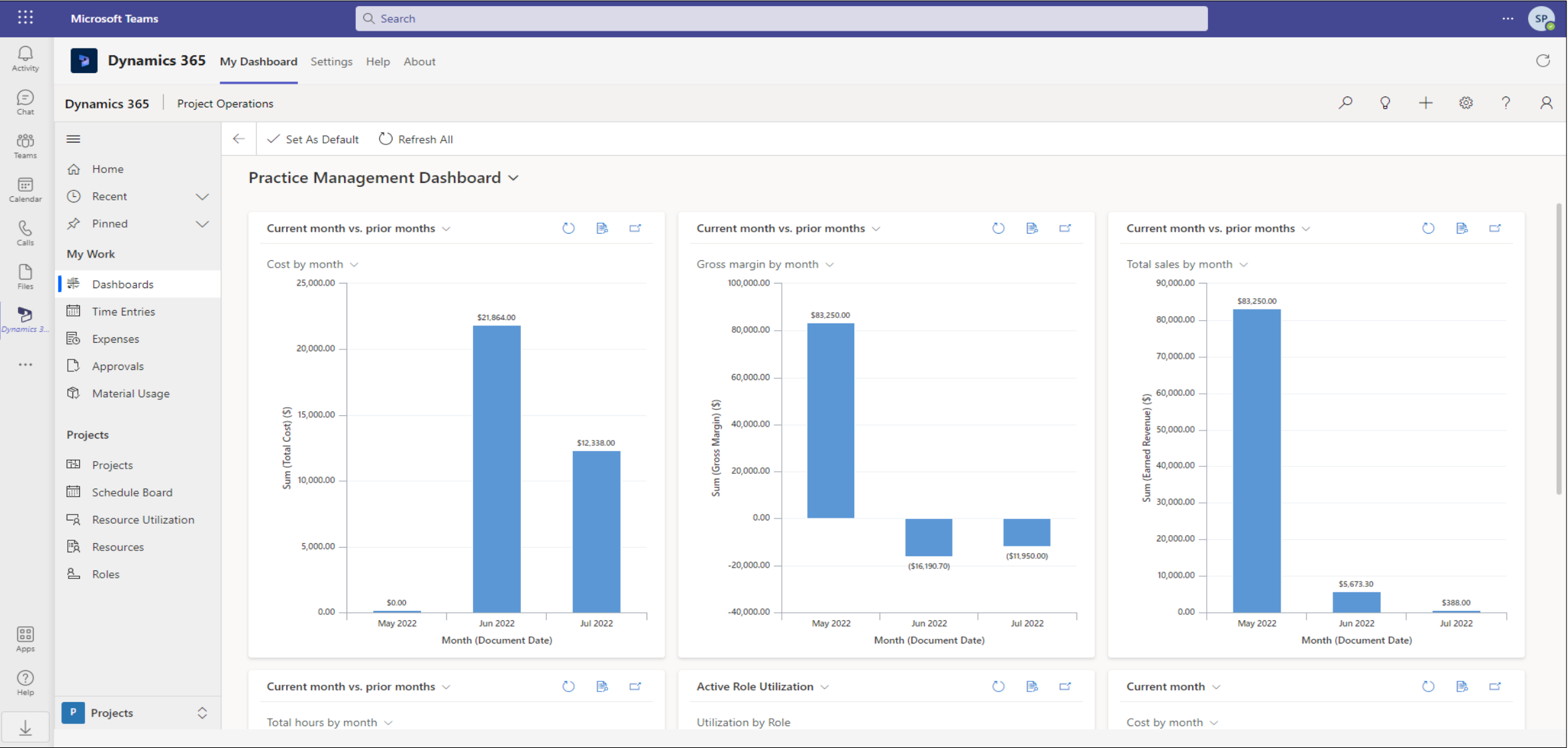
Field	Value
Estimated Start Date	7/4/2022
Finish Date	7/12/2022
Effort (Hours)	119.00
Estimated Labor Cost	\$36,003.00
Estimated Expense Cost	\$2,000.00
Estimated Material Cost	\$0.00
Estimated Total Cost	\$38,003.00

Actuals: The actuals section shows the following data:

Field	Value
Actual Start	---
Actual Finish	---
Actual Labor Cost	\$13,790.40
Actual Expense Cost	\$0.00
Actual Material Cost	\$0.00
Actual Total Cost	\$13,790.40
Effort Completed (Hours)	40.80

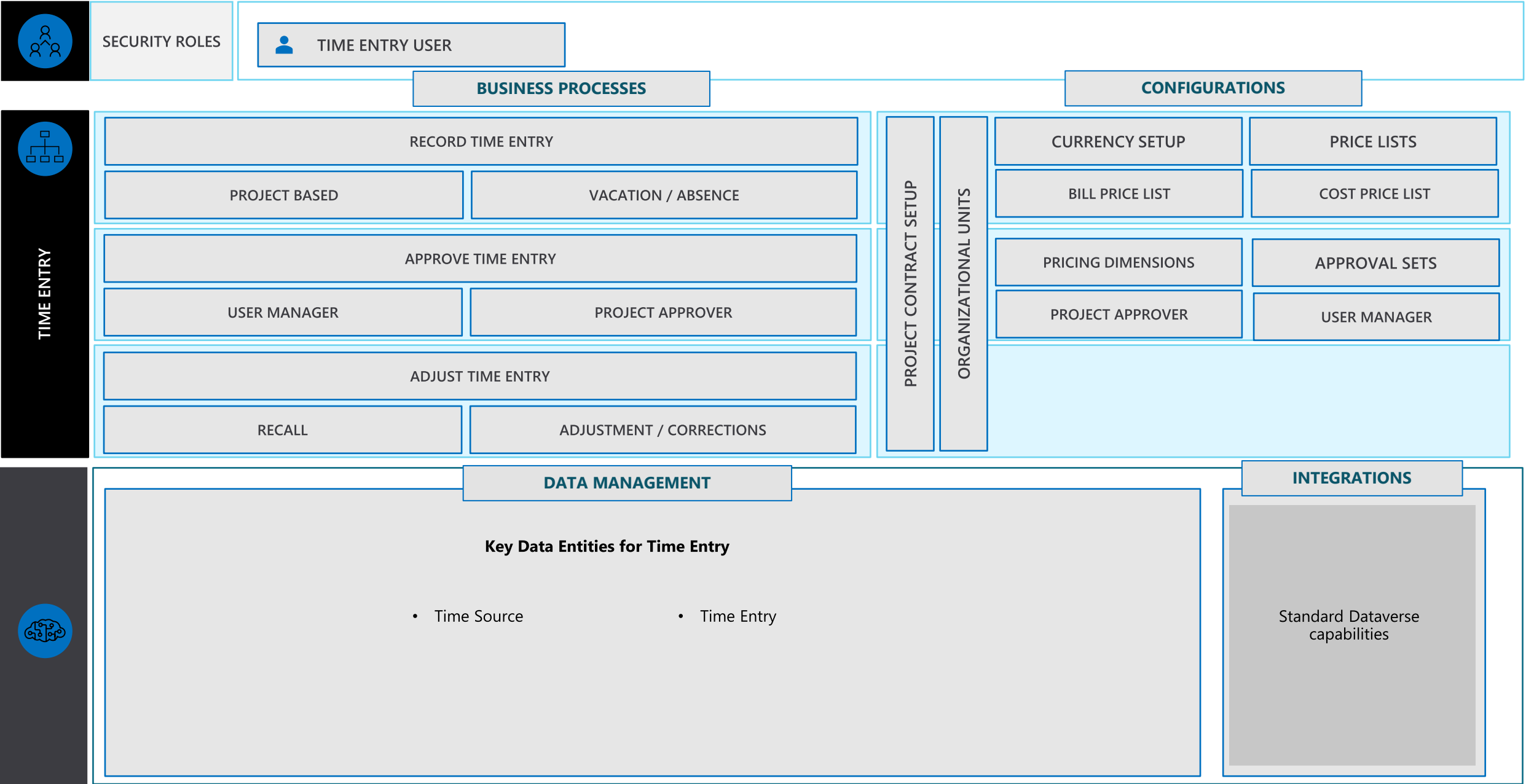
The top of the interface includes a search bar and a "Meet" button. The bottom of the interface shows a "Join or create a team" button.

Project Operations within Teams

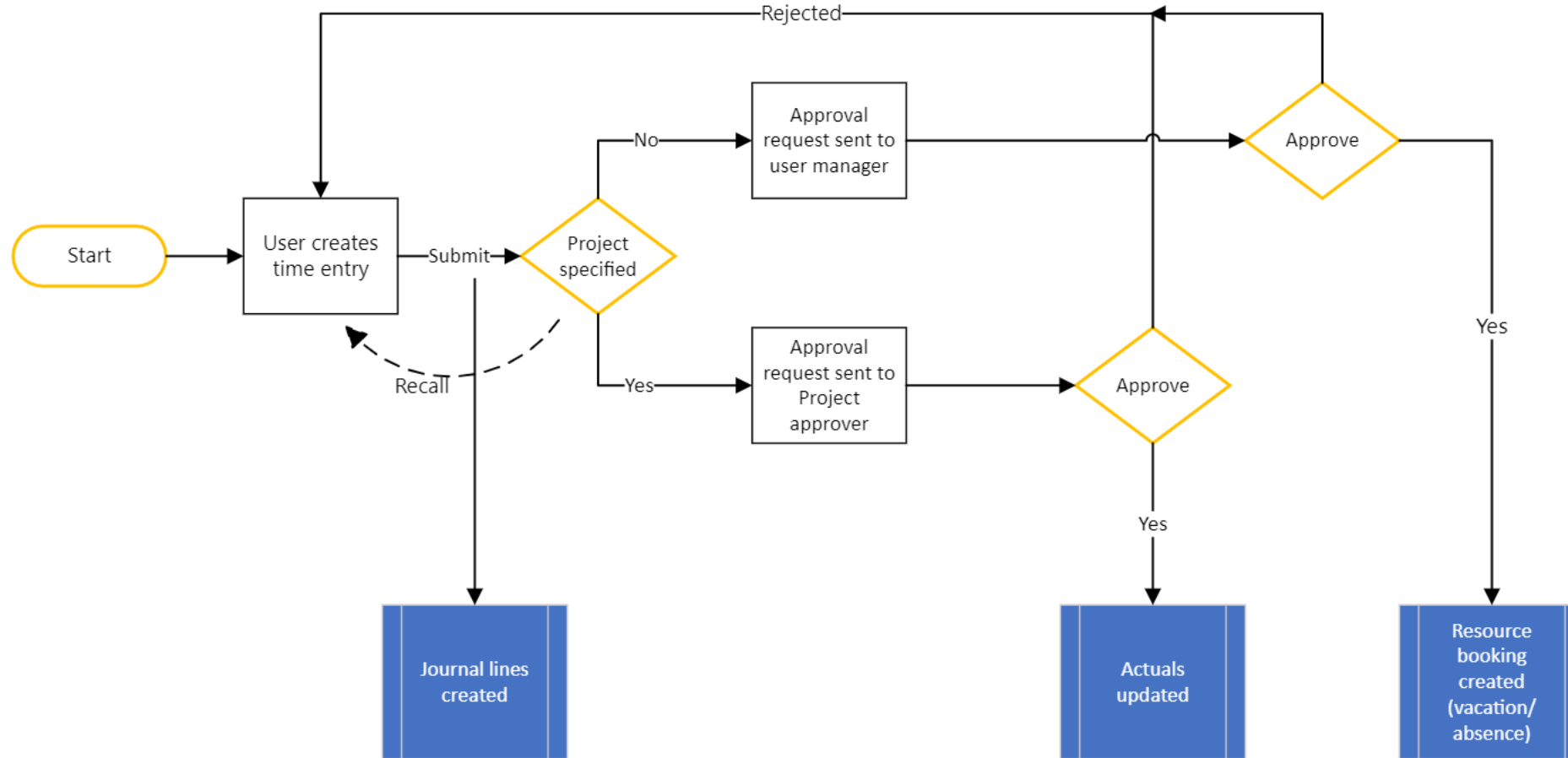


Time Entry

Time Entry – Process Catalog

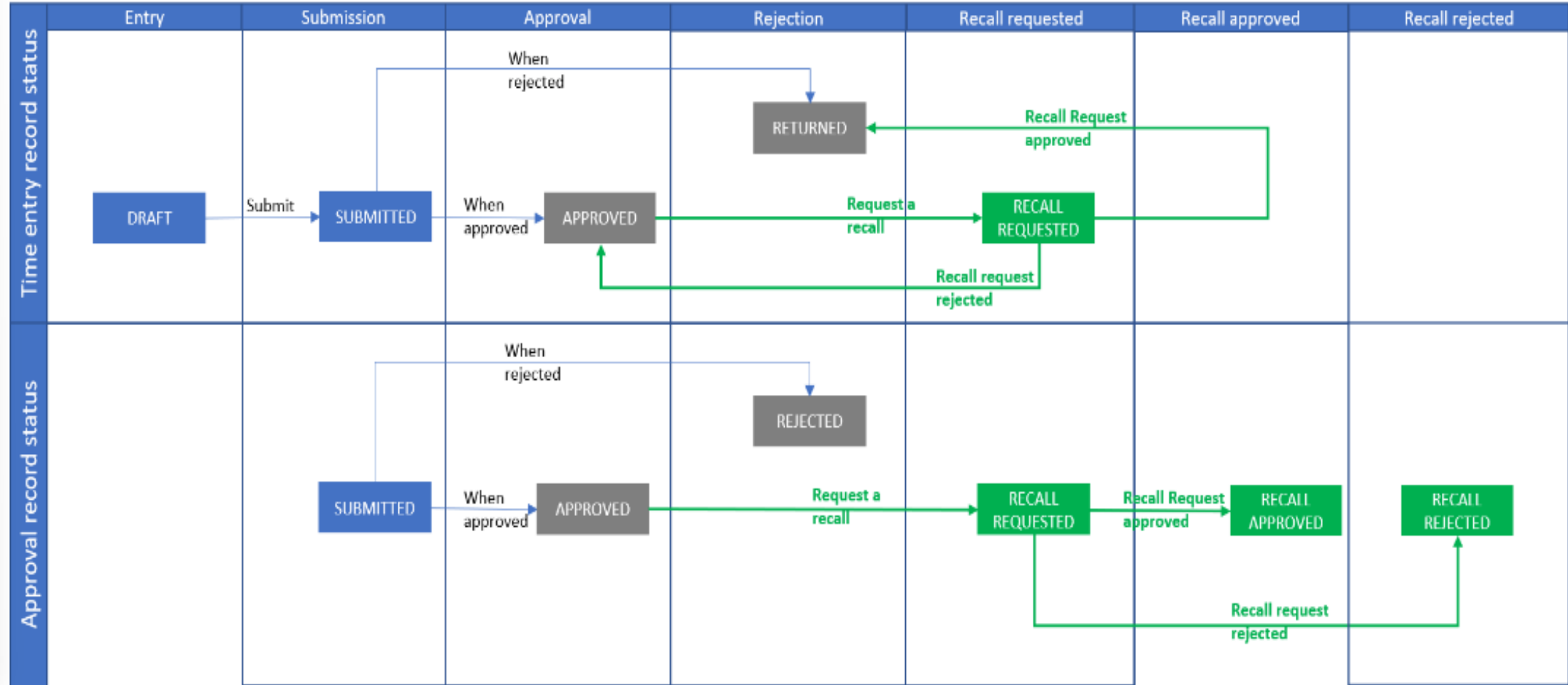


Time Entry Flow



Time Entry States

Initial states Approval states Recall states



Time Entry

Dynamics 365 | Project Operations

My Weekly Time Entries*

Edit columns Edit filters Search this view

+ New Copy row Edit row Submit Recall Delete Refresh Copy week Import

Time Source	Project	Project Task	Role	Resource Work...	Resource Work...	Type	Entry Status	Sun 7/17	Mon 7/18	Tue 7/19	Wed 7/20	Thu 7/21	Fri 7/22	Sat 7/23	Total
Project Service				Local	Regular	Vacation	Draft				24.00				24.00
Project Service	Demo Project - Adatum		Consulting Lead	Local	Regular	Work	Approved		24.00	0.10		0.10	0.10	0.10	24.40
Project Service	Demo Project - Adatum		Consulting Lead	Local	Regular	Work	Approved			0.20		0.20	0.20	0.20	0.80
Project Service	Demo Project - Adatum		Consulting Lead	Local	Regular	Work	Approved			0.25		0.25	0.25	0.25	1.00
Project Service	Demo Project - Adatum		Consulting Lead	Local	Regular	Work	Approved			0.20		0.20	0.20	0.20	0.80
Project Service	Demo Project - Adatum		Consulting Lead	Local	Regular	Work	Approved			0.20		0.20	0.20	0.20	0.80
Project Service	Demo Project - Adatum		Consulting Lead	Local	Regular	Work	Approved			0.20		0.20	0.20	0.20	0.80
Project Service	Demo Project - Adatum		Consulting Lead	Local	Regular	Work	Approved			0.20		0.20	3.50	0.20	4.10
Project Service	Demo Project - Adatum		Team Member	Local	Regular	Work	Returned					1.00			1.00
Project Service	Demo Project - Adatum		Consulting Lead	Local	Regular	Work	Draft					0.10			0.10
Project Service	Demo Project - Adatum		Consulting Lead	Local	Regular	Work	Draft					0.10			0.10
Project Service	Demo Project - Adatum	Task 1	Consulting Lead	Local	Regular	Work	Approved			1.50					1.50
Project Service	Demo Time Entry Actua...		Consulting Lead	Local	Regular	Work	Approved						4.00		4.00
								0.00	24.00	2.85	24.00	2.55	8.65	1.35	63.40

Demo – Time Entry processes

Extending Time Entry

- Time entry status (Read only vs Edit)
- Custom validation rule
 - Client side business rules
 - Server side plug-in validation
- Copy time entry columns view
- TESA (Time, Expense, Status and Approval) solution

Approval Sets

Approval Sets

Dynamics 365

Project Operations

Save

Save & Close

Delete

Refresh

Check Access

Assign

Share

Email a Link

Flow

Home

Recent

Pinned

My Work

Dashboards

Time Entries

Expenses

Approvals

Material Usage

Projects

Projects

Schedule Board

Resource Utilization

Resources

Roles

Projects

Approval Set - Saved

Approval Set

General

Logs

Related

Name

Approval Set

Owner

Satish Panwar

Project

Demo Project - Adatum

Entry Type

Time

Action Type

Approve

Target Status

Rejected

Approver

Satish Panwar

Status Reason

Queued

Life Time

3

System Job Id

Created On

7/19/2022

12:18 AM

Pending Approvals

Refresh

Flow

Run Report

Excel Templates

	Project	Date	Record Stage	Expense Entry	Time Entry	Reference mat...	Submitted By	Resource	Resource Role	Billing Type	Billable Quant...	Sales Price	External Com...
	Demo Project...	7/21/2022	Recall Requested				Satish Panwar	Satish Panwar	Consulting Le...	Not Available	0.00	\$0.00	
	Demo Project...	7/19/2022	Recall Requested				Satish Panwar	Satish Panwar	Consulting Le...	Not Available	0.00	\$0.00	
	Demo Project...	7/22/2022	Recall Requested				Satish Panwar	Satish Panwar	Consulting Le...	Not Available	0.00	\$0.00	
	Demo Project...	7/23/2022	Recall Requested				Satish Panwar	Satish Panwar	Consulting Le...	Not Available	0.00	\$0.00	
	Demo Project...	7/21/2022	Recall Requested				Satish Panwar	Satish Panwar	Consulting Le...	Not Available	0.00	\$0.00	
	Demo Project...	7/19/2022	Recall Requested				Satish Panwar	Satish Panwar	Consulting Le...	Not Available	0.00	\$0.00	
	Demo Project...	7/22/2022	Recall Requested				Satish Panwar	Satish Panwar	Consulting Le...	Not Available	0.00	\$0.00	
	Demo Project...	7/23/2022	Recall Requested				Satish Panwar	Satish Panwar	Consulting Le...	Not Available	0.00	\$0.00	
	Demo Project...	7/21/2022	Recall Requested				Satish Panwar	Satish Panwar	Consulting Le...	Not Available	0.00	\$0.00	
	Demo Project...	7/19/2022	Recall Requested				Satish Panwar	Satish Panwar	Consulting Le...	Not Available	0.00	\$0.00	
	Demo Project...	7/22/2022	Recall Requested				Satish Panwar	Satish Panwar	Consulting Le...	Not Available	0.00	\$0.00	
	Demo Project...	7/23/2022	Recall Requested				Satish Panwar	Satish Panwar	Consulting Le...	Not Available	0.00	\$0.00	
	Demo Project...	7/21/2022	Recall Requested				Satish Panwar	Satish Panwar	Consulting Le...	Not Available	0.00	\$0.00	

Approval Sets Processing

Microsoft Dynamics 365 for Operations Lab

Power Platform admin center

≡

Home

Environments

Analytics

Resources

Help + support

Data integration

Data (preview)

Policies

Admin centers

Environments > D365rsatlab > Settings

Search for a setting

Product

Behavior, Features, Languages, Privacy + Security

Business

Business closures, Calendar, Connection roles, Currencies

Users + permissions

Application users, Business units, Hierarchy security, License to role mapping

Audit and logs

Audit settings

Audit summary view

Entity and field audit settings

System jobs

Templates

Access team templates, Article templates, Contract templates, Data import templates

Updates

App update settings (Preview)

Approval Sets Processing

System Jobs

Entity: Approval Set
View: All System Jobs

More Actions

☐	System Job T...	System Job Name	Regarding	Status Reason	Owner	Started On ↓
	System Event	Project Service - PostApprovalSetmsdyn_ProcessQueuedApprovalSet	Approval Set	Succeeded	SYSTEM	7/19/2022 12:21 AM
	System Event	Project Service - PostApprovalSetmsdyn_ProcessQueuedApprovalSet	Approval Set	Succeeded	SYSTEM	7/18/2022 10:31 AM
	System Event	Project Service - PostApprovalSetmsdyn_ProcessQueuedApprovalSet	Approval Set	Succeeded	SYSTEM	7/18/2022 8:10 AM
	System Event	Project Service - PostApprovalSetmsdyn_ProcessQueuedApprovalSet	Approval Set	Succeeded	SYSTEM	7/18/2022 7:55 AM
	System Event	Project Service - PostApprovalSetmsdyn_ProcessQueuedApprovalSet	Approval Set	Succeeded	SYSTEM	7/17/2022 5:40 PM
	System Event	Project Service - PostApprovalSetmsdyn_ProcessQueuedApprovalSet	Approval Set	Succeeded	SYSTEM	7/17/2022 5:35 PM
☐	System Event	Project Service - PostApprovalSetmsdyn_ProcessQueuedApprovalSet	Approval Set	Succeeded	SYSTEM	6/29/2022 7:17 AM
	System Event	Project Service - PostApprovalSetmsdyn_ProcessQueuedApprovalSet	Approval Set	Succeeded	SYSTEM	6/29/2022 7:17 AM
	System Event	Project Service - PostApprovalSetmsdyn_ProcessQueuedApprovalSet	Approval Set	Succeeded	SYSTEM	6/22/2022 5:24 AM
	System Event	Project Service - PostApprovalSetmsdyn_ProcessQueuedApprovalSet	Approval Set	Succeeded	SYSTEM	6/22/2022 5:19 AM
	System Event	Project Service - PostApprovalSetmsdyn_ProcessQueuedApprovalSet	Approval Set	Succeeded	SYSTEM	6/22/2022 5:14 AM
	System Event	Project Service - PostApprovalSetmsdyn_ProcessQueuedApprovalSet	Approval Set	Succeeded	SYSTEM	6/22/2022 4:49 AM
	System Event	Project Service - PostApprovalSetmsdyn_ProcessQueuedApprovalSet	Approval Set	Succeeded	SYSTEM	6/22/2022 4:44 AM
	System Event	Project Service - PostApprovalSetmsdyn_ProcessQueuedApprovalSet	Approval Set	Succeeded	SYSTEM	6/22/2022 1:13 AM
	System Event	Project Service - PostApprovalSetmsdyn_ProcessQueuedApprovalSet	Approval Set	Succeeded	SYSTEM	6/22/2022 1:04 AM

Approval Sets Processing

Microsoft Dynamics 365 for Operations Lab

Power Automate

Search for helpful resources

Environments D365rsatlab

?

SA

EditShareSave AsDeleteRunSend a copySubmit as templateExportProcess insights (preview)AnalyticsTurn offFlow checker

Flows > Project Service - Recurrently Schedule Project Approval Sets

Details

Flow

Project Service - Recurrently Schedule Project Approval Sets

Owner

SA Solutions Architect

Status

On

Created

Sep 30, 03:40 AM

Modified

Jun 27, 04:50 PM

Type

Scheduled

Plan

This flow runs on owner's plan

Edit

28-day run history

All runs

Start	Duration	Status
Jul 19, 12:21 AM (2 min ago)	45 ms	Succeeded
Jul 19, 12:16 AM (7 min ago)	48 ms	Succeeded
Jul 19, 12:11 AM (12 min ago)	00:00:01	Succeeded
Jul 19, 12:06 AM (17 min ago)	49 ms	Succeeded
Jul 19, 12:01 AM (22 min ago)	00:00:02	Succeeded
Jul 18, 11:56 PM (27 min ago)	45 ms	Succeeded
Jul 18, 11:51 PM (32 min ago)	18 ms	Succeeded
Jul 18, 11:46 PM (37 min ago)	47 ms	Succeeded

Connection References

See all

Microsoft Dataver

Owners

Edit

SA SA Solutions Architect

Solutions

Solution NameManaged

Project OperationsYes

Process insights (preview)

Improve your flow

Average duration of your flow

06 ms

Ask a chatbot

Processed Approval Sets

Dynamics 365 | Project Operations

Read-only This record's status: Inactive

Approval Set - Saved

Approval Set

General Logs Related

Name *	Approval Set	Approver	Satish Panwar
Owner *	Satish Panwar	Status Reason	Completed
Project	Demo Project - Adatum	Life Time	2
Entry Type	Time	System Job Id	878d0e6a-3307-ed11-82e4-000d3a1f0e44
Action Type	Approve	Created On	7/19/2022 12:18 AM
Target Status +	Rejected		

Pending Approvals

Project ↑ ▾	Date ▾	Record Stage ▾	Expense Entry ▾	Time Entry ▾	Reference ma... ▾	Submitted By ▾	Resource ▾	Resource Role ▾	Billing Type ▾	Billable Quant... ▾	Sales Price ▾	External Com... ▾
No data available												

0 - 0 of 0 Page 1 →

Actuals

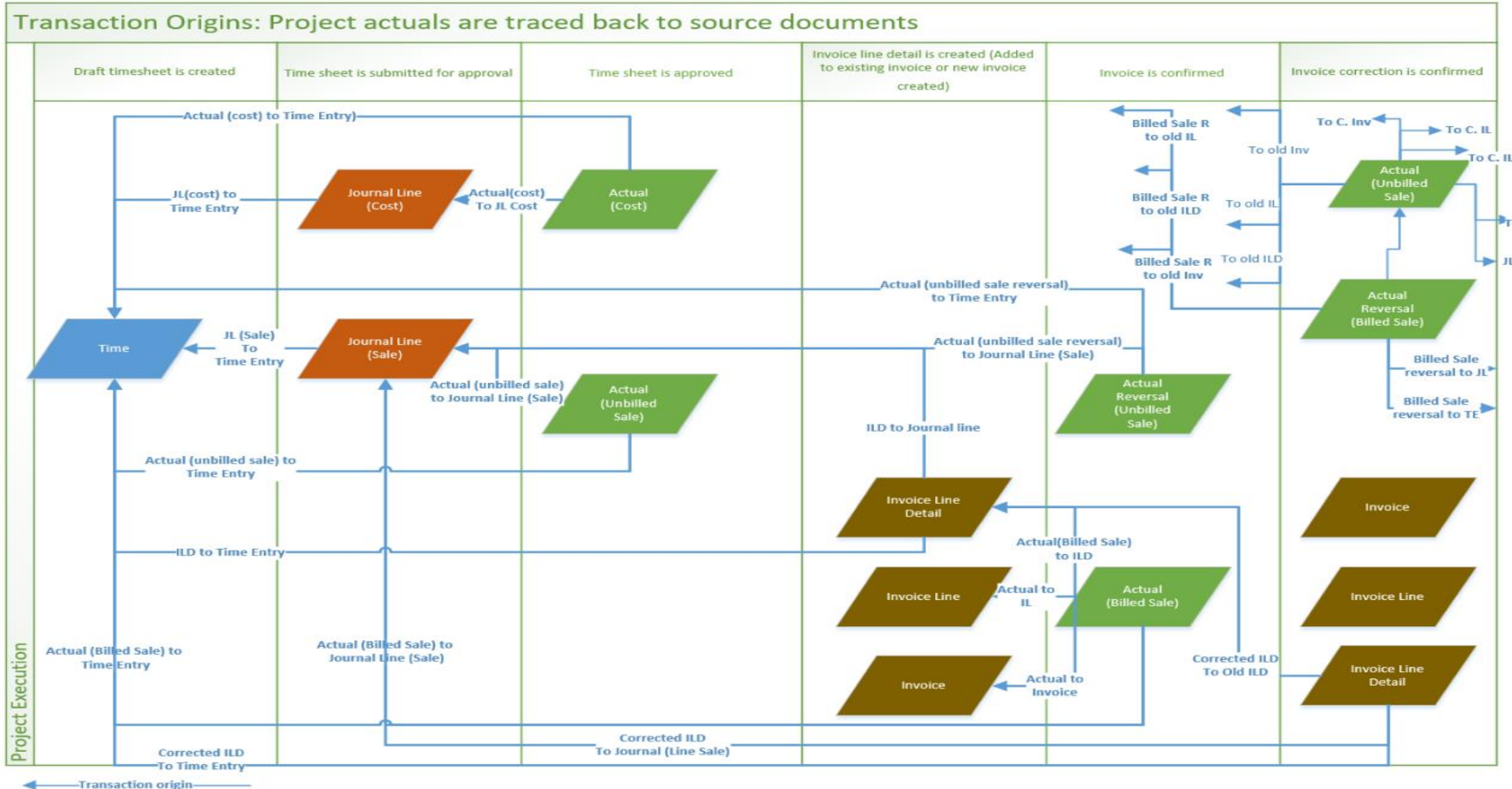
Business Transactions

- Estimation Phase (Financial forecast)
 - Quote line details
 - Contract line details
 - Estimate lines
- Execution Phase (Financial facts)
 - Journal Lines
 - Actuals

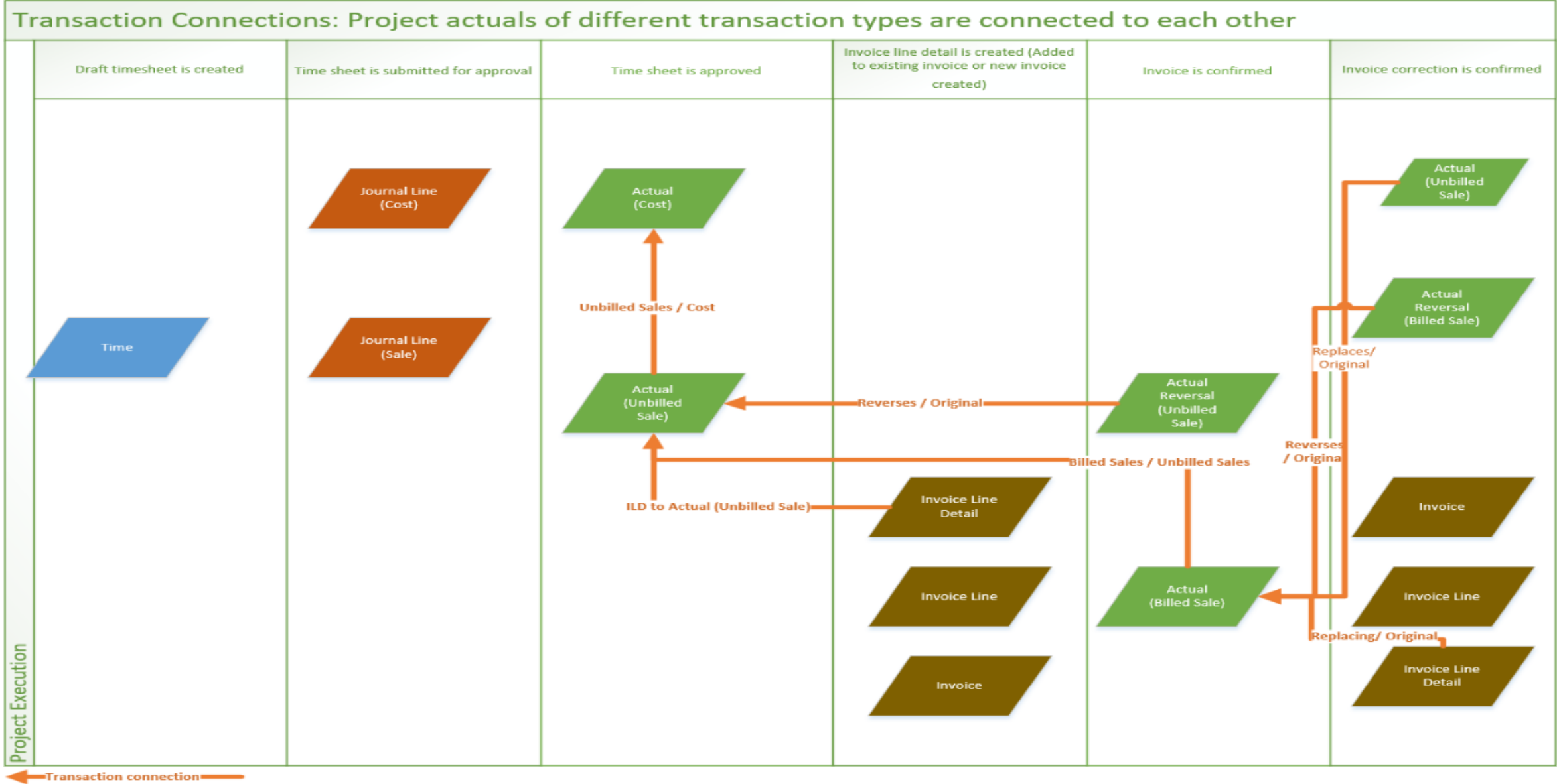
Business Transactions Concepts

- Transaction type
- Transaction class
- Transaction origin
- Transaction connection

Actuals – Transaction Origin



Actuals – Transaction connection



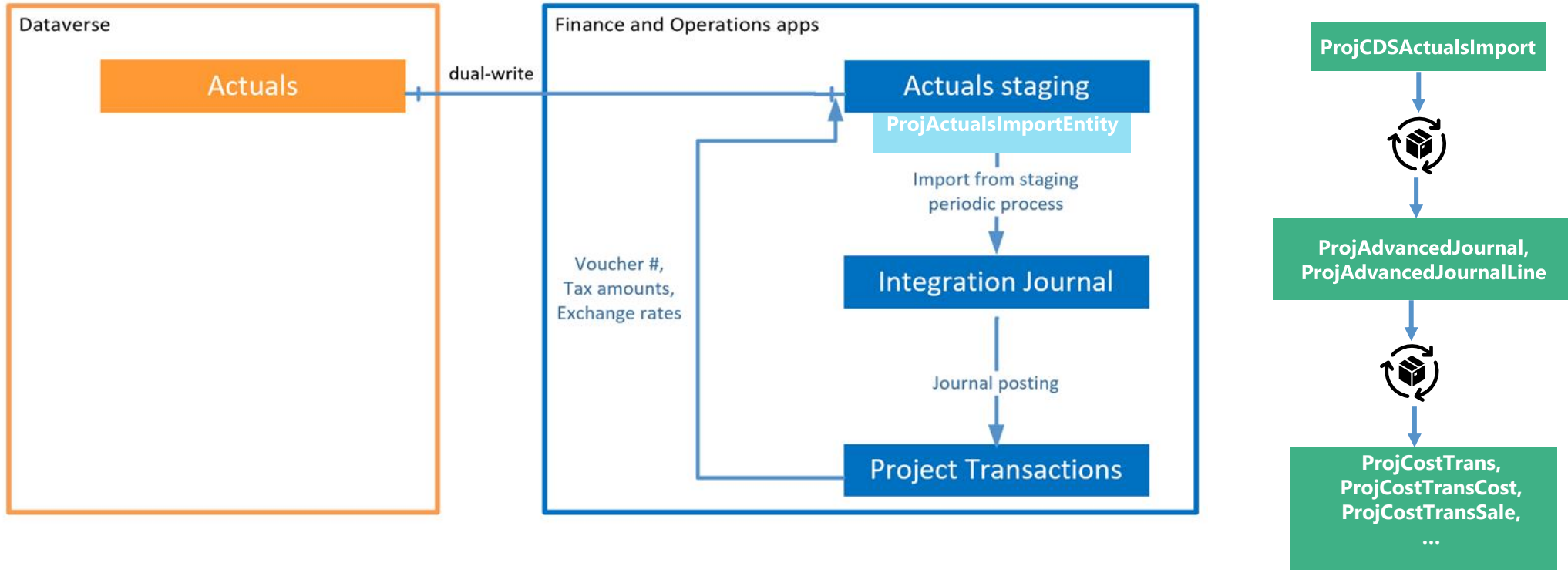
Actuals

Engagement Type	Actual Types
Internal project	• Cost actual
Pre-sales	• Cost actual
Fixed price	• Cost actual • Billed sales actual (Milestone based Invoice)
Time and material	• Cost actual • Unbilled sales actual • Billed sales actual (Invoice)

** Do not edit or delete actuals directly

Data Architecture – Integrated entities

Actuals – Dataverse <-> F&O



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](#)
- [Sales process overview | Microsoft Docs](#)
- [Pricing dimensions overview | Microsoft Docs](#)

Resources – Documentation and Learning

- [Dynamics 365 Project Operations Deployment Options and Scenarios | February 2 & 3, 2022 - Microsoft Dynamics Blog](#)
- [Dynamics 365 Project Operations Demonstration | March 16, 2022 - Microsoft Dynamics Blog](#)
- [Dynamics 365 Project Operations Data Migration | April 14, 2022 - Microsoft Dynamics Blog](#)
- [Extending time entries | Microsoft Docs](#)
- [Documentation](#)
- [Developer home page](#)
- TechTalks* [Upcoming](#) / [Recordings](#)
- YouTube [Dynamics 365](#)
- [Microsoft Learn](#)

Useful links on SLA, Compliance, and Support

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

Q & A



Thank you