projects360 for Project Operations

10.0.39 — Last update: 26 April 2024

HSO | ProServ

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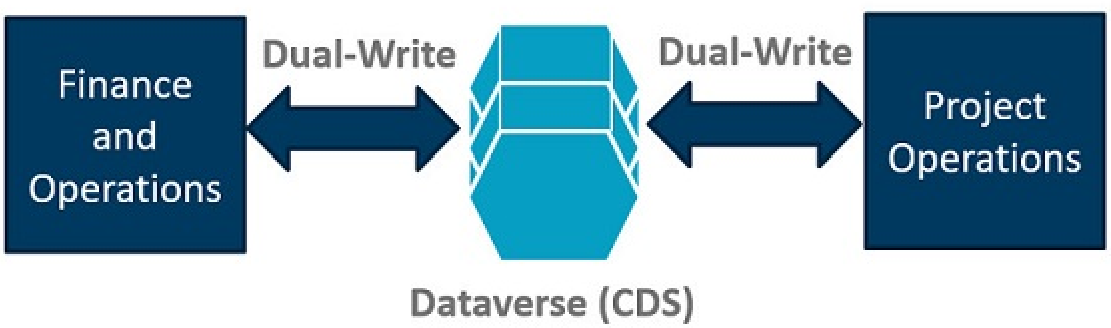
1. Introduction

HSO ProServ projects360 for Project Operations

As part of HSO ProServ's industry strategy for project-driven organizations, we have developed a powerful solution for Microsoft Dynamics 365 CE Project Operations integrated with Dynamics 365 Finance & Operations.

- Combining the best of CE Project Operations to manage Sales, Project planning and Resourcing with the best of our projects360 industry solution for Finance & Operations .

- Using Dual-write and Dataverse Microsoft technologies for a seamless integration as One solution.



- We are able to leverage our projects360 solution with a deep set of extensions to the Microsoft Dynamics 365 Finance and Operations service industries solution providing best-in-class ERP capabilities as well as accelerating implementations of Dynamics 365 while also reducing your cost and risk.

For more information on HSO ProServ projects360 for Microsoft Dynamics 365, please write to us.

projects360 for Project Operations Features Manual

At the top of the page, a Version drop-down is available to select the version you are currently on, and the manual will only reflect features available on that version. On the left of the page, use the Table of contents to select a specific topic you are looking for.

The topic areas included in the Feature Manual include:

- Initial configurations
- Opportunity management
- Contract management

- Project management

There is also a dedicated site for the projects360 ProServ industry solution and projects360 BI Feature Manual.

- projects360 industry solution for Finance & Operations
- projects360 BI

Your Feedback is Welcome!

This feature manual provides detailed information on all the features available in projects360 for Project Operations. It is continuously updated as versions and features change. If you have any suggestions or any feedback pertaining to documentation, existing features, or new feature requests, please either comment on an article or email us.

2. What's new in version 10.0.39

projects360 10.0.39 for Project Operations introduces new features and enhancements such as Effort Allocation and WBS performance enhancements, Convert P4W tasks to WBS Planner tasks, Implemented cell locking for out of range and non-working periods in Effort Allocation, Included edit capabilities to ETC/EAC Management view, Improved performance during Actuals sync, User localization settings in xl360, Enhanced functionality to Move Task dates, Export to Excel button to different spreadsheets.

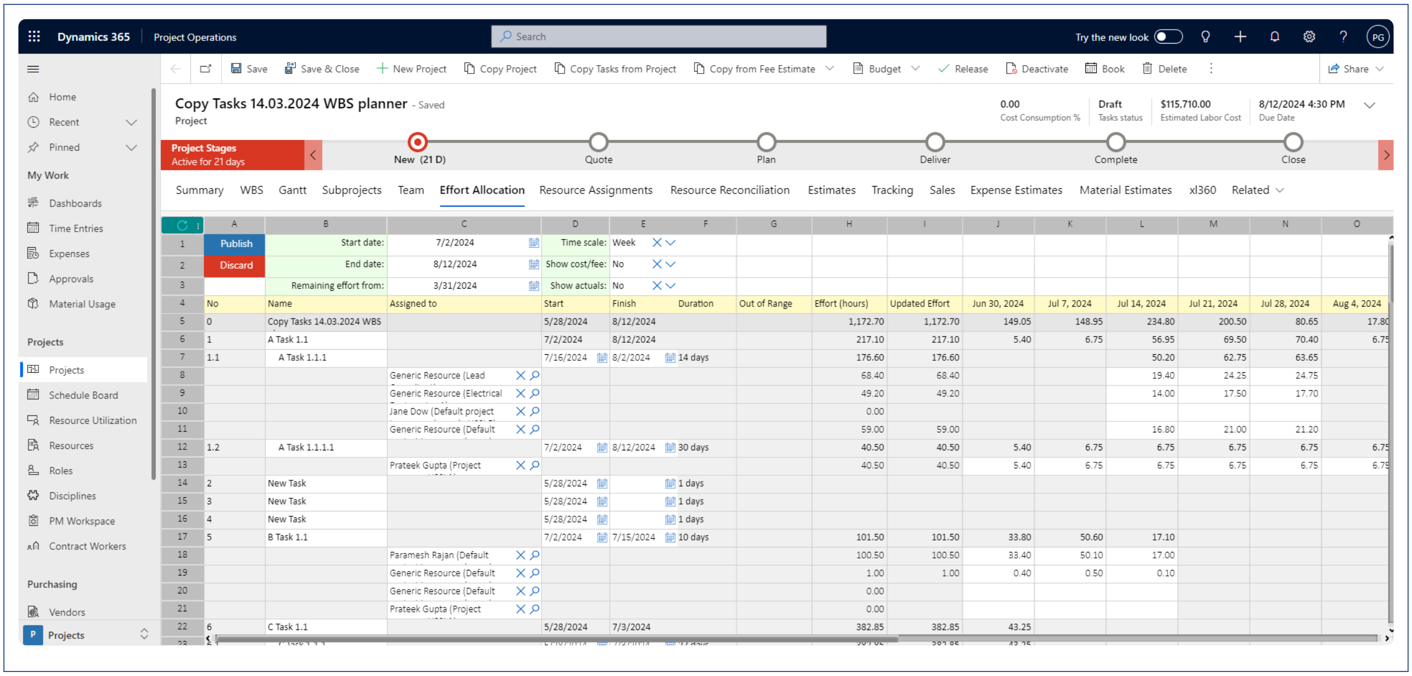
New Features

Effort Allocation and WBS performance enhancements

Performance enhanced by implementing a new JSON structure

The performance of effort allocation has been significantly improved through the implementation of a new JSON format

- The new JSON structure solves the problem of handling large amounts of Project data which earlier followed the traditional data structures approach.
- This involves restructuring the way data is organized and stored, which allows for more efficient handling and processing of information related to effort allocation tasks.
- New JSON structure stores information by year and month efficiently saving and retrieving big amounts of data.
- This new JSON will be used to optimize the performance when updating the Effort Allocation and WBS from front end.
- Copy the project structure from a 'Fee Estimate version' is now optimized as well.
- P4W with 'Effort Allocation' experience using the new JSON structure is also improving performance.



‘Update multiple’ capability enables users to minimize operations in WBS and Effort Allocation

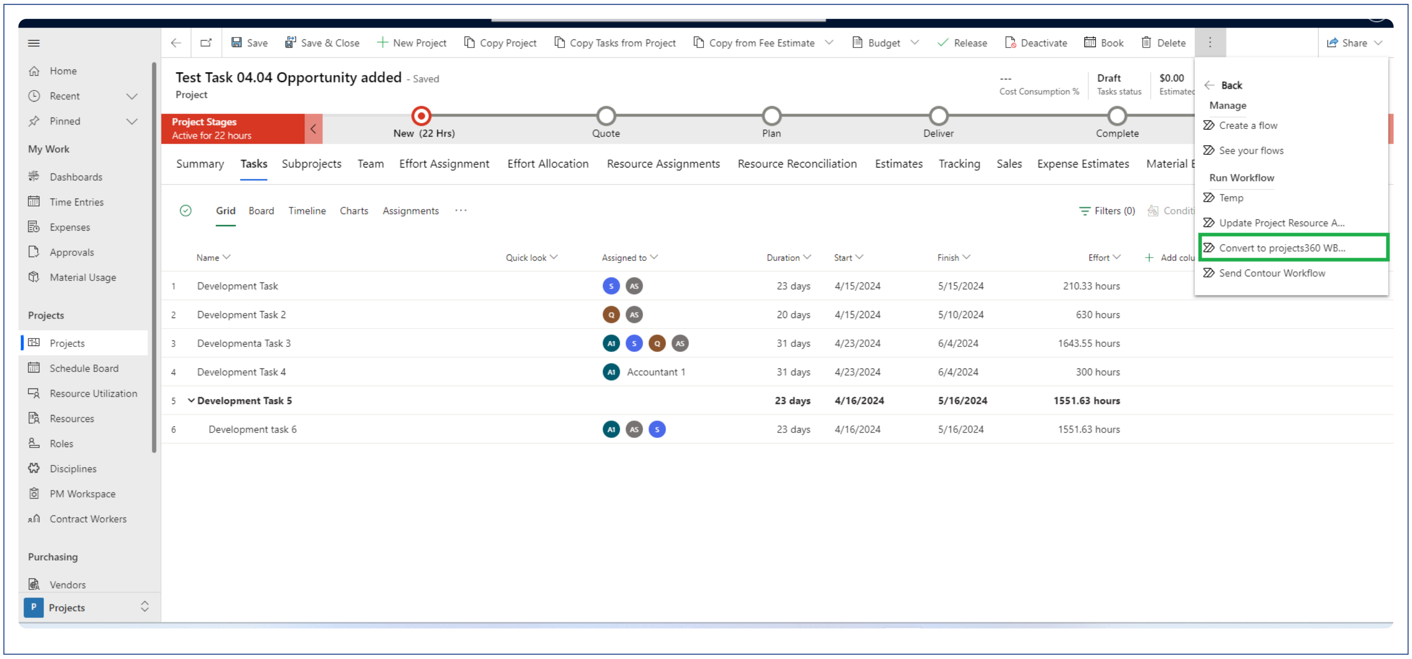
The ‘Update multiple’ capability empowers users to streamline their operations within the WBS and Effort Allocation spreadsheets.

- This will allow xl360 to perform multiple updates or modifications simultaneously in one operation, rather than having to make individual changes as part of different operations.
- Reducing the number of operations also reduces the necessary total time to perform the data modifications. It is especially important when we have multiple users working concurrently in the system.

Convert P4W tasks to WBS Planner tasks

A new workflow called “Convert to Projects360 WBS Planner” has been introduced to convert P4W tasks into WBS Planner tasks.

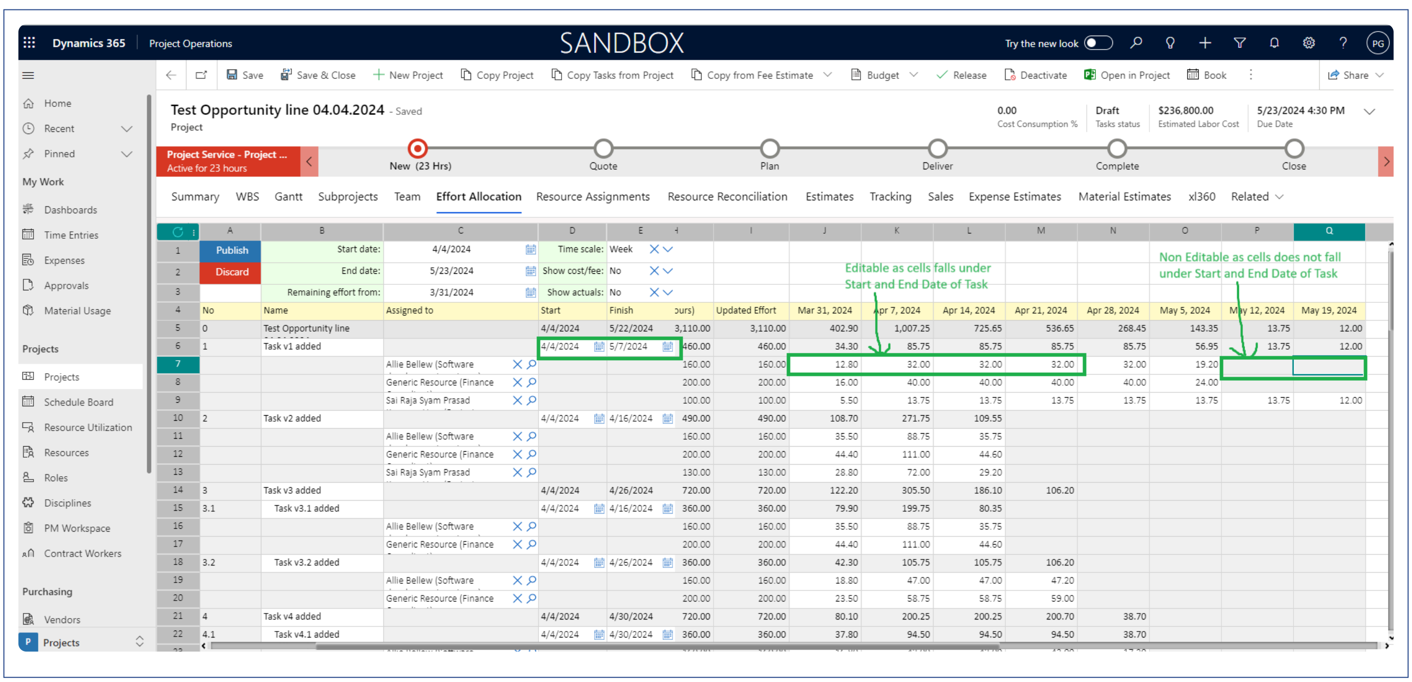
- This feature enables users to instantly convert their project into an externally scheduled project. All tasks, durations, hours, efforts, and Bookable Resources will be directly shown in the WBS Planner project. This saves users from having to recreate the entire process and allows them to utilize the enhanced version of projects360 seamlessly.



Implemented cell locking for out of range and non-working periods in Effort Allocation

Cells are now locked to prevent updating efforts for roles/resources during time periods where Task Start and End Dates do not occur. This precautionary measure aims to minimize human errors.

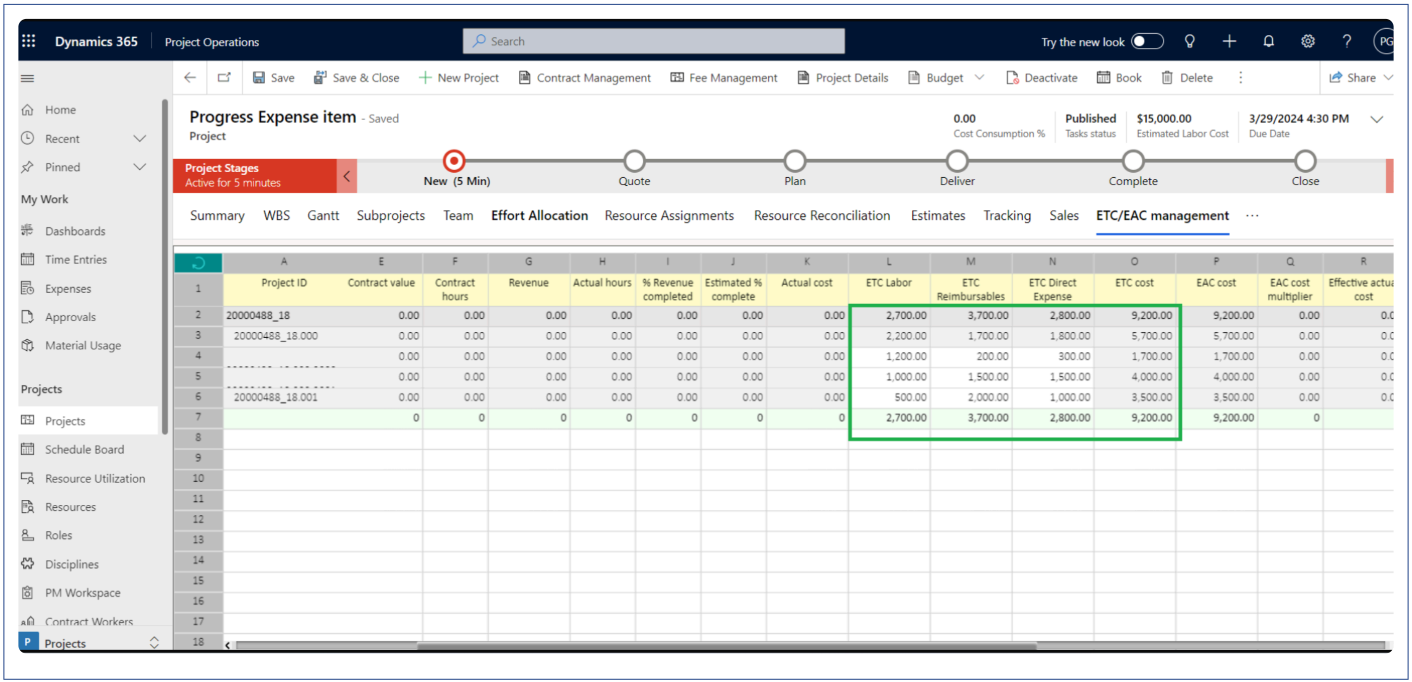
- This feature allows users to make changes only within the designated task period. Any cells outside of this period will be now locked down.
- In addition, non-working periods will be now non-editable as well, ensuring data accuracy.



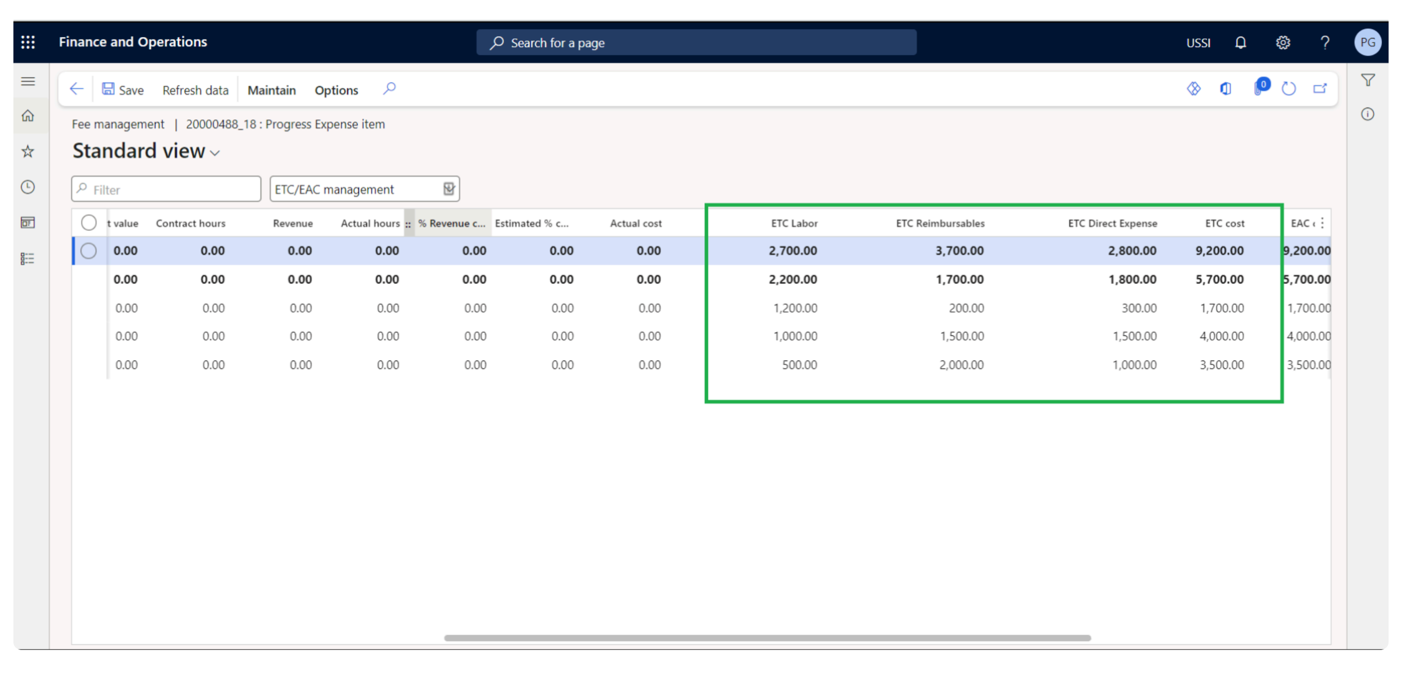
Included editing capabilities to ETC/EAC Management view

The following modifications were made for ‘ETC/EAC management’ tab in Project form.

- Columns/cells related to ETC cost buckets are now editable.



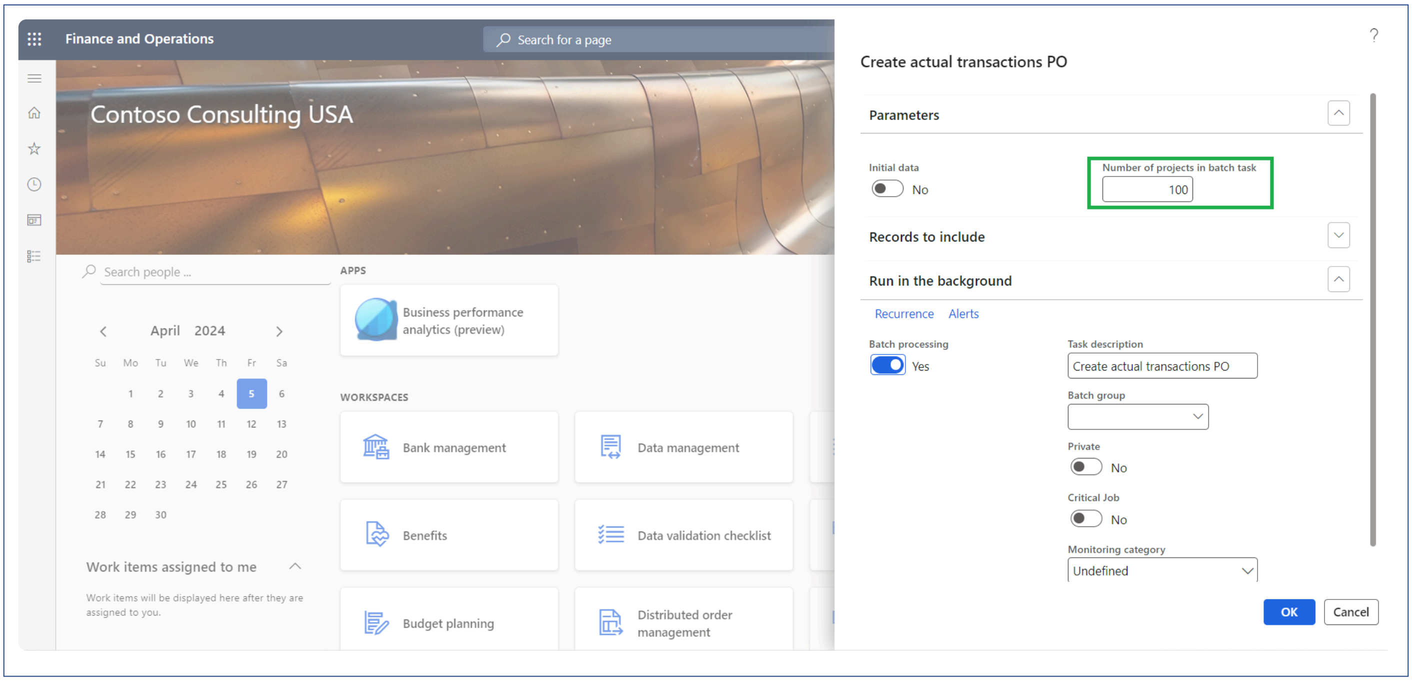
- Data will be synced to Finance and Operations from Project Operations as soon as modifications are made for above editable fields.
- Cost buckets will be automatically updated in F&O through the service connection.



Improved performance during Actuals synchronization from F&O to Project Operations

A new parameter called 'Number of Projects in batch task' is now available from the "Create actual transactions PO" process dialog form in F&O.

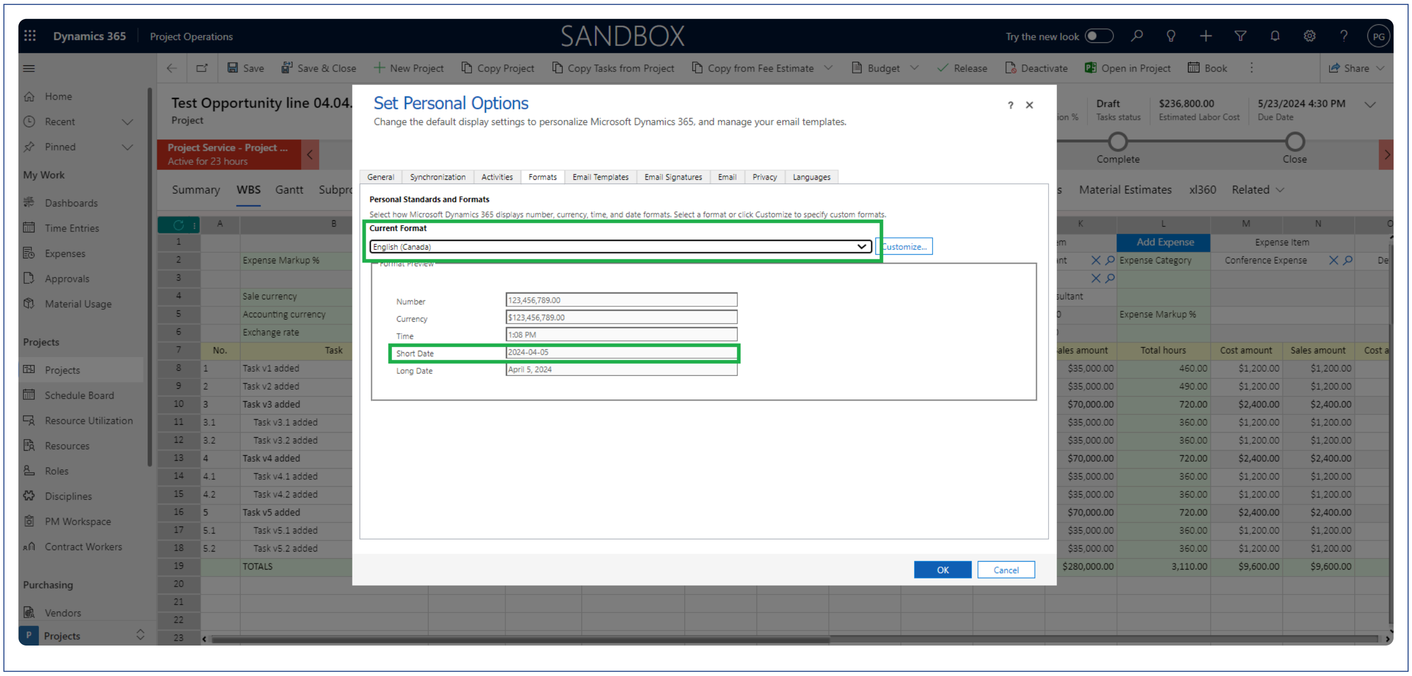
- The improved logic will divide the batch process into several threads.
- Each thread will include the specific number of projects specified in the new parameter.
- By default, the 'Number of Projects in batch task' parameter is set to 100, but users have the ability to adjust this number.



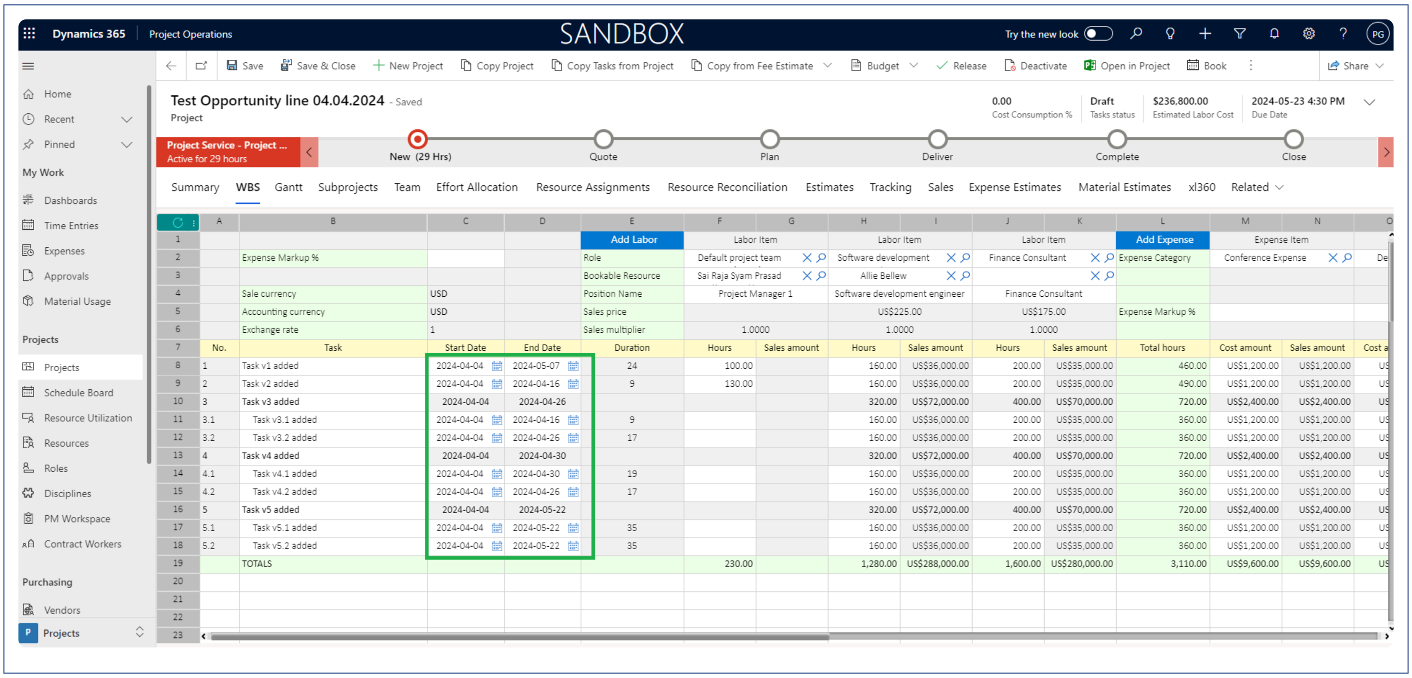
User localization settings are now used in xl360 templates

Changes have been implemented to ensure that the date is visualized and displayed to users based on their localization settings configured in the personalization settings within CRM.

- Selecting a "Current format" in the personalization settings will automatically change how "Short dates" format will be displayed for Task Start and End Date to match your chosen country's format.



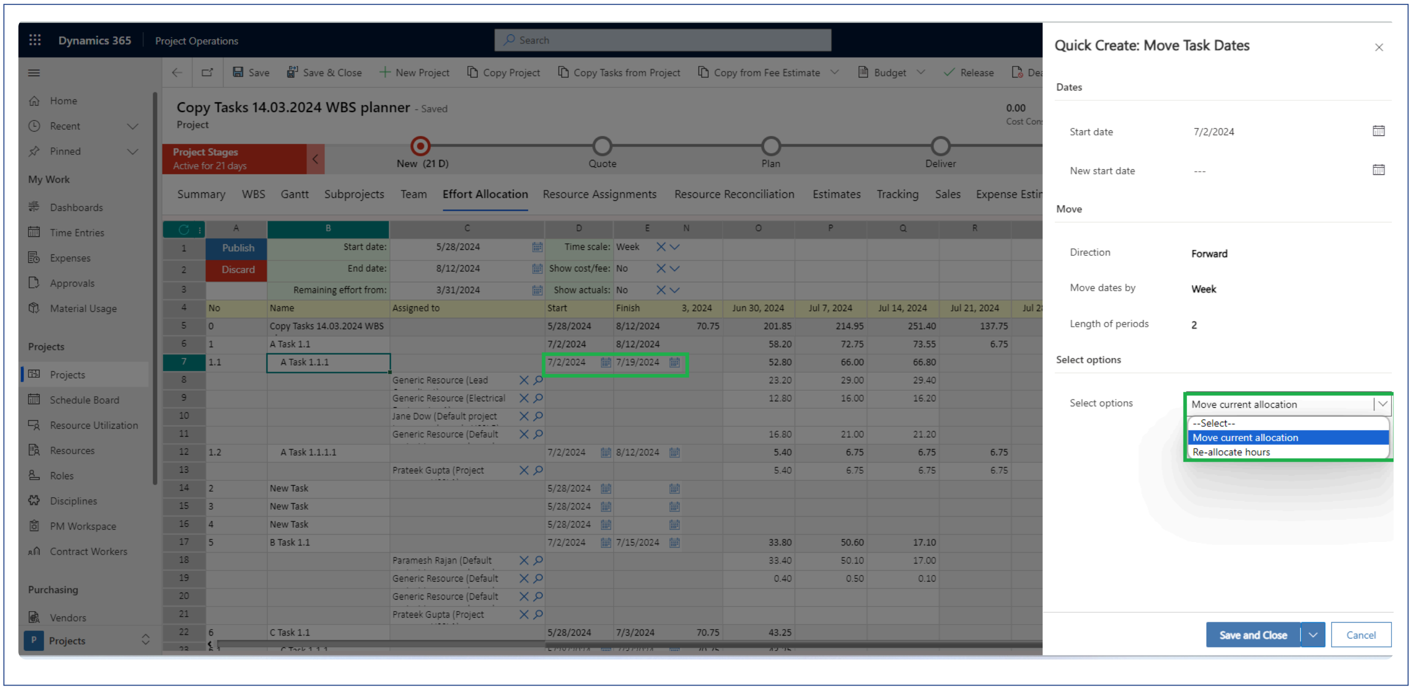
- The WBS Planner, Effort Allocation, and Fee Estimator automatically display task dates in your preferred format based on your location settings. No more confusion about day, month, and year format.



Enhanced functionality to either re-allocate hours or not using the Move Task date feature

The Move Task Dates feature now offers more flexibility when adjusting the tasks dates to move the current allocation forward or backward.

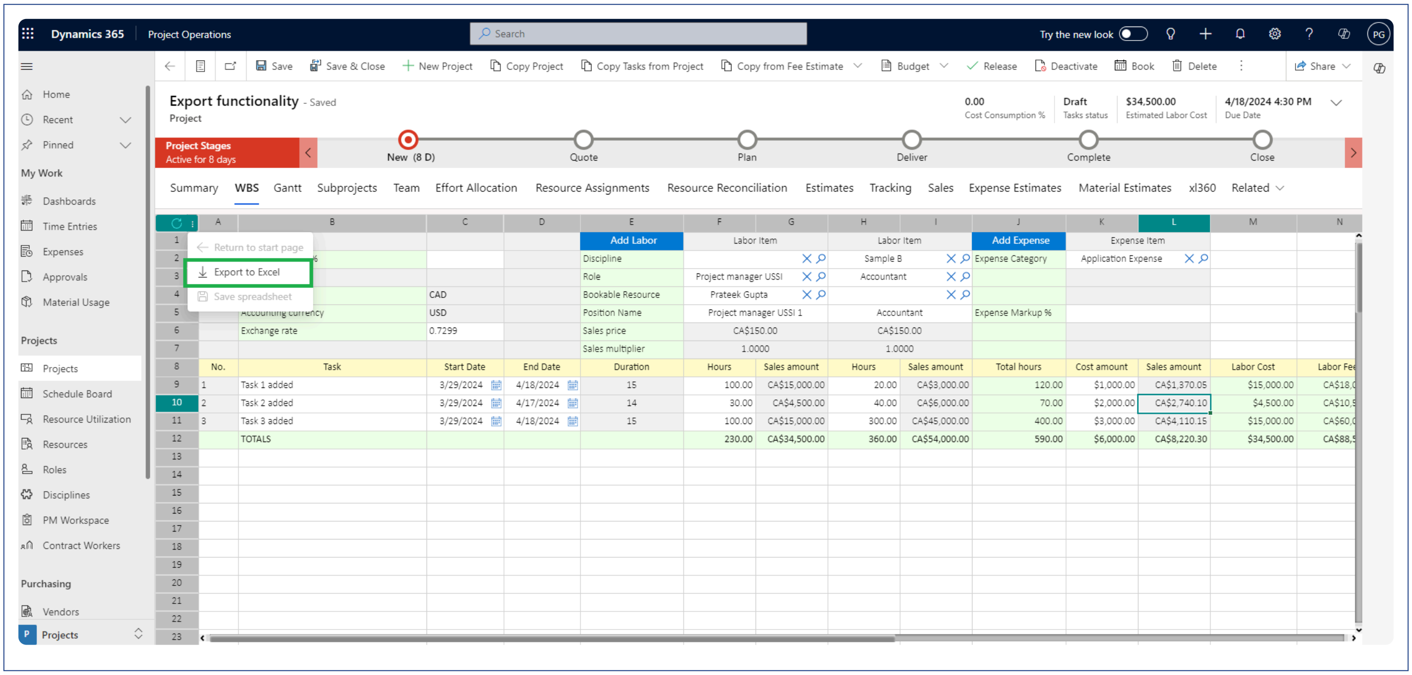
- **Move current allocation** : When you move task dates using the ‘Move Current Allocation’ option, then existing allocated hours for bookable resources will be automatically shifted forward or backward based on the new dates. Any specific allocated hours will be kept instead of recalculated.
- **Re-allocate hours** : When using ‘Re-allocate hours’ option, then effort will be recalculated for each day allocating equally across the new timeframe, disregarding previously allocated hours.



Export to Excel button for WBS planner, Effort Allocation and Fee Estimator

The ‘Export to Excel’ functionality allows users to transfer data from the different xl360 spreadsheets directly into a Microsoft Excel file.

- This new feature is currently available for WBS planner, Effort allocation and Fee Estimator.
- Allows users to export xl360 data in one click from the three dots menu button as shown below.



2.1. What’s new in version 10.0.38

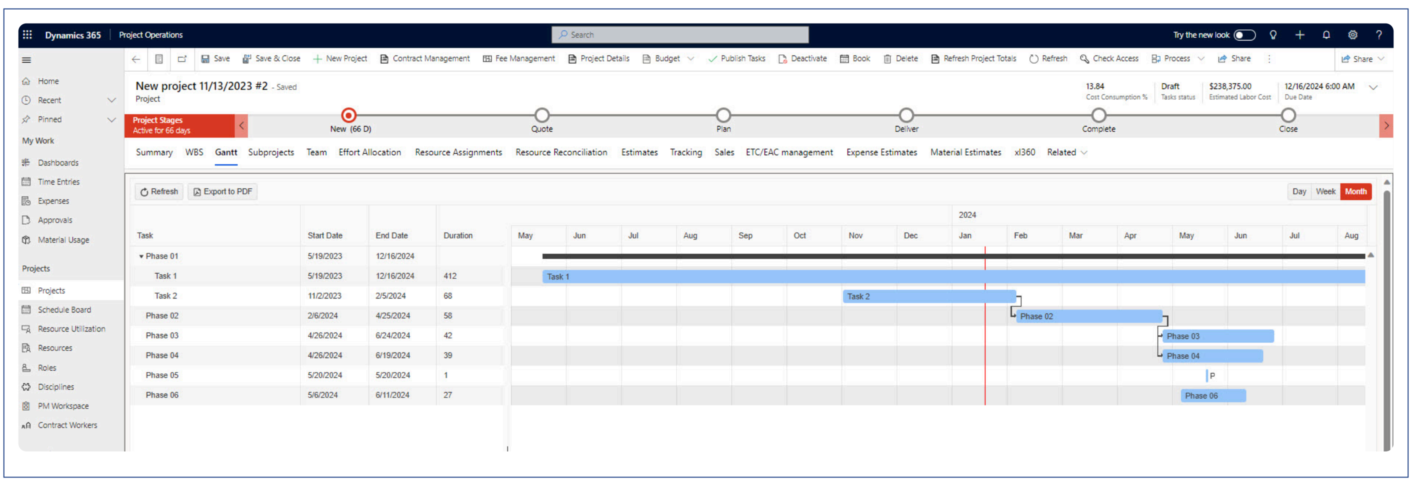
projects360 10.0.38 for Project Operations introduces new features such as Gantt View, WBS dependencies between tasks, Move task dates, Disciplines and ETC/EAC Management.

New Features

Gantt View

A “Gantt View” was added to the product as a graphical representation of the WBS Planner and the Effort Estimator features.

- This view will provide a complete visualization of the project tasks showing Start date, End date, Duration and Dependencies.
- This view allows to use 3 different time scales: Day, Week and Month.
- The Gantt View will be available from Project and Opportunity Line forms if either WBS Planner or Effort Estimator are activated.

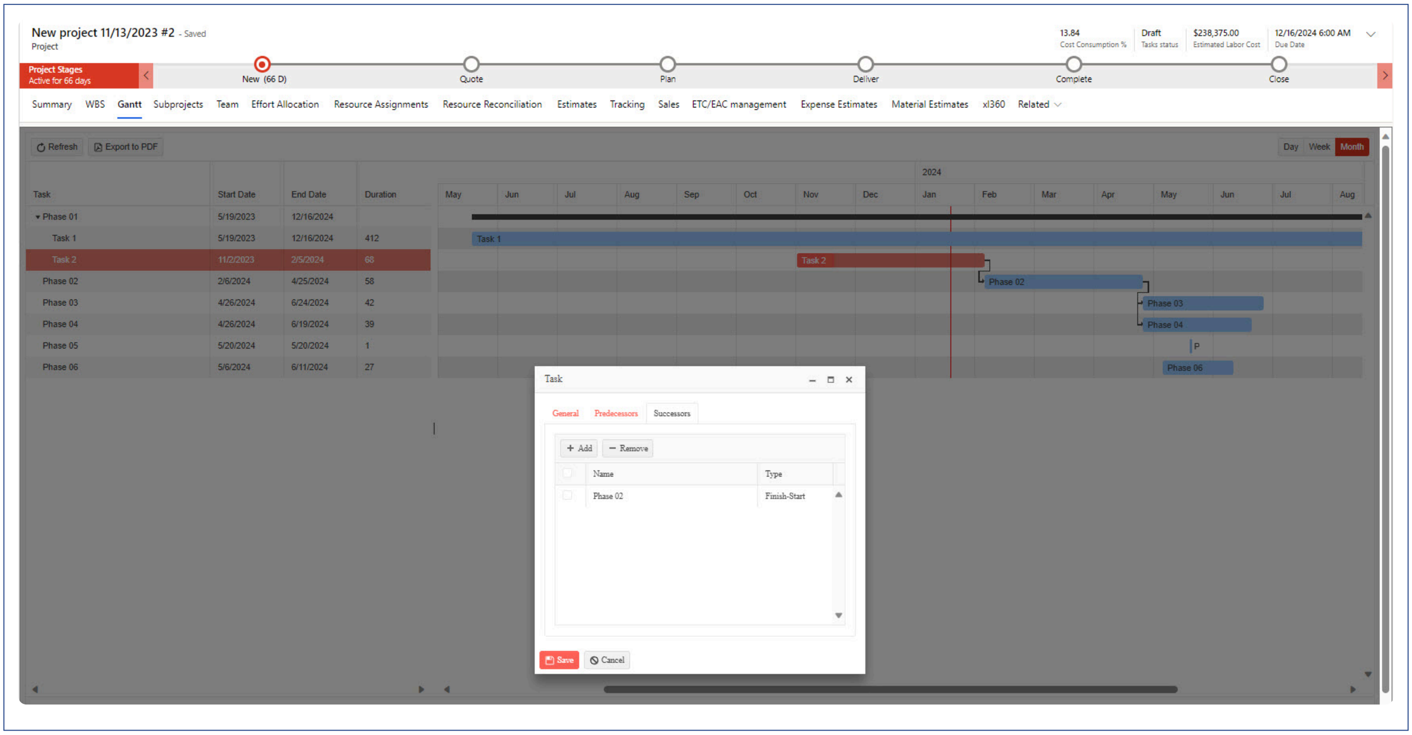


WBS dependencies between tasks

Finish to Start dependencies between Tasks have been added to WBS Planner and Effort Allocation existing features.

- Predecessors and Successors can now be defined from the Gantt View.
- Start Date will be automatically re-calculated for successor tasks when a predecessor task is moved

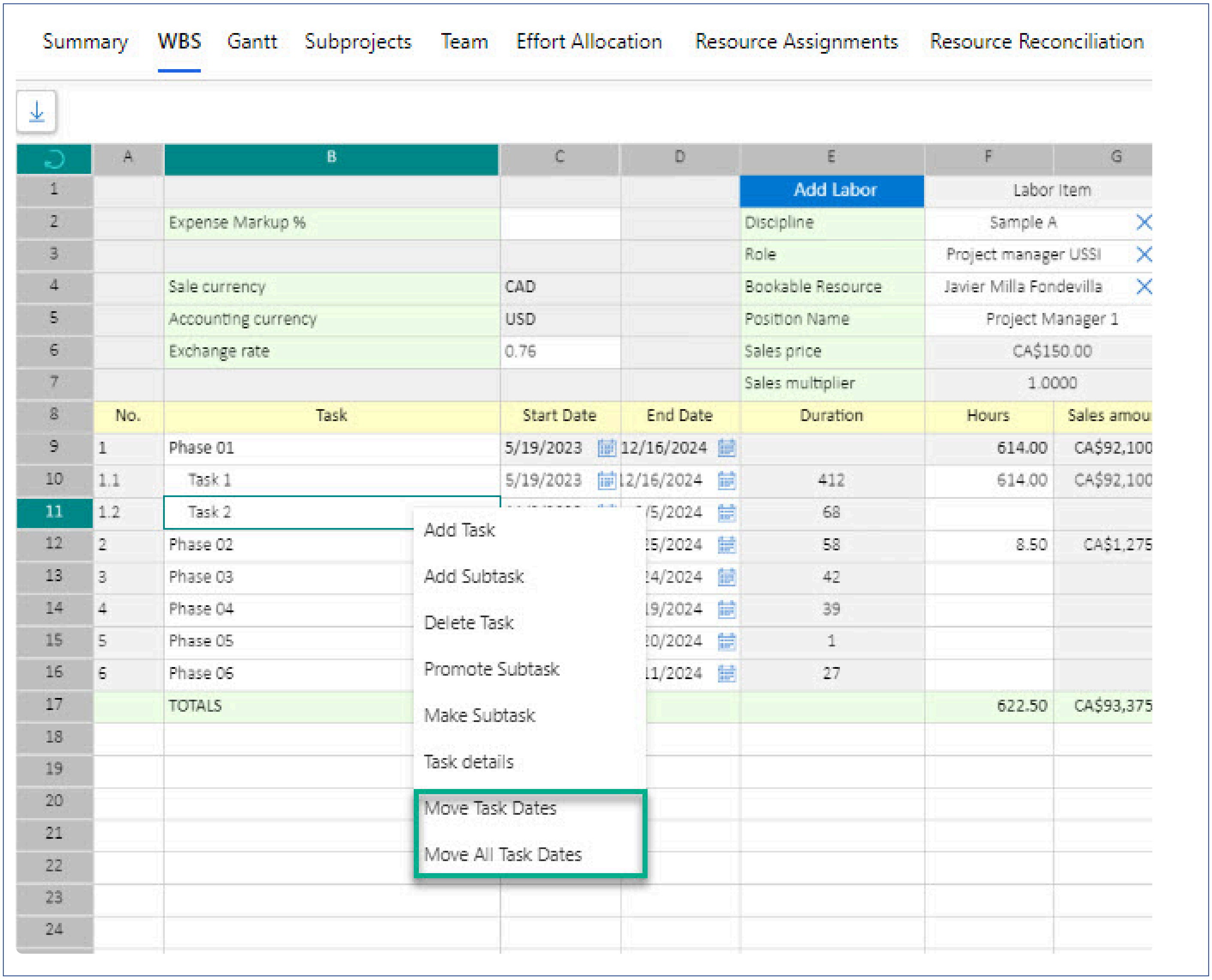
in time.



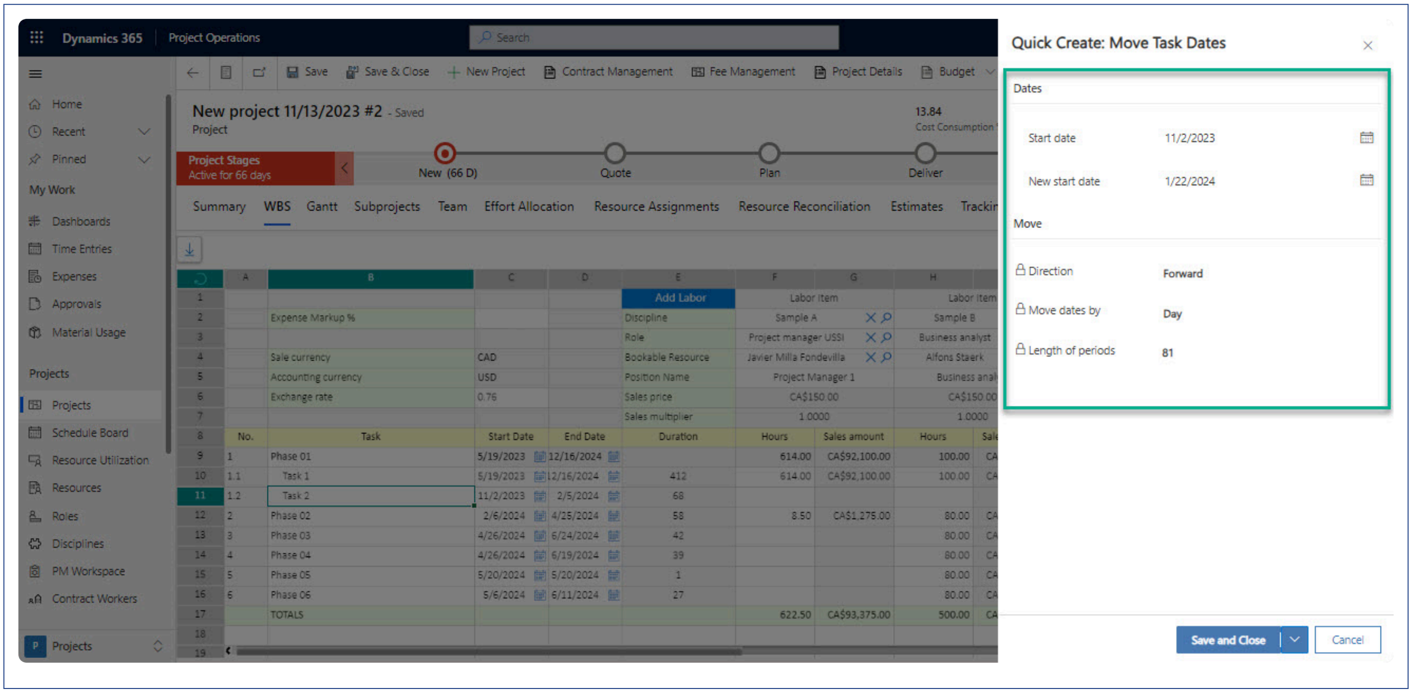
Move task dates

This new feature provides the ability to move specific Task or All Tasks dates forward or backward in time.

- Available from WBS Planner, Fee Estimator, and Effort Allocation xl360 spreadsheets.



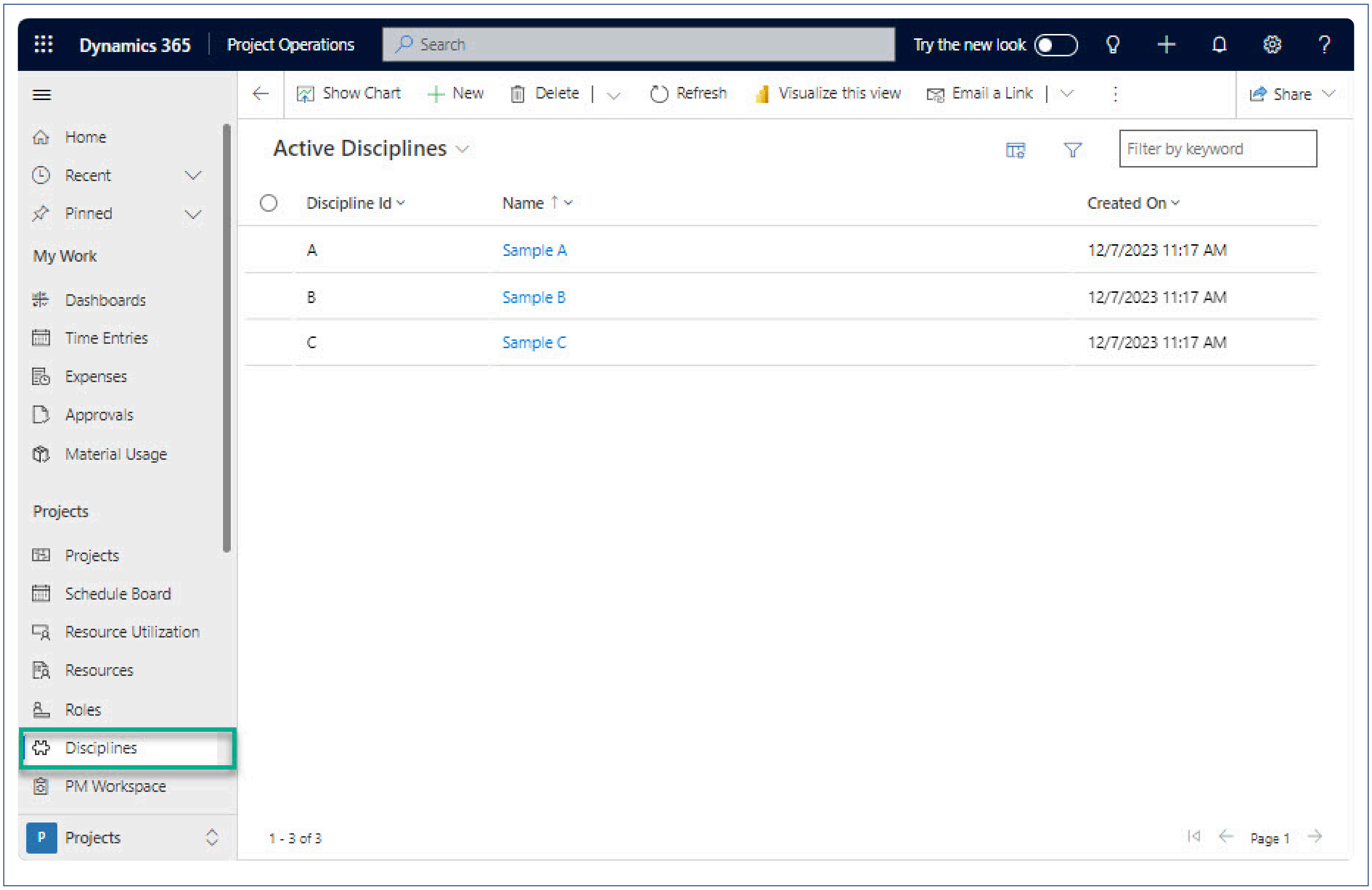
- The process updates the task Start and End dates as well as any resource effort allocations/ assignments.
- The user can either enter a new start date or a specific number of periods to move tasks in time.



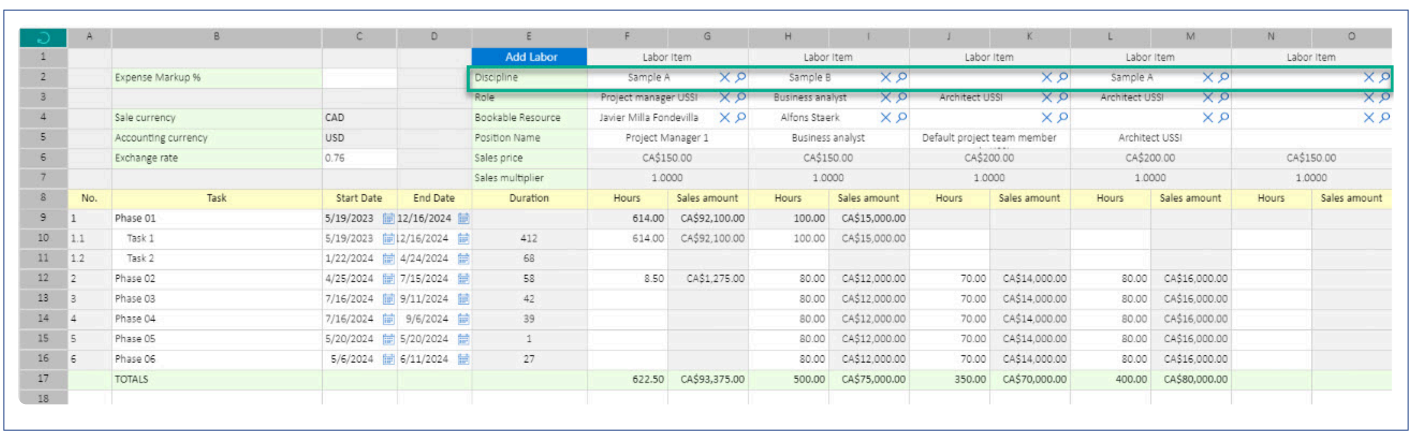
Disciplines

A new entity called “Discipline” is now available in Project Operations.

- Disciplines can be defaulted for Roles and Bookable Resources.



- This new entity can be displayed as a new attribute to filter Roles and Bookable resources in WBS Planner and Fee Estimator spreadsheets.
- Also, disciplines can be defined at Project or Subproject level and used as financial dimension if needed.

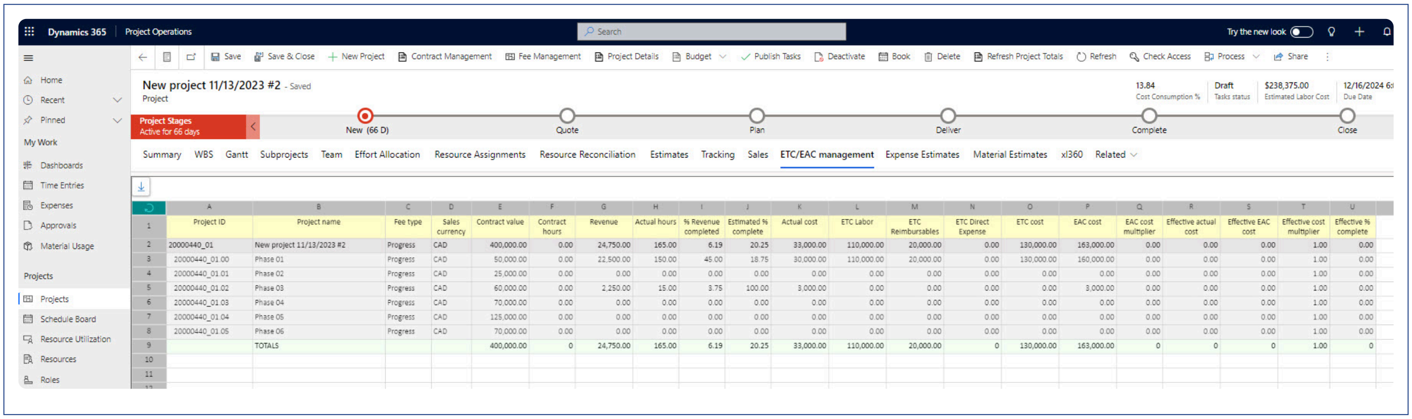


ETC/EAC management

Now “ETC/EAC management” F&O data is directly displayed in ProjOps Project form.

- A new xl360 spreadsheet template allows us to display this information directly from F&O into ProjOps using a OData connection.

- All columns displayed in the F&O experience will be displayed in the “ETC/EAC management” view in the project form.



2.2. What's new in version 10.0.36

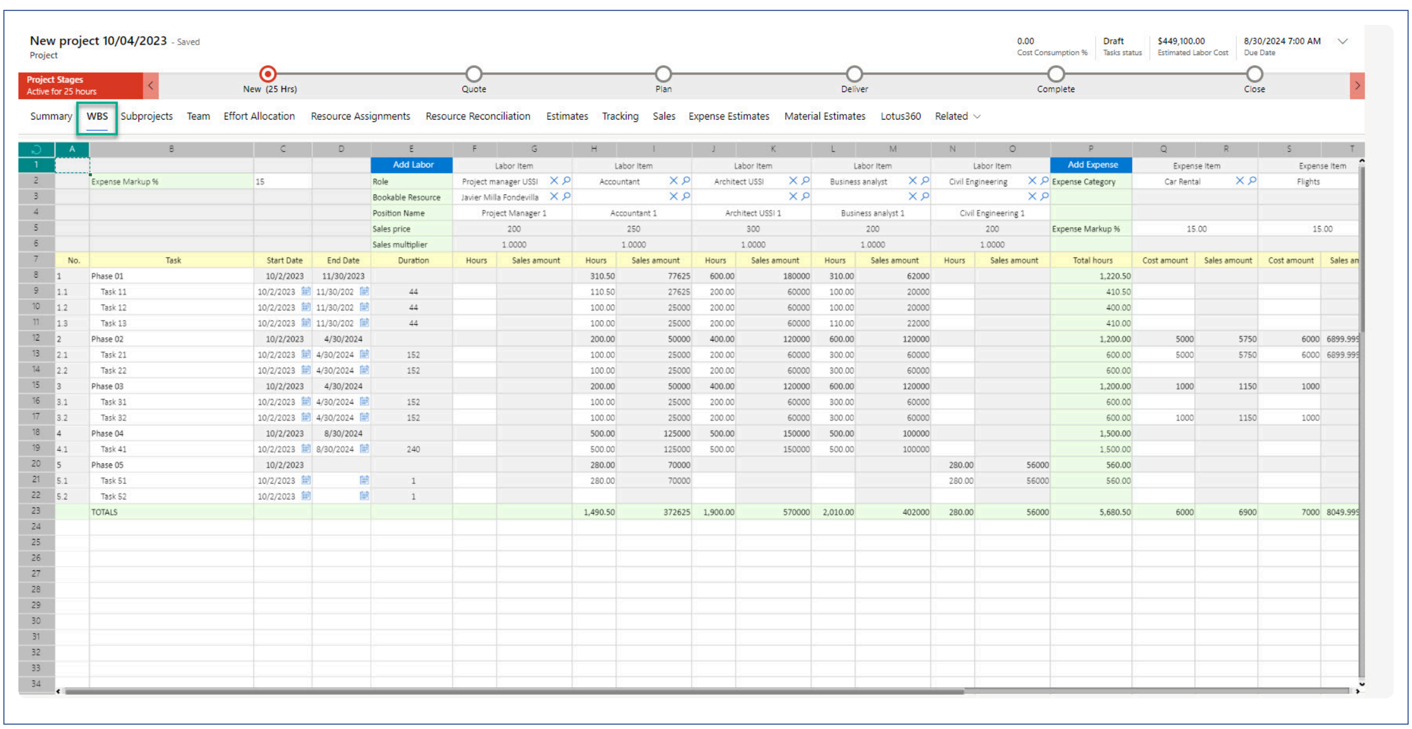
projects360 10.0.36 for Project Operations introduces new features such as WBS Planner (Preview), enhanced Effort Allocation, and Direct Booking.

New Features

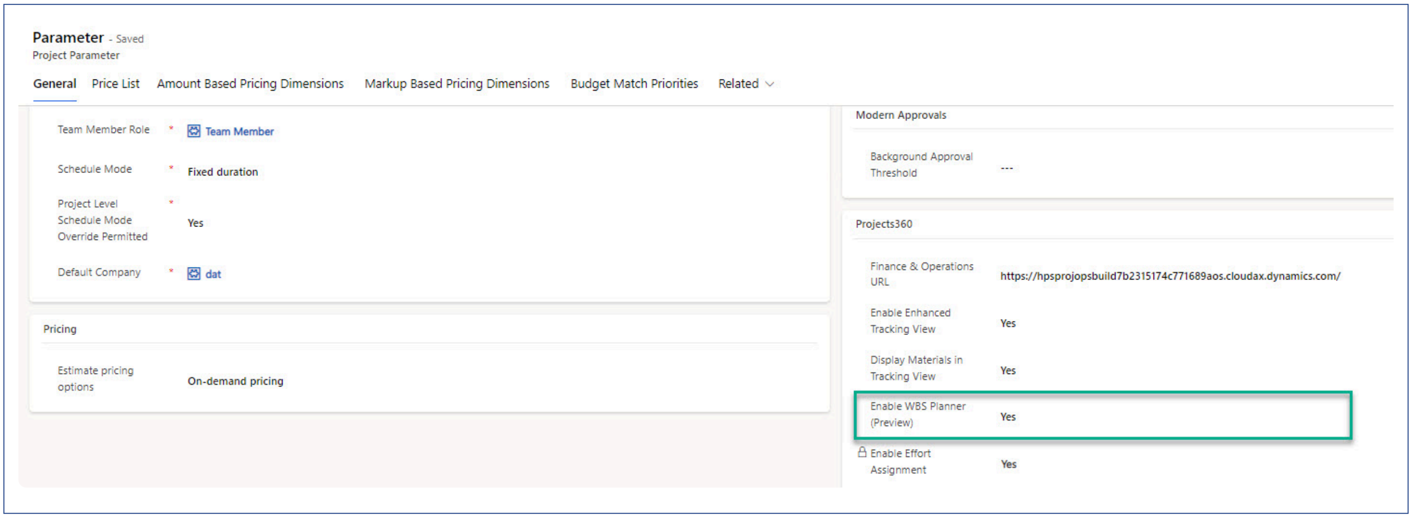
WBS Planner (Preview)

"WBS Planner (Preview)" is a key new feature that will replace MS Projects for the Web when activated. This feature will allow users to maintain the project structure, fee and expense estimates as well as resource assignment from just one view.

- This feature leverages the new XL360 platform (former Lotus360) built as canvas application with better performance.
- Disconnected from MS P4W, it will allow us to use almost unlimited level of tasks and resource assignments (solving the known MS P4W limitations).
- Tasks, Team members, Expenses and Effort assignments can be maintained on real time from a single screen directly in the Project form.



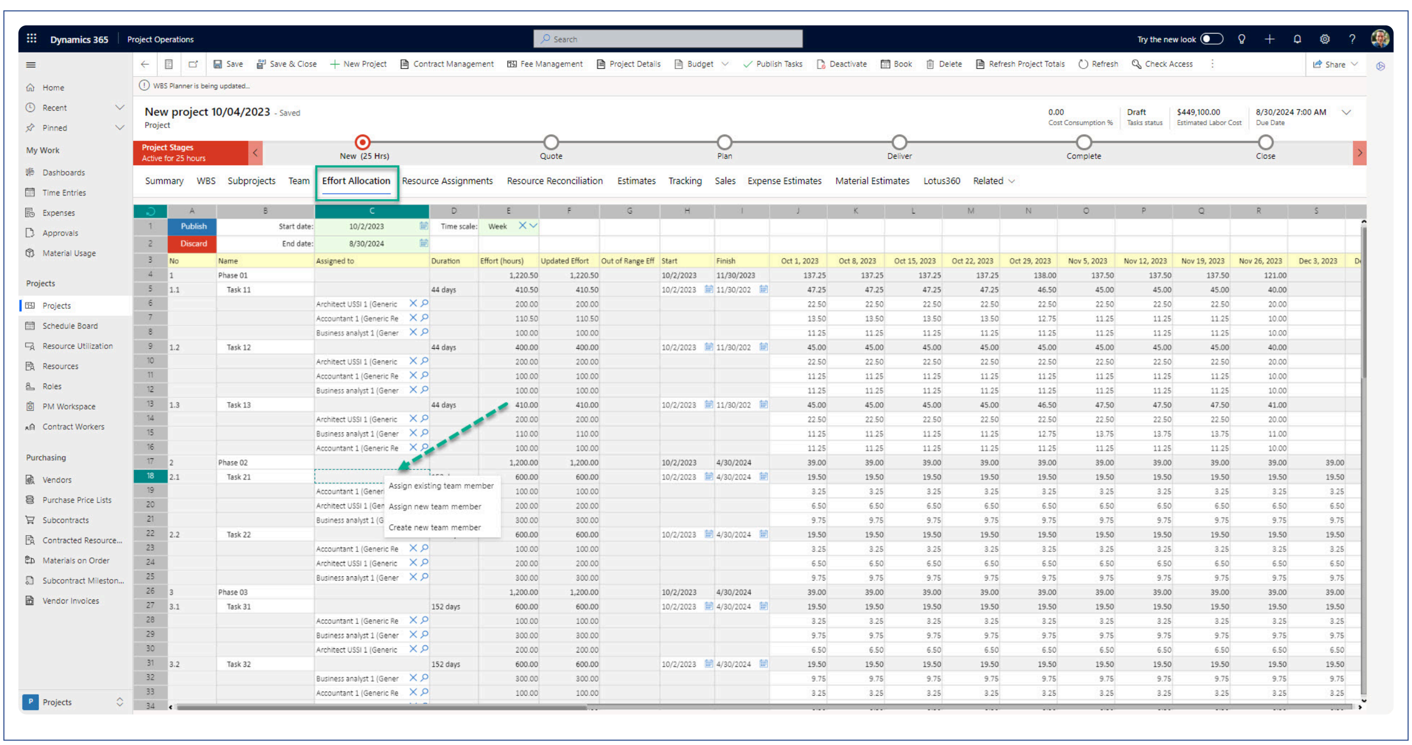
- Note: This is a “Preview” feature, and it can be activated and deactivated by configuration. Implementations using MS P4W can continue using it.



Enhanced Effort Allocation

“Effort Allocation” was now enhanced to use our new “WBS planner” feature leveraging the new XL360 Canvas platform.

- The enhanced “Effort Allocation” will be activated automatically when “WBS Planner (Preview)” feature is activated.
- The enhanced experience will allow users to maintain Tasks, Team members and Effort assignments directly from the same “Effort allocation” screen.

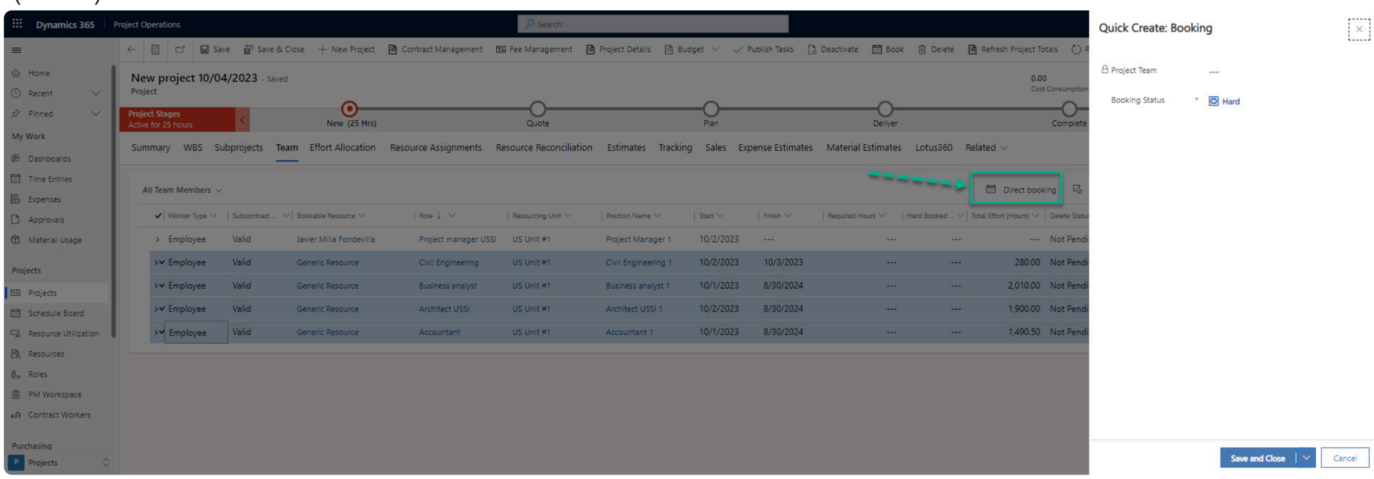


Direct Booking

This new feature provides the ability to generate booking directly from the “Team members” tab in the “Project” form.

- The user will be able to select the type of booking (Hard/Soft/Custom type).
- The booking will be directly made based on the effort allocation data in a single click.

!(zoom)



3. Initial configurations

All the configurations relating to projects360 for project operations have been grouped together in this section. The configurations that are grouped together in this section are related to:

- **Finance and Operations**
- **Project Operations**

Select a section to view more details about them.

3.1. Finance and Operations

This section details out the parameters to be configured at Finance and Operations.

All the configurations relating to projects360 for project operations at Finance and Operations have been grouped together in this section. The configurations that are grouped together in this section are related to:

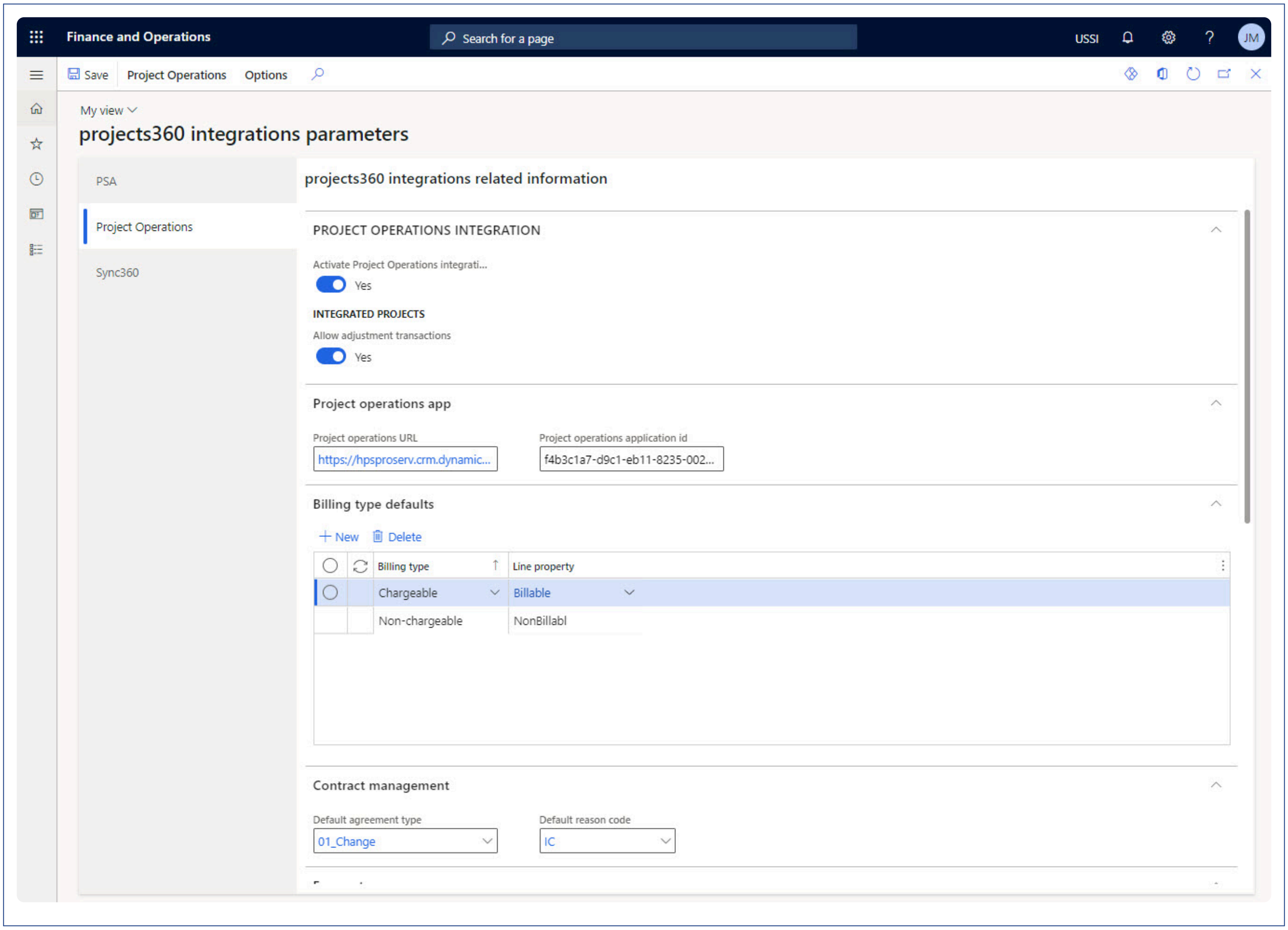
- **projects360 integration parameters**
- **projects360 parameters**
- **Dual-write sync**
- **Periodic tasks**

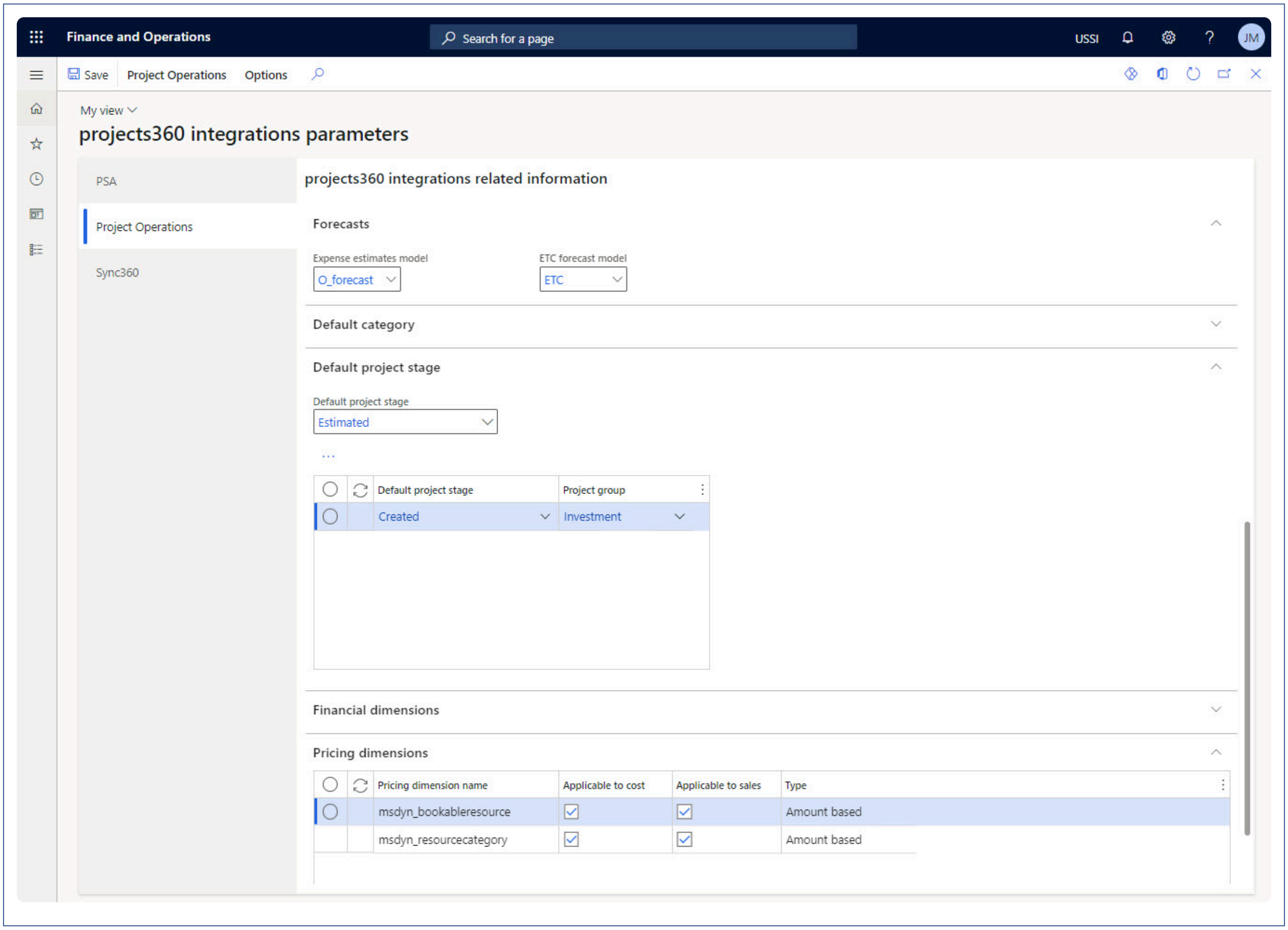
Select a section to view more details about them.

3.1.1. projects360 integration parameters

A new ‘Project Operations’ tab in ‘projects360 integration parameters’ form allows us to activate and configure Project Operations for a specific legal entity in Finance and Operations.

Go to projects360 integrations > Setup > projects360 integration parameters





Details of the fields available on the projects360 integration parameters form at Project Operations tab as follows:

Fields	Description
Activate Project Operations integration	This parameter enables integration to project operations for specific legal entity.
Allow adjustment transactions	If this parameter is set as "Yes", then adjustment transactions will be allowed for integrated projects.
Project operations URL	Define Project operations URL linked to the FO environment.
Project operations application id	Define Project operations application id linked to the FO environment.
Billing type	Create records here to define mapping to convert "Billing type" from Project operations to

defaults	“Line property” in Finance and Operations.
Default agreement type	Allows to select contract agreement types which will be used as default value when the project contract line is integrated from Project Operations to Finance and Operations.
Default reason code	Allows to select contract reason codes which will be utilized as default value when the project contract line is integrated from Project Operations to Finance and Operations.
Expense estimates model	Allows to select forecast models which will be utilized to sync expense estimates from Project Operations.
ETC Forecast model	Default forecast model utilized to sync ETC tracking data from PO. This forecast model should be different than the one configured as “Manual ETC forecast model” in projects360 parameters if we are using ETC cost buckets.
Default category	Default category utilized to sync hours forecast from Project Operations.
Default project stage	Allows to select default project stage when the project is integrated from Project Operations. Also, user can define project group specific project stage when the project is integrated from Project Operations.
Default project stage by project group	Define default project stage based on project group when a project is released in F&O from PO. If there is no match with these rules, then previous “Default project stage” parameter will be applied as default value.
Pricing dimensions	This setting allows to configure from F&O which pricing dimensions will be active for integration purposes. We can specify if they are active for Cost, Sales or both.

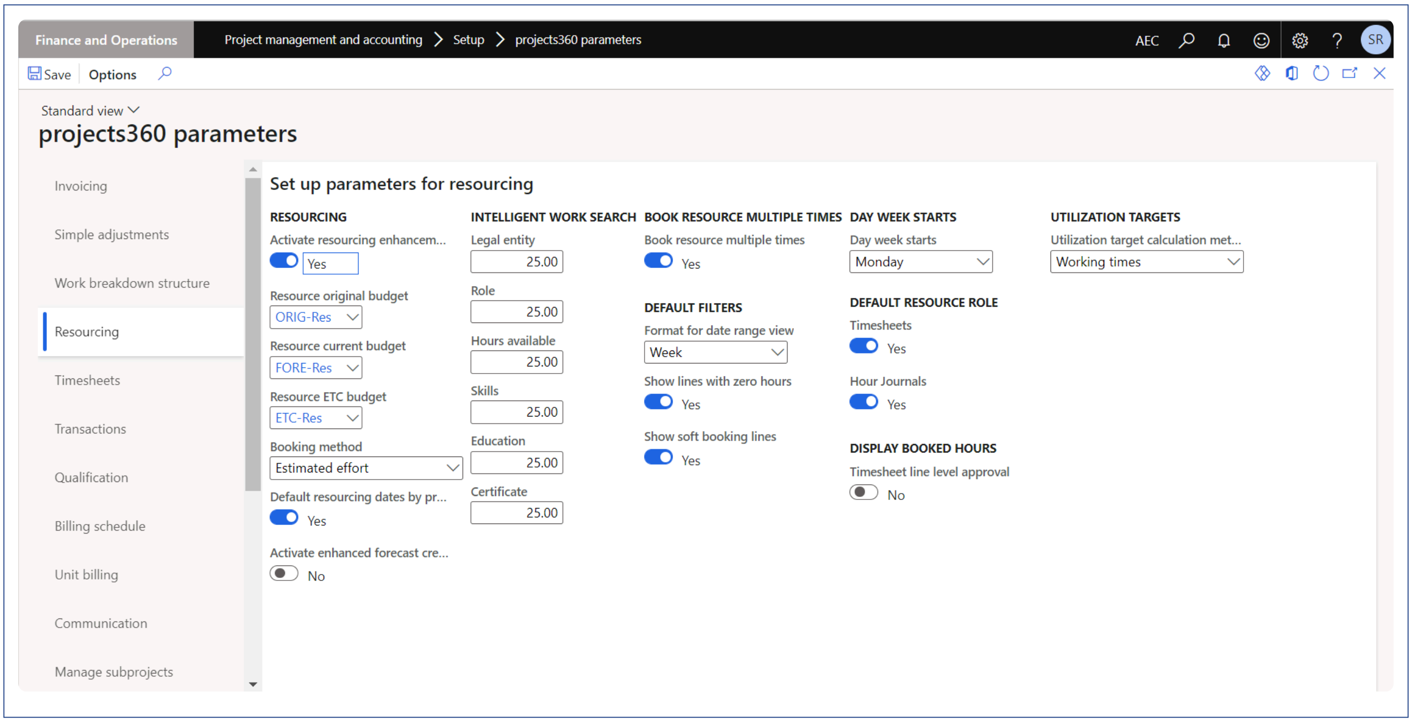
Note – This configuration must be done for each legal entity planned to be integrated with Project Operations.

3.1.2. projects360 parameters

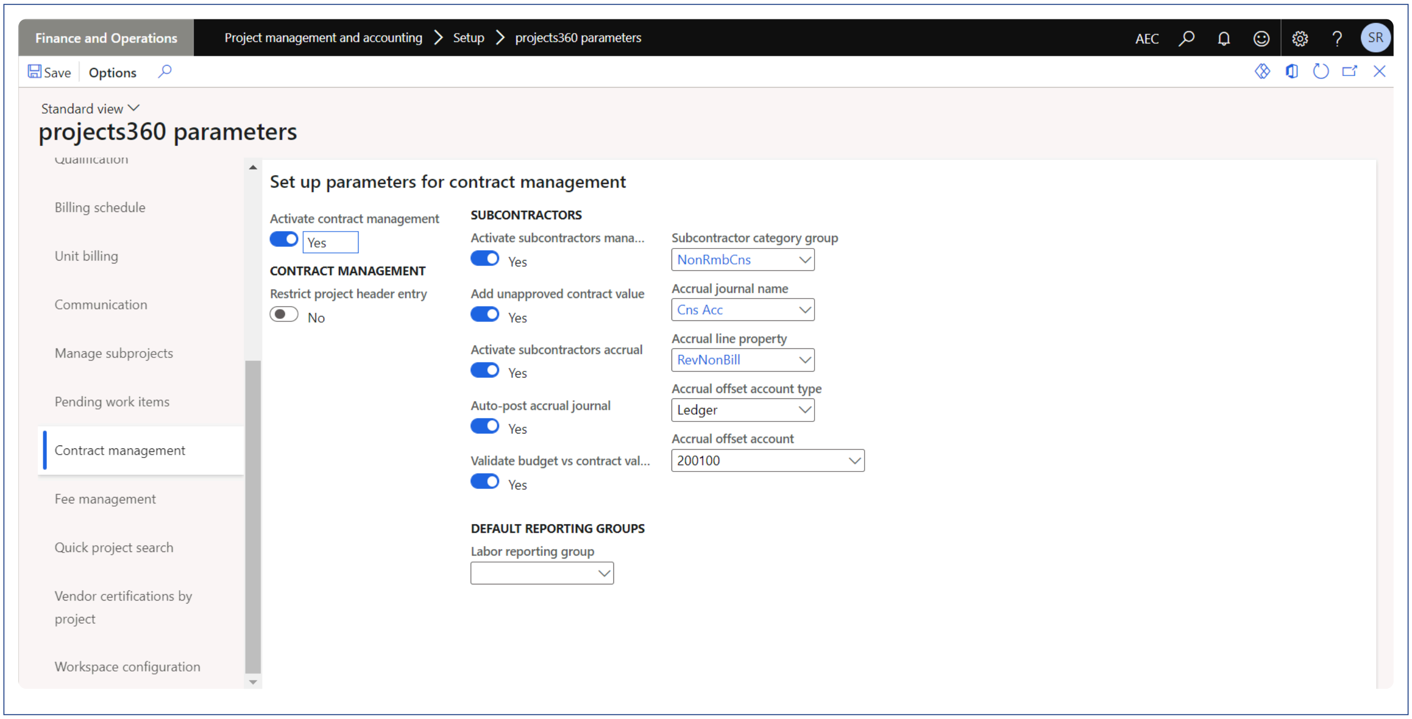
There are no specific settings for Project Operations in the “projects360 parameters”. However, features such “Resourcing”, “Contract management” and “Fee management” should be activated and configured.

Go to Project management and accounting > Setup > projects360 parameters

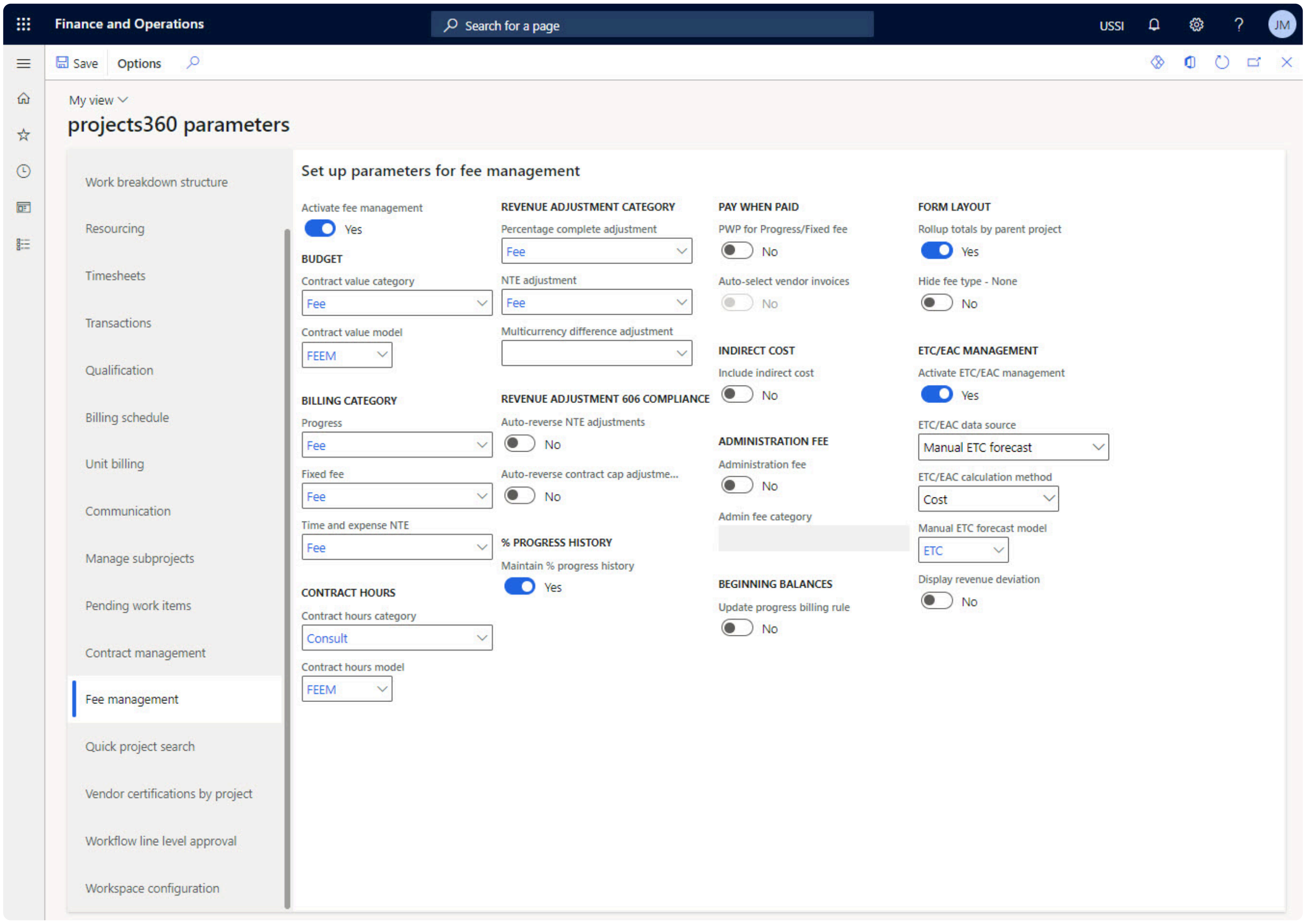
- **Resourcing** – This manual gives insights to what’s available in projects360 resourcing, how we can configure and use it to the best of our needs.



- **Contract management** – This manual gives insights to what’s available in projects360 contract management, how we can configure and use it to the best of our needs.



- **Fee management** – This manual gives insights to what's available in projects360 fee management, and how it can be configured.



Note – The "Manual ETC forecast model" parameter value should be different to the "Default forecast model" configured in "Project management and accounting parameters".

3.1.3. Dual-write sync from Finance and Operations to Project Operations

The following are the list of data integrates from Finance and Operations to Project Operations as part of dual write initial sync or as and when data created or updated in the Finance and Operations.

Project groups

Project groups created or updated in Finance and Operations will be synced to Project Operations using dual-write and available for selection while creating or updating company parameter settings, opportunity lines and projects.

Go to Project management and accounting > Setup > Posting > Project groups

Shared categories

Shared project categories created or updated in Finance and Operations will be created or updated in Project Operations as Transaction categories using dual-write. Only records with “Can be used in Project” marked as “Yes” will be synced to Project Operations.

Go to Project management and accounting > Setup > Categories > Shared Categories

Project resources (Workers)

Resources created or updated in Finance and Operations will be created or updated in Project Operations as Bookable resource using dual-write. The resource will be synced only after the Project setup is configured in Finance and Operations. New field Resource Id is added in the Project Operations Bookable resource form to update the Resource ID of resource integrating from Finance and Operations.

Go to Project management and accounting > Project resources > Resources list

Resource roles

Roles created or updated in Finance and Operations will be created or updated in Project Operations using dual-write. New fields Role Id and Company added to Resource categories form in Project Operations to update the Role integrating from specific legal entity.

Go to Project management accounting > Setup > Resources > Resource roles

Price groups

Price/discount group records created or updated in Finance and Operations will be created or updated in Project Operations using dual-write where Price/Discount group type = Price type and Module = Customer as Price lists.

Go to Sales and marketing > Price and discounts > Customer price/discount groups

Role cost/sales prices

Sales prices created or updated in Finance and Operations will be created or updated in the Project Operations using dual-write as Price list for role prices. It is applicable for the hour sales prices created or updated in Finance and Operations where “Role ID” is not blank, “Valid for” = All, “Sales price model” = Qty. and following fields are blank.

- Category, Resource, Project ID, Project contract ID, Customer account and Price group

Go to Project management and accounting > Setup > Prices > Sales price (hour)

Cost prices created or updated in Finance and Operations will be created or updated in the Project Operations using dual-write.

Go to Project management and accounting > Setup > Prices > Cost price (hour)

Note – Only “Cost price (hour)”, “Sales price (hour)” configured by role will be synced between Finance and Operations and Project Operations.

Actual transactions

Project transactions posted or updated in Finance and Operations will be created or updated in the Project Operations actuals using dual-write. Only project transactions created in Finance and Operations will be synced to Project Operations and the sync is applicable only for transaction types Hour, Expense and Fee. In case of Hour and Expense transaction it will create or update two actual transactions i.e., A cost transaction and a revenue transaction where-as in case of Fee transaction only revenue transaction will be created or updated in Project Operations.

Contract reason codes

Contract reason codes created or updated in the Finance and Operations will be created or updated in the Project Operations and vice versa.

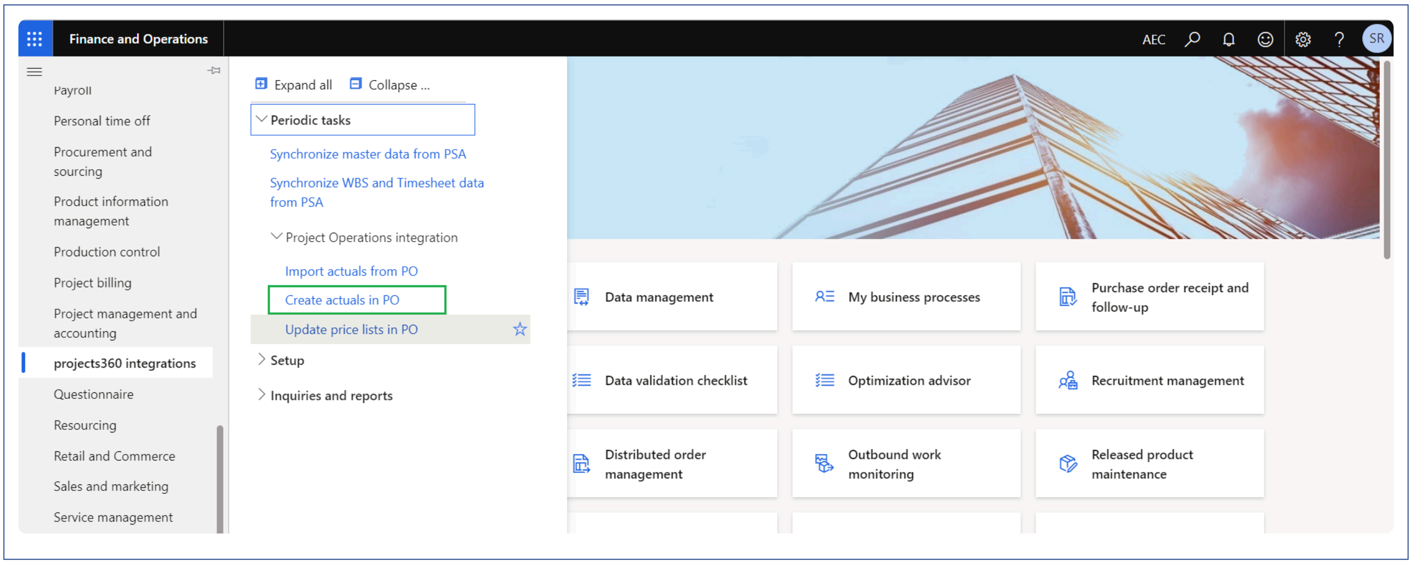
Go to Project management and accounting > projects360 Setup > Contract management > Contract reason codes

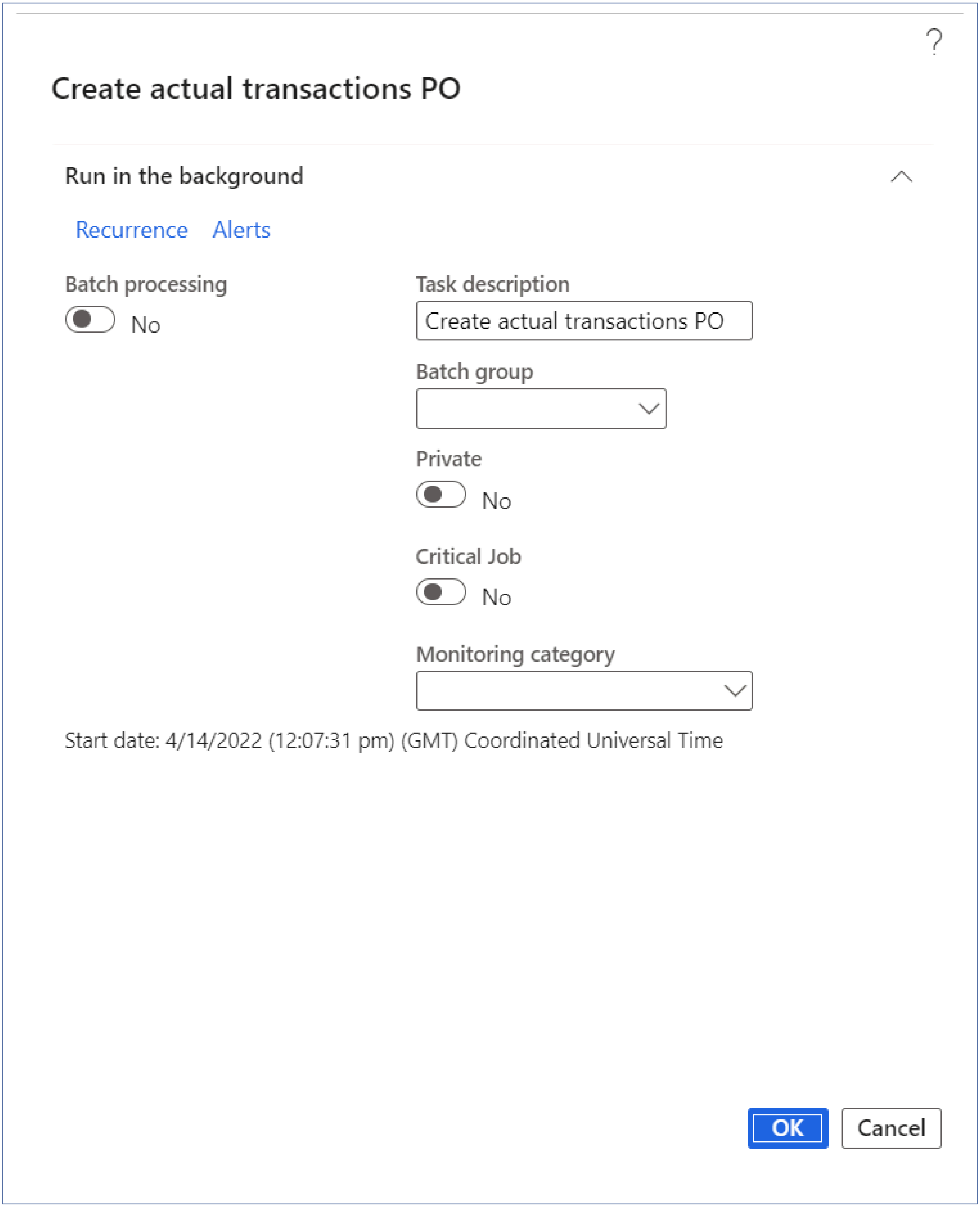
3.1.4. Periodic tasks

Create actuals in PO

Create actuals in PO periodic process helps in create/update actuals in Project Operations when project transactions are posted/updated in Finance and Operations using dual-write. Only project transactions created in Finance and Operations will be synced. This sync will happen for Hour, Expense and Fee type transactions. This process can be executed in batch as well.

Go to projects360 integrations > Periodic tasks > Project Operations integration > Create actuals in PO



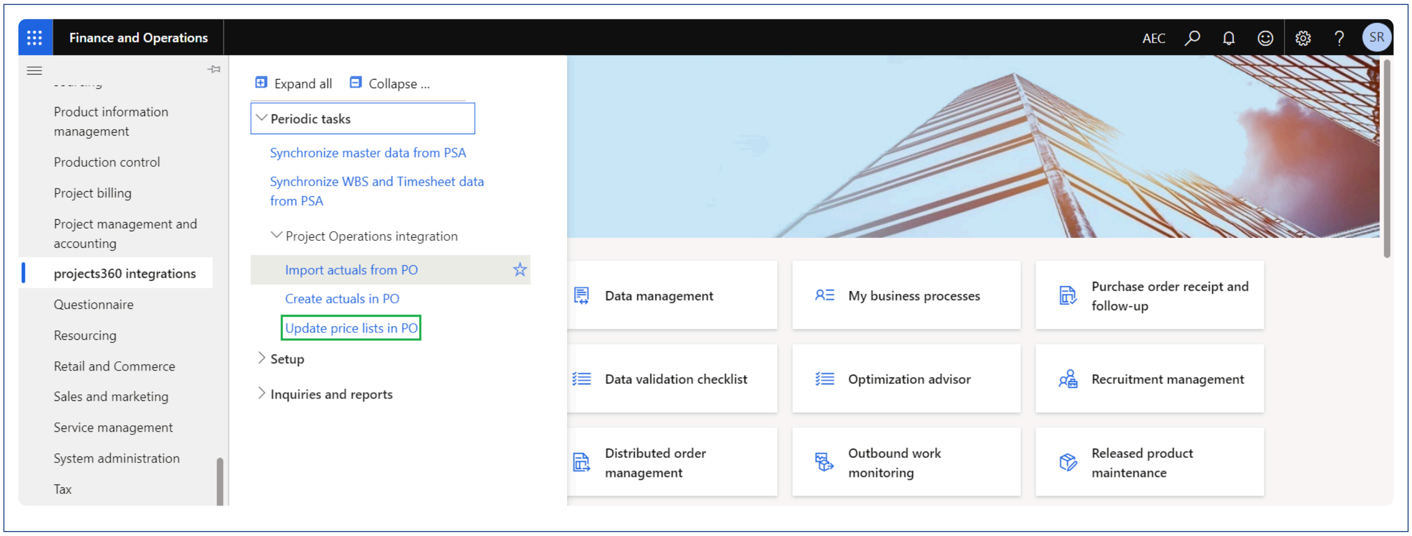


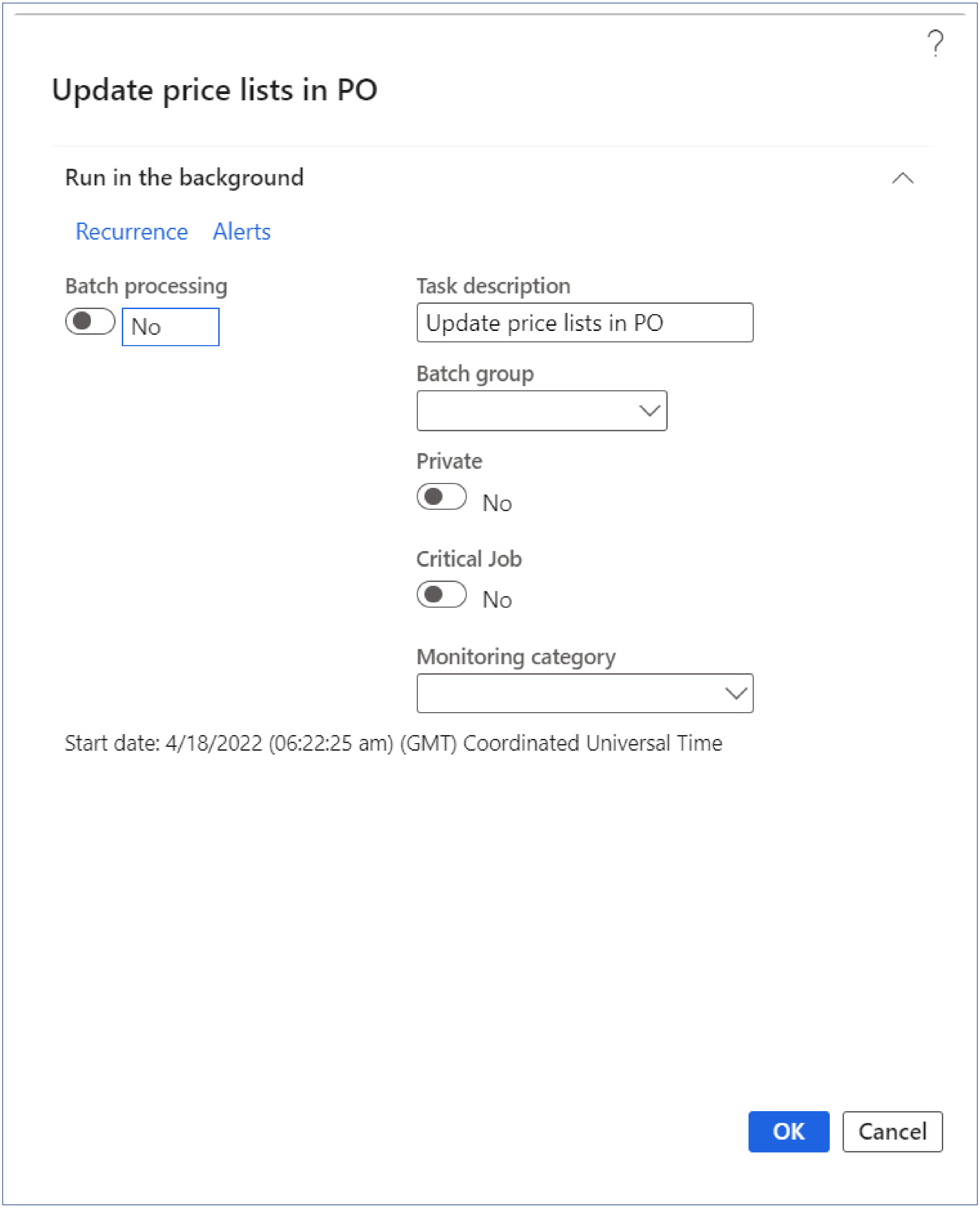
The syncing process will create/update two actual transactions for hour and expense transaction types i.e., A cost and a revenue transaction for each. where as in case of fee transaction type only one actual transaction will create/update in Project Operations i.e., A revenue transaction.

Update price lists in PO

Update price lists in PO periodic process helps to create or update price list in Project Operations and this process can be executed in batch as well.

Go to projects360 integrations > Periodic tasks > Project Operations integration > Update price lists in PO




Update price lists in PO
Run in the background
Recurrence
Alerts
Batch processing
No
Task description
Update price lists in PO
Batch group
Private
No
Critical Job
No
Monitoring category
Start date: 4/18/2022 (06:22:25 am) (GMT) Coordinated Universal Time
OK
Cancel

3.2. Project Operations

> *This sections details out the parameters to be configured at Project Operations per legal entity.*

All the configurations relating to projects360 for project operations have been grouped together in this section. The configurations that are grouped together in this section are related to:

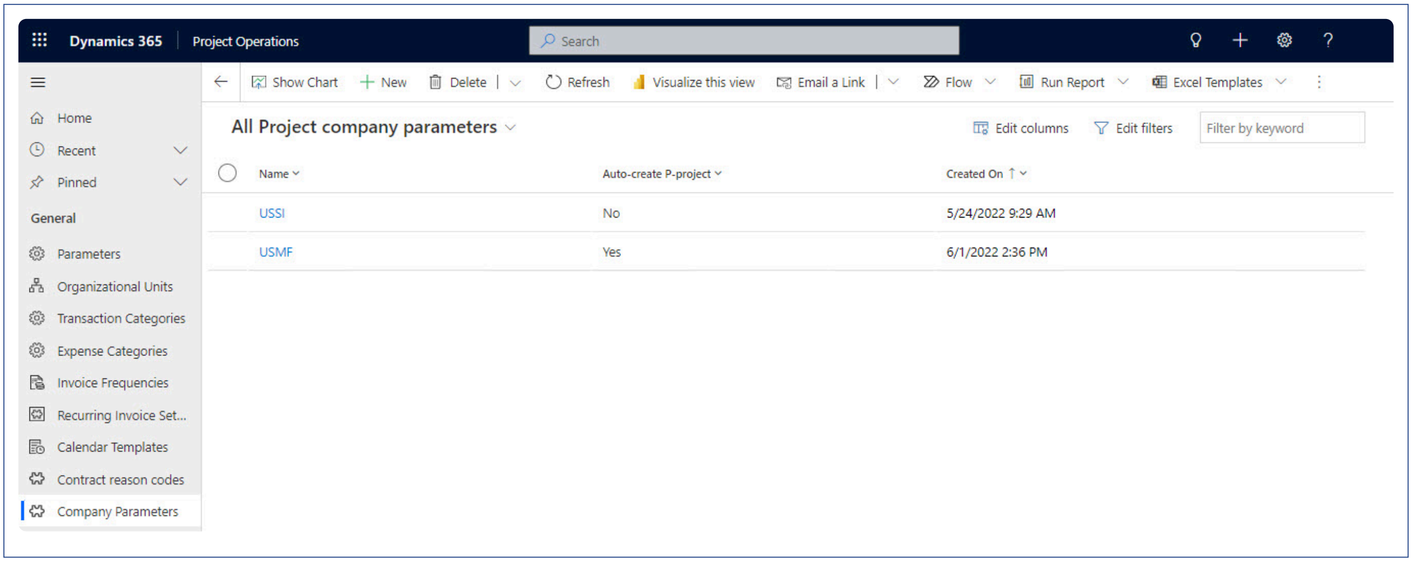
- **Company parameters**
- **Financial dimensions**
- **Autonumber settings**
- **Project parameters**
- **Contract reason codes**
- **Qualify lead parameters**

Select a section to view more details about them.

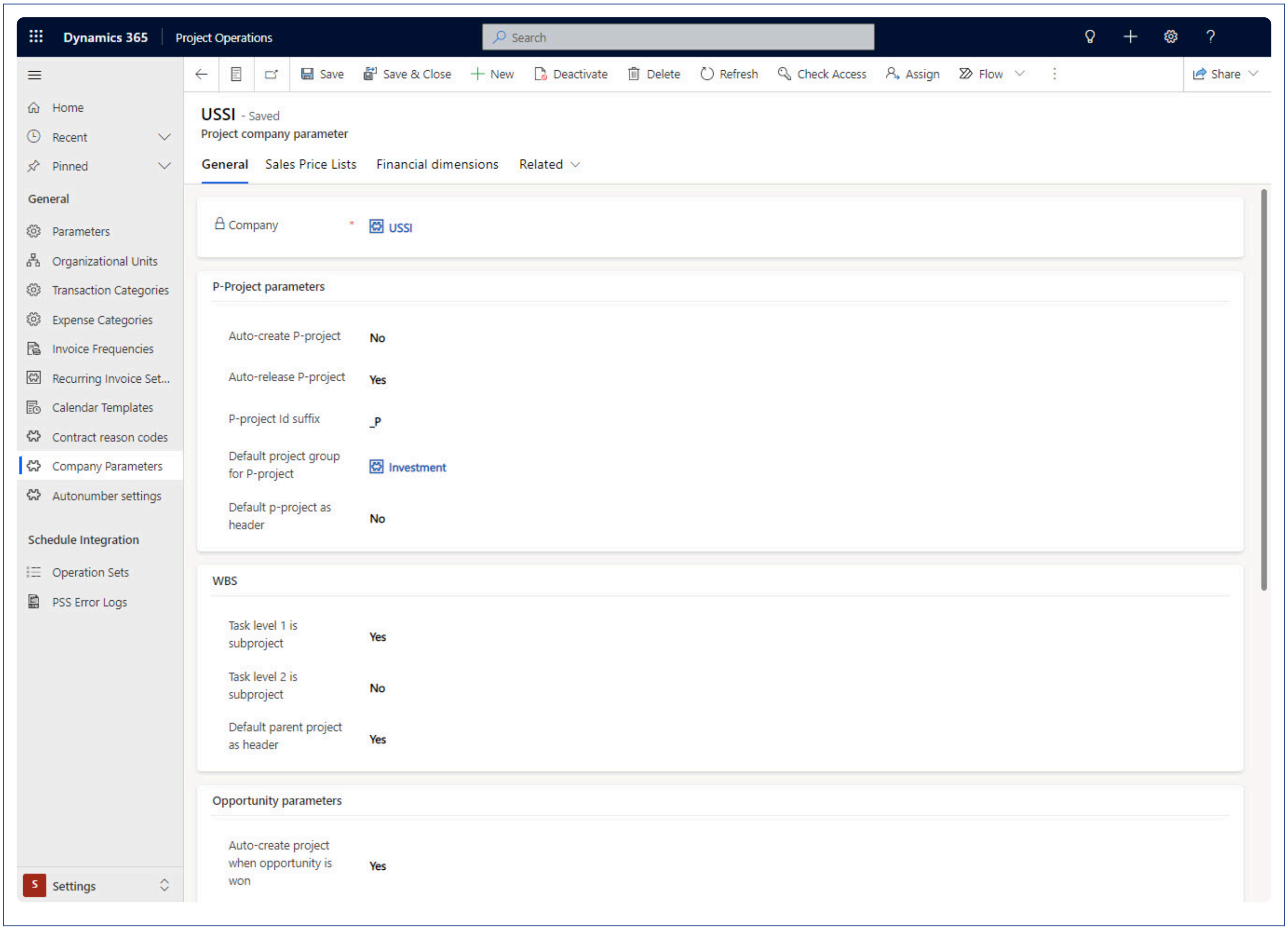
3.2.1. Company parameters

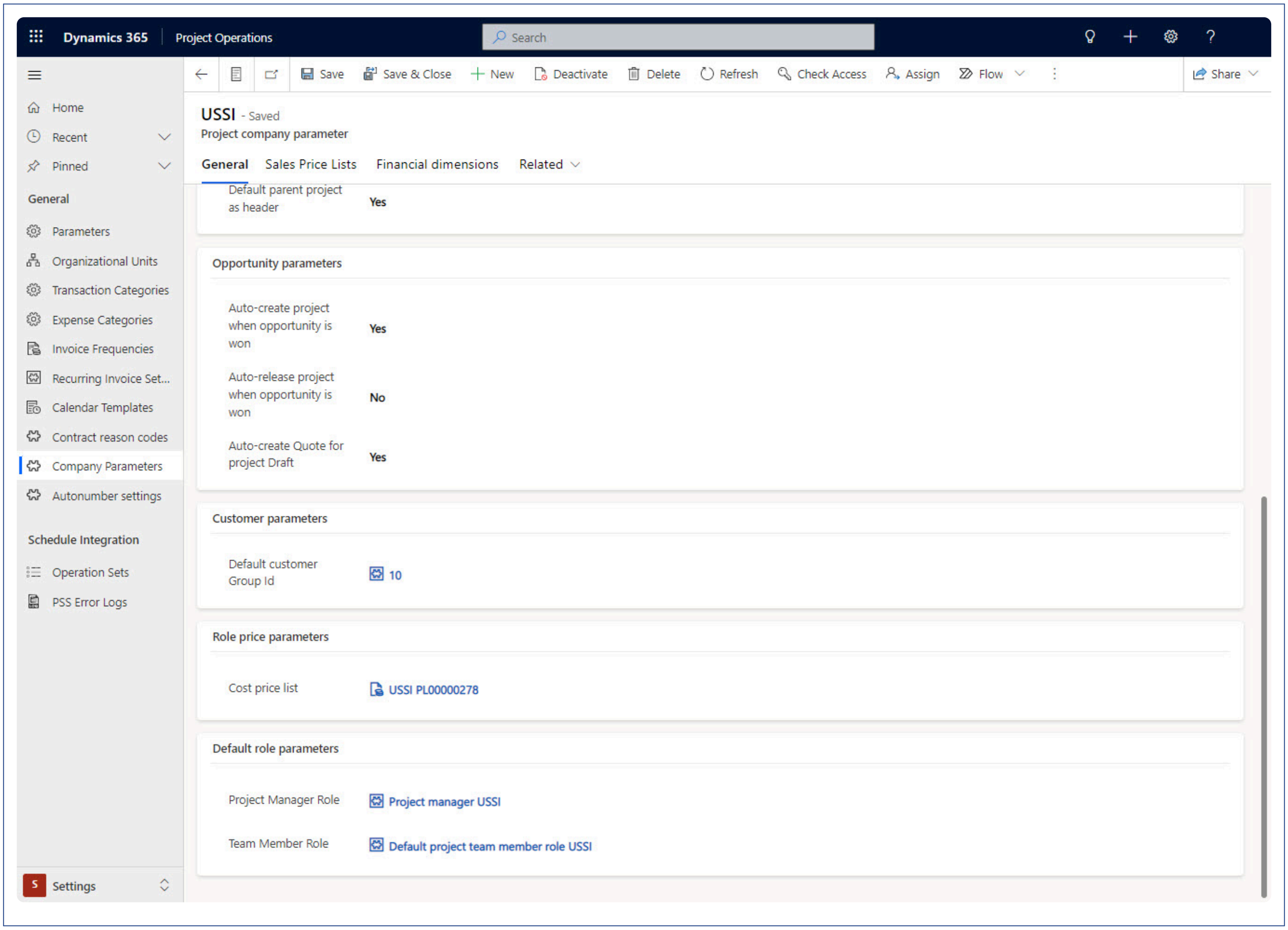
There is a new parameter form “Company parameters” introduced to configure default parameters for P-Project, WBS, Opportunity, Customer, Role prices and Default roles for specific legal entity.

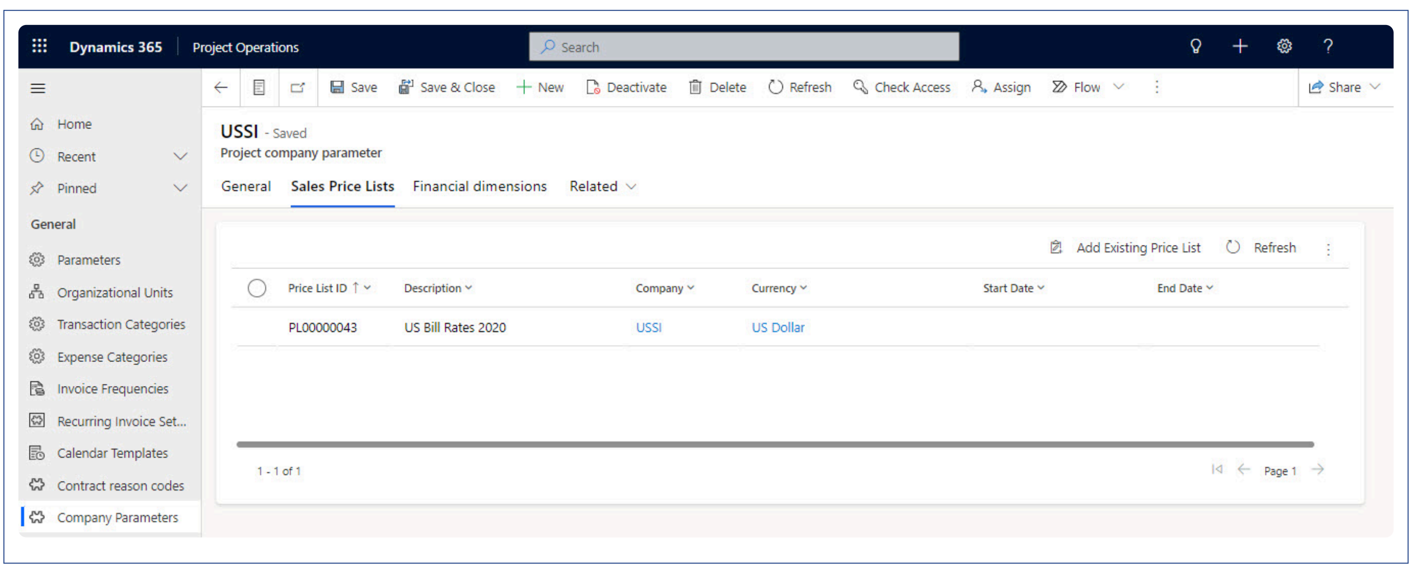
Go to Settings > General > Company parameters



The ‘Company Parameters’ form is structured into distinct sections like Project parameters, WBS, Opportunity Parameters, and more. Within each section, administrators can easily locate and configure the relevant settings.
This user-friendly layout allows the system administrator to efficiently fine-tune configurations, ensuring they meet the specific business requirements.


Dynamics 365
Project Operations
Search
Save
Save & Close
New
Deactivate
Delete
Refresh
Check Access
Assign
Flow
Share
Home
Recent
Pinned
General
Parameters
Organizational Units
Transaction Categories
Expense Categories
Invoice Frequencies
Recurring Invoice Set...
Calendar Templates
Contract reason codes
Company Parameters
Autonumber settings
Schedule Integration
Operation Sets
PSS Error Logs
Settings
USSI - Saved
Project company parameter
General
Sales Price Lists
Financial dimensions
Related
Company
USSI
P-Project parameters
Auto-create P-project
No
Auto-release P-project
Yes
P-project Id suffix
_P
Default project group for P-project
Investment
Default p-project as header
No
WBS
Task level 1 is subproject
Yes
Task level 2 is subproject
No
Default parent project as header
Yes
Opportunity parameters
Auto-create project when opportunity is won
Yes





Details of the fields available on the Company parameters form are as follows -

Fields	Description
Company	Select the Company to be configured, this will provide list of Finance and Operations legal entities

	for selection.
Auto-create P-project	If you set this parameter to “Yes,” it will automatically generate a P-Project (Proposal project) when a new opportunity is created. If you set this parameter to “No,” the “Create P-Project” button will be accessible at the top of the Opportunity form. Users can manually create a P-Project by clicking this button.
Auto-release P-project	If you set this parameter to “Yes,” it will automatically release and synchronize the P-project with Finance and Operations. If you set it to “No,” a button will appear on the Opportunities form, allowing you to manually release the P-project.
P-project id suffix	Define the suffix for P-project Id, which will be added to the Opportunity Id to create the P-project Id.
Default project group for P-project	Select one of the existing project group, which will be used as default project group for the P-project created from Opportunity. Note: The project group should be of type Internal.
Default p-project as header	If this parameter is set to Yes, the P-project created will be considered as header project.
Task level 1 is subproject	If you choose “Yes” for this parameter, the Project tasks created at Level 1, typically referred to as Parent Tasks, will be transformed into subprojects. If you opt for “No,” then by default, Task Level 2 will be set to “No.”.
Task level 2 is subproject	If you set this parameter to “Yes,” any Project task created at Level 2 under the Task Level 1 (Parent Tasks) will be transformed into a subproject.
Default parent project as header	If you set this parameter to “Yes,” the default parent project will be treated as the header project in the Subprojects grid of Projects. In this view, users can see the Project listed as the Header Project, along with all the related parent tasks defined in the Work Breakdown Structure (WBS) that is specified under the Header Project.
Auto-create project when opportunity is won	If you choose “Yes” for this parameter, Projects will be automatically created when opportunities or opportunity lines are closed as won. If you select “No,” no Project will be generated or linked to the Opportunity Line.
Auto-release project when opportunity is won	If you set this parameter to “Yes,” it will automatically release and synchronize the P-project with Finance and Operations. If you set it to “No,” a button will appear on the Opportunities form, allowing you to manually release the P-project.

Auto-create Quote for project draft	If this parameter is set to Yes, it will automatically create a quote when a new project draft is created from opportunity lines.
Default customer Group Id	Select one of the existing customer group which will be used as default value when the new customer is created from Project Operations.
Cost price list	This price list will be used to sync role cost prices from F&O." and it will vary with every legal entity configuration done for Company Parameters and depending on currency of Legal Entity, admin should define the Cost price list.
Sales price lists	This tab enables the configuration of multiple default "Sales price lists" for each company. Sales price lists may vary over time, and different roles and prices are associated with different price lists. That's why administrators have the privilege to add several Sales Price lists depending on the Legal Entity for which the Company Parameter is defined. These will serve as default Sales Price Lists for new Opportunities, Quotes, and Project contracts.
Project Manager Role	Select the Role which will be used as default Project manager for the specific company.
Team Member Role	Select the Role which will be used as default Team member for the specific company.

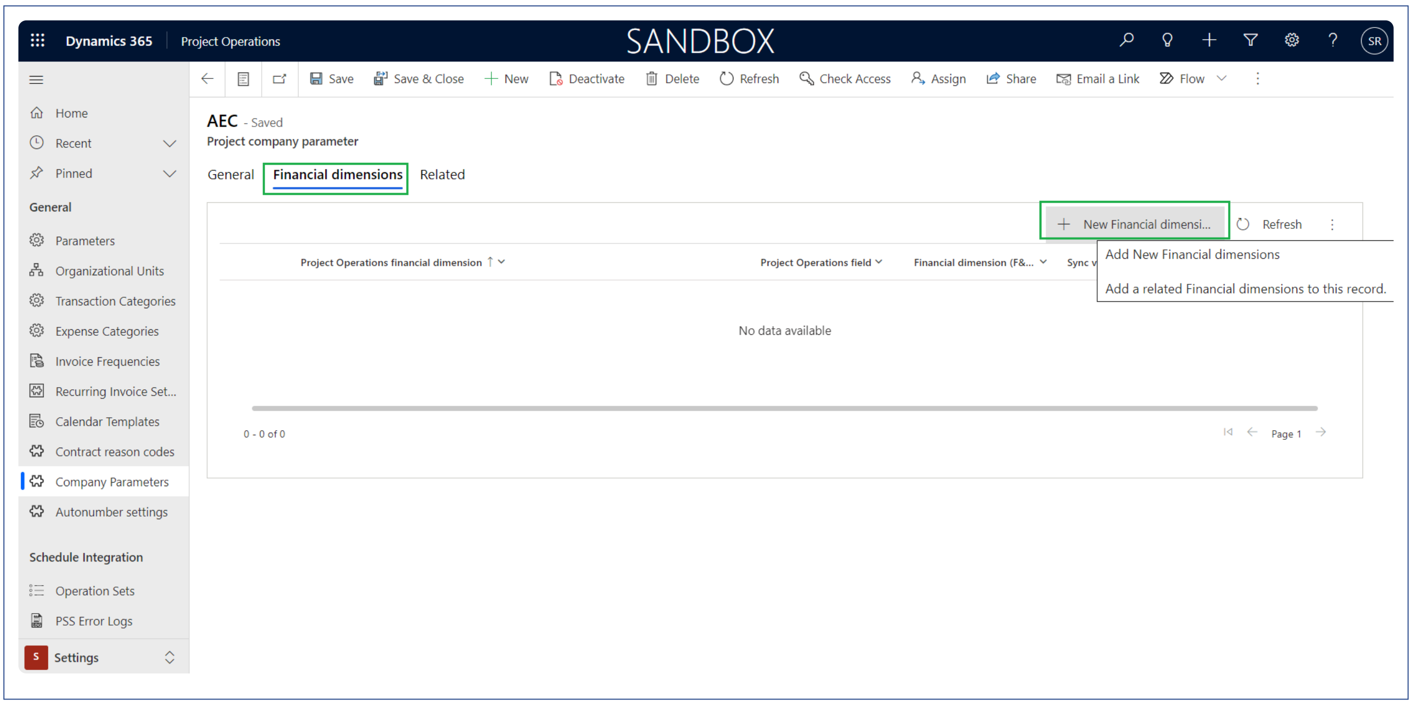
Note – This setup needs to be completed for each legal entity that is intended to be integrated with Finance and Operations.

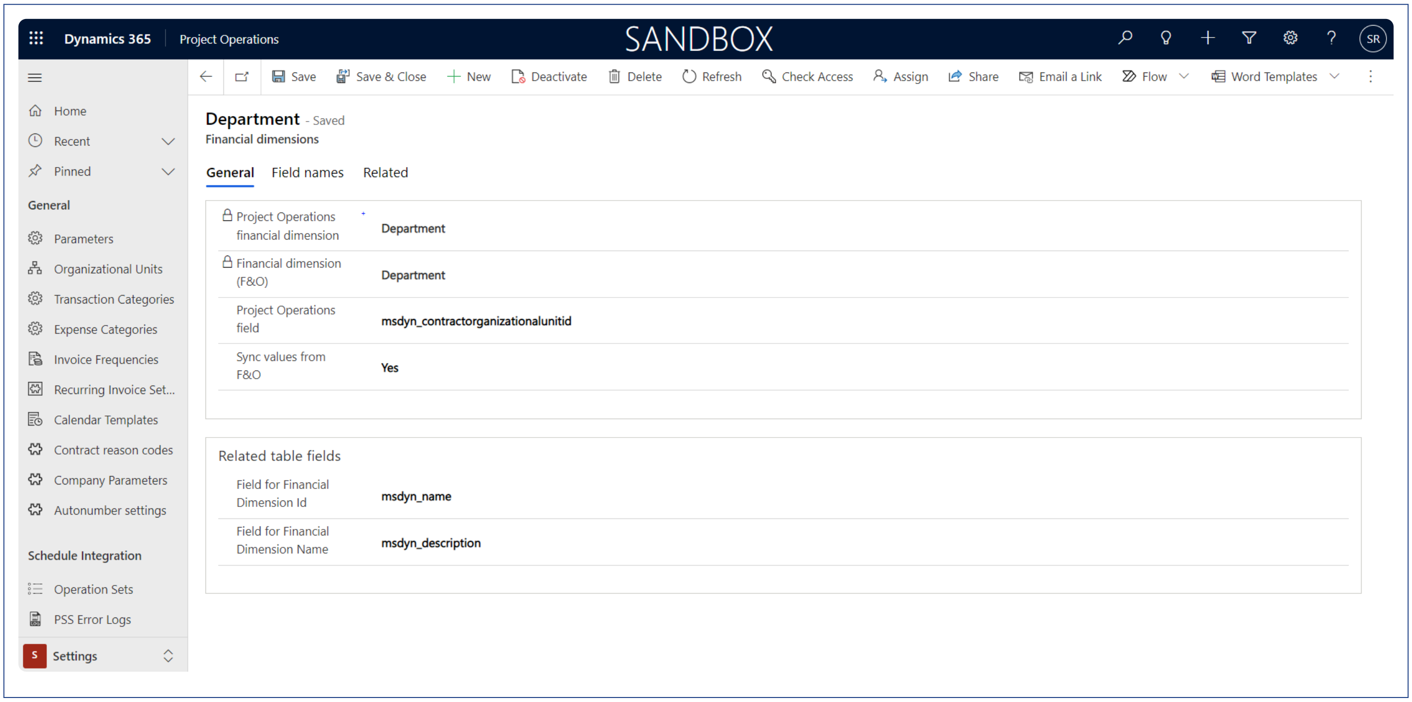
3.2.2. Financial dimensions

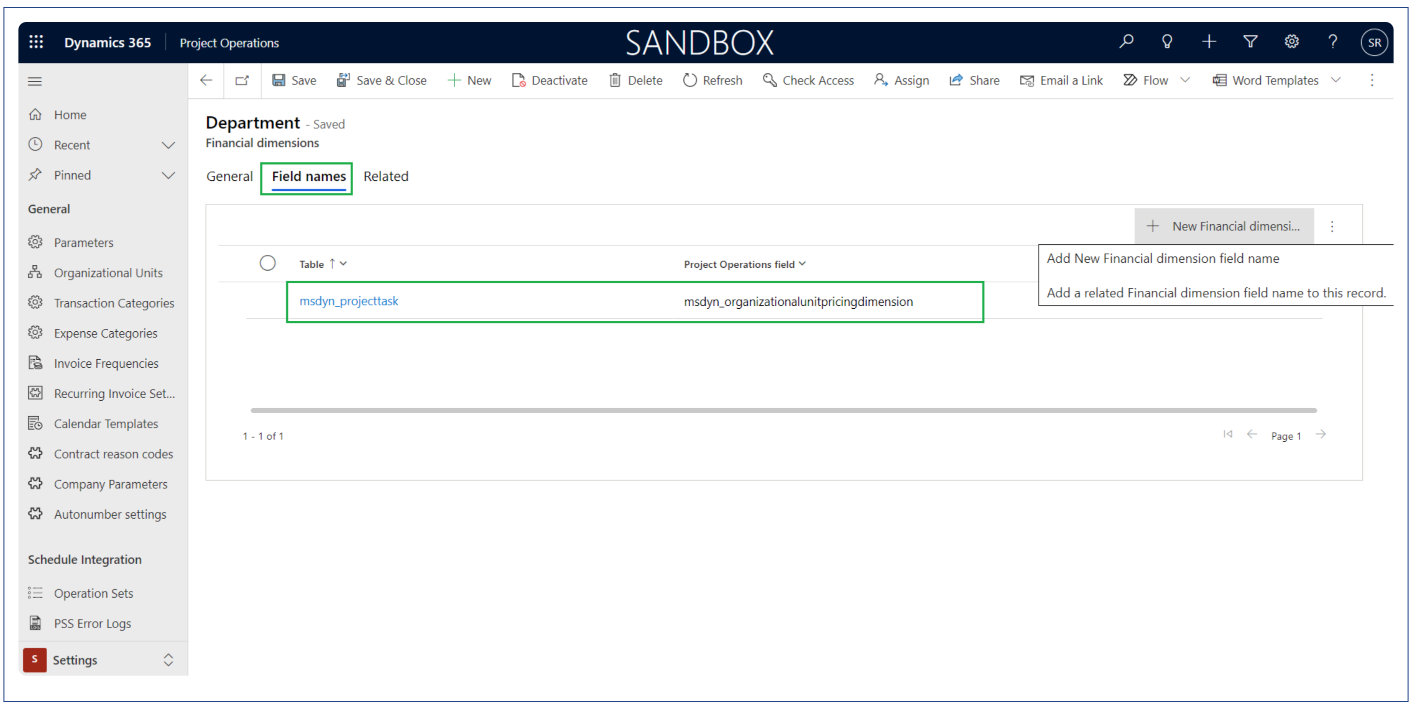
This section outlines the financial dimensions that should be synchronized for Projects between Project Operations and Finance and Operations. While it's not mandatory, users can manually enter financial dimensions for projects in Finance and Operations. However, configuring these settings will enable the definition of specific fields from the Project Operations 'Project' table to become financial dimensions in Finance and Operations, ensuring the automatic syncing of dimension values.

CE Project Operations: Go to Settings > Company Parameters > Financial dimensions tab

- Financial dimensions will be created first in CE Project operations.

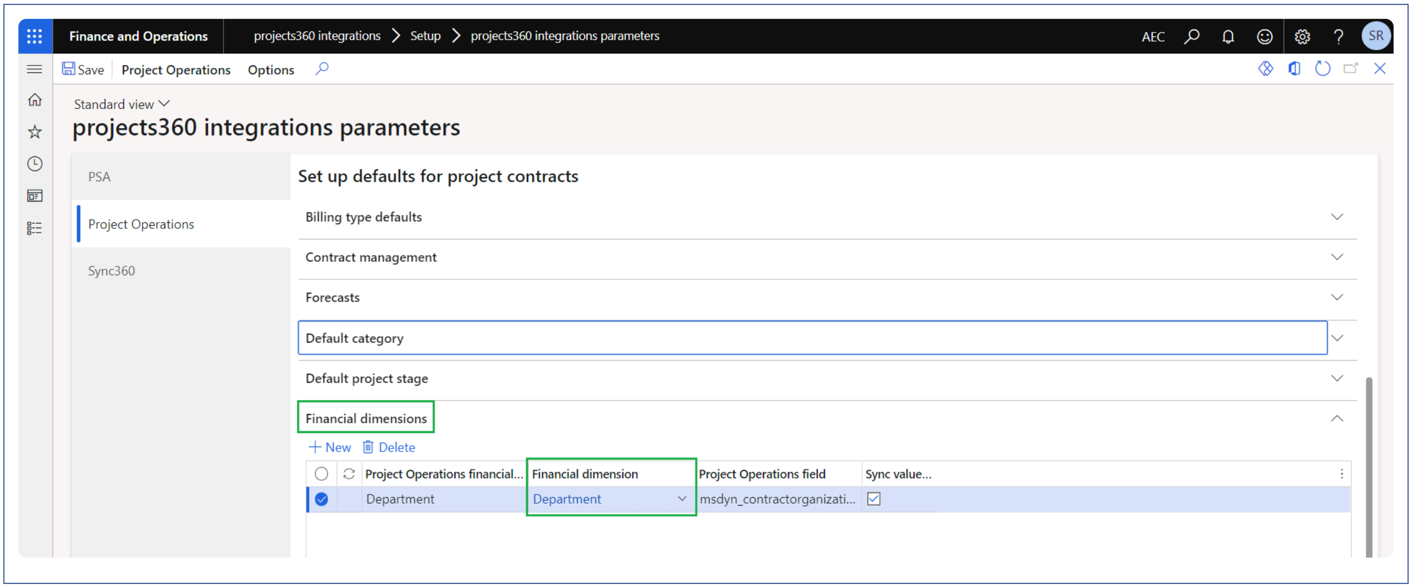






F&O: Go to projects360 integrations> projects360 integrations parameters > Project Operations tab

- Configuration will be finished in F&O where a financial dimension will be selected from the active ones for the specific legal entity.



Fields	Description
Project Operations financial dimension	Enter a Project Operations Financial dimension Id for each new record. Note – It is a good practice to have this field as same name as Finance and Operations financial dimension Id.
Financial dimension (F&O)	Select an existing financial dimension. This field is not editable. Note – This setting must be configured in Finance and Operations from ‘projects360 integration parameters’. Once the record is created in the Project Operations the same will be integrated as new record under Financial dimensions tab of ‘projects360 integration parameters’ form and user can select the matching financial dimension for the record.
Project Operations field	Enter the project table field (System name) which will be synced to Finance and Operations as financial dimension.
Sync values from F&O	Select ‘Yes’ to sync values from Finance and Operations to Project Operations when projects are updated in Finance and Operations.
Field for Financial Dimension Id	Define which field (System name) will become the ‘Financial dimension Id’ when a new value is synced to Finance and Operations. This field’s data source is the related table with ‘Project Operations field’.
Field for Financial Dimension Name	Define which field (System name) will become the ‘Financial dimension name’ when a new value is synced to Finance and Operations. This field’s data source is the related table with ‘Project Operations field’. Note – This is optional since the sync logic will use the ‘Field for Financial Dimension Id’ if this setting is empty.

'Field names' tab	This is an optional configuration only necessary if we can't use the 'Field for Financial Dimension Name' setting. This happens when 'Financial Dimension Name' data source is not directly related to 'Project Operations Field'.

- If we have a financial dimension assigned to 'Project Operations field' in 'Project Operations financial dimension':
    - Then this field from the project table in Project Operations will be synced as the configured financial dimension for the created project in Finance and Operations.
    - If the financial dimension is set as 'Custom dimension' and the financial dimension value doesn't exist in Finance and Operations, then it will be created before populating the value for that project.
    - If the financial dimension is set as other than 'Custom dimension' and the financial dimension value doesn't exist in Finance and Operations, then an error message will be displayed stopping the sync process.
    - The financial dimension should be updated in Finance and Operations if the fields value is updated in Project Operations after the project creation.
- Recommended 'Financial dimensions' standard configuration for CE AEC merged solution.

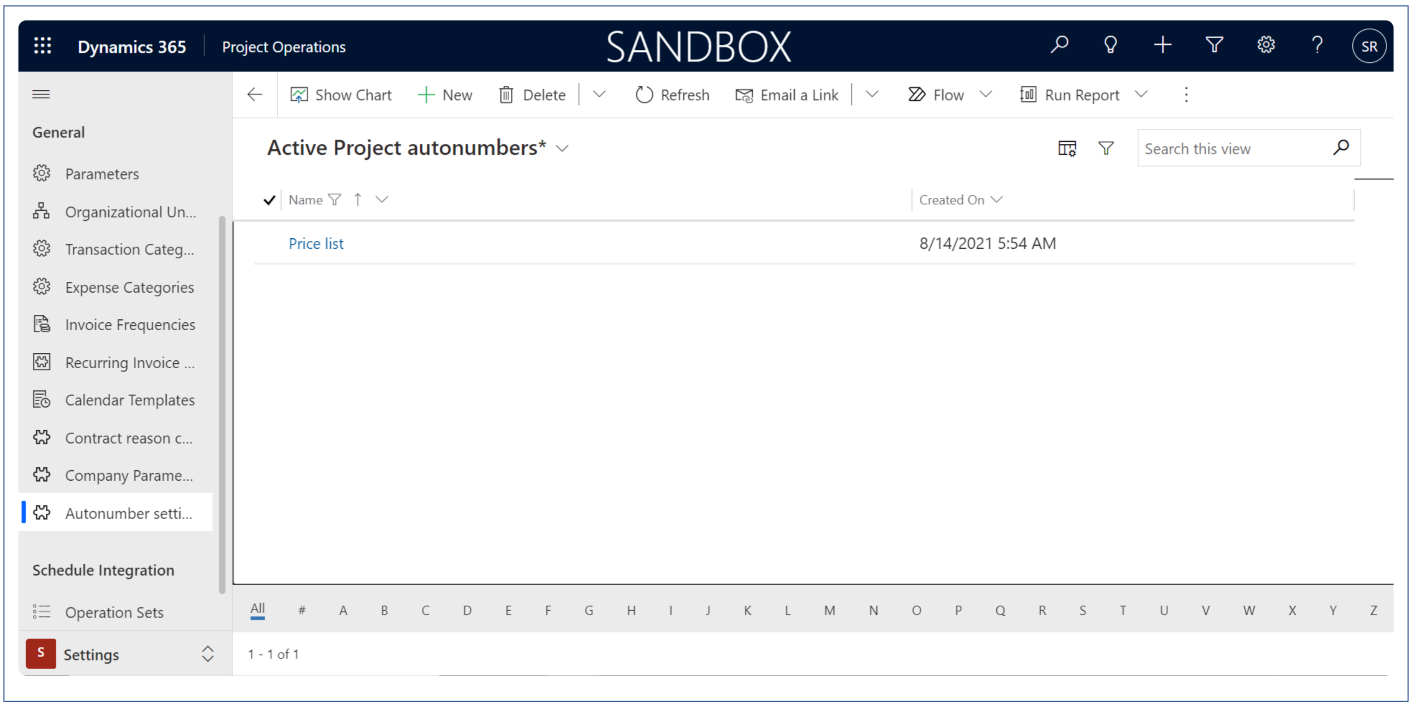
ProjOps Financial dimension	F&O Financial Dimension	Project Operations Field	Sync Value from F&O	Field for Financial Dimension Id	Field for Financial Dimension Name
Market	Market	vs360_market	Yes	vs360_name	—-
Office	Office	vs360_office	Yes	vs360_name	—-
Segment	Segment	vs360_segment	Yes	vs360_name	—-

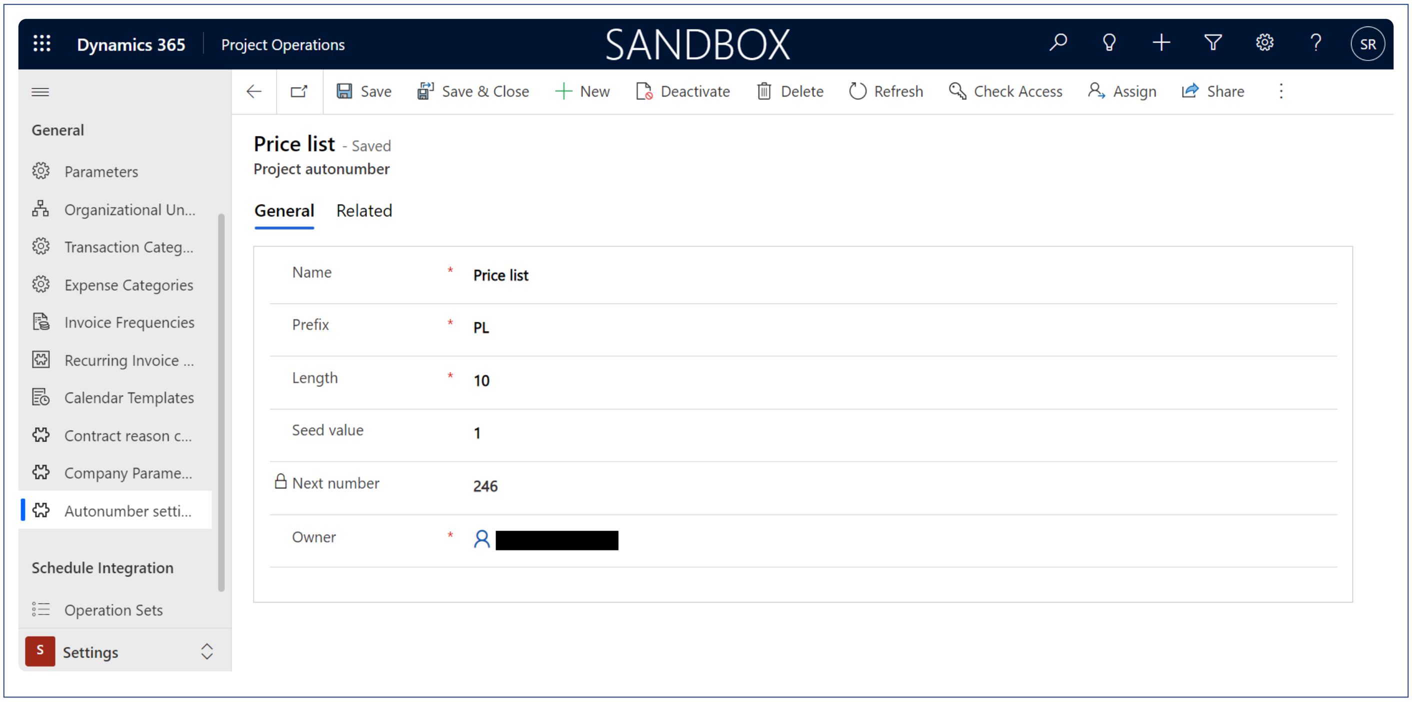
3.2.3. Autonumber settings

There is a new parameter form “Autonumber settings” introduced to configure number sequence format for “Price list”. This autonumbering will be used when the role based cost or sales prices synced between Finance and Operations and vice versa.

The Auto Number settings assist administrators in establishing the sequencing for entities based on the business process. The Auto Number feature serves as a unique identifier for every record, facilitating easy data retrieval through the auto-number sequence.

Go to Settings > General > Autonumber settings





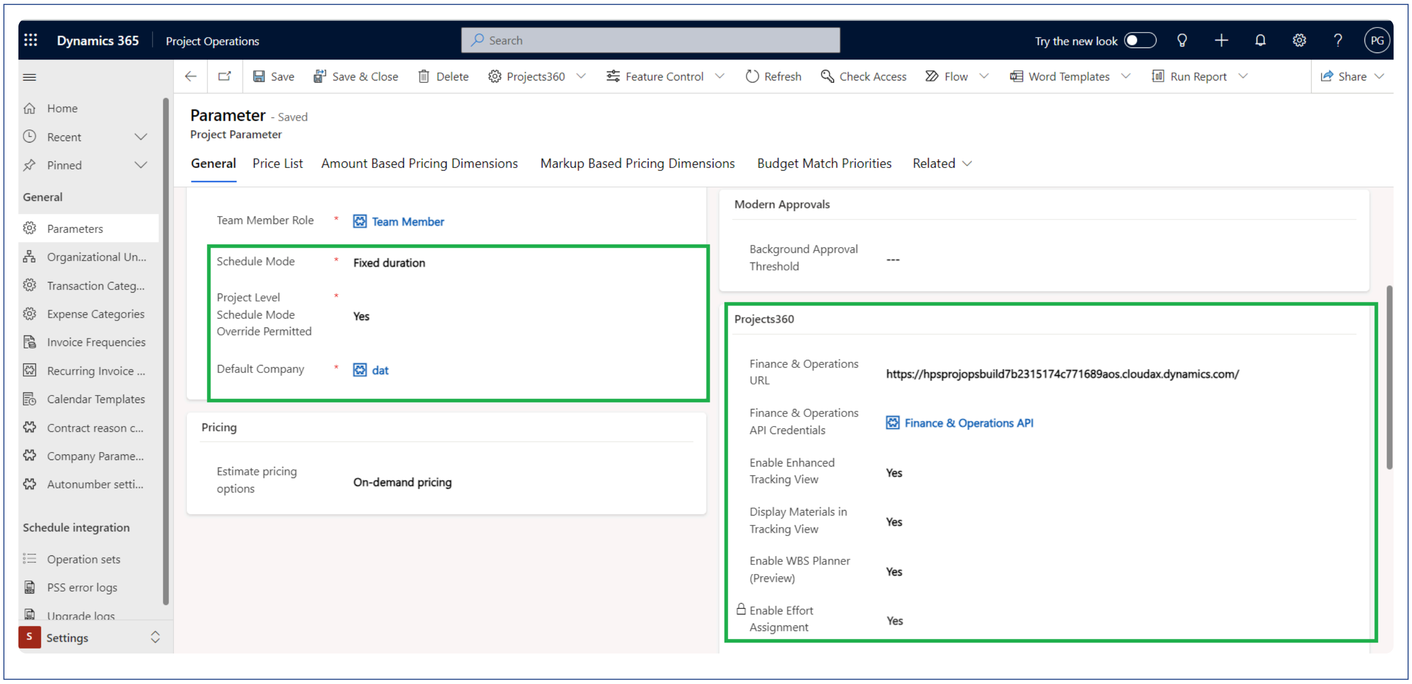
Details of the fields available on the Autonumber settings form are as follows -

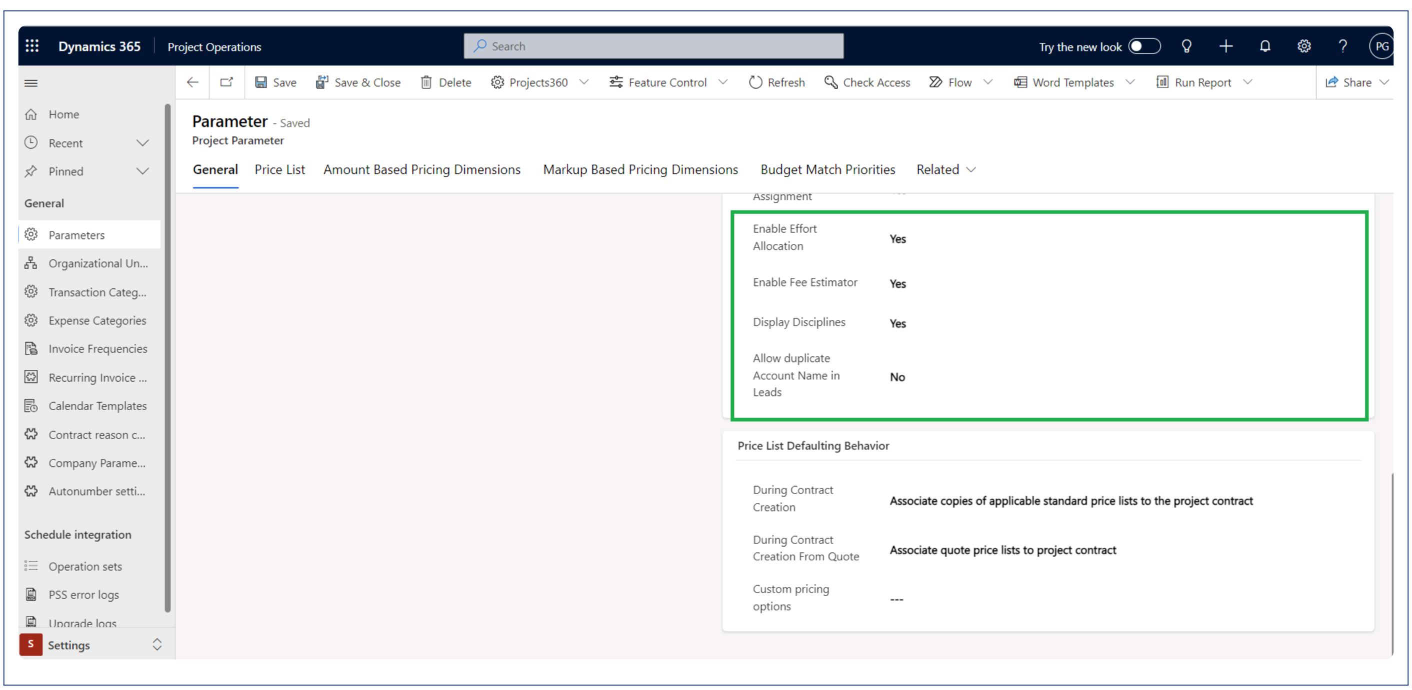
Fields	Description
Name	Define the value as “Price list”.
Prefix	Define the prefix value for Price list.
Length	Define length for numbering.
Seed value	Define starting value for the numbering.
Next number	Auto populates based on the number sequence increment.
Owner	Auto populates with the user name creating the autonumbering.

3.2.4. Project parameters

Specific Project 360 parameters have been added to the Project Operations "Project parameters" form. Additionally, some standard parameters must also be configured. Projects360 section can be found in "Project parameters" form where settings related to different areas like Projects, Opportunities, Contracts, etc. can be configured..

Go to Settings > General > Parameters





Details of the fields available on the Project parameters form are as follows -

Fields	Description
Schedule Mode	Select the default schedule mode for all new projects. Suggested to use “Fixed duration” value while if activating Fee Builder.
Project Level Schedule Mode Override Permitted	This parameter allows to change the schedule mode by specific project. Suggested to use “Yes” value.
Default Company	This is a mandatory parameter, and it will be used to default the company for shared Customers. Suggested to use company DAT if there will be multiple companies configured in the system.
Finance & Operations URL	Set URL pointing to the F&O environment that we want to link with the Project and Operations app.
Enable Enhanced Tracking View	Set as “Yes” to activate the enhanced projects360 Tracking view within the Project form.
Display Materials in Tracking View	Set as “Yes” to display materials in the Enhanced Tracking View. The feature will be set to “No,” and the field will be locked if the Enhanced Tracking View is set to “No”.
Enable WBS Planner	Set as “Yes” to activate the projects360 “WBS Planner” spreadsheet within the Project form. This action will remove the Task grid from the Project, and resource and expense estimates will be conducted on the WBS Spreadsheet.
Enable Effort Assignment	Set as “Yes” to activate the new projects360 “Effort Assignment” spreadsheet within the Project form.
Enable Effort Allocation	Set as “Yes” to activate the projects360 “Effort Allocation” spreadsheet. All role and resource efforts will be associated and tightly coupled with effort assignments. If effort assignment is set to “No,” then “Effort Allocation” will also be disabled, and vice versa.
Enable Fee Estimator	Set as “Yes” to activate the new projects360 “Fee Estimator” spreadsheet within the Opportunity line form.
Display Disciplines	Set as “Yes” to display “Disciplines” across various spreadsheets such as WBS, Fee Estimator, Effort Allocation, and Tracking View.
Allow Duplicate Account Name in Leads	Activating this setting, the same “Account Name” can be used multiple times in new Leads.

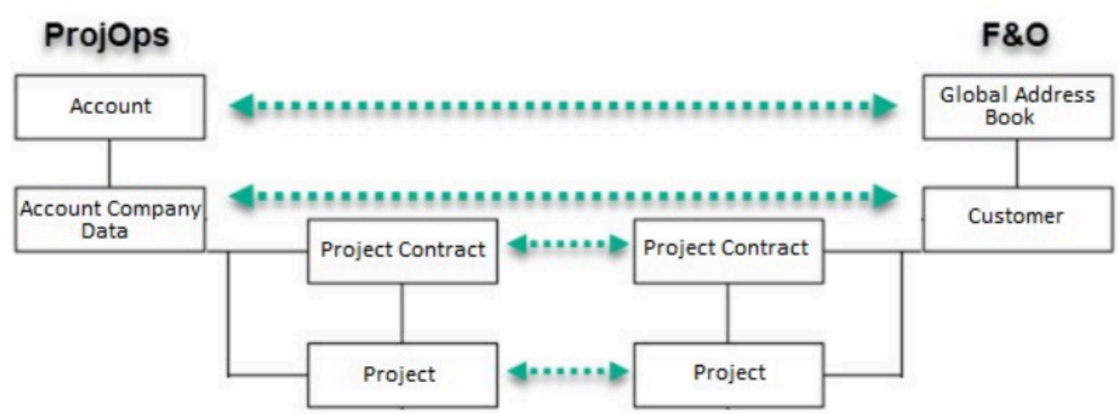
Note – The Finance and Operations URL specified in the field should not include a company argument.

3.2.5. Shared customers across companies

The synchronization of accounts and customers between Project Operations and F&O has been enhanced allowing to use shared customers across all legal entities.

Overview of the “Shared customers/accounts” dual-write structure

The graph below outlines the new dual-write data entities structure that supports shared customers/ accounts across multiple companies:



Dual-write Data Entities	Description
Account – Organization	Replacing the standard one. Accounts will be synced as **“Book address organization”** in Finance & Operations.
Account Company data – Customer	Replacing the standard one. Account Company Data will be synced as “**Customers**” in Finance and Operations.

Account Company Data

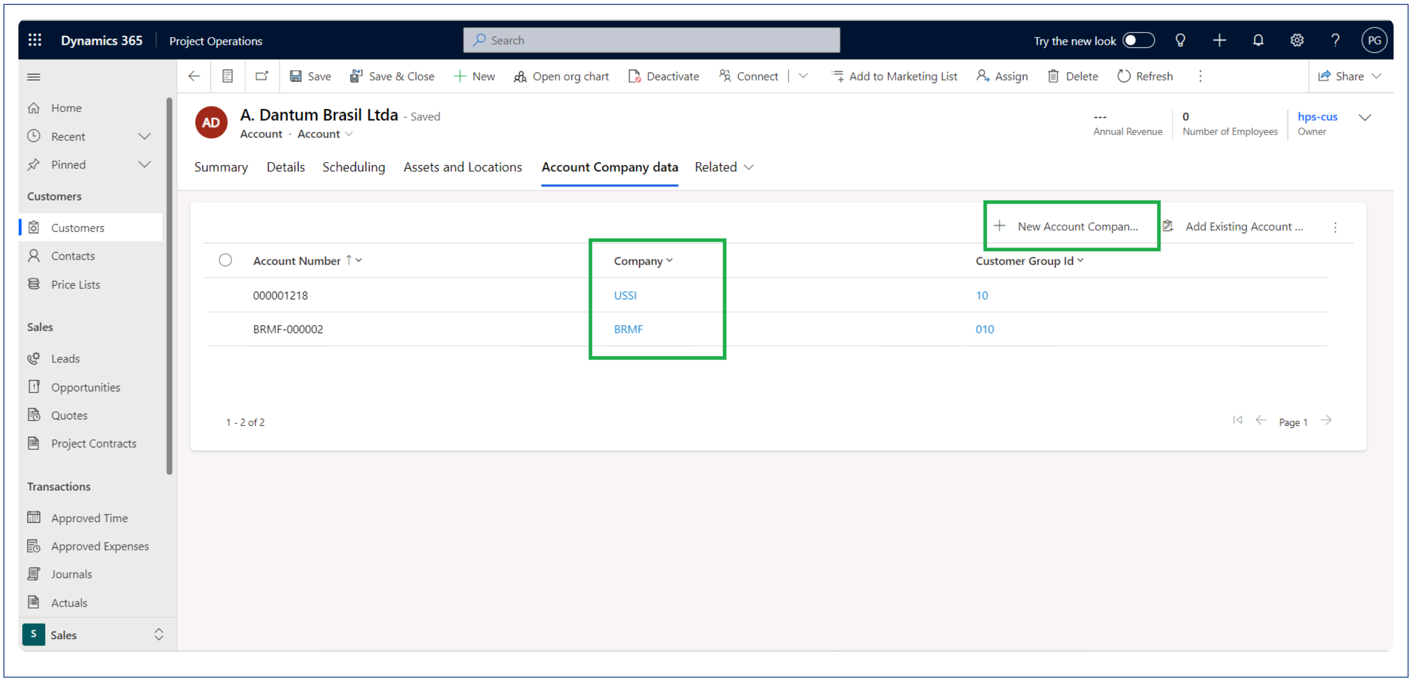
A new entity “Account Company Data” will contain the specific data for each legal entity.

- All necessary fields to create customers for specific legal entity will be contained on this entity.
- “Account company data” is accessible from the “Customer/Account” form in Project Operations.
- The “Account Company Data” field will also be available from the entities “Project” and “Contract”. This field is auto-populated based on the combination of the “Account” field and the new “Company” fields. When both fields are selected, the projects360 logic will populate the “Account Company Data” field.

Note – An error message will appear if “Account Company Data” does not exist for the combination of “Account” and “Company”. The error message will be: “Account %1 is not configured for Company %2”.

A new tab labeled “Account Company Data” is now available from the Account form only when the Relationship type of the Account is set to “Customer”.

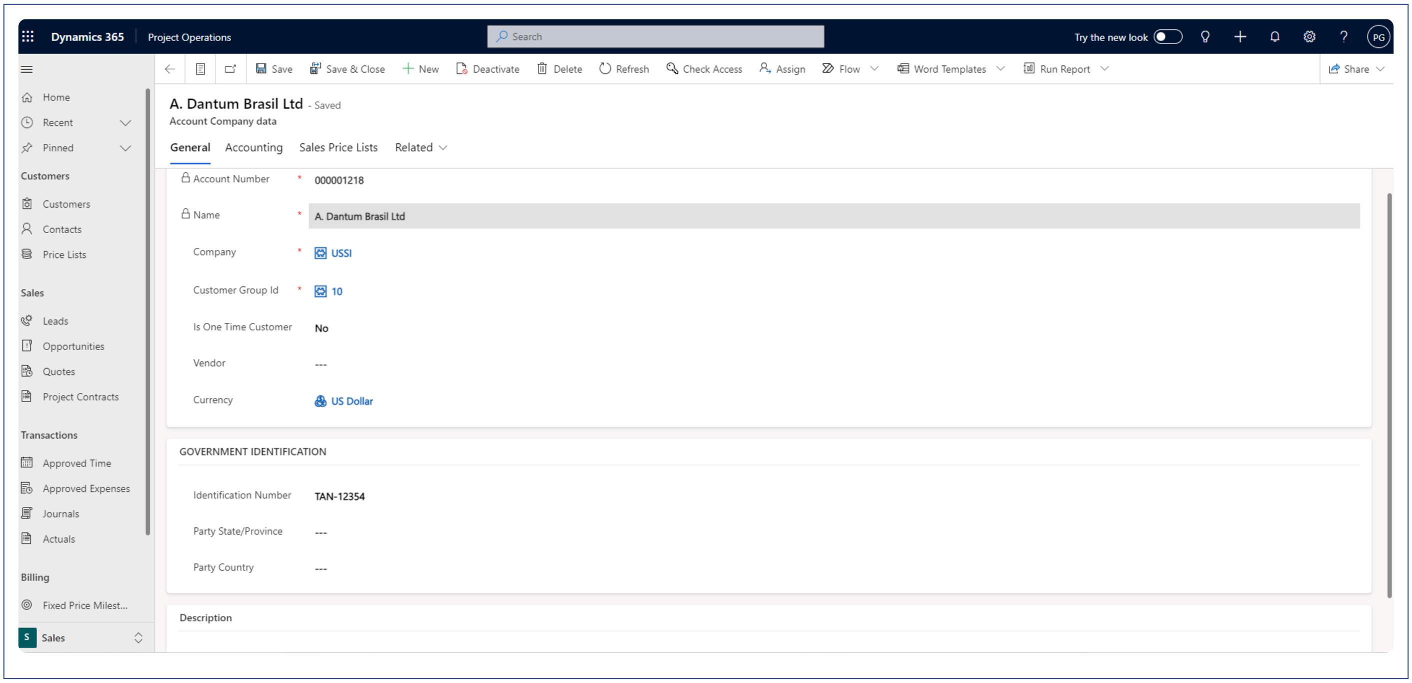
- New “Account Company Data” records can be created directly from this grid.
- A new grid is displaying the “Account Company Data” records filtered by the selected Account.



Note – “Account Company Data” records can be deleted only if there are no related “Projects” or “Contracts” associated with Account otherwise an error message will be displayed.

Account Company Data form consists of different tabs like “General”, “Accounting” and “Sales Price List”:

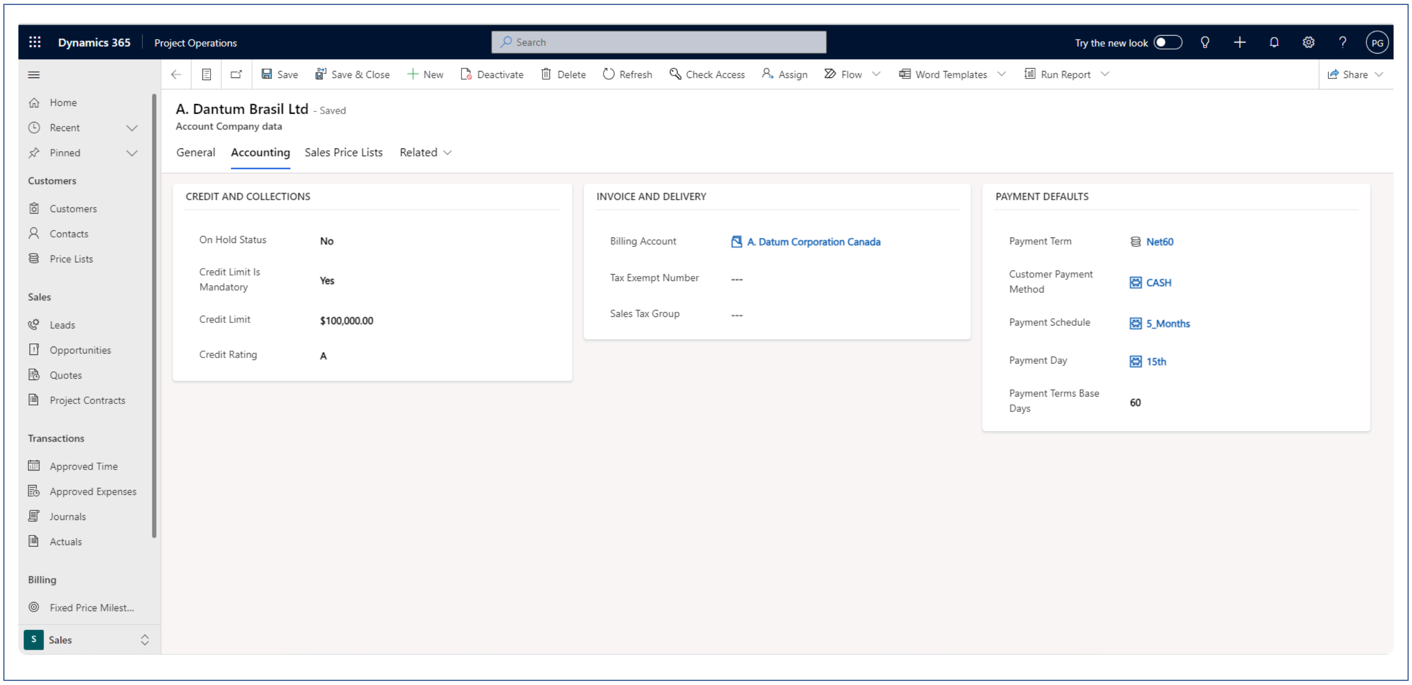
- **General**
  The General tab of the “Account Company Data” typically highlights basic information about the account or customer. The detailed explanation of fields are highlighted below.



Fields	Description
Account Number	A unique identifier of the Account.
Name	Account Name will be auto populated.
Company	Select the Company for which you want to configure Account Company Data.
Customer Group Id	This field will be filtered based on the company we are selecting.
Is One Time Customer	“Is One time Customer” field typically reflects whether the account is classified as a one-time customer or not. When this field is enabled or checked, it indicates that the account is considered to be a one-time customer, meaning they are not expected to be repeat customers.
Vendor	When you select a vendor , it establishes a connection between the account and the vendor. This relationship might indicate that the account is associated with or managed by the selected vendor.
Currency	The “Currency” field on the Account Company Data form typically reflects the currency associated with the account. This field allows users to specify the currency in which financial transactions related to the account of specific company are conducted.
Identification Number	This field might represent various types of identification numbers like Tax Identification Number, Company Registration Number depending on the organization’s needs.
Party State/ Province	This field reflects the state or province associated with the primary contact or party related to the account.
Party Country	This field reflects the country associated with the primary contact or party related to the account. This field helps in identifying the geographical location related to the account.

Description	This field reflects additional information or notes about the account company data been configured for specific company.

- **Accounting**
  The Accounting tab on the Account form typically reflects financial and accounting information related to the account and are basically divided into three sections like “Credit and Collections”, “Invoice and Delivery” and “Payment Details”. The fields related to these sections are highlighted below.

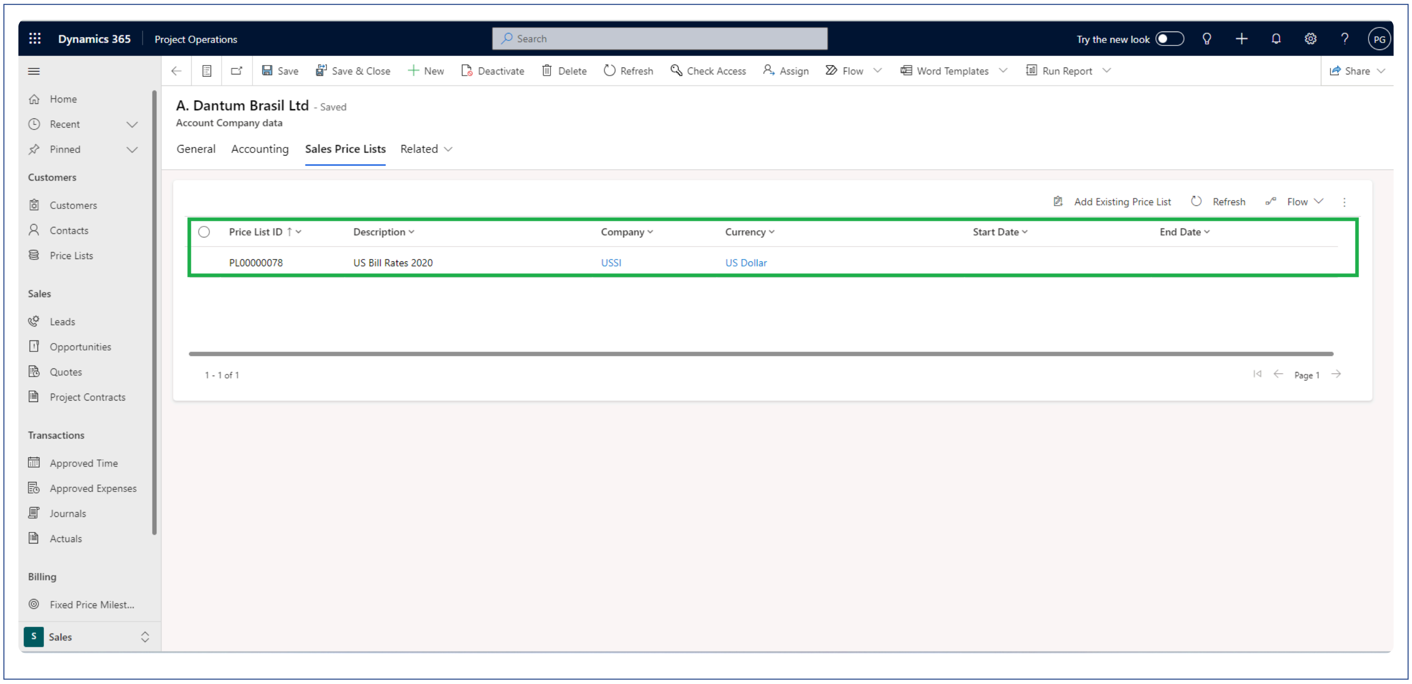


Fields	Description
On Hold Status	This optionset field reflects the status of the account company data in relation to its activity or engagement. Different On Hold Status which are available are “No”, “Invoice”, “All” etc.
Credit Limit Is Mandatory	This field reflects whether the credit limit is a mandatory field for the account or not.
Credit Limit	This field reflects the maximum amount of credit extended to the account.
Credit Rating	This field allows users to assign a rating or score to the account based on various factors such as payment history, credit checks, or other financial metrics.
Billing Account	This field reflects a relationship between the current account and another account designated as the billing account. This field allows users to associate the current account with another account that handles billing-related activities.When users select a billing account using this lookup field, it indicates that the selected account is responsible for billing or invoicing purposes related to the current account.

Tax Exempt Number	This field is used to record any tax exemption identification numbers associated with the account, indicating that the account is exempt from certain taxes.
Sales Tax Group	This field is often used to specify the tax group or category that applies to sales transactions related to the account.
Payment Term	This field reflects the payment terms associated with the specific account or customer. The Payment Term lookup field allows users to specify the agreed-upon payment terms for the account, such as “Net 30 days,” “Net 60 days,” or other custom payment arrangements. This information helps different teams to understand the payment schedule and manage customer accounts effectively.
Customer Payment Method	This field reflects the preferred payment method associated with the customer account. This field typically allows users to select from a list of payment methods that have been predefined in the system.
Payment Schedule	This field allows users to link specific payment schedules to the account record, providing quick access to relevant payment information.
Payment Day	This field reflects the preferred payment day for the account. This field might be configured to display a list of predefined payment day options, such as specific dates of the month or weekdays, allowing users to select the preferred payment day for the account.
Payment Terms Base Days	This field reflects the number of days added to the transaction date to calculate the due date for payments.

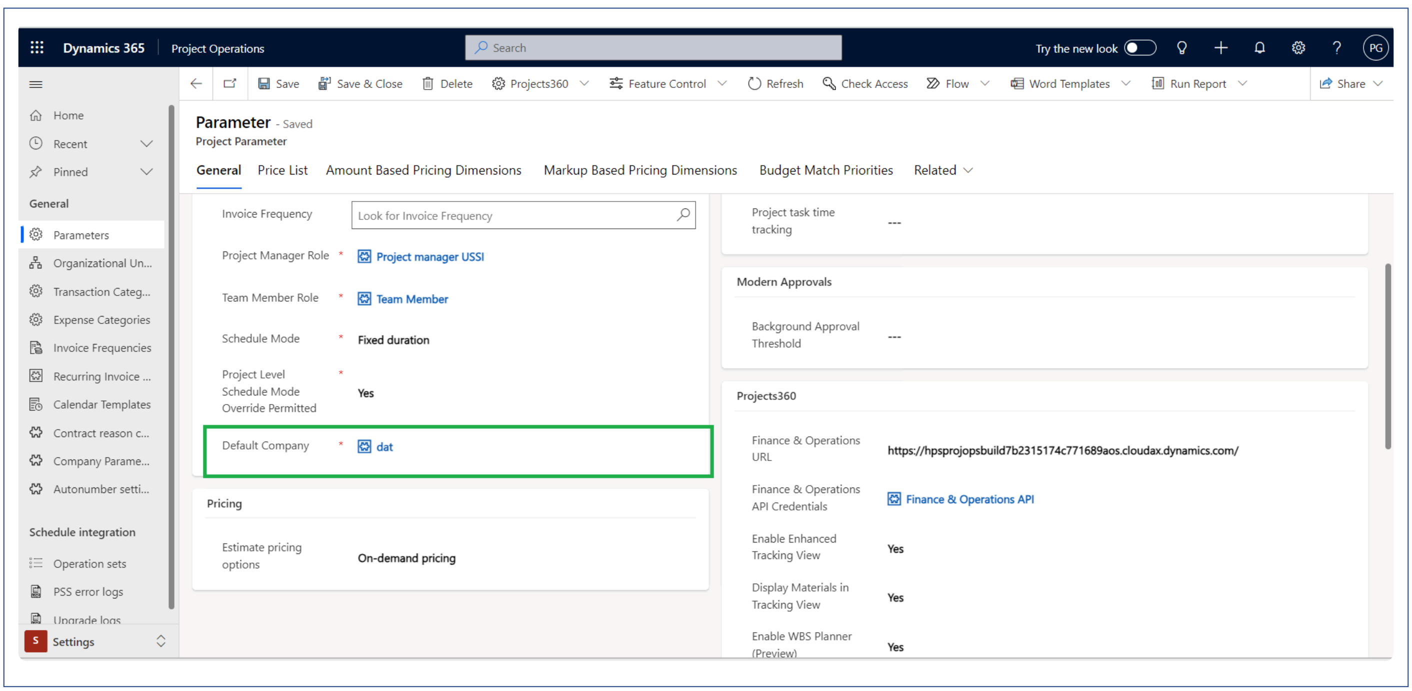
- **Sales Price List**

This tab enables the configuration of multiple default “Sales price lists” for each company. Sales price lists may vary over time, and different roles and prices are associated with different price lists. That’s why administrators have the privilege to add several Sales Price lists depending on the Legal Entity for which the Account Company Data is defined. These will serve as default Sales Price Lists for new Opportunities, Quotes, and Project contracts.



Configuration

The below table highlights "Default company" parameter added to Project Operations Parameters.



Fields	Description
Default Company	This is a mandatory parameter, and it will be used to default the company for shared customers.Suggested to use company DAT if there will be multiple companies configured in the system.

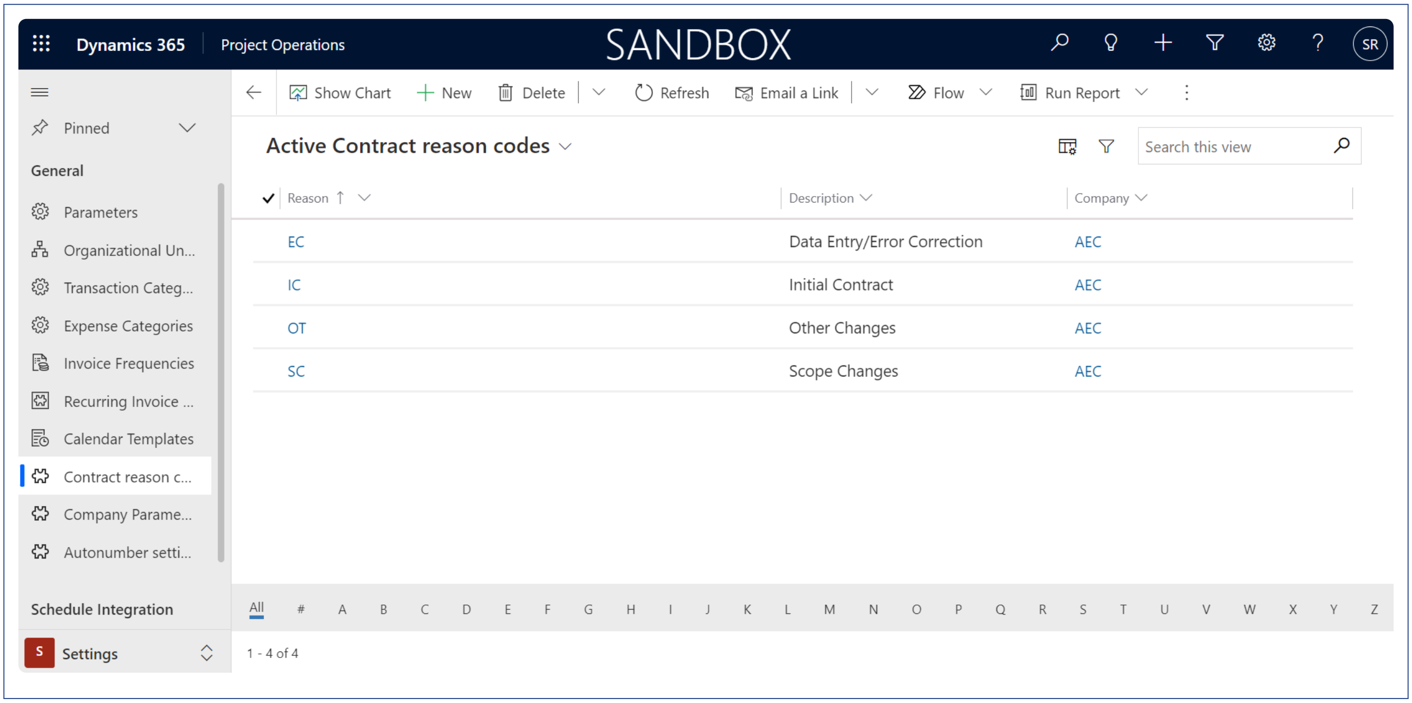
Important notes regarding this feature

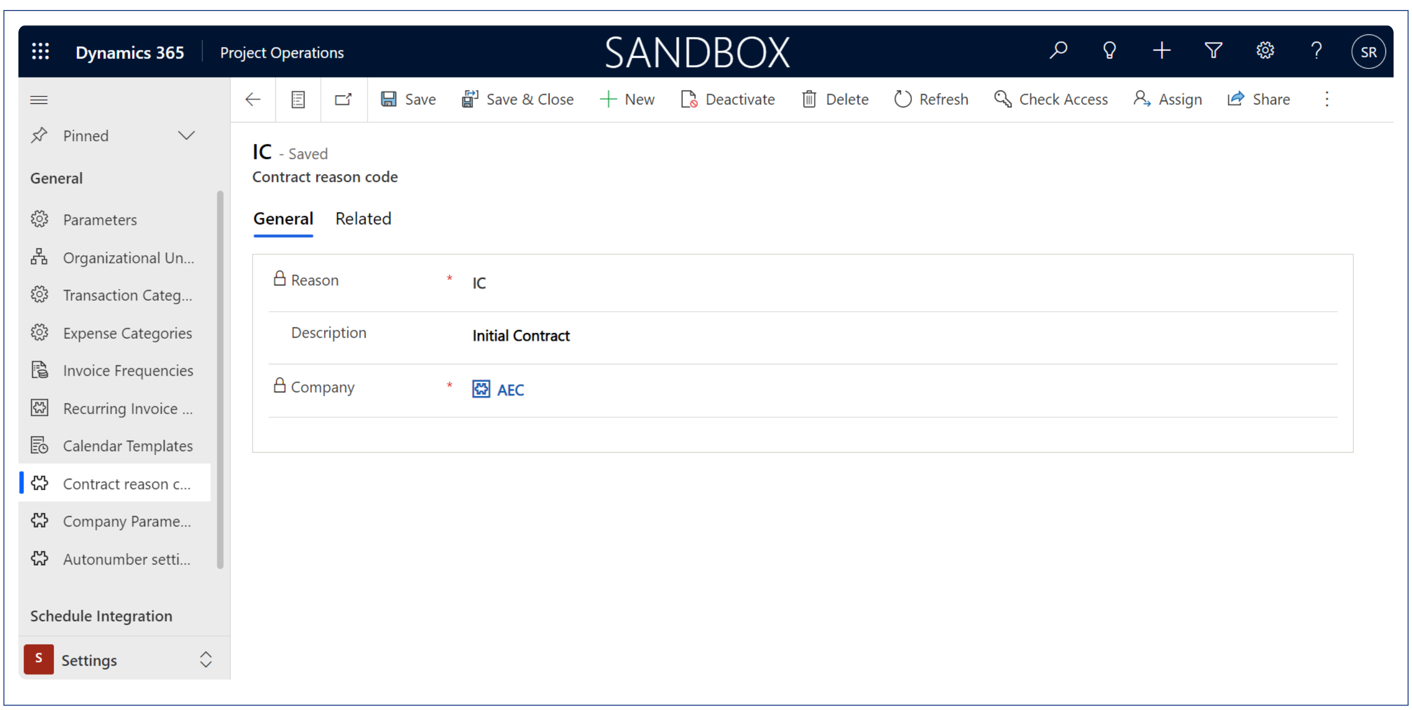
- When a new “Opportunity” or “Opportunity line” record is created then:
  - Microsoft Standard “Company” field is defaulted from the “Default Company” from Parameters.
  - The new “Company” field (vs360_company) is defaulted using the “Company” from the “Bookable Resource” form. If no value is present, it will then default from the “Usage Company” from the “User”.
- When a new “Project” record is created:
  - Microsoft Standard “Company” field will be defaulted using“Default company” from Parameters.
  - New “Company” field is defaulted using the “Company” from “Bookable resource” form. If there is no value, then it will be defaulted from the “Usage Company”from“User”.
- The “Account Company Data” field was also be added to the “Project” and “Contract” entities, but it will not be visible on the form. This field will be automatically populated based on the combination of the “Account” field and the new “Company” fields. When both fields are selected, the new logic will populate the “Account Company Data” field.
- Additionally, when a new team member is added to the project, the “Resourcing Company” will be defaulted from the value of the new “Company” field (vs360_company).

3.2.6. Contract reason codes

A new form for “Contract reason codes” has been introduced to create the necessary reason codes. These codes will be utilized when creating project contract lines. This data can also be synchronized from Finance and Operations.

Go to Settings > General > Contract reason codes





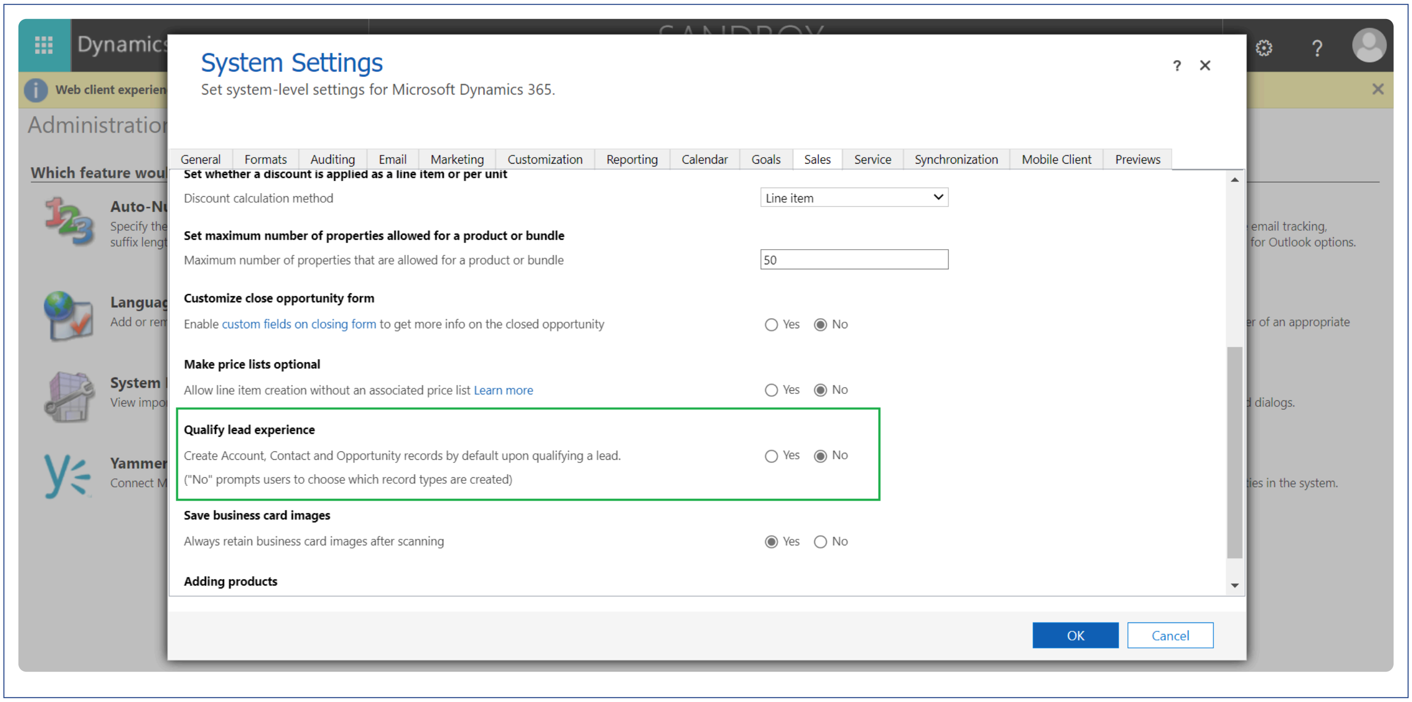
Details of the fields available on the Contract reason codes form are as follows -

Fields	Description
Reason	Define the reason code.
Description	Define the description for the reason code.
Company	Define the company for which the reason code is created.

3.2.7. Qualify lead parameters

Update the “Qualify Lead Experience” parameter to “No” in the System settings. This action will prompt users to choose which records to create. This is necessary as part of the enhancement to the current “Qualify Lead” logic, where a new account is created as a “Prospect.” Additionally, the existing logic, when an opportunity line is won, will be improved to update “Prospect” to “Customer.”

Go to Advanced Settings > Administration > System Settings > Sales tab



4. Opportunity management

This section details out the various enchantments provided for the Opportunity management process such as creation of P-project and draft project, ability to win, lose or reopen options at the opportunity line level and automatic creation of quote line for draft project created. The enhancements that are grouped together in this section are related to:

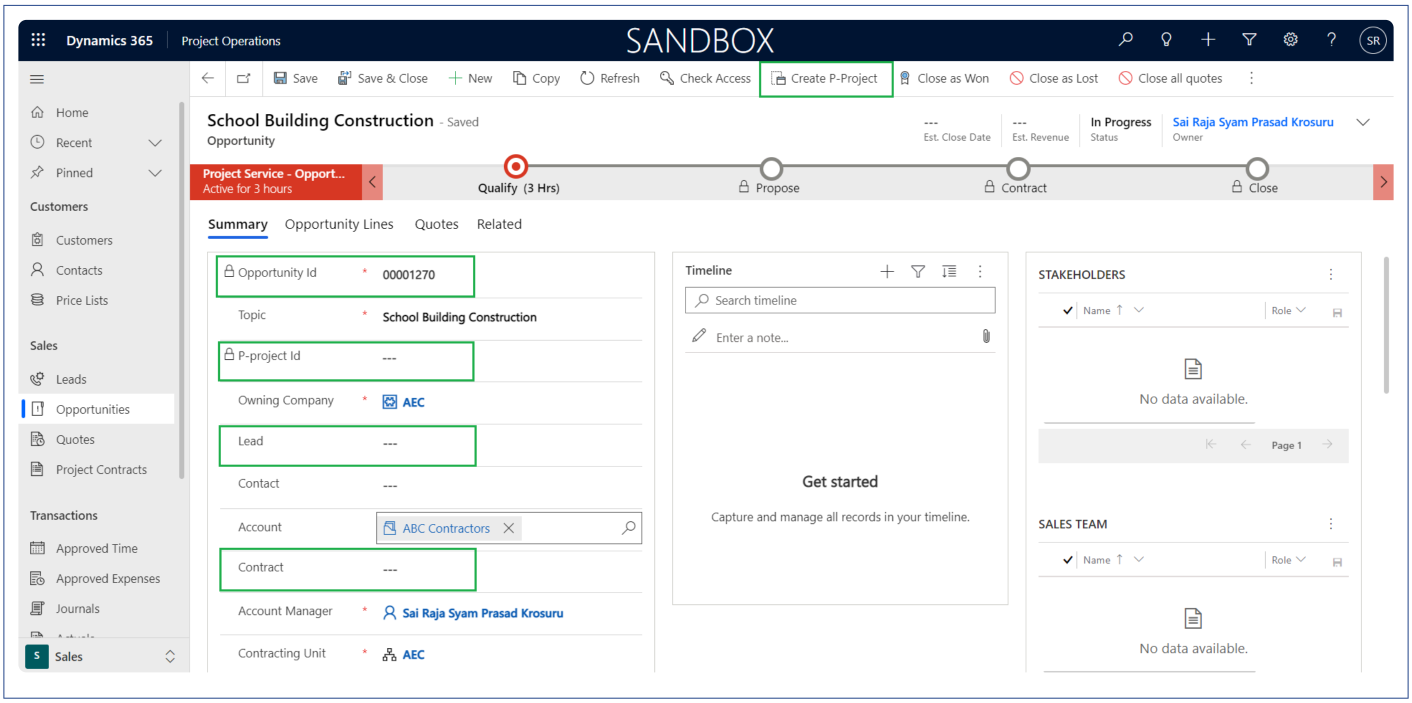
Select a section to view more details about them.

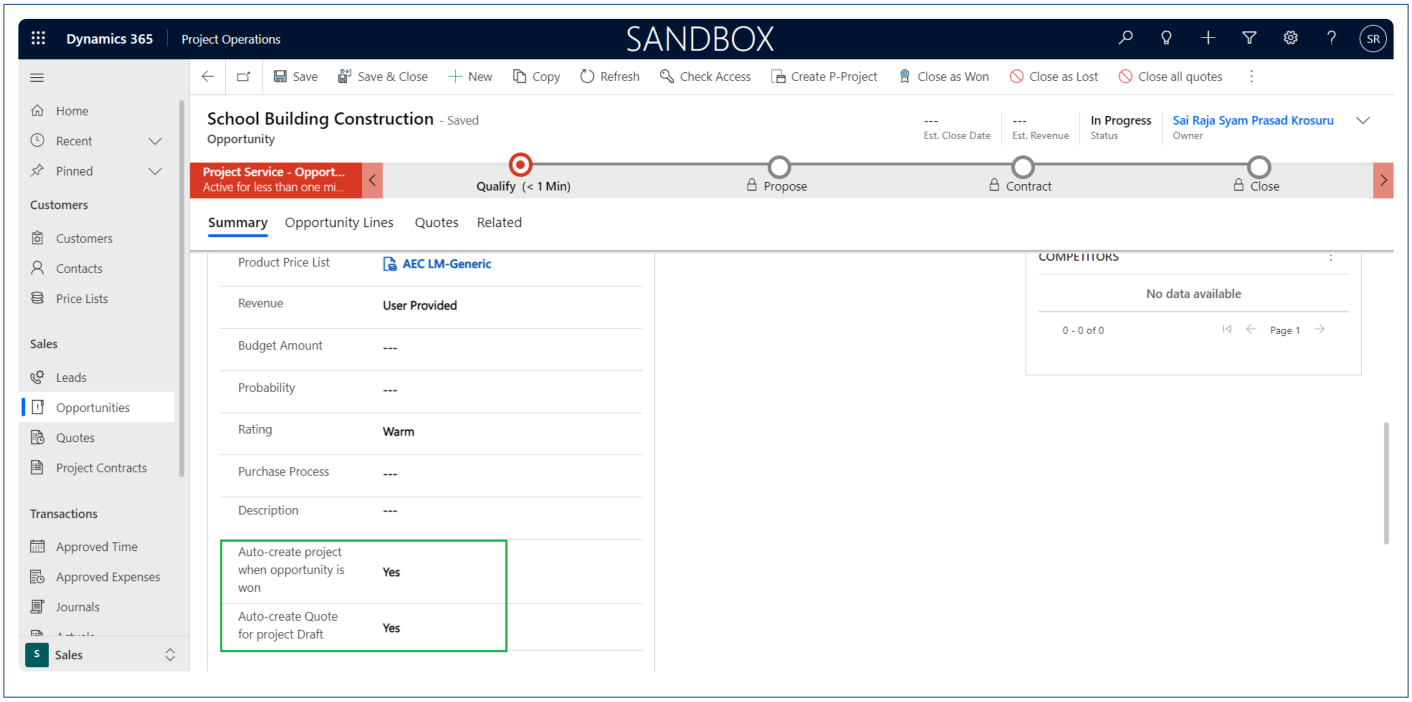
4.1. Opportunity sales process

This section details out the opportunity sales process and various steps involved during this process such as opportunity creation, P-project creation, adding opportunity lines, creation of project draft, auto-creation of quote for project draft, closing the Opportunity/Opportunity lines as 'Won' or 'Lost'.

Go to Sales > Opportunities

Users can create new opportunity records by updating fields 'Topic', 'Account' and 'Product Price List'. Once the record is successfully saved 'Opportunity Id' will be generated automatically which is displayed in the Opportunity form. Additional functionality is added to automatically create a 'P-project' or 'Proposal project' (Refer P-project creation section for more details) when the Opportunity record is saved.





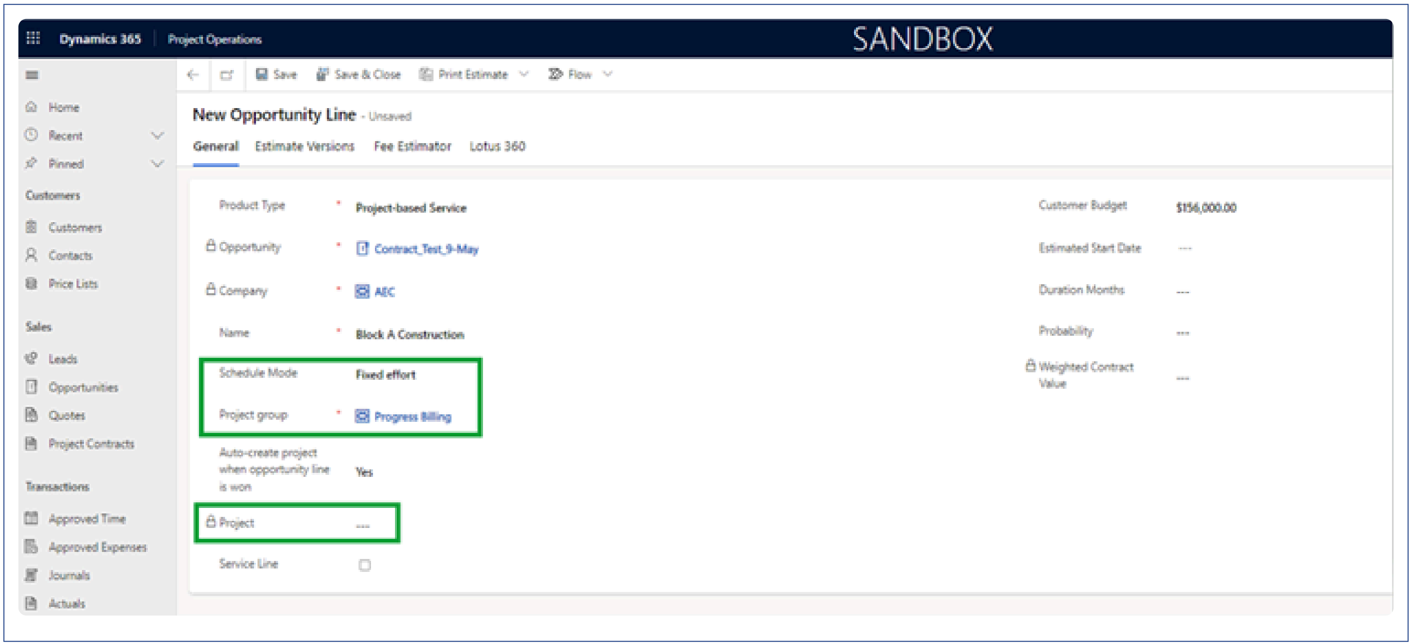
Details of the fields and buttons are described below:

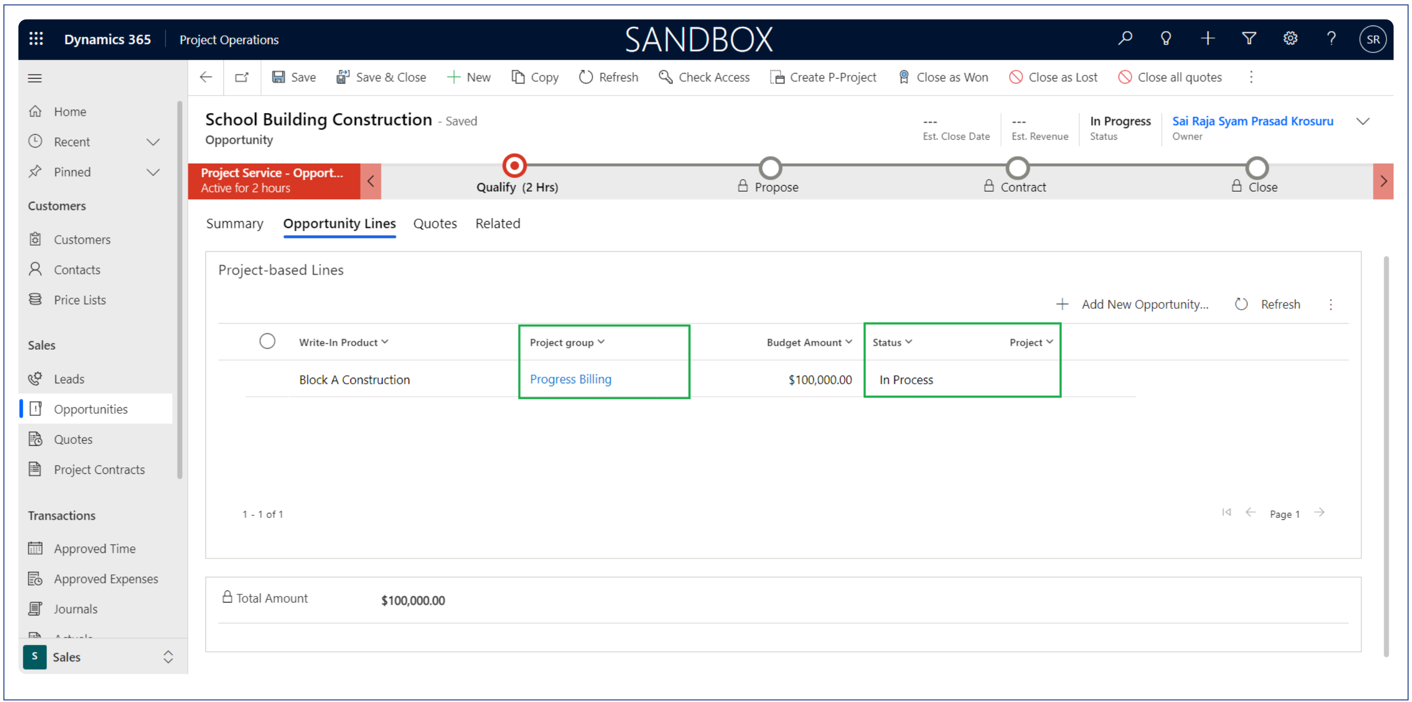
Fields	Description
Opportunity Id	This field is mandatory and non-editable. Automatically generates when a new opportunity is saved.
P-project Id	This field is non-editable and represents the name of the proposal project created when the opportunity is saved. This updates automatically when the ‘Auto-create P-project’ is set to ‘Yes’ in the Company Parameters. For ex: The Opportunity Id is ‘00001001’, P-project Id suffix is ‘_P’, then the Project ID created for this project will be ‘00001001_P’ in the Projects form.
Lead	This field is optional and editable, lists the available lead records filtered by owning company. This field will not be editable once the opportunity is closed as won.
Contract	This field is optional and blank when the opportunity is created. This field will be updated with ‘Contract Id (Sales Order Number)’ created when an opportunity line is ‘Won’.
Auto-create project when opportunity is won	If this parameter is set to ‘Yes’, projects get created automatically when the Opportunity or opportunity lines are ‘Close as Won’.
Auto-create Quote for project Draft	If this parameter is set to ‘Yes’, a quote and quote line will get created automatically when-ever there is new project draft is created for opportunity line.
Create P-Project	This button will be available only when the ‘Auto-create P-project’ is set to ‘No’ in the Company Parameters and ‘P-project Id’ field is blank at the Opportunity form Summary tab.

	Clicking on this button will create P-project.

Go to Sales > Opportunities > Opportunity Lines tab

User can add Opportunity lines against the saved Opportunity by clicking on button ‘Add New Opportunity Line’ at the ‘Opportunity Lines’ tab by updating fields ‘Name’, ‘Customer Budget’ and ‘Project group’. ‘Billing Method’ for this Opportunity line by default will be ‘Time and Material’ and not editable.
Also, the user can see there are 3 more tabs available under the Opportunity line tab: Estimate Versions, Fee Estimator, and Lotus360.

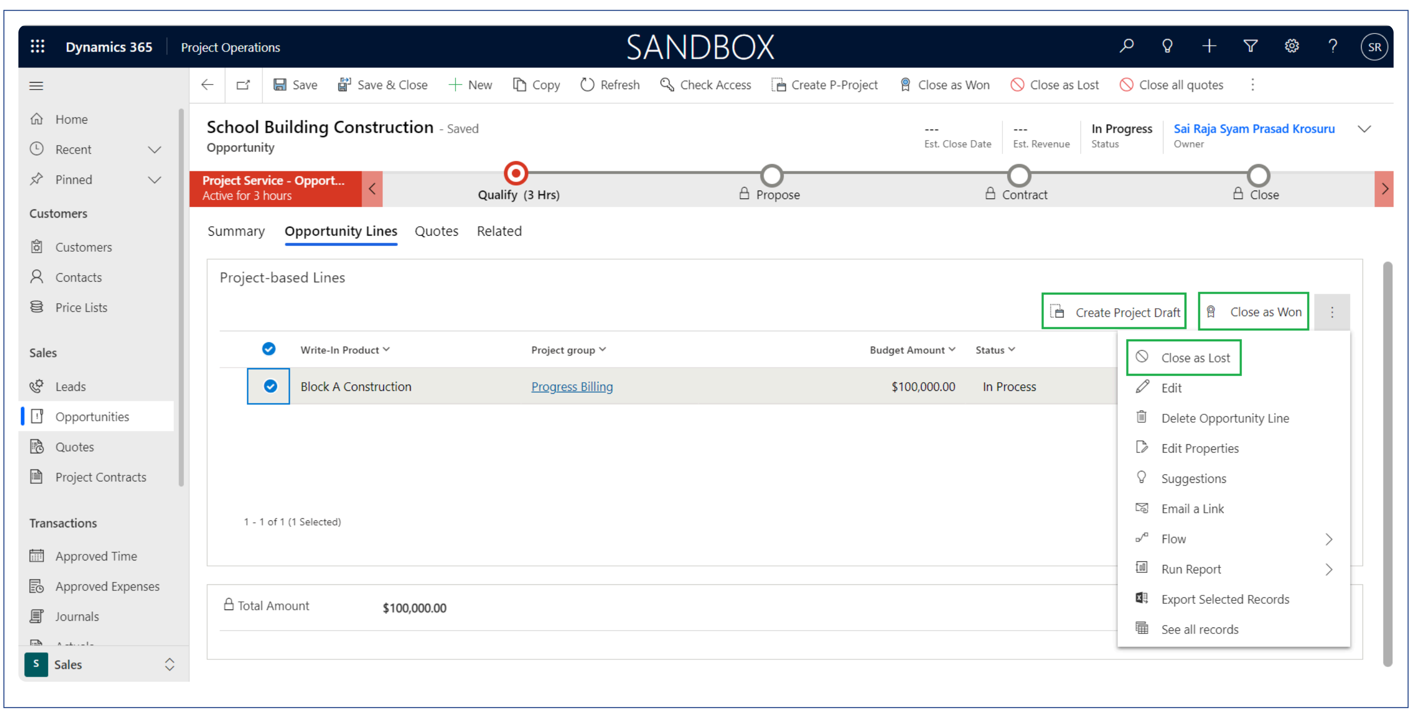


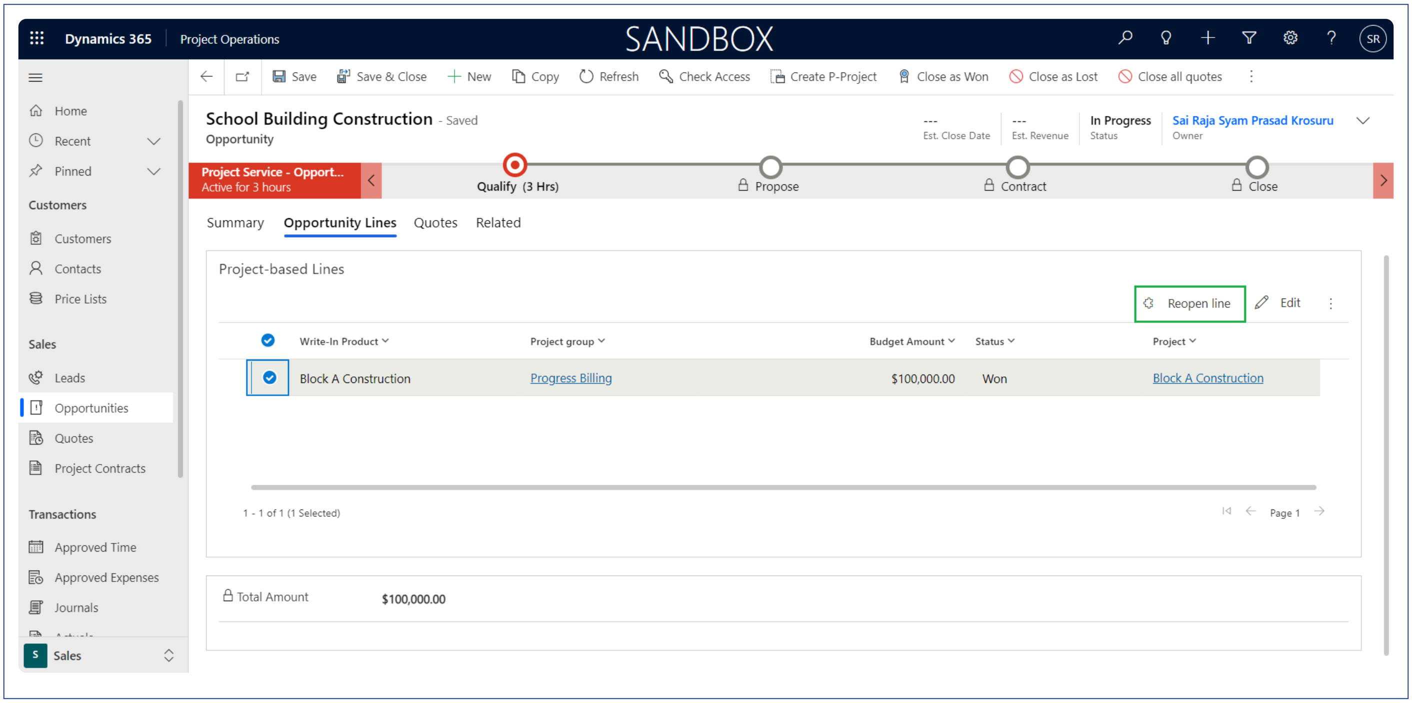


Details of the added fields and existing fields modification are described below:

Fields	Description
Billing Method	This field is non-editable and always defaults with value 'Time and Material'.
Project group	Lists the Project groups available for selection while creating the new opportunity line.
Project	This is non-editable field and updates with project name when-ever new project is created either by 'Create Project Draft' or 'Close as Won'.
Schedule Mode	Value for this field defaults from 'Project Parameters' field 'Schedule Mode'. And this field will be editable only when the field 'Project Level Schedule Mode Override Permitted' is set 'Yes' at 'Project Parameters' form. Options available with this field are 'Fixed duration', 'Fixed effort' and 'Fixed units'. 'Schedule Mode' will be defaulted from opportunity line setting when a new project is created from the opportunity.
Status	This field is non-editable and indicates the status of the opportunity lines. The options available are In Process, Won, Canceled.

User has been provided with options of creating 'Project draft', 'Auto-create Quote for project draft', 'Close as Won', 'Close as Lost' and 'Reopen line' at the Opportunity line level.





Details of the buttons and their functionality is described as below:

Fields	Description
Create Project Draft	This button will be available only when the 'Project' field blank for the selected opportunity line. Using this option user can create new 'Project draft'. Creation of project draft will not have any impact on the 'Status' of the opportunity line, it will be 'In Process' only.
Close as Won	This button will be available only when the 'Status' is 'In Process' for the selected opportunity line. Using this option user can close the opportunity line as Won and create a new project along with 'Project Contract' and 'Project Contract Line'. 'Status' of the opportunity line will change to 'Won'.
Close as Lost	This button will be available only when the 'Status' is 'In Process' for the selected opportunity line. Using this option user can close the opportunity line as Lost. 'Status' of this opportunity line will change to 'Canceled'.
Reopen line	This button will be available only when the 'Status' is 'Won' or 'Canceled' for the selected opportunity line. Using this option user can reopen the opportunity line for further process. 'Status' of this opportunity line will change to 'In Process'.

Refer the following sections to know more about the options available.

[Project draft creation](#)

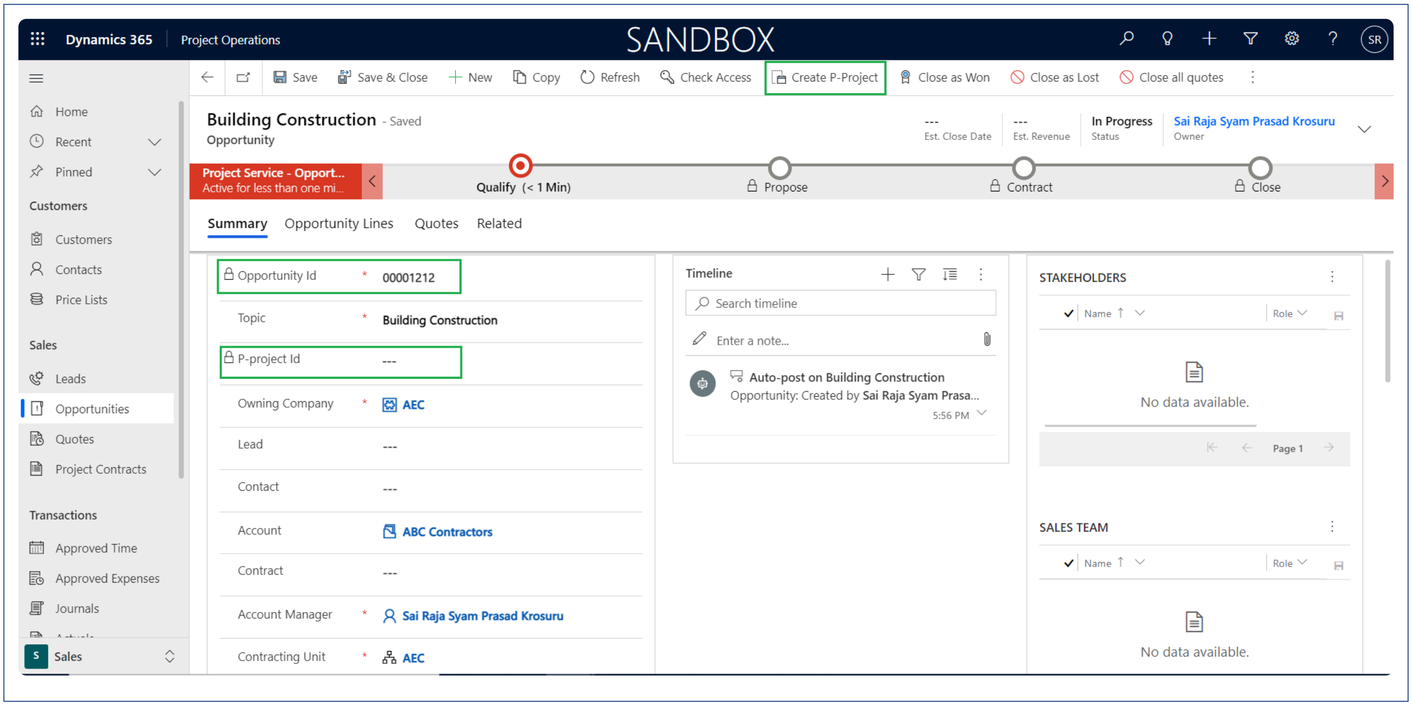
[Auto-create Quote for project draft](#)

[Opportunity line close](#)

4.1.1. P-project (Proposal project)

The ‘P-project’ or Proposal project is an internal project generated from the opportunity record in Project Operations. This internal project facilitates the tracking of effort and expenses incurred during the opportunity management process. The ‘P-project’ can be automatically generated when a new opportunity is created, or it can be manually created using a button added at the Opportunity form level.

Go to Sales > Opportunities



Details of the new fields and buttons added at Opportunity form are as follows:

Fields	Description
Opportunity Id	This field is mandatory and non-editable. Automatically generates when a new opportunity is saved.
P-project Id	This field is non-editable and updates with the name of the proposal project created when the opportunity is saved. This updates automatically when the ‘Auto-create P-project’ is set to ‘Yes’ in the Company Parameters. For ex: The Opportunity Id is ‘00001001’, P-project Id suffix is ‘_P’, then the Project ID created for this project will be ‘00001001_P’ in the Projects form.
Create P-Project	This button will be available only when the ‘Auto-create P-project’ is set to ‘No’ in the Company Parameters and ‘P-project Id’ field is blank at the Opportunity form Summary tab. Clicking on this button will create P-project.

	Note – Project group is mandatory while creating the new project, during the process of creating P-project it will consider the Project group specified for the parameter ‘Default project group for P-project’ in the Company Parameters form.

To capture the effort and expenses incurred during the opportunity management process, the created P-project needs to be integrated with Finance and Operations. This integration can be achieved through the release process, either automatically or manually. When the ‘Auto-release P-project’ parameter is set to ‘Yes’ in the Company Parameters form, the project will be automatically released and integrated with Finance and Operations using dual-write.

4.1.2. Opportunity header close as Won/Lost

The standard out of box options 'Close and Won', 'Close as Lost' and 'Reopen opportunity' at opportunity level are enhanced further to handle the newly introduced options of 'Close as Won', 'Close as Lost' and 'Reopen line' at opportunity line level.

Close as Won

- Clicking the "Close as Won" button triggers the following actions: all Opportunity lines with a status of "In Process" are automatically updated to "Won," the associated Project is attached to the Opportunity line, and a Contract is simultaneously linked to the Opportunity.

Close as Lost

- Clicking "Close as Lost" changes the status of all "In Process" Opportunity lines to "Canceled." However, this action does not automatically disassociate any attached Projects from the Opportunity line.

Reopen opportunity

- Clicking the "Reopen" button on an opportunity line with a "Won" status will revert its status to "In Process." Additionally, any associated Project will be disassociated from the Opportunity line.
- Clicking the "Reopen" button on a "Canceled" opportunity line reactivates it by changing its status to "In Process." Any associated Project remains linked to the Opportunity line in this scenario.

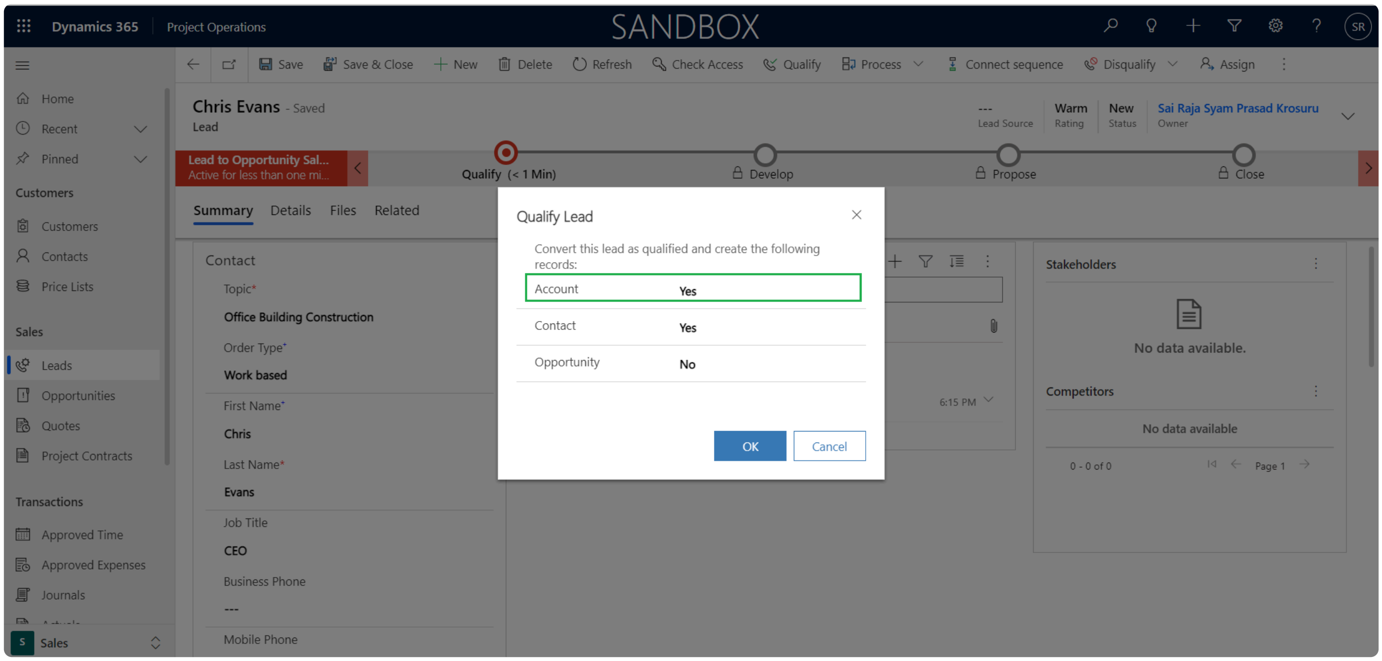
> Note – During the process of 'Close as Won', 'Close as Lost' and 'Reopen opportunity', if there are any errors for any of the opportunity lines, then the whole process will be rolled back.

4.1.3. Opportunities for Leads (non-customers)

This section details the enhancement to current ‘Qualify Lead’ logic to create a new account as ‘Prospect’ and convert the prospect as ‘Customer’ once the opportunity line is won.

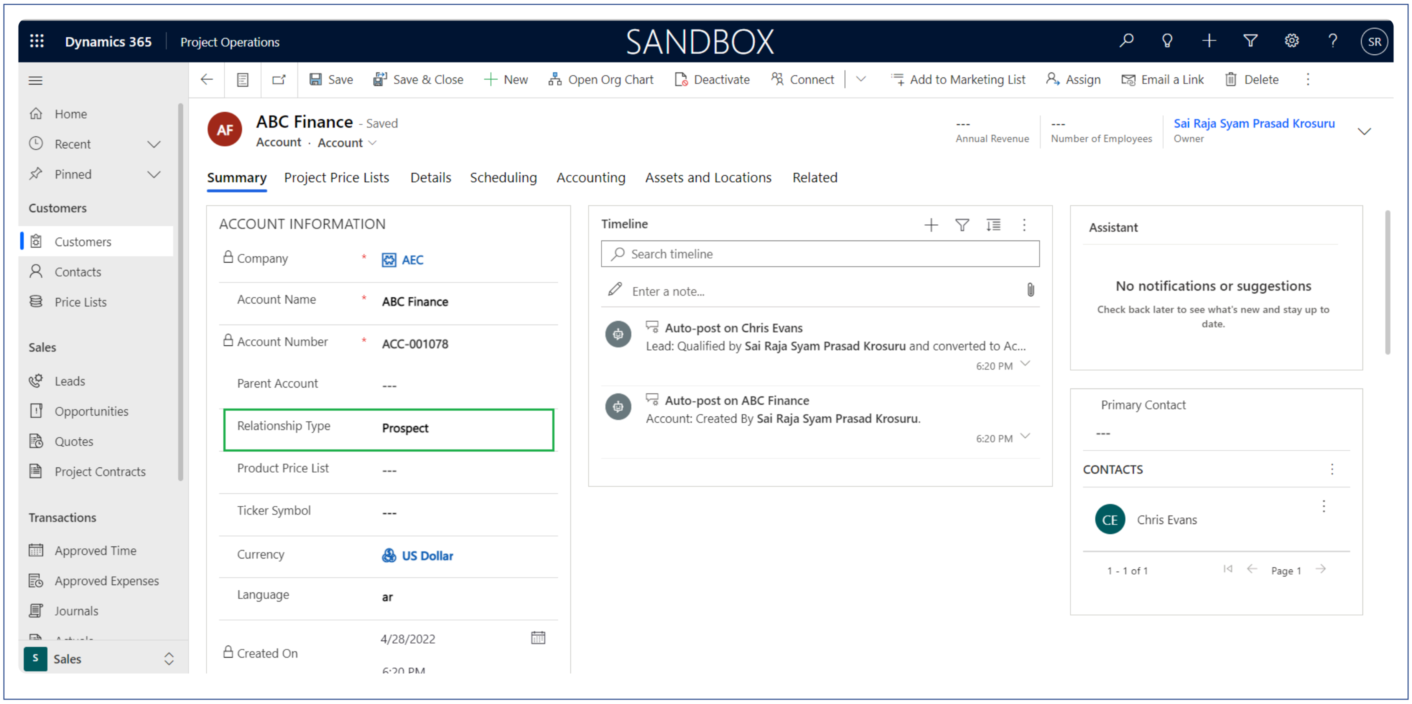
Go to Sales > Leads

User can create a new Lead record and update the required information and upon qualifying the lead, if user selects option ‘Account’ as ‘Yes’ during the lead process execution it will create a new account record with relationship type as ‘Prospect’ instead of ‘Customer’. As part of this enhancement ‘Account Name’ field is made as mandatory in the Leads form.



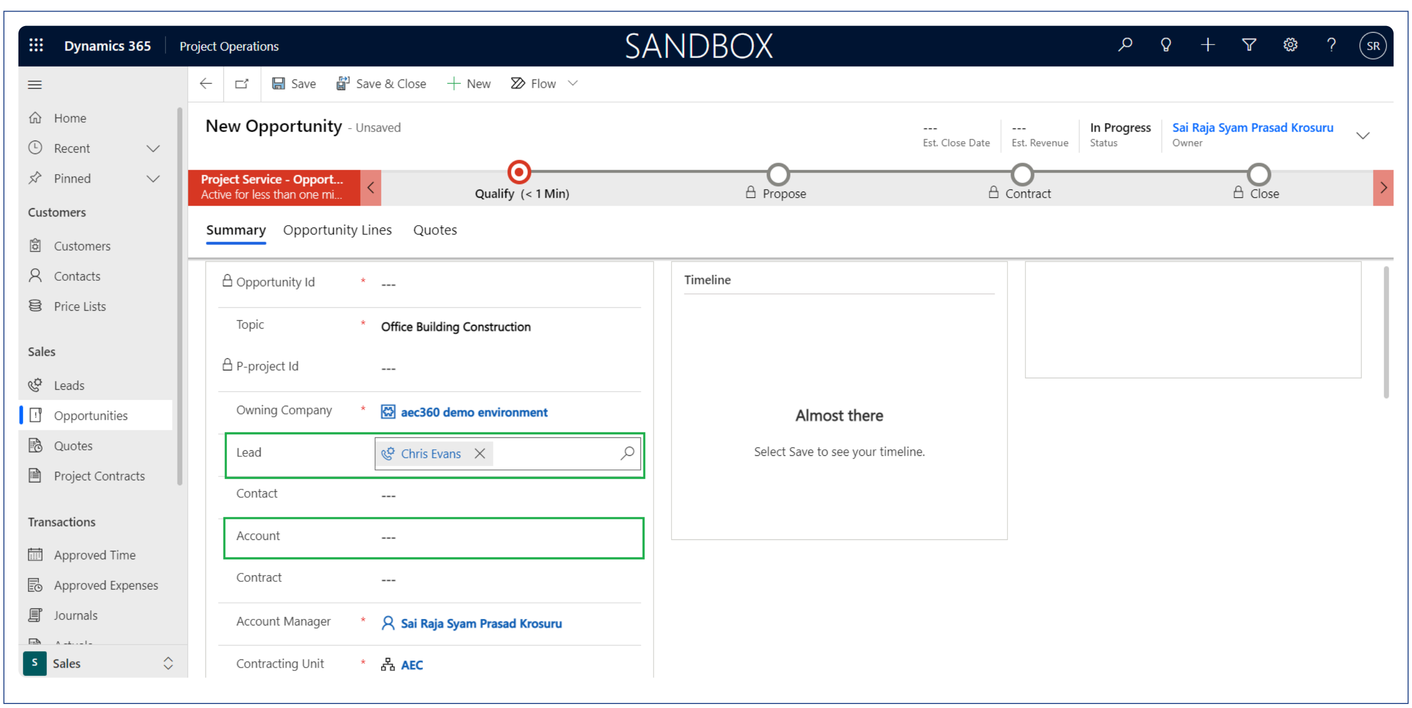
Go to Sales > Customers > Select the Active Accounts View

User can view the newly created account which is of type ‘Prospect during the Lead qualify process.



The new field 'Lead' is introduced in the Opportunity form which will allow the users to create opportunity records without specifying the Customer account. User can update the Lead record while creating the new opportunity and opportunity lines. By clicking 'Close as Won' at opportunity line level, it will change the relationship type of account to 'Customer' from 'Prospect' and triggers Customer account integration from Project Operations to F&O. Project Contract also gets created simultaneously which will be released in F&O once the Project associated to Contract is in "Released" stage.

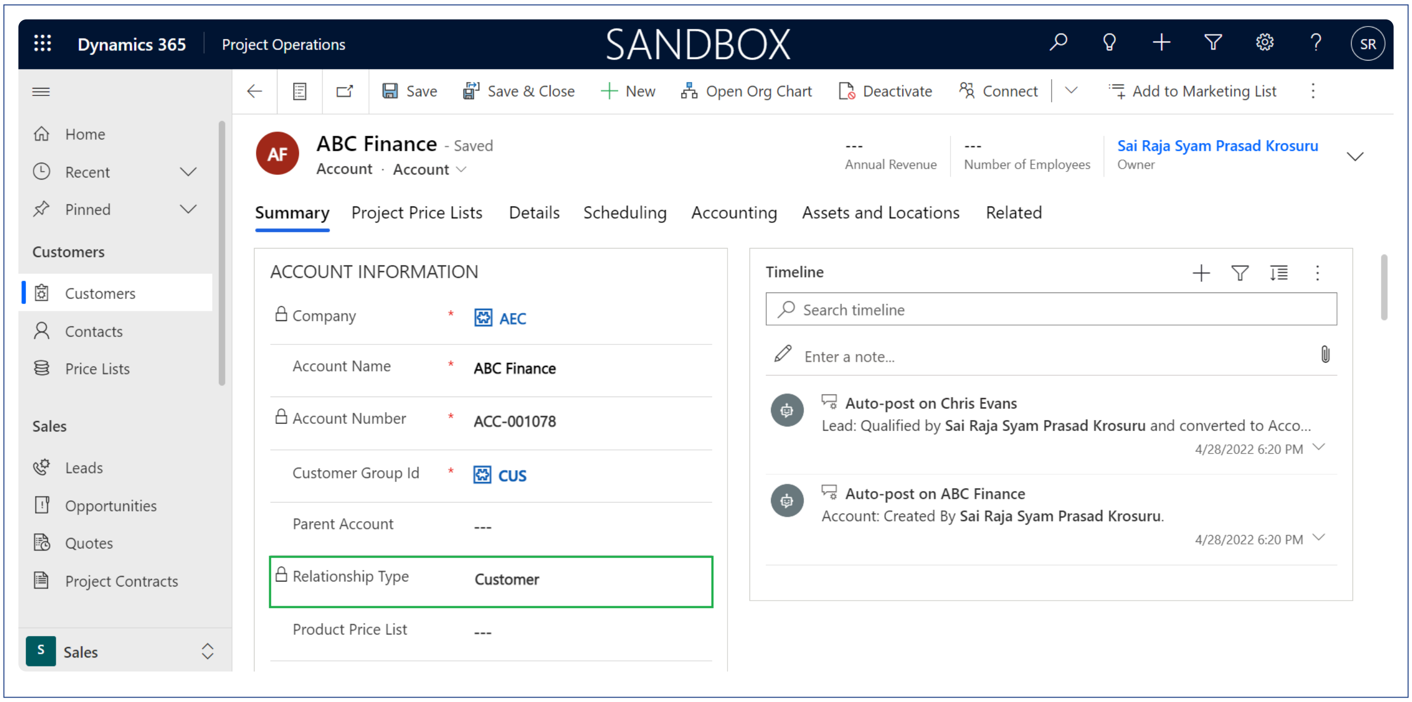
Go to Sales > Opportunities



Fields	Description
Lead	This field is optional and editable, lists the available lead records filtered by owning company. This field will not be editable once the opportunity is closed as won.

Note – The ‘Close as Won’ logic considers that if there is no ‘Account’ assigned to the Opportunity and Lead is populated then the Account which is associated to that particular Lead will get converted from “Prospect” to “Customer”.

Go to Sales > Customers



4.2. Opportunity lines

This section outlines the various enhancements provided for the Opportunity Management process at the opportunity line level. These includes the ability to create draft projects, win/lose/reopen options, and automatic quote line generation for draft projects. Opportunity lines function as child entities of Opportunities, enabling Sales teams to create multiple lines for individual solutions within an opportunity. This facilitates forecasting and budgeting based on each line, with the consolidated amount reflecting the Estimated Revenue.

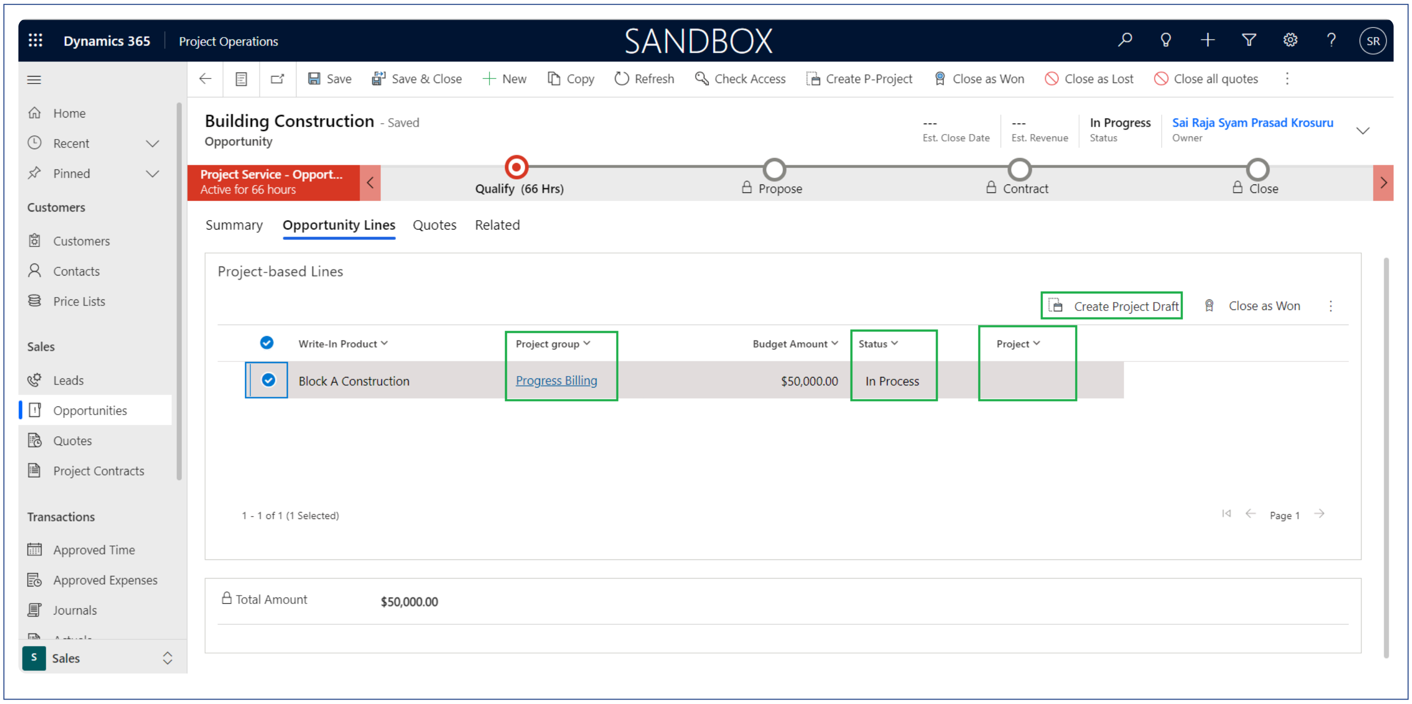
While Opportunity lines are particularly relevant when proposing multiple services to Prospects and assessing their budgets, it’s important to remember that not every “Prospect” becomes a “Customer” immediately ready to accept all proposed services.

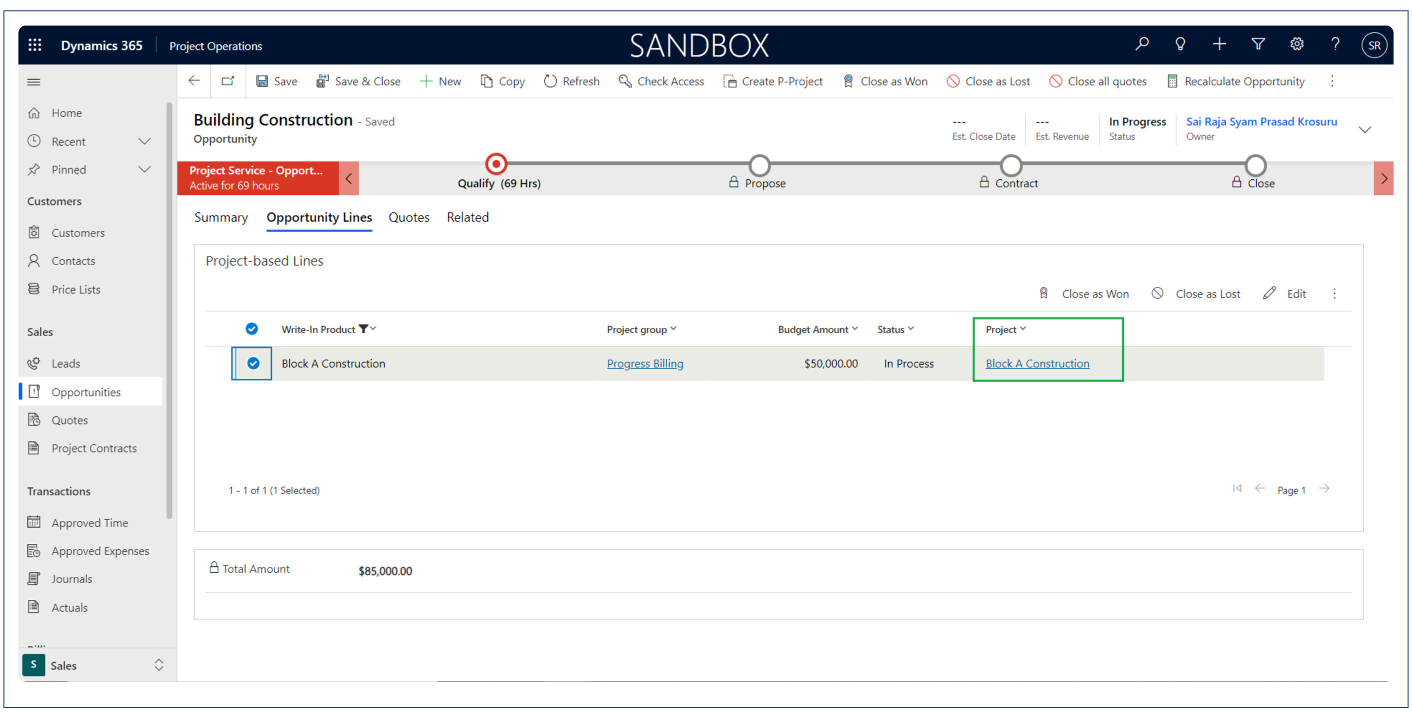
Negotiations and finalization typically occur at the Quote and Contract levels. Nonetheless, Opportunity lines empower Sales teams by allowing them to present multiple offerings with the possibility of increased service uptake, ultimately boosting scalability and efficiency.

4.2.1. Project Draft

New button ‘Create Project Draft’ is added at Opportunity line level which will allow users to create the draft project during the opportunity management process adding detailed project tasks and prepare the quote for the project. Users can see the button ‘Create Project Draft’ for the newly created opportunity line when selected.

Go to Sales > Opportunities > Opportunity lines





Details of the fields and buttons added at opportunity line level are as follows:

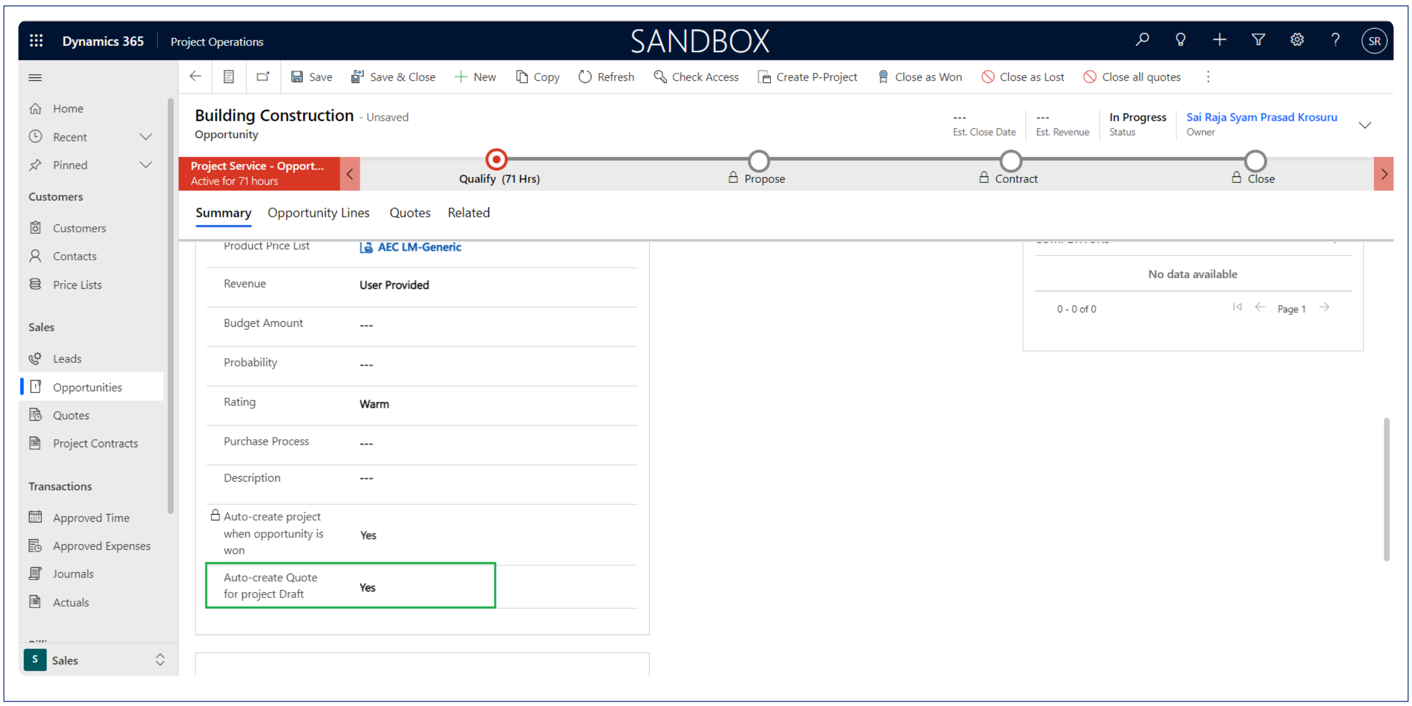
Fields	Description
Create Project Draft	This button will be available only when the 'Project' field is blank for the selected opportunity line.
Project group	Lists the Project groups available for selection while creating the new opportunity line.
Status	This field is non-editable and indicates the status of the opportunity lines. The options available are In Process, Won, Canceled.
Project	This field is non-editbale and displays the name of the project created either by Create Project Draft or Close as Won.
Opportunity line number	This field is auto-generated and of type Integer.
Billing Method	This is an existing field, always defaults with value 'Time and Material' and hidden from 'Opportunity line' grid.

Note – When the draft project is created it will not have any project contract created yet since the 'Status' is still 'In process' and not won.

4.2.2. Auto-create Quote for project draft

To automate Quote generation with draft projects, a new “Auto-create Quote for project draft” field has been added to the Opportunity form’s Summary tab. This field inherits its default value from the Company Parameters setting of the same name. When enabled in Company Parameters, all newly created Opportunities inherit this “Yes” setting. However, users retain the flexibility to override this for specific opportunities, disabling automatic Quote creation.

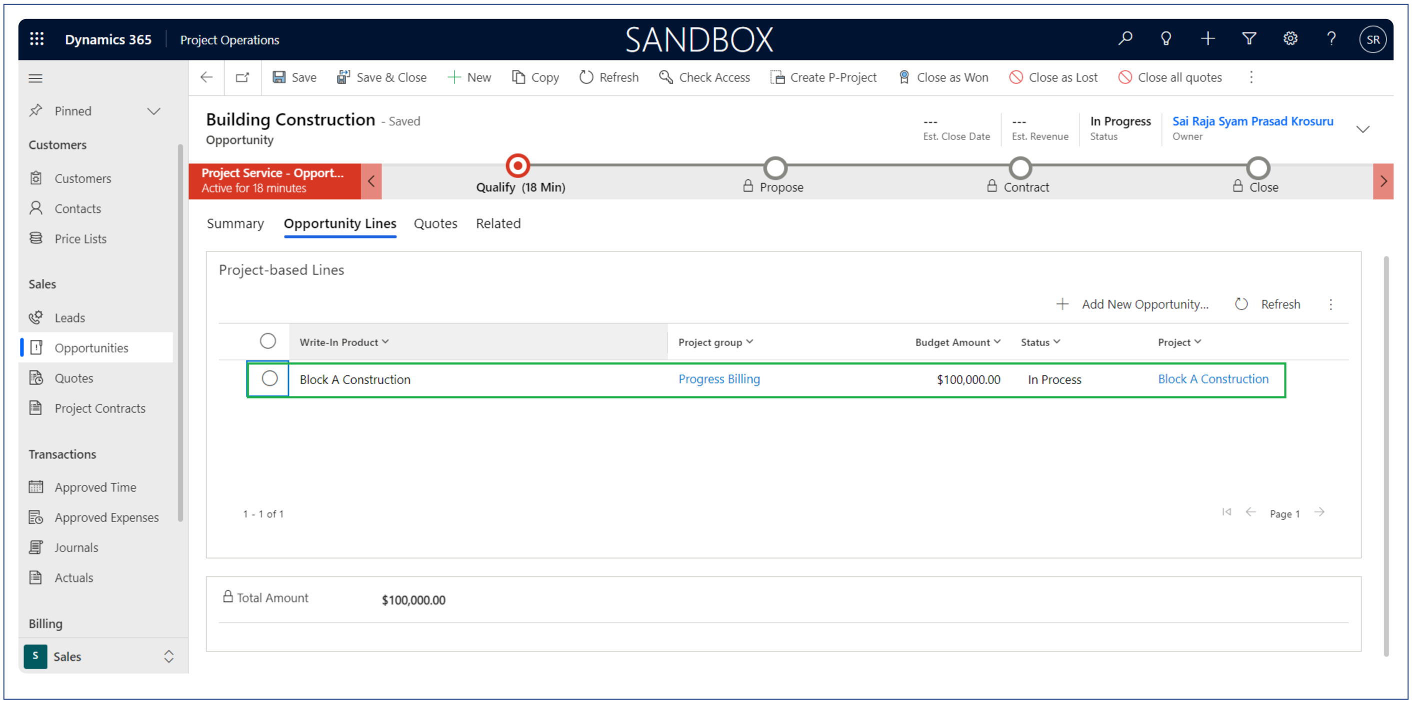
Clicking the “Project Draft” button on an Opportunity line automatically creates a new Quote for the selected line (provided the “Auto-create Quote for Project draft” field within the Opportunity is set to “Yes”). Additionally, the associated Project is created and attached to Opportunity line, and the Opportunity line’s status is updated to “In Process”.

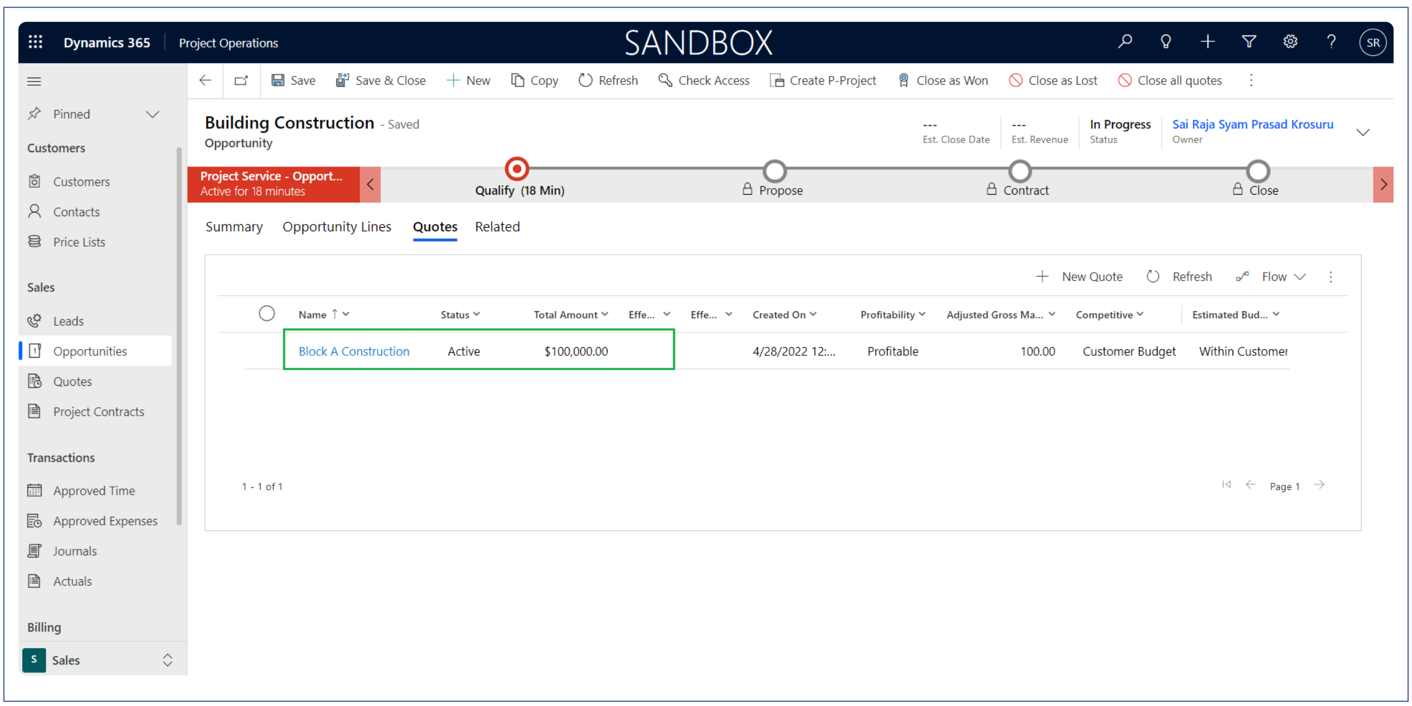


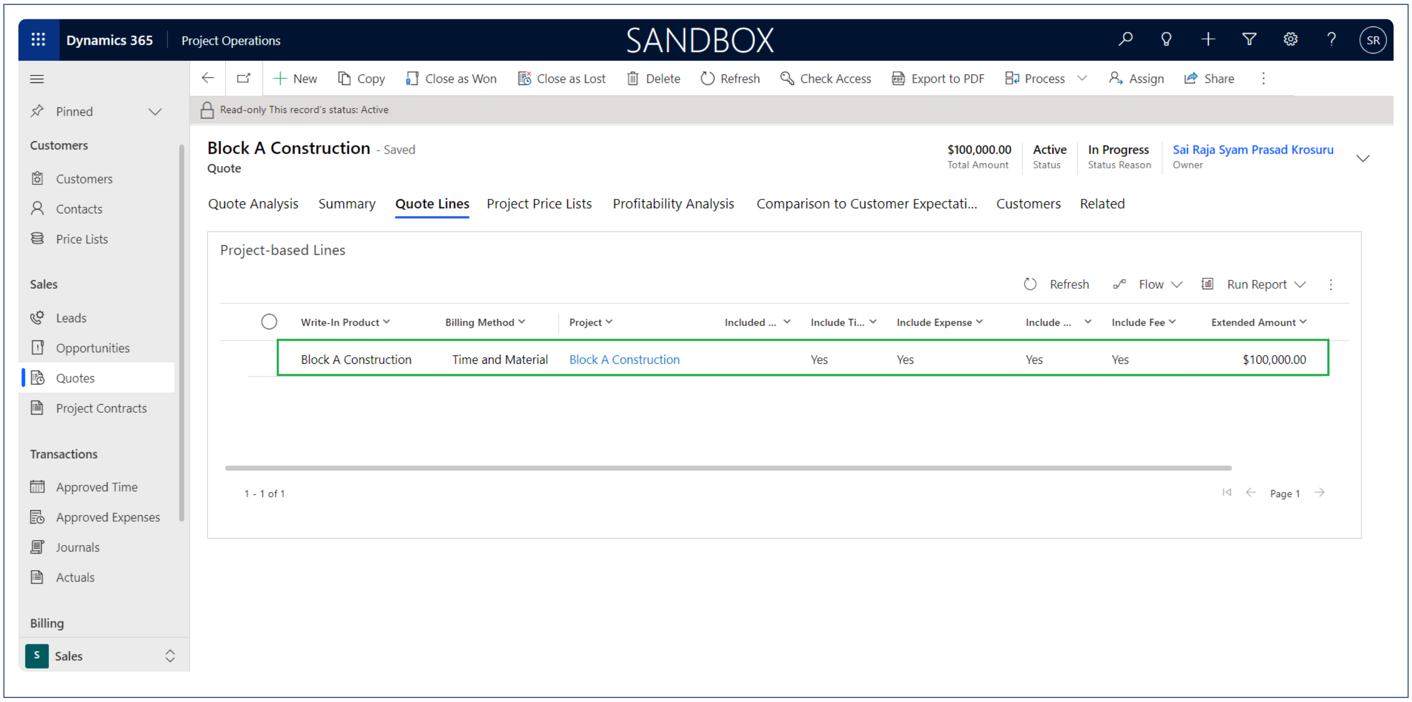
The quote and quote line details will be created once the user creates project draft against the opportunity line. The user can see the quote created in the Quotes tab of the opportunities form with ‘Status’ as ‘Active’ and ‘Total Amount’ as Customer budget amount.

Open the Quote and user can find the following details in the Quote lines tab of the Quote.

Fields	Description
Billing Method	Same as Opportunity line.
Include Tasks	Include Time = Yes, Include Expense = Yes, Include Material = Yes and Include Fee = Yes.
Extended Amount	Extended Amount and Customer Budget same as Customer budget amount.

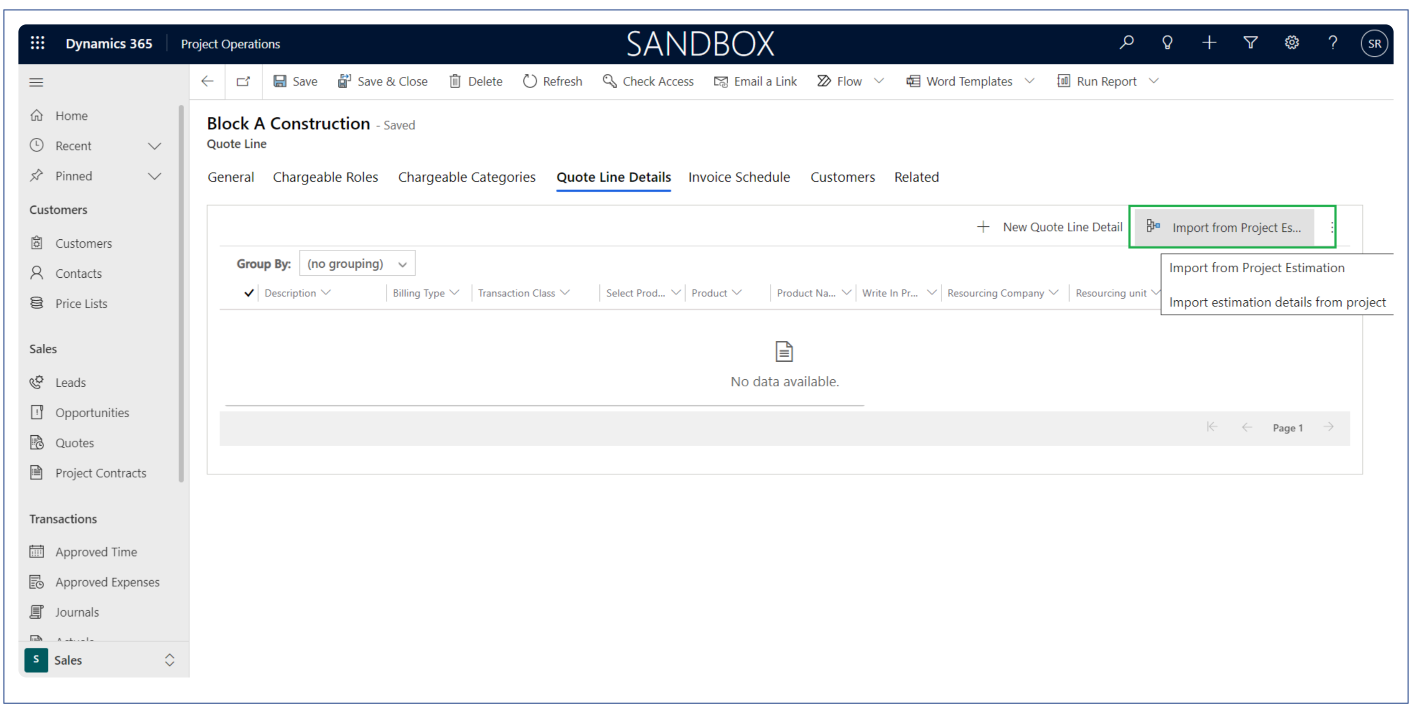






Note – User can customize the defaulted project price list by clicking ‘Create Custom Pricing’ at Project Price Lists tab which will in turn create a new sales price list and integrated to Finance and Operations as Customer price/discount group once the opportunity line is won.

For the created project draft user can add detailed tasks, generic resources with roles and efforts in the Tasks tab and build an estimate and same estimate can be imported in the Quote line details using ‘Import from Project Estimation’ option to arrive the final quote amount.

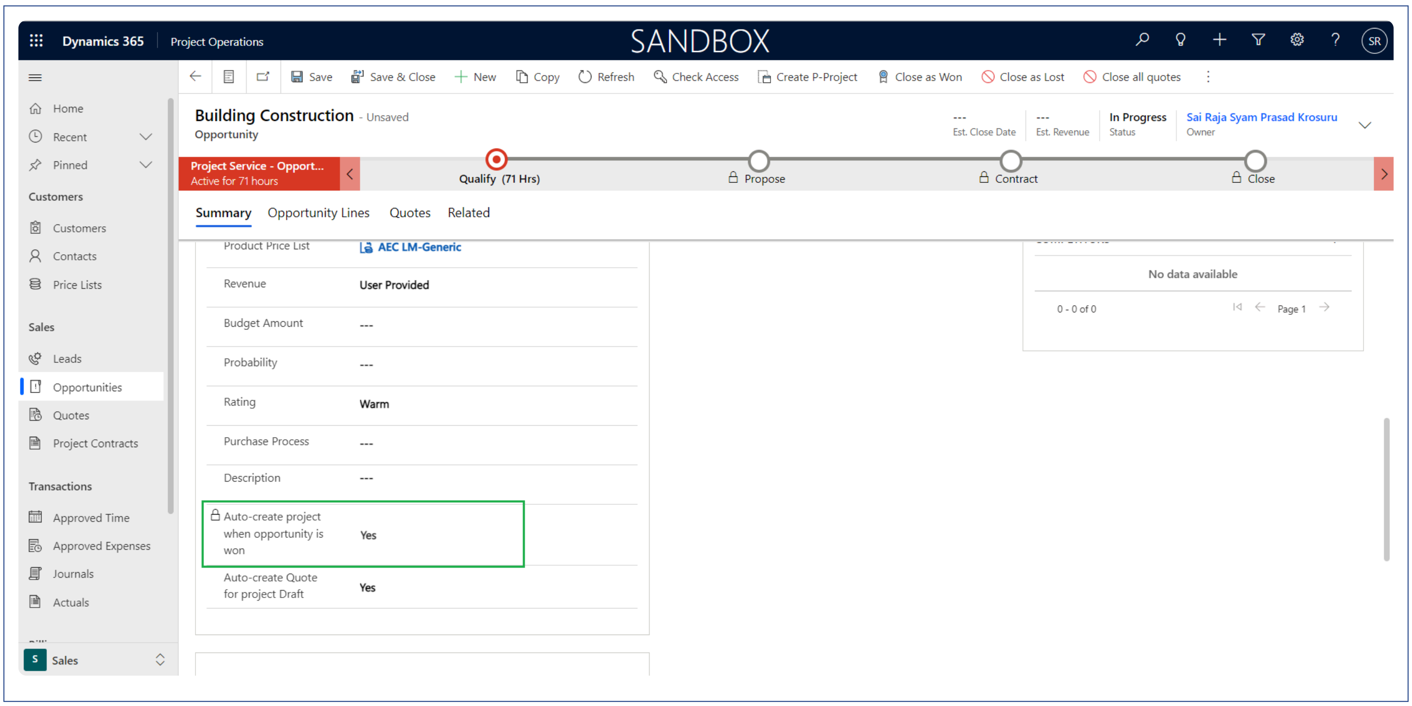


Note – Upon successful closure of an Opportunity line, the corresponding Quote status is automatically updated to “Closed” within Microsoft Dynamics CRM. This aligns with the established sales process flow of Opportunity -> Quote -> Contract, where a “Won” Quote is a prerequisite for Contract creation.

4.2.3. Close as Won/Lost and Reopen line

Standard out of box Project Operations allows to perform actions ‘Close as Won’ or ‘Close or Lost’ or ‘Reopen Opportunity’ only at the opportunity header level not at the individual opportunity line levels. This functionality is enhanced further by adding three new buttons to allow the users to perform ‘Close as Won’, ‘Close as Lost’ and ‘Reopen line’ for the selected individual opportunity lines.

A new parameter ‘Auto-create project when opportunity is won’ is added in the Opportunity form to control whether new project to be created or not when the opportunity is won. Default value for this parameter comes from Company Parameters form field ‘Auto-create project when opportunity is won’.



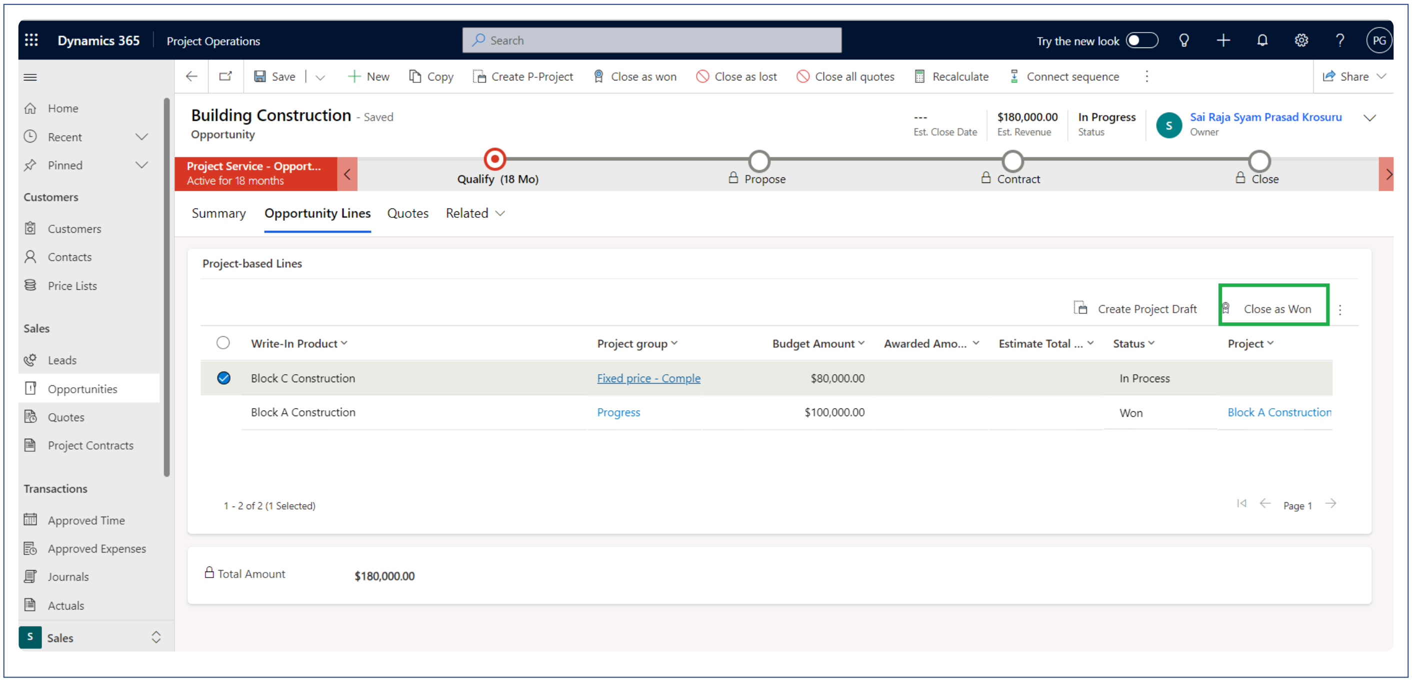
Close as Won

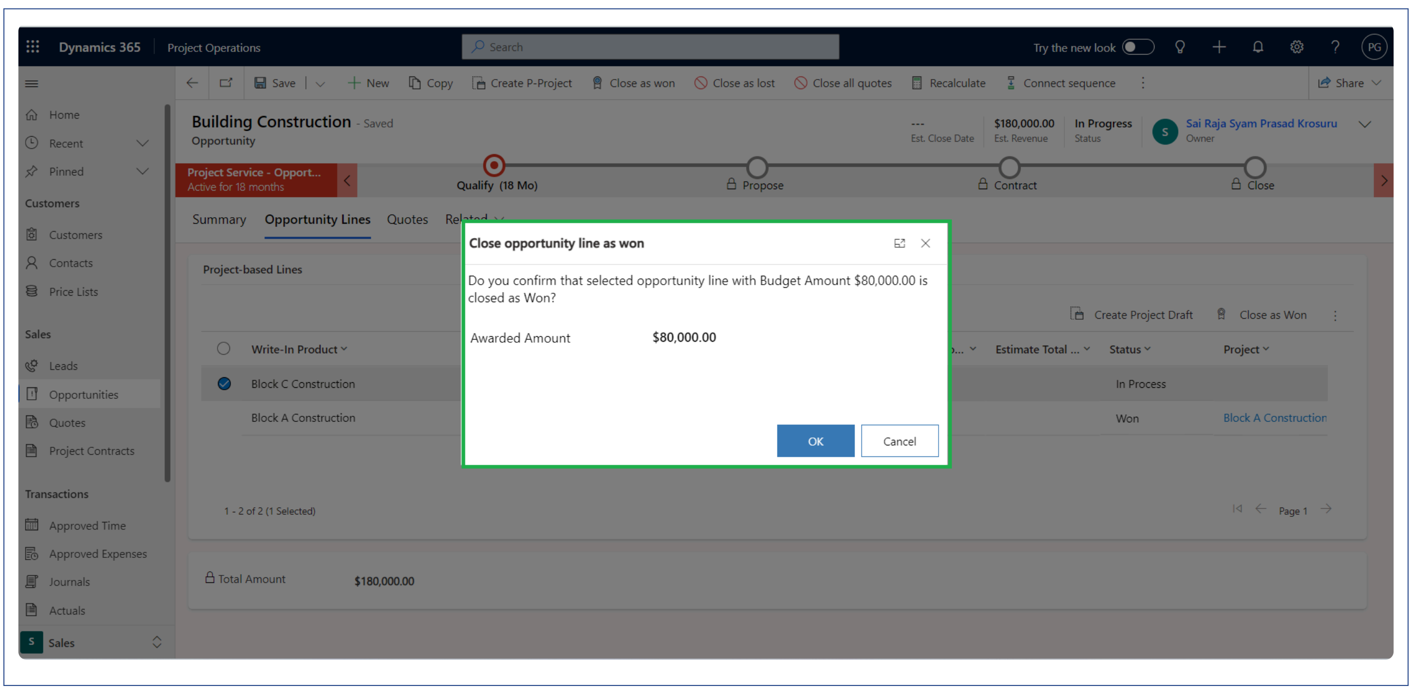
‘Close as Won’ action performed towards selected opportunity line will create project automatically along with the project contract and contract line.

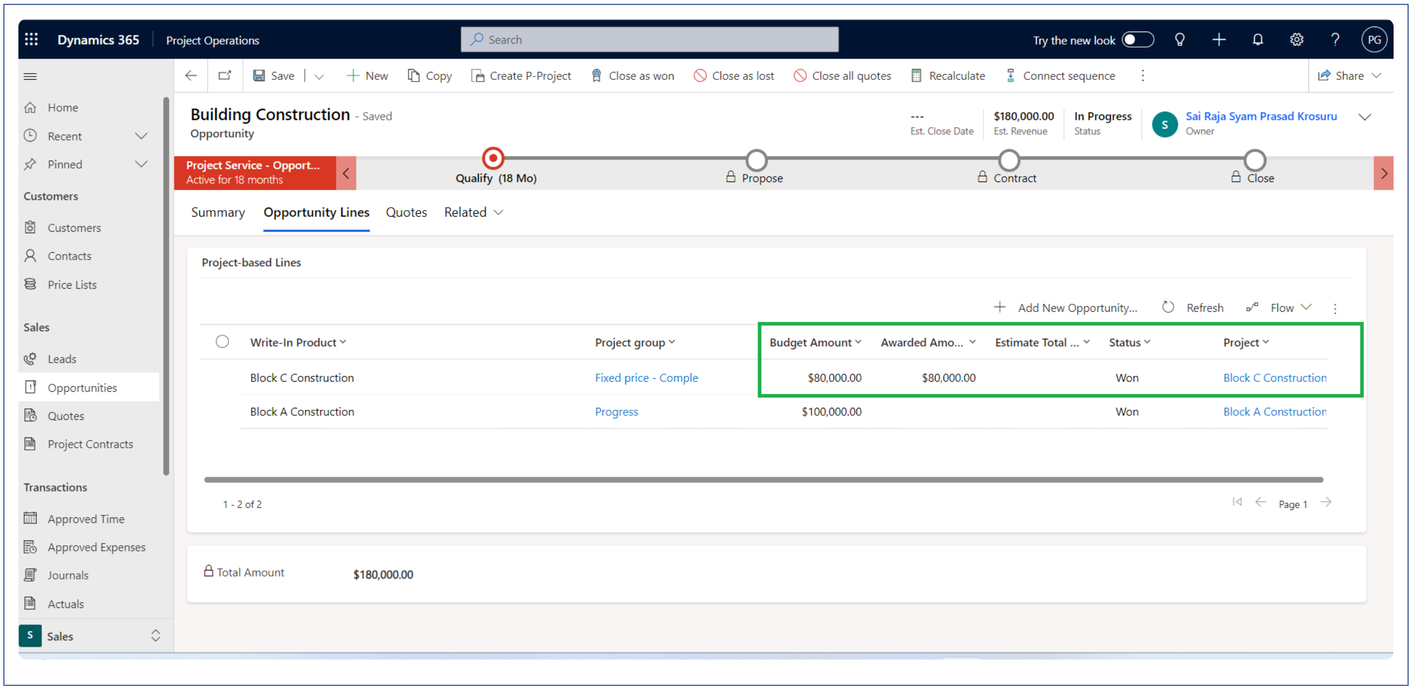
- For the selected opportunity line button ‘Close as Won’ is visible and enabled only when the status of the opportunity line is ‘In Process’ and ‘Budget Amount’ is not blank.
- Once the ‘Close as Won’ action is performed values for fields ‘Status’ will be updated as ‘Won’ and ‘Project’ field will be updated with the name of the Opportunity line.
- ‘Close as Won’ action can be performed for the opportunity line for which draft project is created, this action will create project contract record and assigns against the already created draft project.

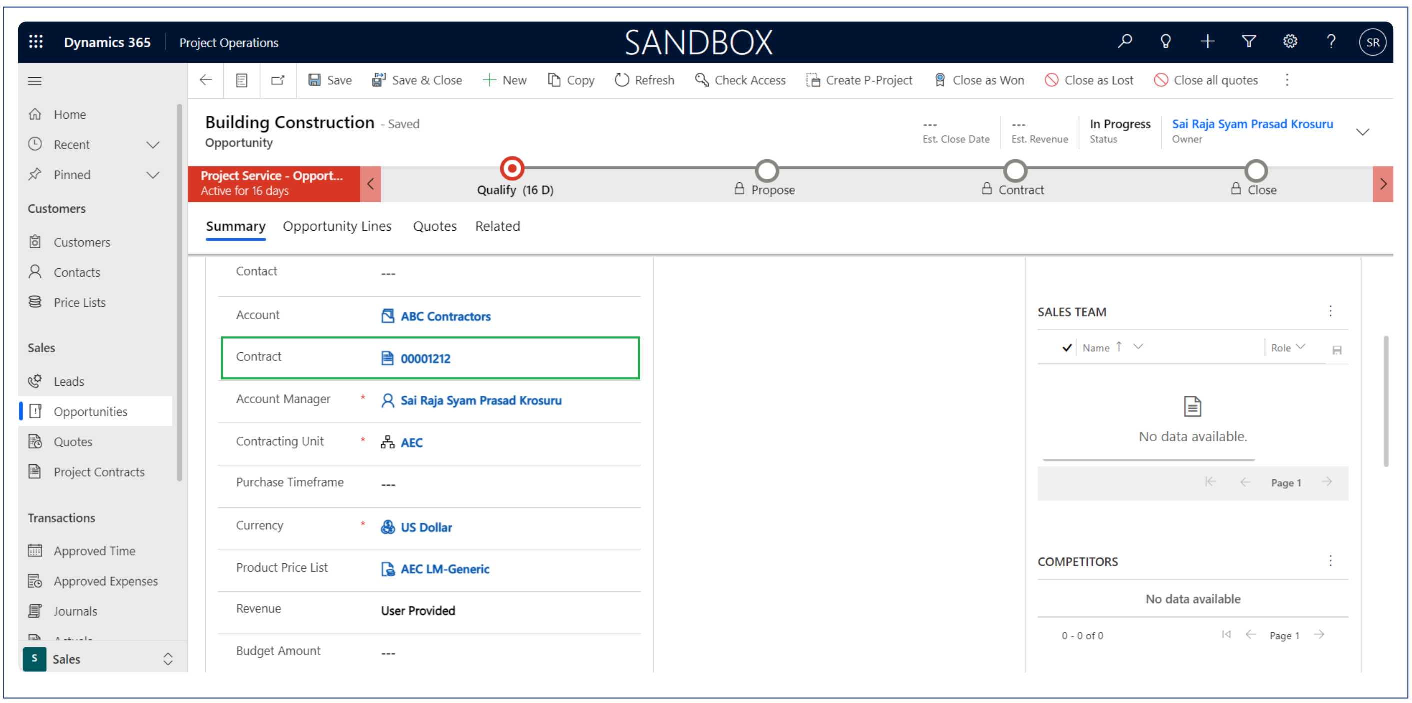
Apart from this new functionality of Awarded Amount is also introduced which will come into the action before the “Opportunity lines” are closed as Won.

- Clicking on "Close as Won" button will enable Awarded Amount pop up box where "Awarded Amount" will be initially equal to "Budgeted Amount" of "Opportunity Line" allowing users to change the final amount before winning the "Opportunity Line".
- This Information will segregate Budgeted Amount from Awarded Amount which will help in comparative and reporting analysis.









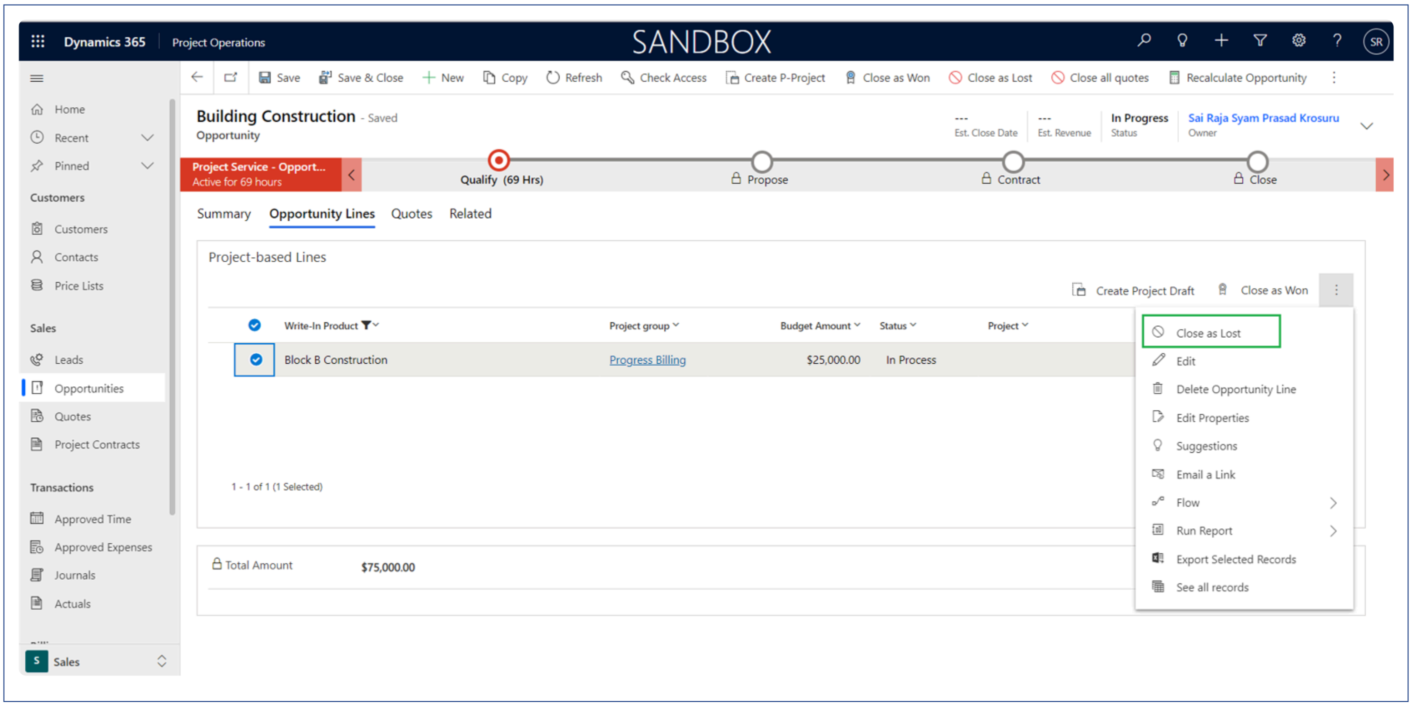
Details of the new fields added in the Opportunity form are as follows:

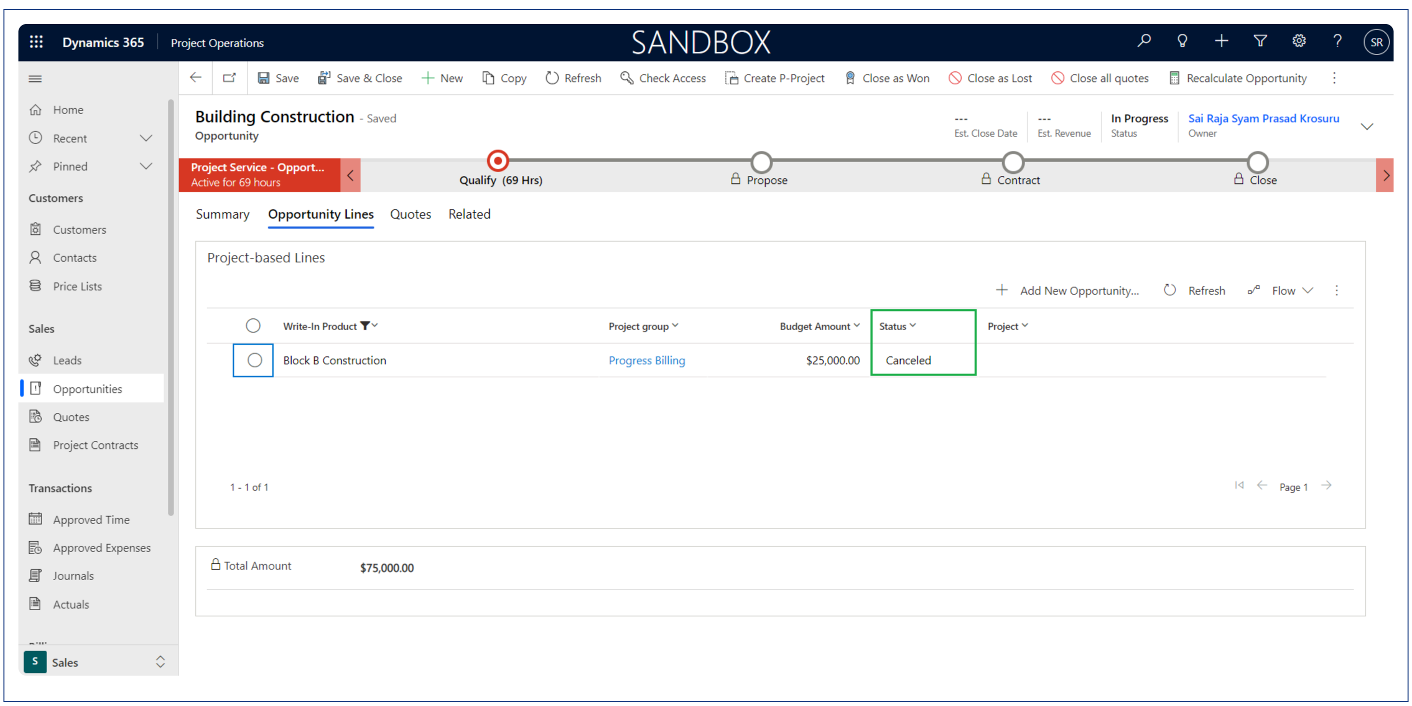
Fields	Description
Contract	This field is optional and blank when the opportunity is created. This field will be updated with 'Contract Id (Sales Order Number)' created when and opportunity line is 'Won'.

Note – The project will be created only when the 'Auto-create project when opportunity is won' set as 'Yes' at Opportunities form > Summary tab.

Close as Lost

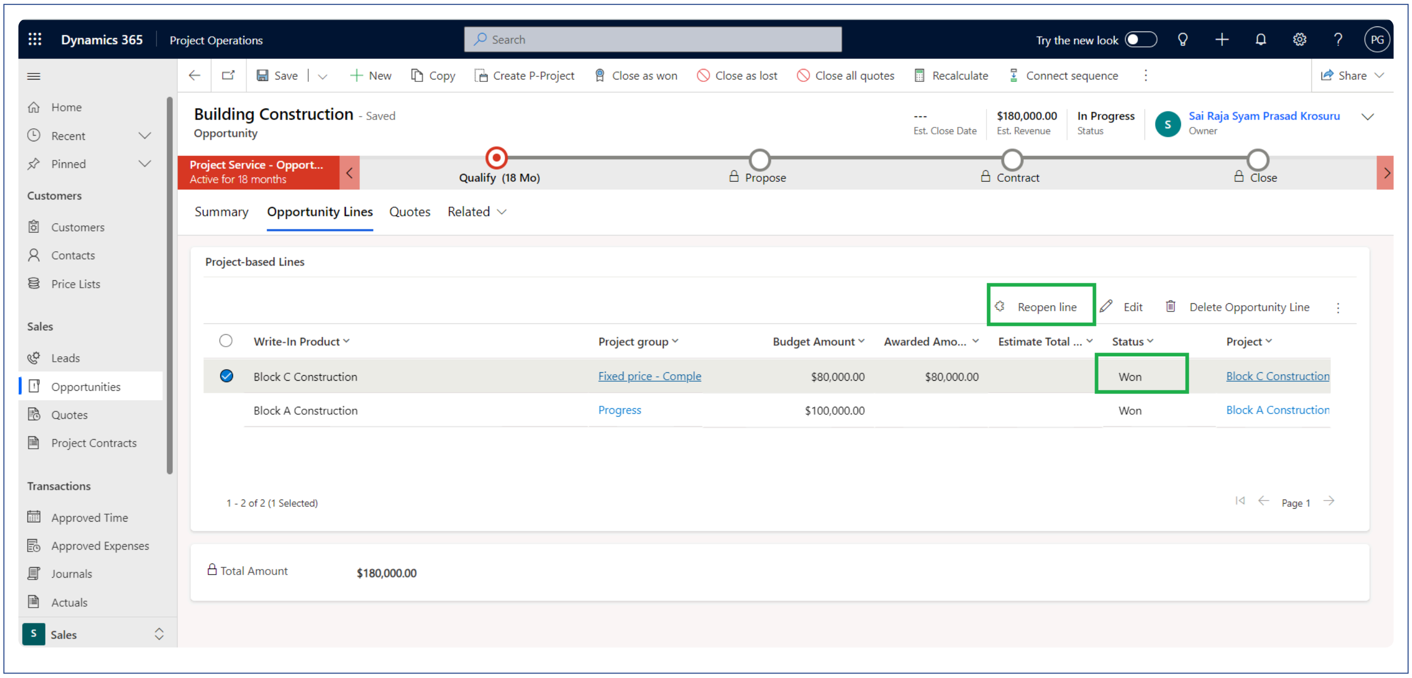
‘Close as Lost’ action performed towards selected opportunity line will update the ‘Status’ as ‘Canceled’. For the selected opportunity line button ‘Close as Lost’ visible and enabled only when the status of the opportunity line is ‘In Process’. ‘Close as Lost’ action can be performed for the opportunity line for which draft project is created also.

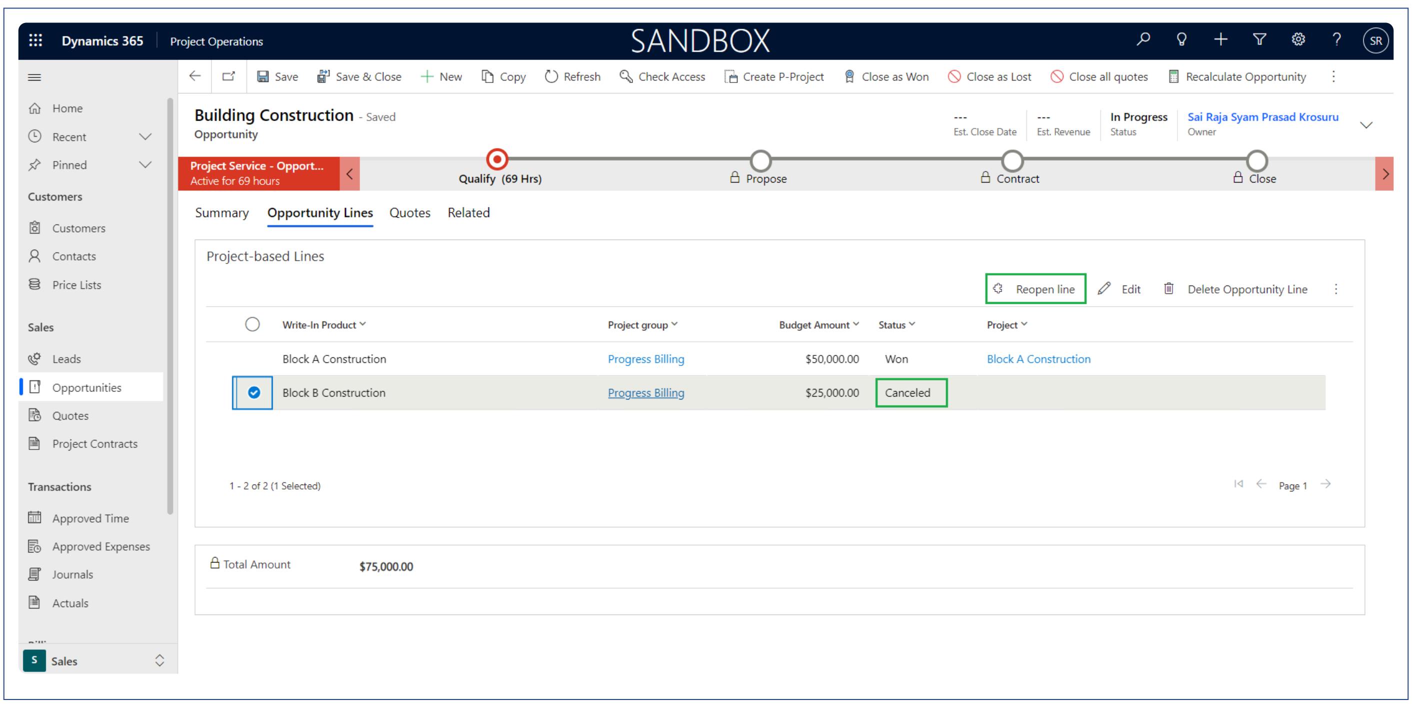




Reopen line

‘Reopen line’ option allows the user to change the status of the opportunity line to ‘In Process’. This button will be visible and enabled only when the ‘Status’ of the opportunity line is ‘Won’ or ‘Canceled’.





Note – When Reopen line action performed against opportunity line with ‘Status’ as ‘Won’ then it will be deleting the project and associated contract and contract line.

Note – When Reopen line action performed against opportunity line with ‘Status’ as ‘Won’ and the project is already in ‘Released’ status then it will trigger warning message.

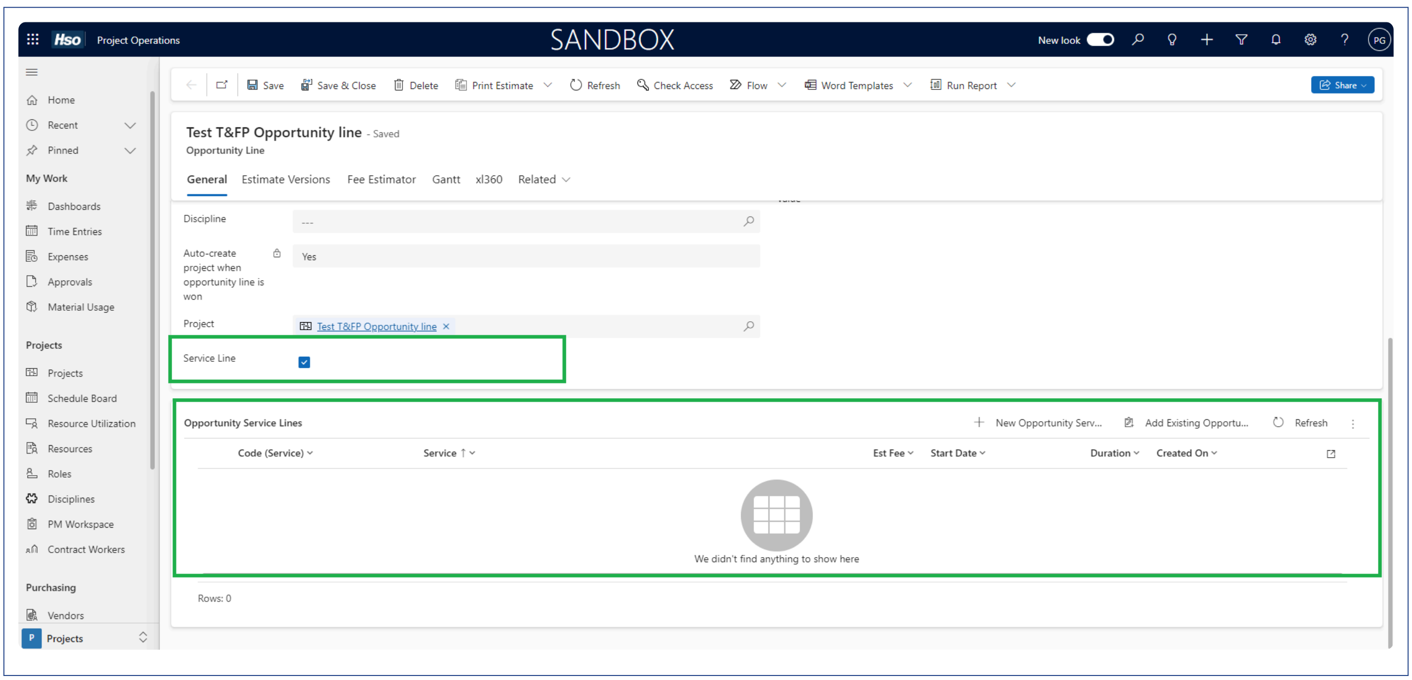
4.2.4. Opportunity Service Lines

Opportunity service lines are the specific services or products offered within an opportunity or sales deal. They outline what exactly is being sold or provided to the customer. For example, in a software sales opportunity, the service lines might include software licenses, maintenance services, training, and customization. These lines help break down the opportunity into its individual components for better tracking and management.

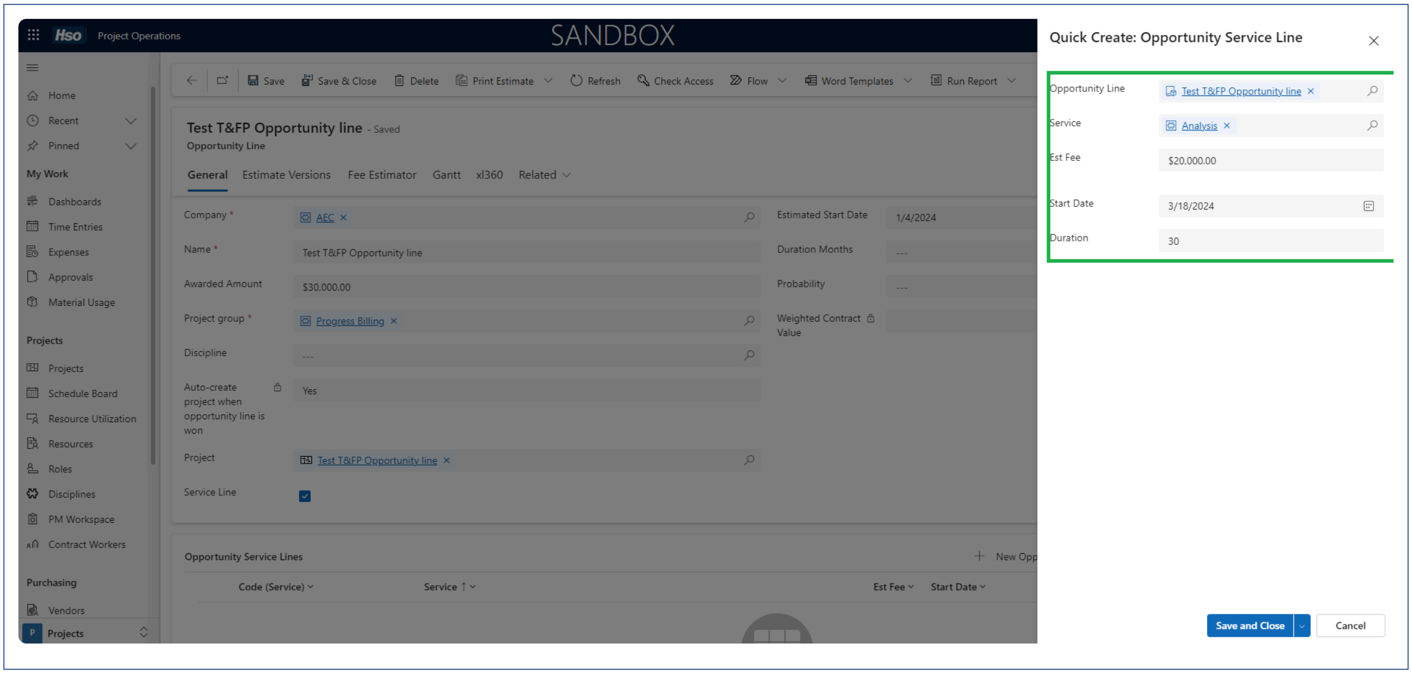
Opportunity Service lines process

When you create opportunity service lines for an opportunity lines, the total budget for the opportunity line automatically adjusts to match the combined cost of all those opportunity service lines.

Users can still manually adjust the total budget for an opportunity. However, for easier and automatic updates to the customer's budget, users can create opportunity service lines. By enabling the "Service Line" field, a new section will appear where you can define these service lines.



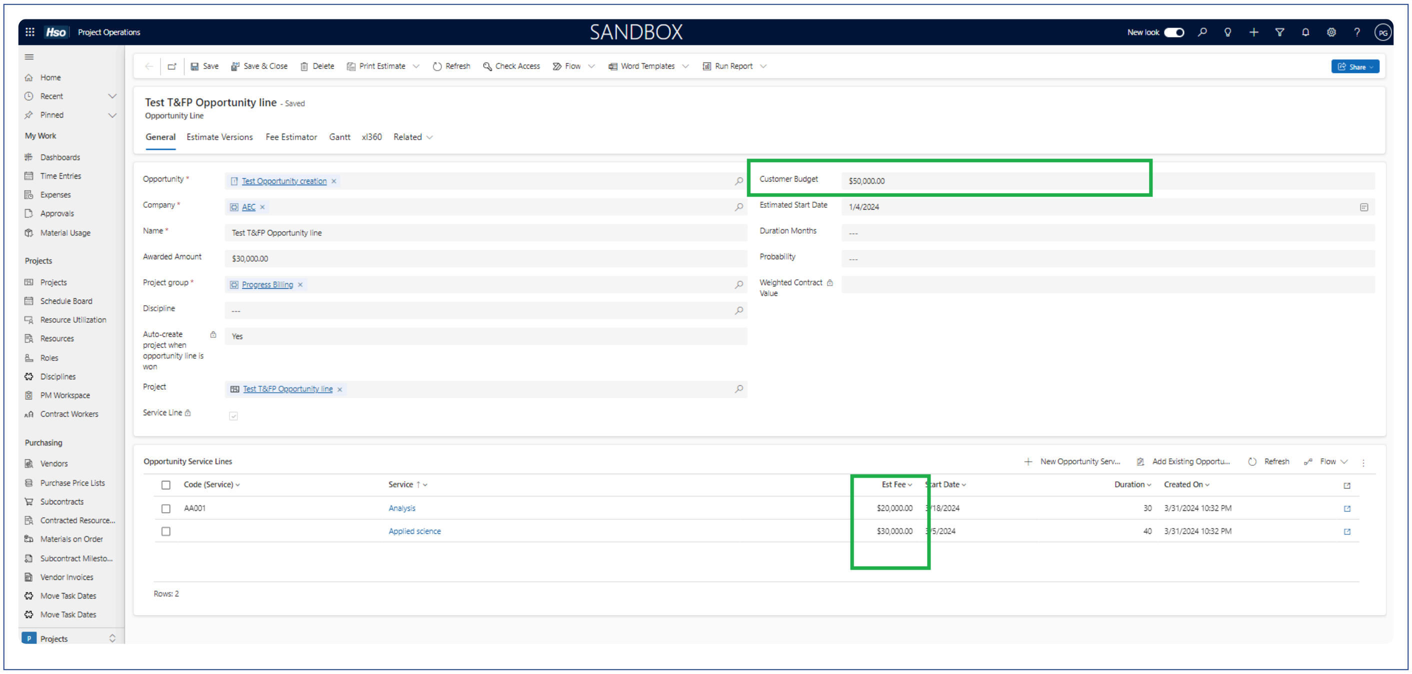
The main fields displayed in Opportunity Service lines forms are as followed.



Fields	Description
Opportunity line	When creating Opportunity service lines, the system will clearly display the name of the Opportunity line you're associating them with.
Service	The Service field in Opportunity service lines highlights the specific services or products being offered within an opportunity or sales deal. It helps to clearly identify and differentiate the various services or products that are part of the opportunity, making it easier to manage and track them individually.
Est Fee	The "Estimated fee" in Opportunity service lines points out the expected cost or charge associated with each specific service or product offered within the opportunity line. It gives a clear picture of the anticipated fees for each service line, helping to estimate the overall cost of the opportunity line.
Start Date	The Start Date in Opportunity service lines indicates when a particular service or product is scheduled to begin or become available. It helps track the timing of activities or deliverables associated with each service line within an opportunity line.
Duration	The Duration field in Opportunity service lines indicates the length of time or period associated with a particular service or product offered within an opportunity. It highlights how long the service or product will be provided or active as part of the opportunity line.

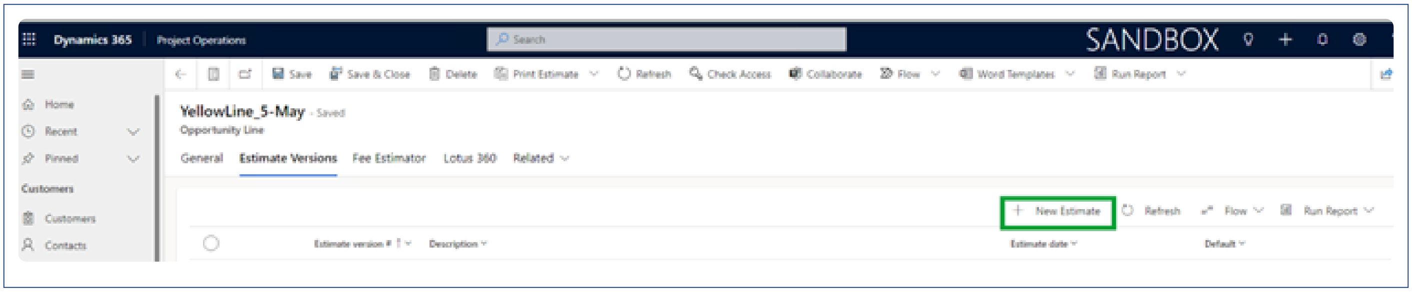
When you create service lines for an opportunity lines, the estimated cost of each service is automatically added together. This total cost then replaces the original budget for the opportunity line. This ensures the sales team has an accurate budget for the opportunity that reflects all the included services.

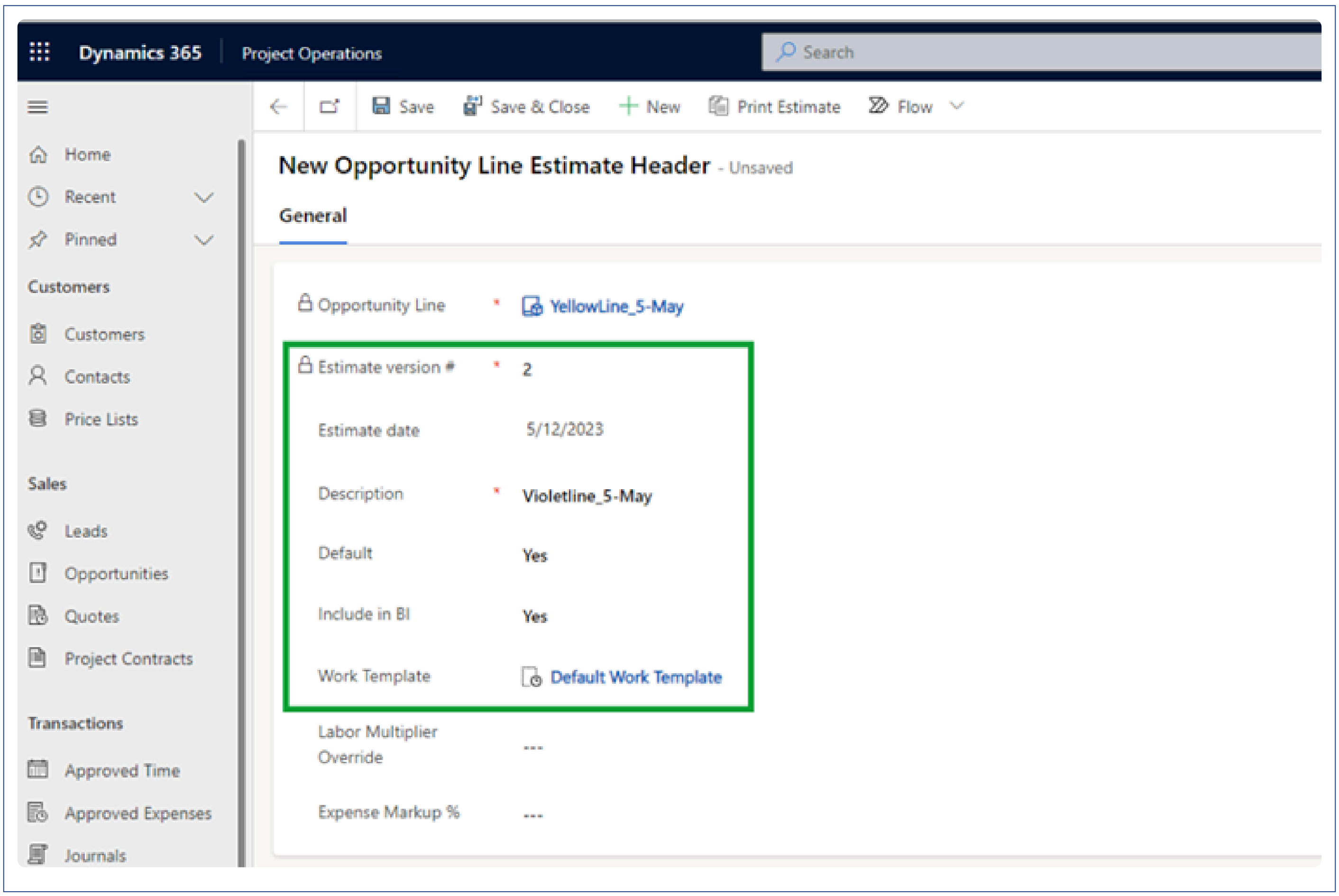
The below screenshot demonstrates how the combined cost of all service lines (shown as "$50,000" under "Estimated Fees") is automatically shown in the "Customer Budget" field for the opportunity line.



4.3. Estimate version

This is a new feature introduced within the opportunity line for the Project manager to build the estimates by adding Tasks, Labour, and Expenses. All those things can be done in one place.





Different fields which are part of Estimate Versions:

Fields	Description
Version#	When you create a new version estimate Version# will auto-populate.
Estimate Date	Estimate date defaults to today’s date.

Description	Description will be auto populated based on the description from Opportunity Line along with Version number.
Default	If yes then this version is the default for me.
Include BI	If you want all versions to be available, then Include BI should be yes.

4.4. Fee Estimator

The new “Fee Estimator” feature allows users to create “Opportunity Line Estimates” where Labor and Expenses are forecasted during the opportunity lifecycle.

- Multiple Estimate versions can be created for the same Opportunity line.
- Estimate versions can be Copied and/or Duplicated whenever necessary.

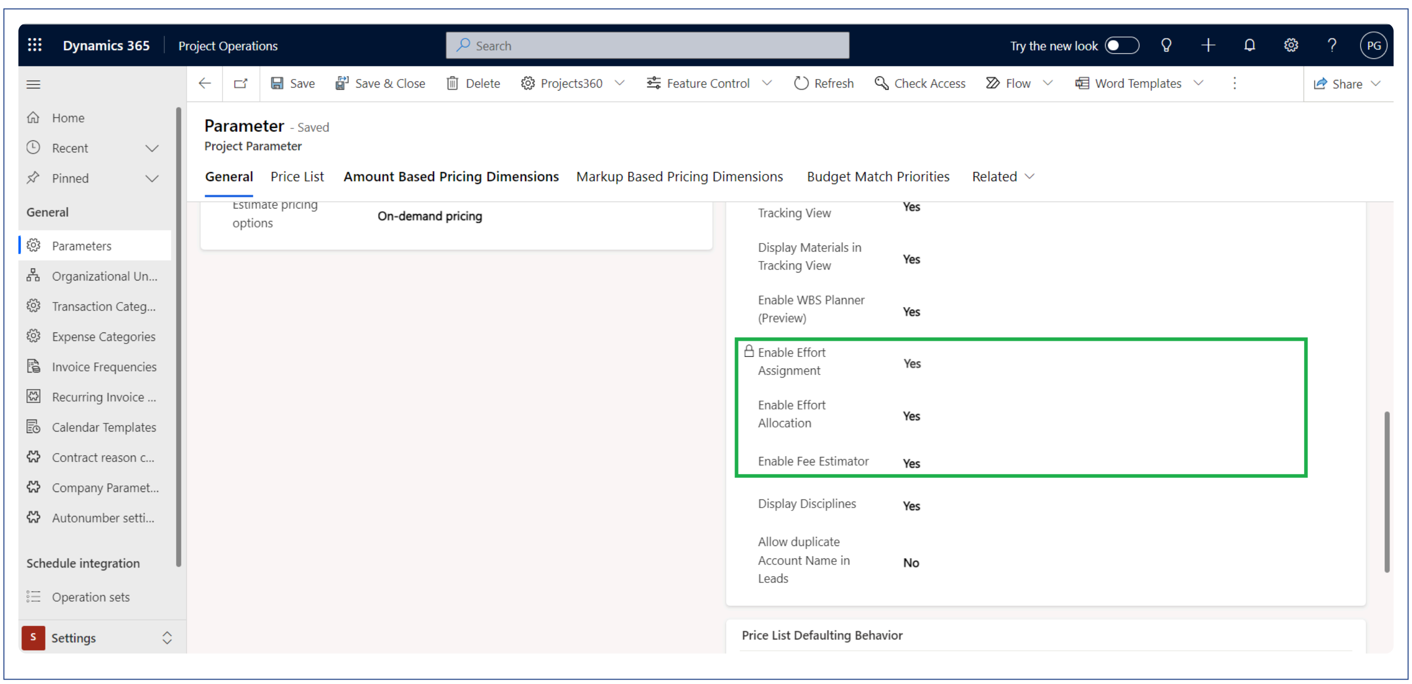
Users can easily plan budgets for different project stages in one place. Switch between versions and make changes in the same spreadsheet, save time and provide accuracy. All your estimates are securely stored for future reference. Plus, these estimates automatically follow the project when it starts, ensuring everything matches up.

- Win deals with accurate estimates you can depend from Fee Estimator spreadsheet.
- Clear budgeting leads to happier clients and smoother projects.

Configuration

The highlighted section below shows the essential setups that System Adminstrator must configure to use the Fee estimator feature. This feature can be activated in the Parameters.

Go to Settings > General > Parameters -> Project360 -> Enable Fee Estimator



Details of fields required for Fee Estimator are as followed:

Fields	Description

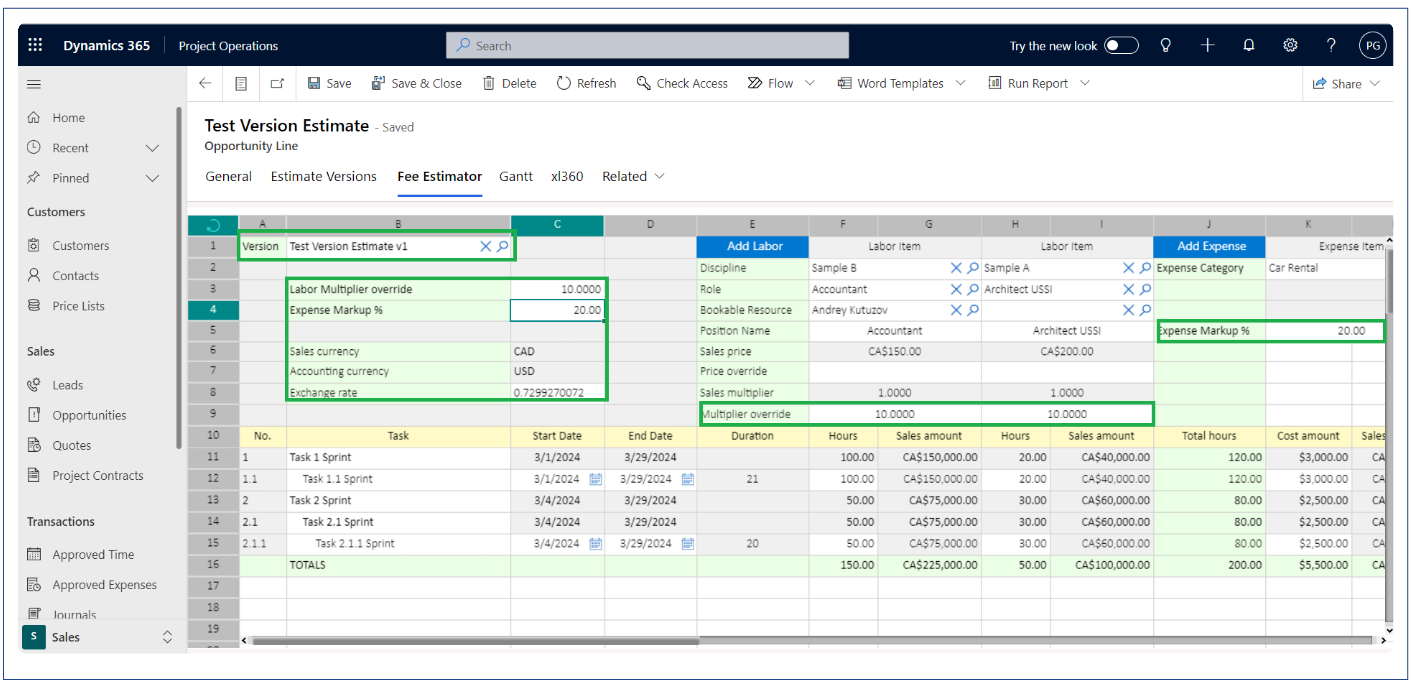
Enable Effort Assignment	Set as “Yes” to activate the new projects360 “Effort Assignment” spreadsheet within the Project form.
Enable Effort Allocation	Set as “Yes” to activate the projects360 “Effort Allocation” spreadsheet within the Project form.
Enable Fee Estimator	Set as “Yes” to activate the new projects360 “Fee Estimator” spreadsheet in the Opportunity Line form.

Fee Estimator

The Fee Estimator will help users to define project estimates and budgets for different phases. They can switch between versions to build estimates in one place and make changes easily in the Fee Estimator Spreadsheet. It ensures all estimates are stored in Dataverse for future reference and can be used during project execution.Overall, this new functionality will make the estimating process more efficient and organized for Sales Team.

- Open the “Fee Estimator” tab. You’ll see the current version of your estimate.
- Just hover over the “Version” field and choose the version you want to work on. Any changes you make will be saved automatically. You can switch between versions anytime.

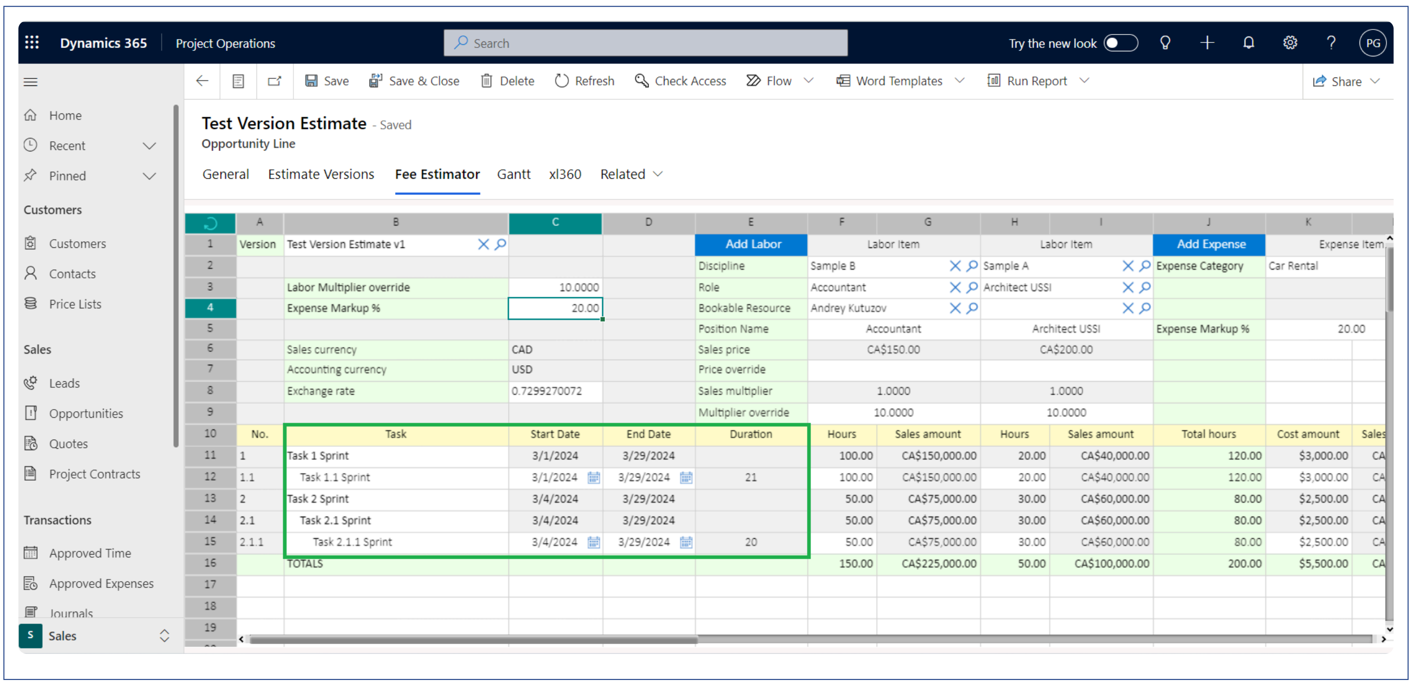
Below the “Version” field, there are additional fields you can use to build your estimate. To help you understand what each field means, we have added clear explanations right next to them.



Fields	Description
Labor Multiplier	Based on the selected Version in the Fee Estimator Spreadsheet, the value will automatically fill in from the Estimate Version. If no input has been provided in the Estimate Version, the field value

override	will be left blank. The value in the Labour Multiplier Override field always changes when the Version is changed.
Expense Markup %	If you choose a Version in the Fee Estimator Spreadsheet, the value will fill in automatically from the Estimate Version. If there's no input in the Estimate Version, the field will be left blank. The value in the Expense Markup percentage field changes whenever the Version changes.
Sales Currency	The "Sales Currency" field shows the currency of the Opportunity. This sets the currency for all estimates related to that opportunity, no matter which version you're working on. It automatically fills in this currency in the Fee Estimator spreadsheet and won't change even if you switch versions.
Accounting Currency	The "Accounting Currency" field shows which company currency the opportunity belongs to. This currency applies to all versions of the opportunity's estimated costs. It automatically fills in the Fee Estimator spreadsheet and stays the same, no matter which version you're working on.

Besides the fields connected to different estimate versions, here are some extra steps to help you get the most accurate budget for roles and expenses:



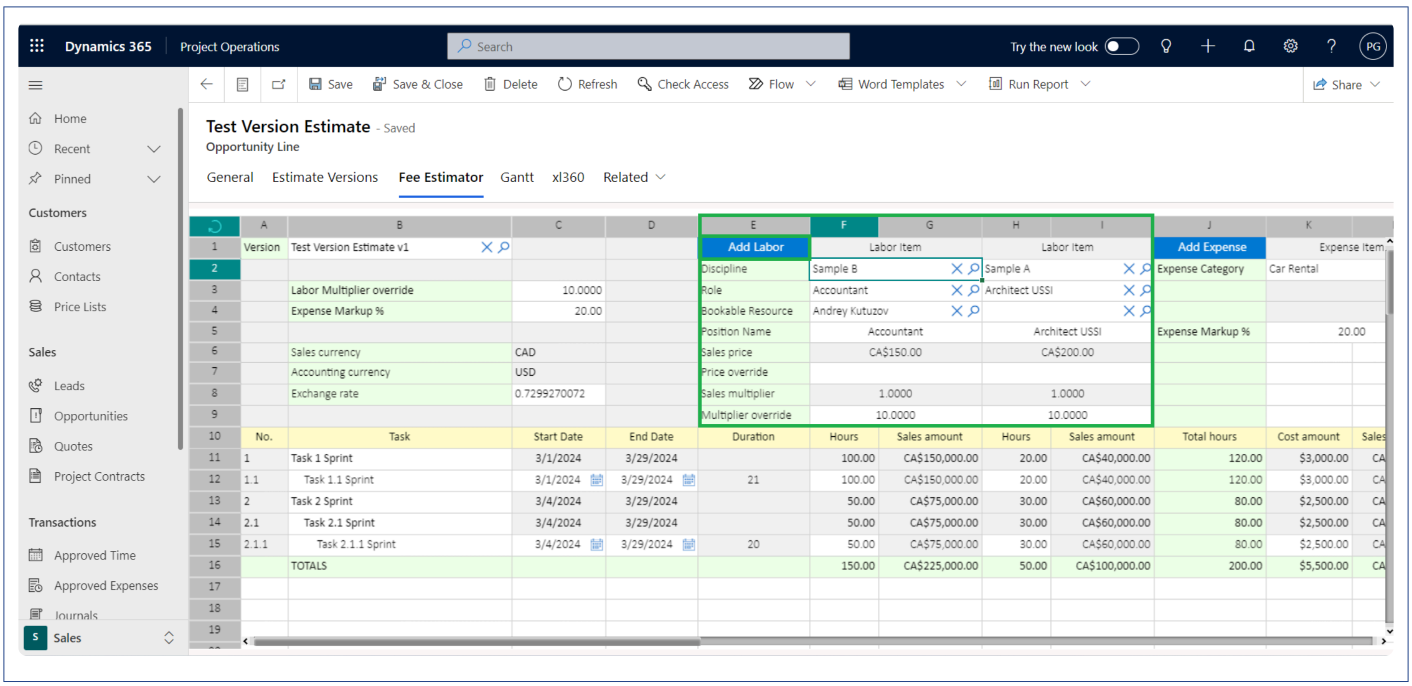
Fields	Description

Tasks	• Right-click on any row and choose "Add Task".
	• Give your task a name, then set its start and end dates. The system automatically calculates the duration based on these dates.
	• You can also :
	  ◦ Add subtasks to break down larger tasks.
	  ◦ Delete tasks you no longer need.
	  ◦ Promote subtasks to become main tasks.

Start Date	Choose the specific date the task will start.
End Date	Choose expected completion date for this task.
Duration	• It is calculated based on the start and end dates you set. The difference between those dates determines how long the task takes. • Different calendar templates in different versions matter. If you choose a version with a different calendar (like holidays or workdays), the duration will automatically adjust to reflect same.

Fee Estimator feature includes two key buttons designed to streamline both role and expense budgeting, facilitating a more efficient process.

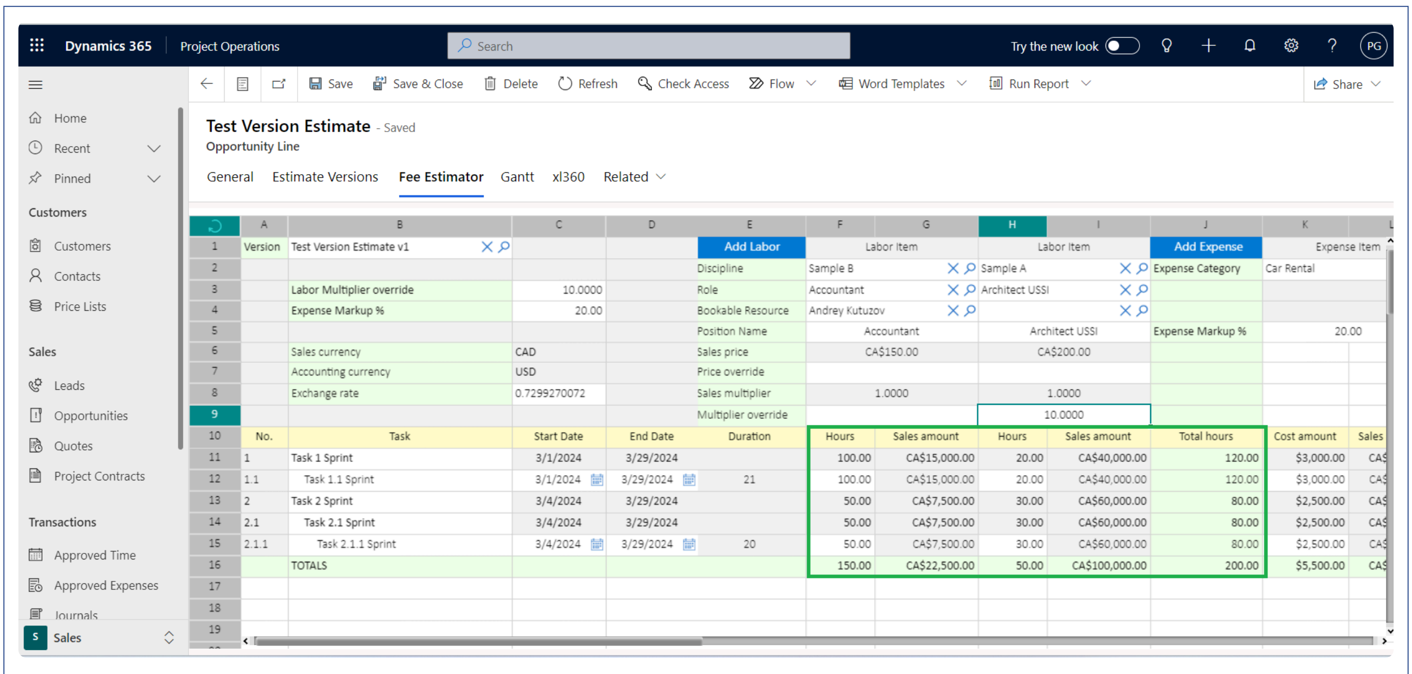
- **Add Labor Button**
  Add different resources to work on a task, Click the “Add Labour Button”. This will open a menu or window where you can choose the roles you need and set their budgets. Click the button as many times as needed to add more resources. Once you click, you’ll see these fields to fill in the details:



Fields	Description
Role	Users can choose any role that’s already set up in the system. The list will show all the resource categories that are currently active.
Bookable Resource	Click the dropdown menu of Bookable Resources and choose the resource you want from the list. Bookable Resource is an optional field and can be left blank and users can only select the role, blank resources will be interpreted as generic resources by the system.

Position Name	When users choose a role, its description will default from the selected role.
Sales Price	The Sales Price value will be populated from the Sales Price list related to the Opportunity.
Price Override	Users can enter custom price here, and the system will automatically calculate the total sales amount based on that price, instead of the roles usual sales price.
Sales Multiplier	The Sales Multiplier will be populated from Sales Price List markup and if there is no markup then it is defaulted as “1”. The Sales multiplier will be applied on top of Sales price to calculate the final Sales Amount.
Multiplier Override	Multiplier override allows to override the value of Sales multiplier and will be applied on top of Sales price to calculate the final Sales Amount.

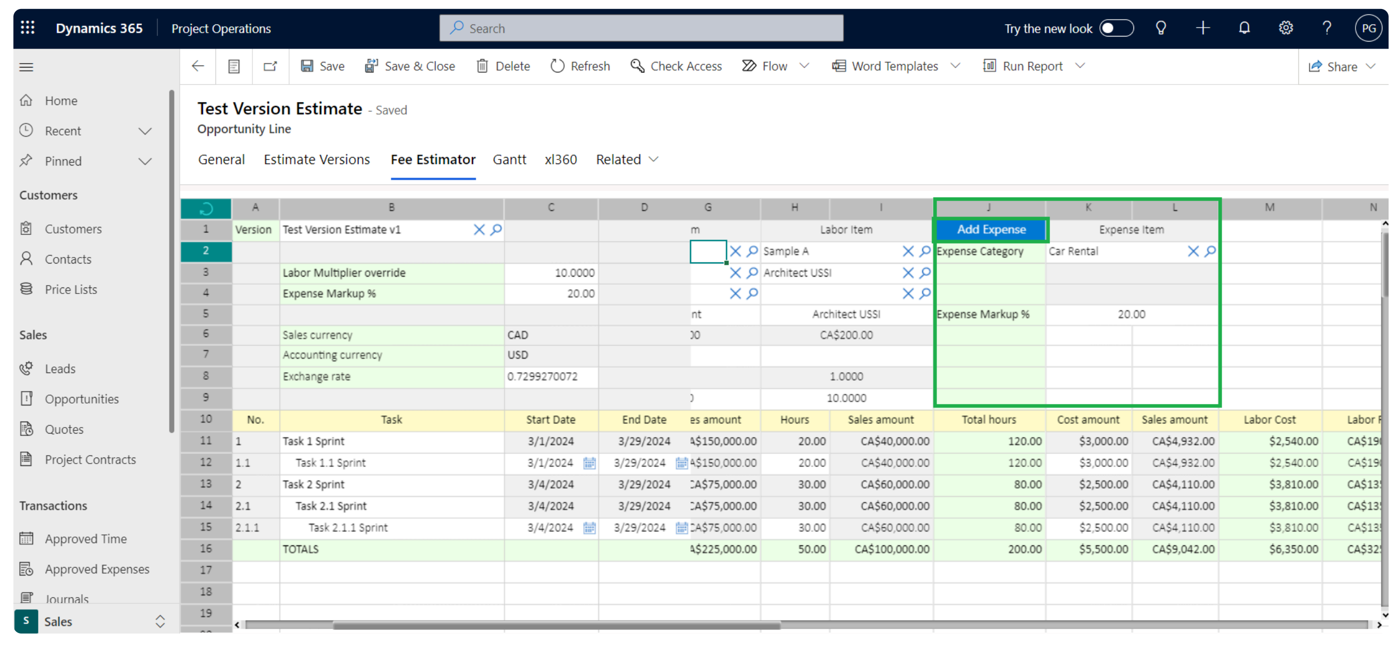
Users also have the flexibility to view different Cost and Sales Estimations for Roles . This helps them to get an overview of the forecasting and make necessary adjustments if needed. Once labor items are added , users will be able to see below fields under different labor items.



Fields	Description
Hours	Users must manually input the total number of hours for the labor they will perform on a particular task.
Sales Amount	There are two ways to calculate the Sales Amount of Labour, depending on the scenarios stated below: • If there is no “Price Override” value and no “Multiplier override” value then **Sales Amount = Sales Price * Sales Multiplier * Hours**.

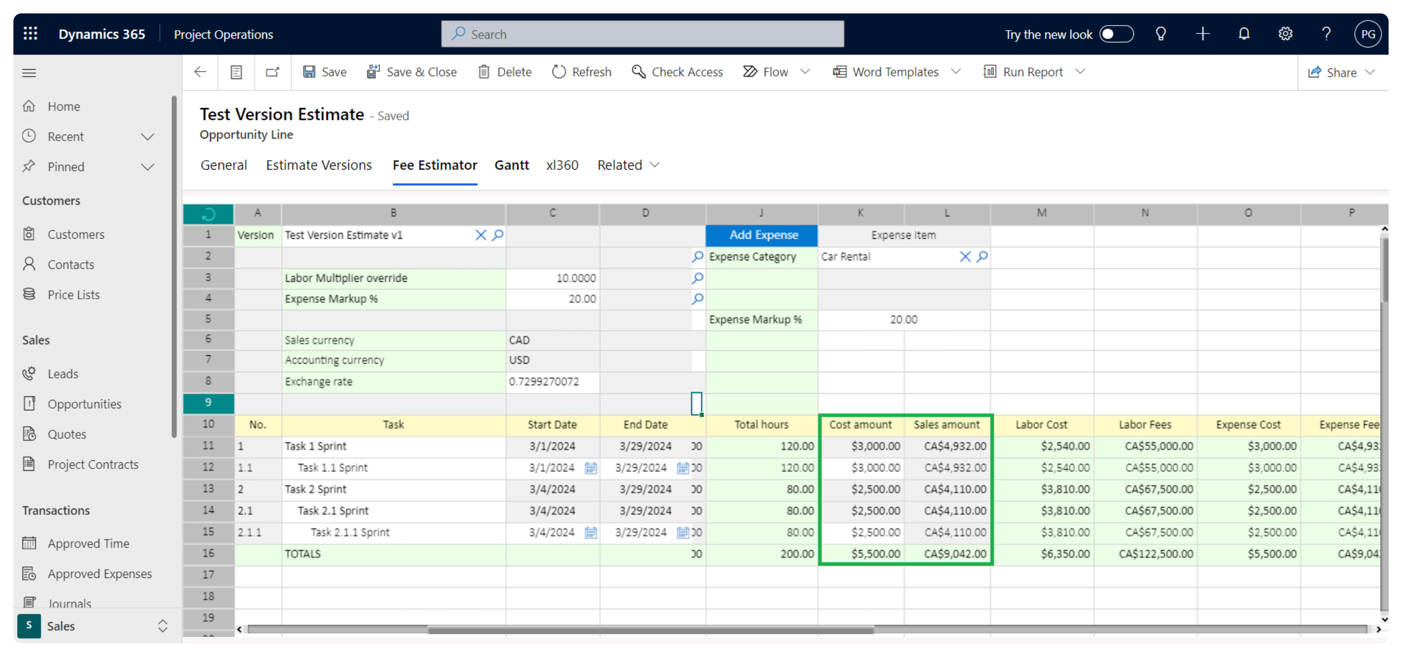
	• If there is “Price Override” value and no “Multiplier override” value then **Sales Amount = Price Override * Sales Multiplier * Hours**. • If there is “Price Override” value and “Multiplier override” value then **Sales Amount = Price Override * Multiplier Override * Hours**.
Total Hours	Sum of all the estimated work time for your project. There are two ways of calculating Total hours: • By Task: Add up the hours each person spends on a specific task. This gives users the total hours “row-wise”. • By Project Structure: Sum up the total hours for each level in your project breakdown (like subtasks, main tasks, etc.). This gives users the total hours “column-wise”.

- **Add Expense Button**
- Click the “Add Expense Button”, this opens a menu/window where you can easily add a budget for as many expense categories you need.
- Once you click, the following fields will appear for you to fill in:



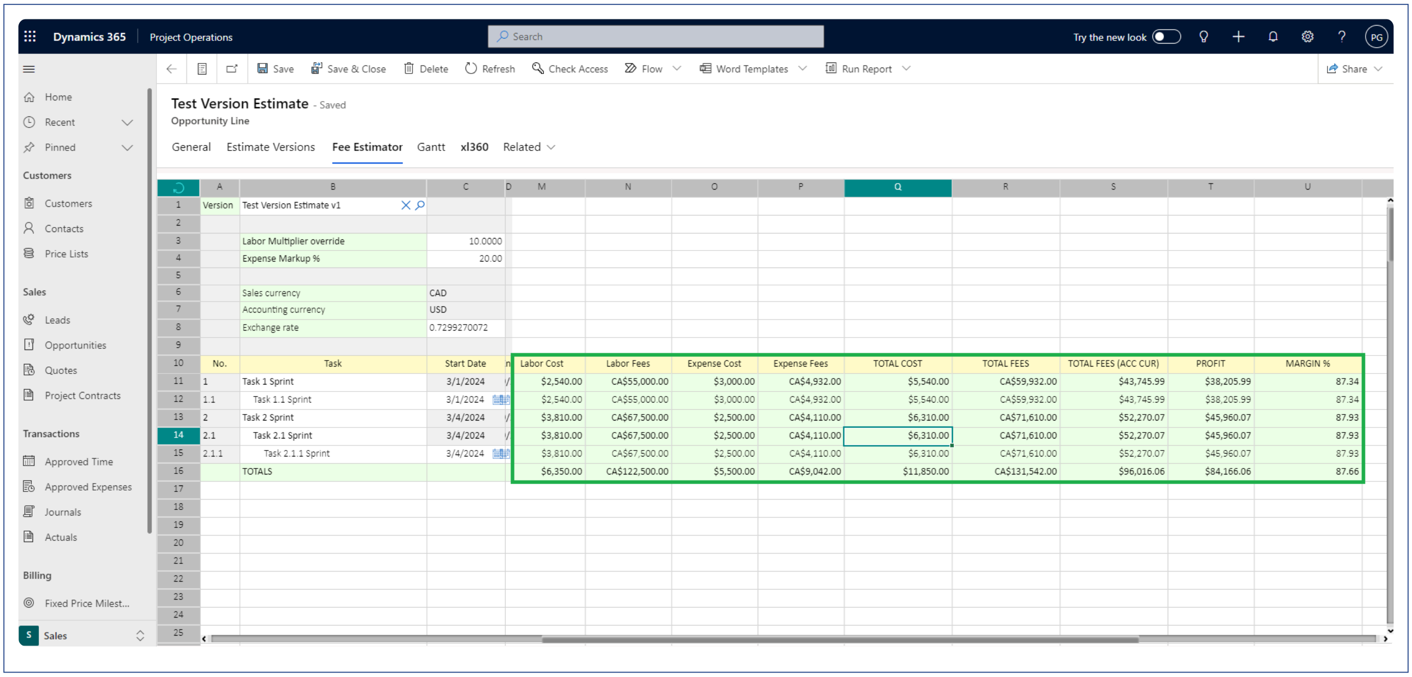
Fields	Description
Expense Category	In the “Expense Category” field, users will see a list of all the active expense categories currently available in system.
Expense Markup %	This field will be automatically populated from the version you selected, with flexibility to manually change.

After adding expenses and filling in the details, you’ll see both the cost and sales amount for each expense. Here is detailed explanation of the fields:



Fields	Description
Cost Amount	Users need to enter the cost amount for each expense they added under a expense category.
Sales Amount	Sales Amount calculation varies with Sales and Accounting currency, can be demonstrated with help of some scenarios: • If the "Expense Markup %" field has no value, and both the sales and accounting currencies are the same, then **Sales Amount = Cost Amount**. • If the "Expense Markup %" field has a value, and the Sales Currency and Accounting Currency are the same, then the **Sales Amount = Cost Amount {1+ [(Cost Amount * Expense Markup %)/100]}**. • If the "Expense Markup %" field doesn't have a value, and the Sales Currency and Accounting Currency are different, then the **Sales Amount = Cost Amount / Exchange Rate**.

There are even more useful fields in the WBS spreadsheet for managing expenses and roles. Here are the fields description highlighted below.



Fields	Description
Labor Cost	“Labor Cost” adds up the costs of all roles/resources assigned to different tasks in Accounting Currency. These costs come from the “Cost Price” list set in your company’s settings.
Labor Fees	The “Labor Fees” is sum of all the Sales Amount from all the tasks in Sales Currency.
Expense Cost	The “Expense Cost” is the total of all the different costs added up for each task in Accounting Currency.
Expense Fees	“Expense Fees” are the total sum of all Sales Amounts for Expense Items defined at every task level in Sales Currency.
Total Cost	The “Total Cost” is the sum of the “Labor Cost” and the “Expense Cost” for a task in Accounting Currency.
Total Fees	The “Total Fees” is the sum of the “Labor Fees” and the “Expense Fees” for a task Sales Currency.
Total Fees(ACC CUR)	• If “Sales Currency” is same as currency of “Accounting currency” then **Total Fees (ACC Cur) = Total Fees**. • If “Sales Currency” is different as currency of “Accounting currency” then **Total Fees (ACC Cur) = Total Fees * Exchange Rate**.
Profit	The WBS can be used to track and analyze the actual profit for a project by comparing the actual costs incurred with the originally planned costs and sales price. **Profit = Total Fees (ACC CUR) – Total Cost**.
Margin %	Margin percentage in a Work Breakdown Structure (WBS) is a measure of the profit or markup applied to the cost of work at each level of the breakdown. **Margin % = Profit/ Total Fees (ACC**

	CUR).

5. Contract management

This section details out the enhancements provided for the Contract management process such as creation of Project contract, Project contract line and integration to Finance and Operations. The enhancements that are grouped together in this section are related to:

- **Project contract**
- **Project contract line/Contract agreement**

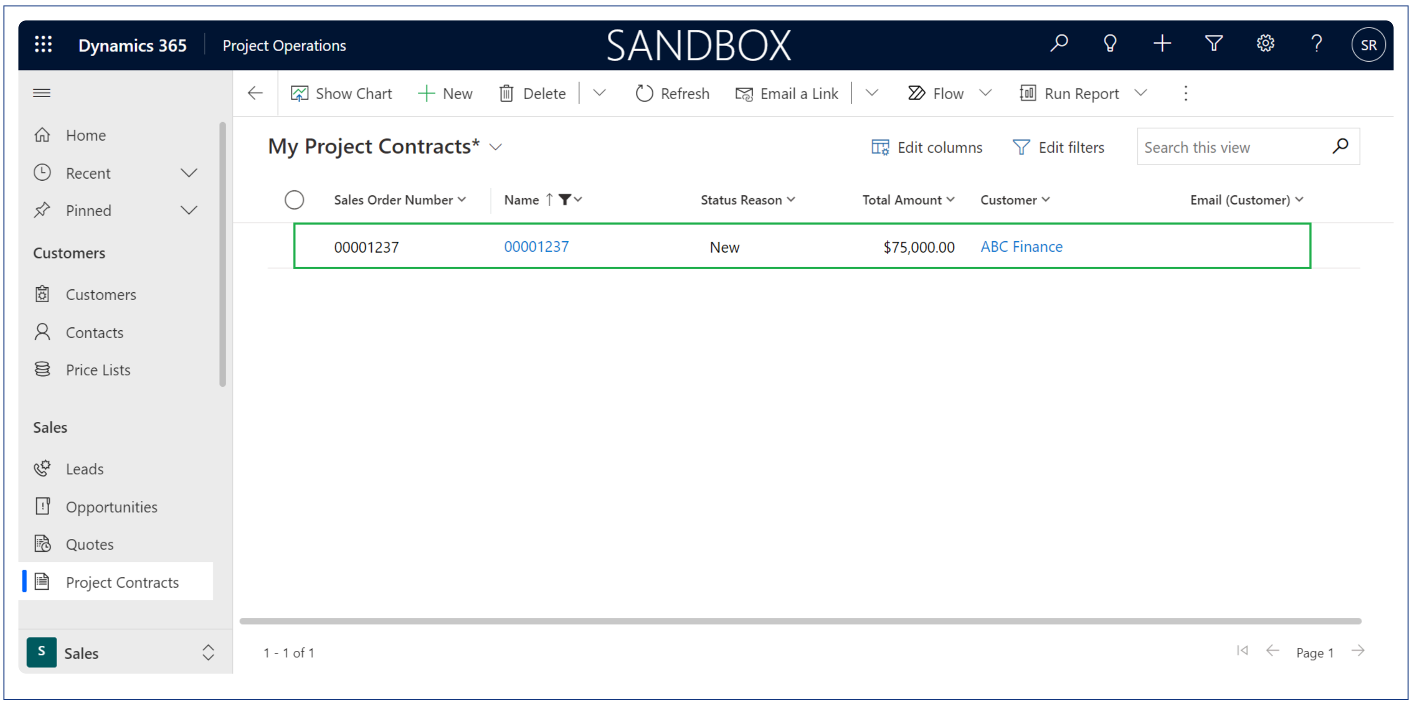
Select a section to view more details about them.

5.1. Project Contract

When a Project Contract gets created by the 'Close as Won' process at the Opportunity or Opportunity line level , then the associated Project gets linked to the Opportunity Line, and the Contract automatically appears on the Opportunity form..

A new Project Contract always gets created with new "Funding source" and same will be updated in Finance and Operations automatically using dual write. After 'Funding source' record is created, a new 'Funding rule' record will be created along with 'Funding rule Allocation' record.

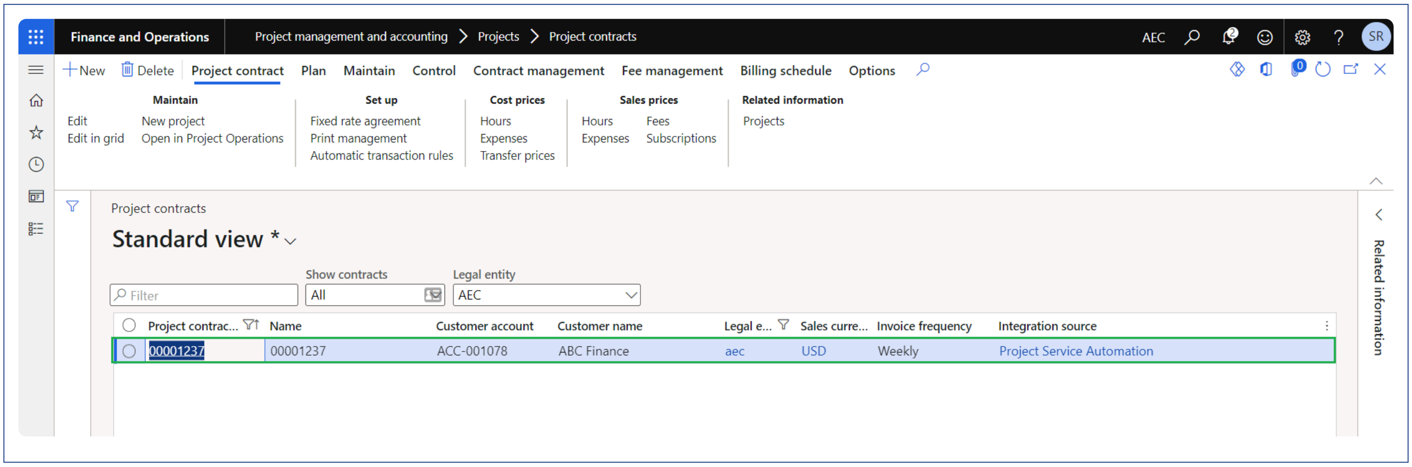
Go to Sales > Project Contracts

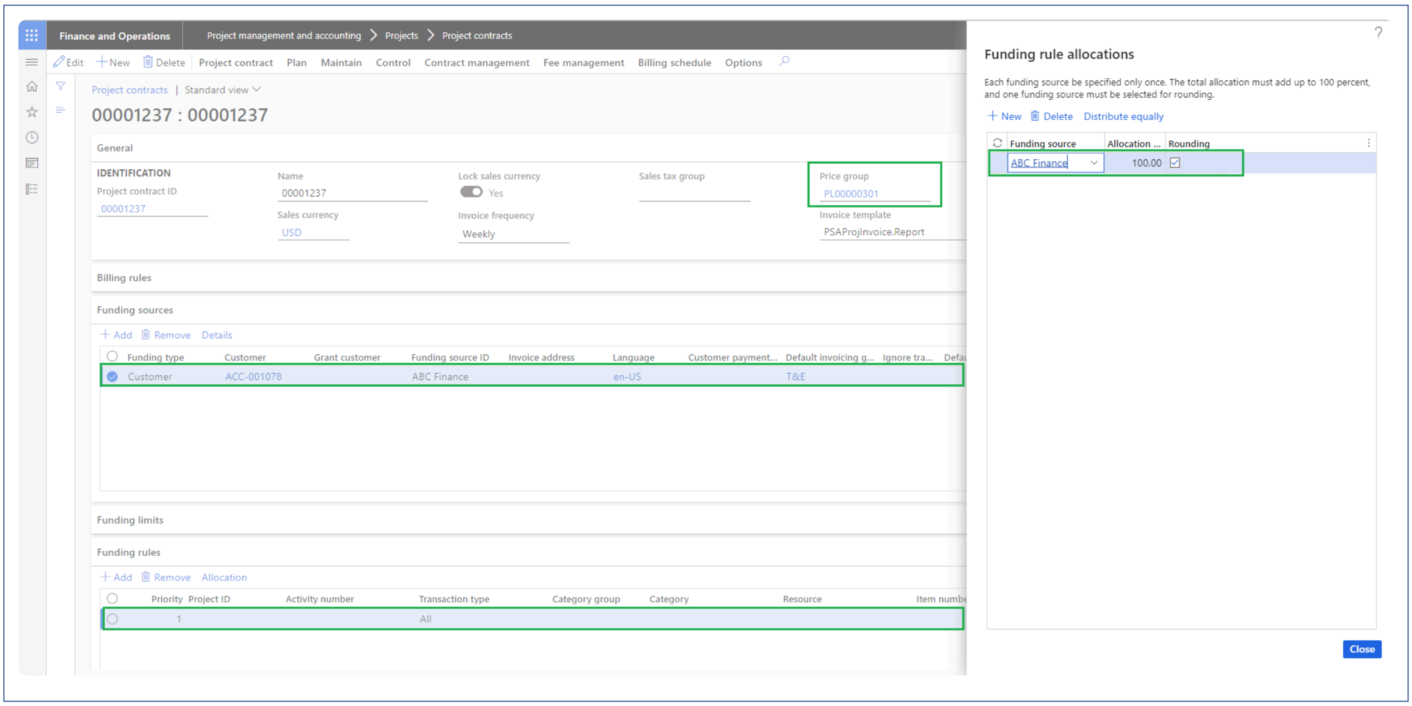


Note – When a new project contract is created by Close as Won at the Opportunity/Opportunity line level, the value for fields 'Sales Order Number' and 'Name' will be the 'Opportunity Id' number at Project Contract.

Below are the list of the records gets created when the new project contract is integrated to Finance and Operations from Project Operations.

Go to Project management and accounting > Projects > Project Contracts





Record gets created in the Funding sources tab with below specifications in Finance and Operations:

Fields	Specification
Funding type	Customer
Customer account	Customer account from Project Contract in Project Operations
Funding source Id	Name of the Customer
Invoice Address	Defaults from Customer address
Language	Defaults from Customer language
Default invoicing group	Defaults from projects360 parameters > Invoicing tab > Default invoicing group field

Record gets created in Funding rules tab with below specifications in Finance and Operations:

Fields	Specification
Priority	1
Transaction type	All
Activity number	Blank
Category group	Blank
Category	Blank
Resource	Blank
Item number	Blank
Start date	Blank
End date	Blank

Record gets created in Funding rules tab > Allocation with below specifications in Finance and Operations:

Fields	Specification
Funding source	Funding source Id created above.
Allocation percentage	100.00
Rounding	Yes

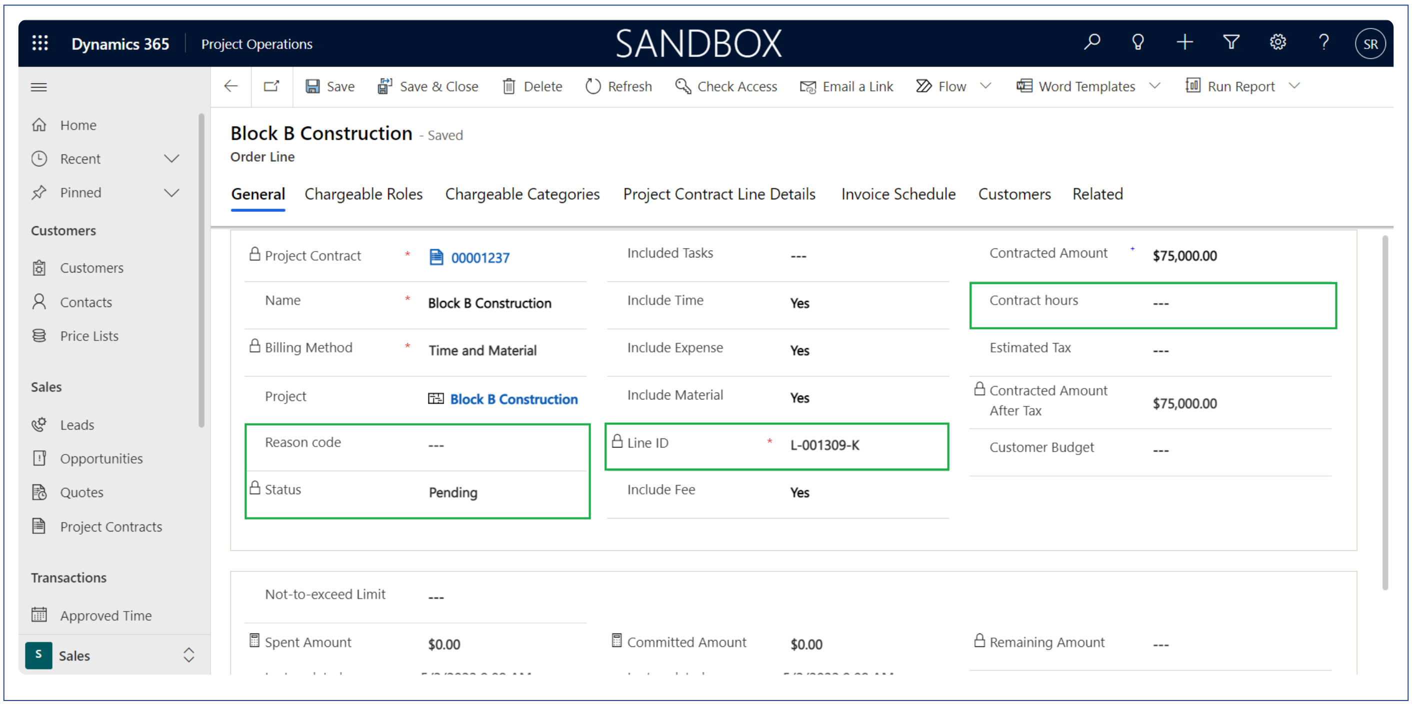
Note – ‘Price group’ field at Project contract form in Finance and Operations will be populated when the new project contract record is created. Also, ‘Price group’ should be updated when the price list is modified within the contract in Project Operations.

5.2. Project Contract line

‘Contract line’ will be automatically created for the selected contract when a new project gets created. When ‘Project contract lines’ are created or updated in Project Operations, it will be created or updated as ‘Contract agreement’ and synced as ‘Billing rules’ against the project contract in Finance and Operations using dual-write. This integration happens only when the Project is in released stage from Project Operations.

Note – The Contract line which will be created automatically, whenever the Project gets created will be of Billing Type “Time and Material”.

Go to Sales > Project Contracts > Contract Lines



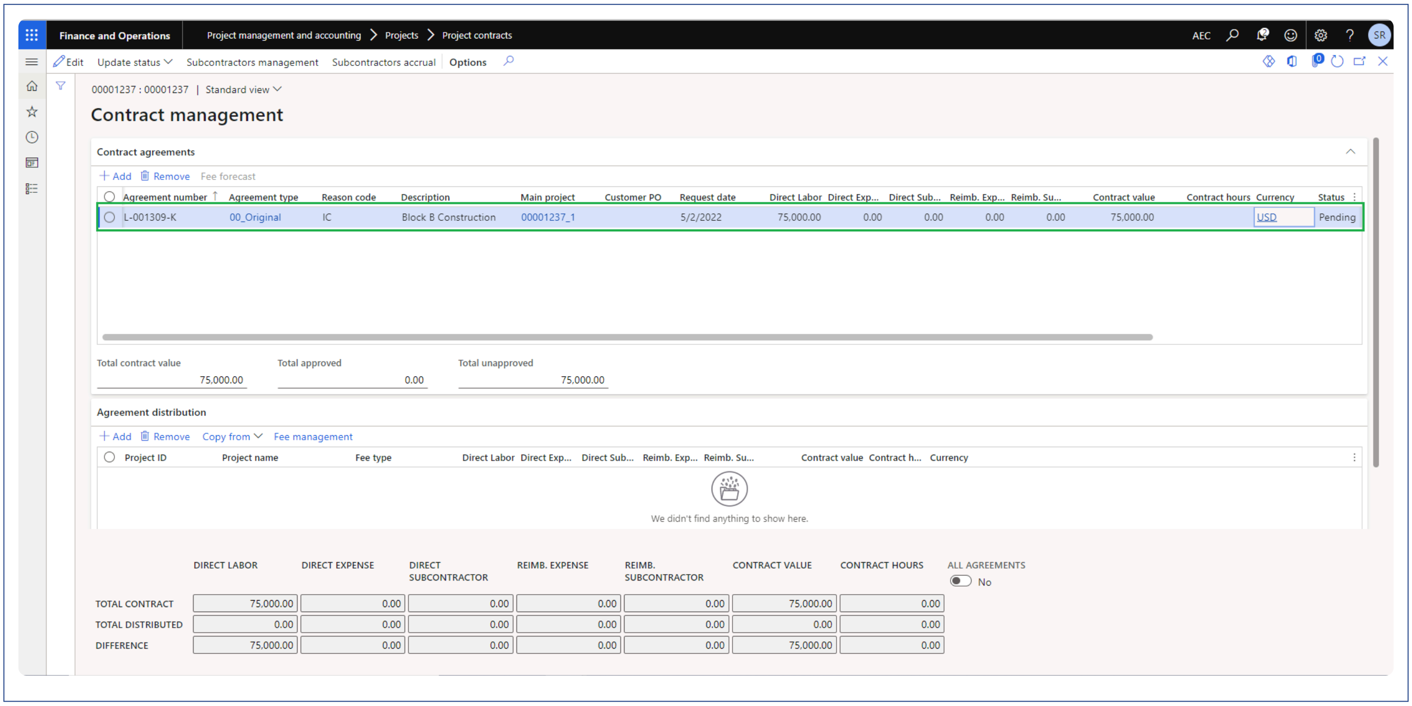
Details of the new fields added at Contract Line form at Project Operations are as follows:

Fields	Description
Line ID	This field non-editable and value is generated automatically when a new contract line gets created. This will be used as Agreement number in Contract agreement.
Reason code	This field is optional and editable, lists the Contract reason codes values available for selection.
Status	This field is non-editable and contains same options as Contract agreement status field in Finance and Operations. i.e., Pending, Rejected and Approved.
Contract	This field is optional and editable field, user can define number of contracted hours.

hours	

Contract agreement

This section details out the contract agreement integration process and related field mappings from Project Operations to Finance and Operations. When a project released and has the contract/contract line associated with it then it will automatically create as a record in Contract agreement form of respective project contract or project.



Details of the field mappings for Contract agreement record in Finance and Operations are as follows:

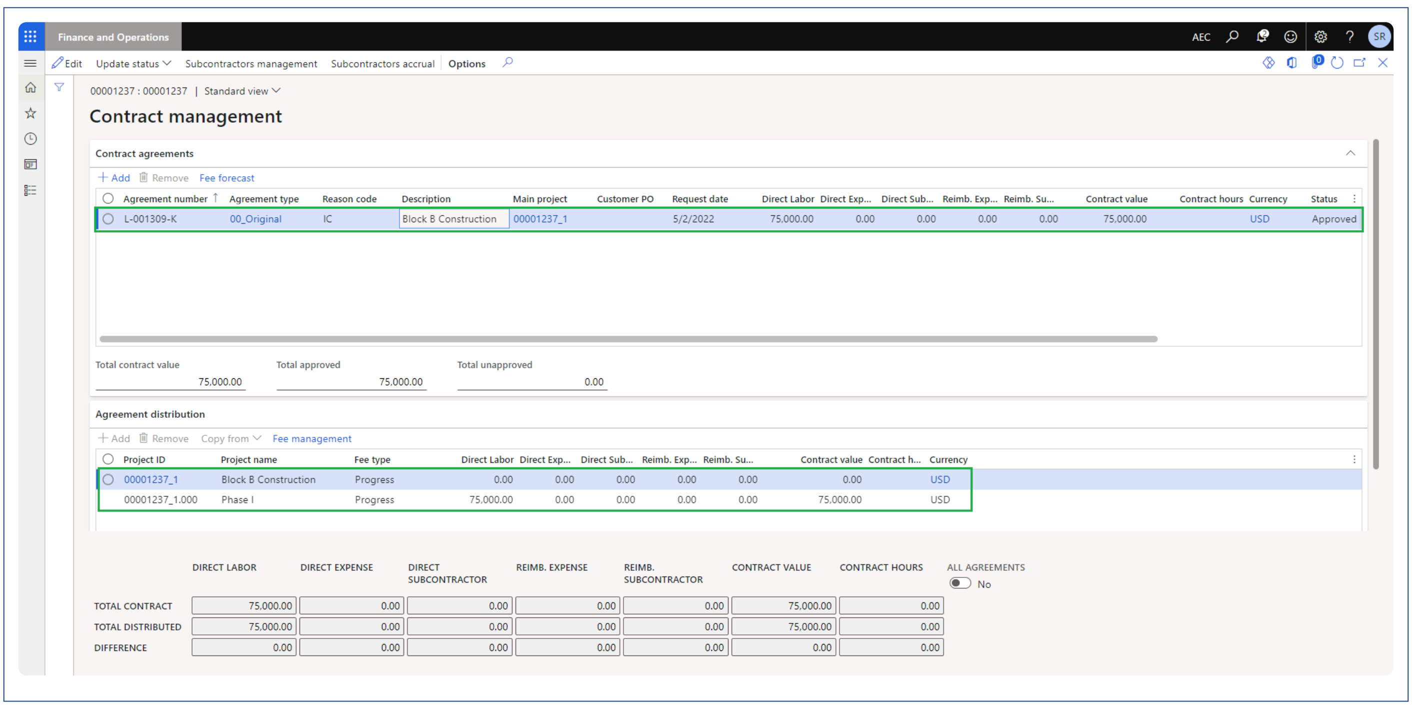
Fields	Specification
Agreement number	'Line ID' field value from Project Operations Contract Line.
Agreement type	Defaults from projects360 integrations > Setup > projects360 integration parameters > Project Operations tab > Default agreement type field value.
Reason code	'Reason Code' from the Contract Line from Project Operations. If no value specified at the Project Operations level then it will default from projects360 integrations > Setup > projects360 integration parameters > Project Operations tab > Default reason code field value. This updated Reason code from Finance and Operations will integrate back to Contract line at Project Operations.
Description	'Write-In Product' field value from Project Operations Contract Line.
Requested date	Date when the Contract line is created.

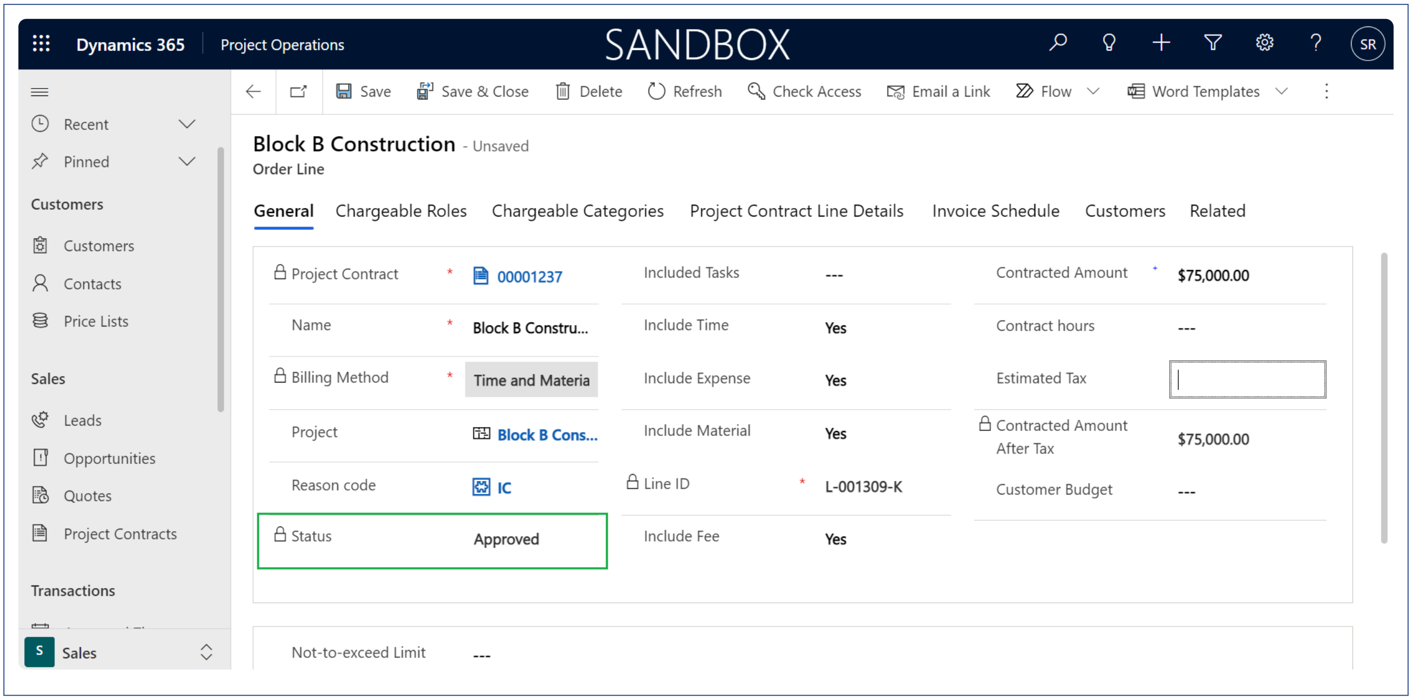
Contract value	Amount' field value from Project Operations Contract Line and this value will also be updated in the first available active contract management bucket.
Currency	Defaults from the Project contract in Finance and Operations.
Status	By default the value will be 'Pending'. Note – Contract agreement record can be modified only when the 'Status' is 'Pending'.

Note – The contract agreement record will be created and integrated only when the 'Contracted Amount' field is not zero in Project Operations.

Agreement distribution and contract approval can be performed in the Contract management form at Project contract or Project level in Finance and Operations. Once the Contract amount is distributed and approved the status will be updated as 'Approved' at the project contract line level also using dual-write.

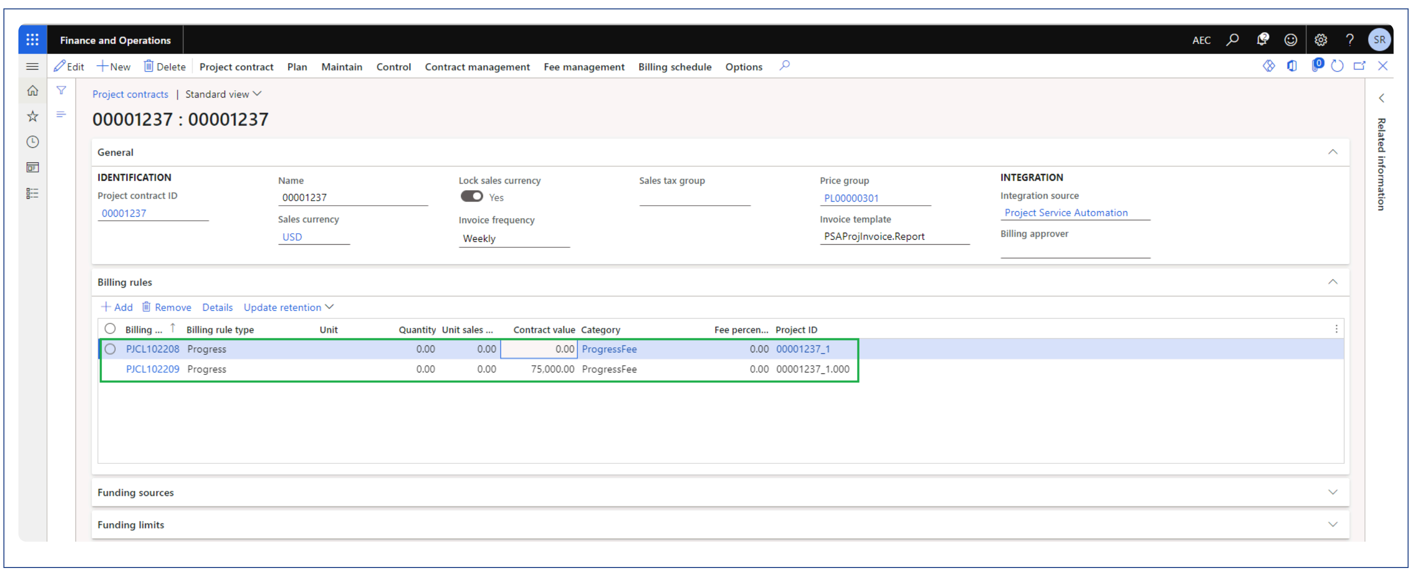
- **Contract management** – This manual gives insights to what's available in projects360 contract management, how we can configure and use it to the best of our needs.





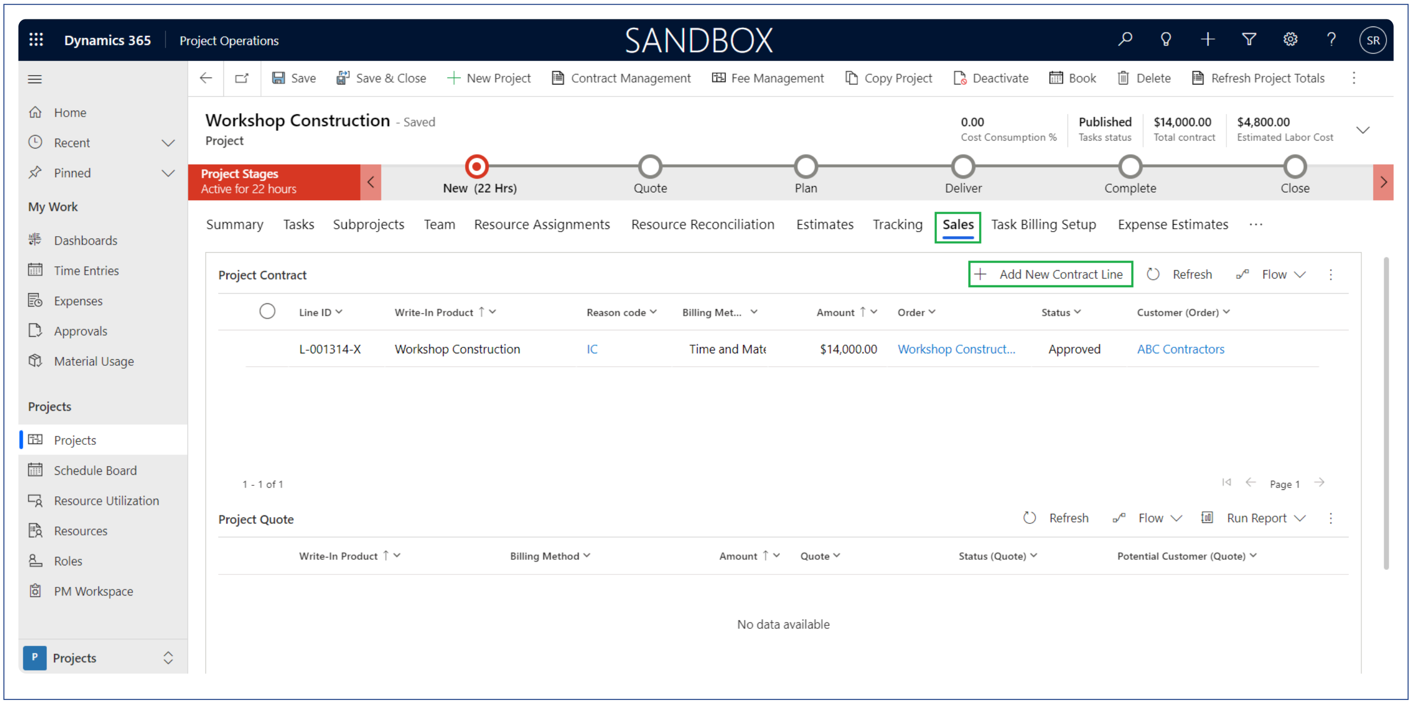
Billing rules

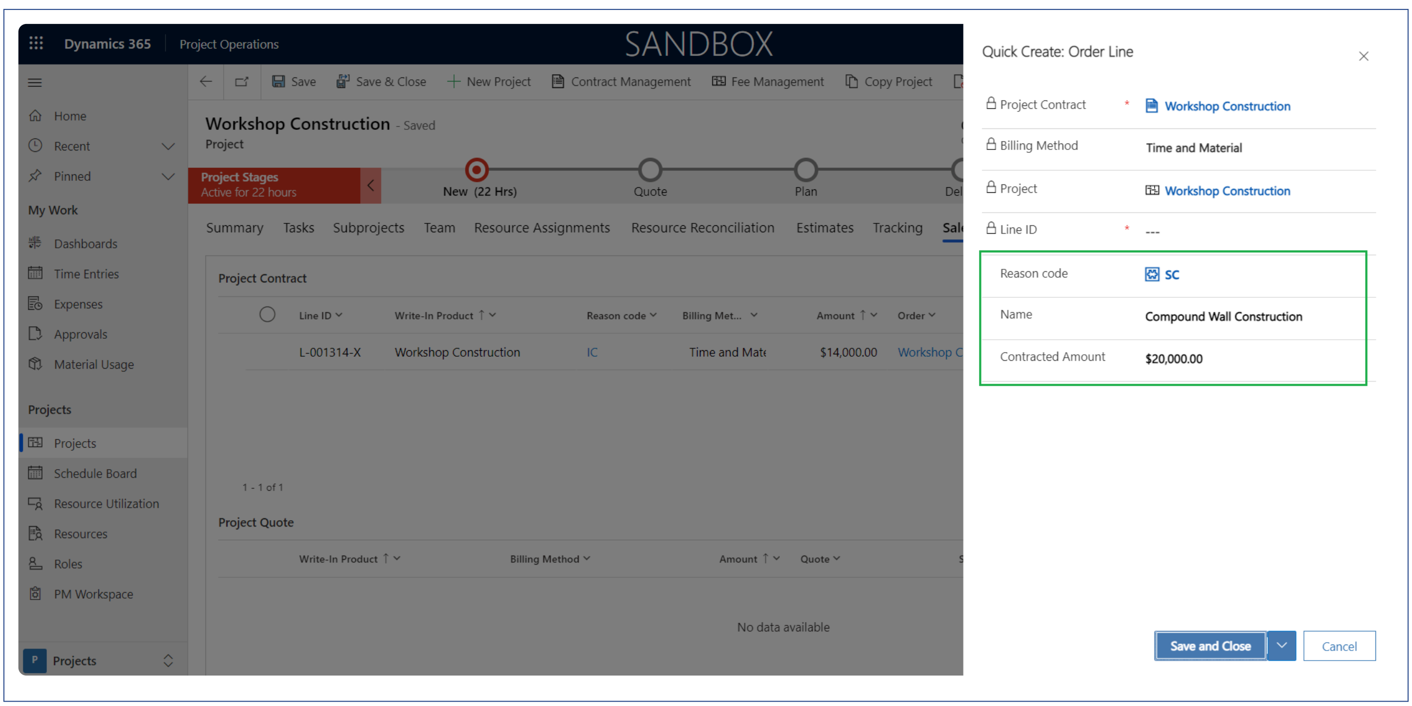
Once the project is successfully released to Finance and Operations, it will create a billing rule against the project contract in Finance and Operations.



5.2.1. Create Contract line from project

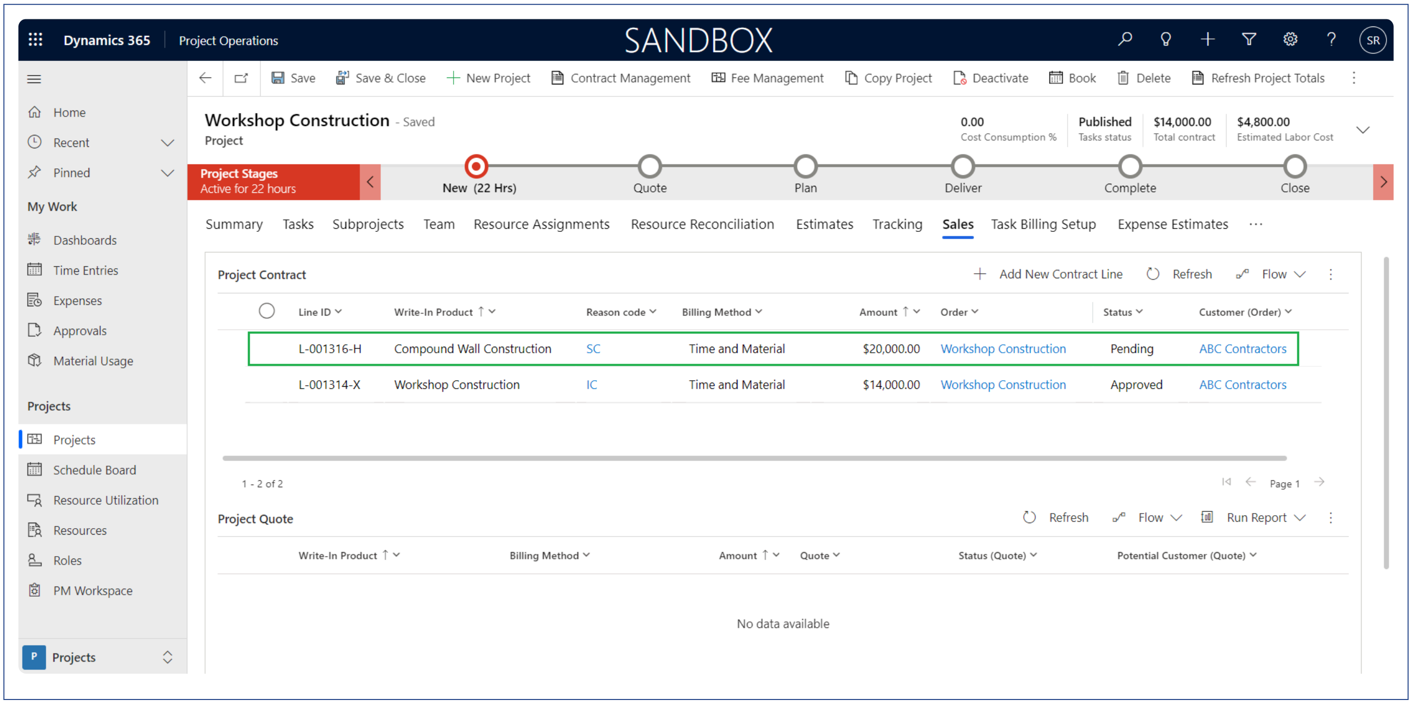
As part of this enhancement a new button ‘Add New Contract Line’ is added to quickly create ‘Contract Line’ from ‘Projects > Sales’ tab. This button will open a new dialog form called ‘Quick Create: Order Line’.

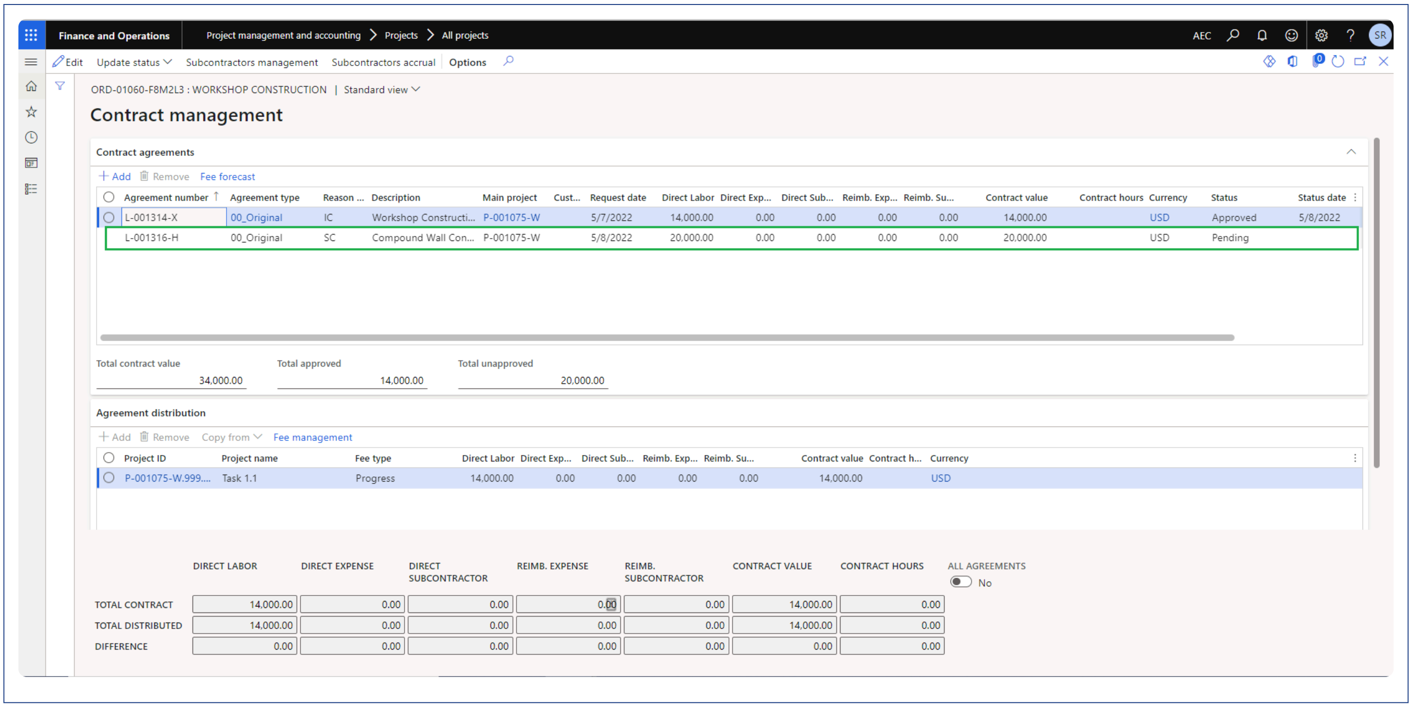




This button will open a new dialog form called ‘Quick Create: Order Line’. It will be similar when a contract line is created from project contract form but only showing few fields. Details of the fields in the quick create form are as follows:

- The following fields will be defaulted and non-editable.
  - ‘Project Contract’ from the selected ‘Project’
  - ‘Billing Method’ as ‘Time and Material’
  - ‘Project’ from the selected ‘Project’
  - ‘Line ID’ using the standard sequence.
- Fields ‘Name’ and ‘Contracted Amount’ will be available and editable.
- When ‘Save and Close’ button is clicked, then a new Order Line/Contract Line record will be created.
- ‘Project Contract’ grid will be refreshed after this dialog form is closed.
- New contract agreement record will be created in Finance and Operations against the project.





6. Project management

This section details out the enchantments provided at the Projects level in Project Operations. The enhancements that are grouped together in this section are related to:

- **Projects**
- **Project tasks**
- **Subprojects**
- **Release process**
- **Actuals integration**

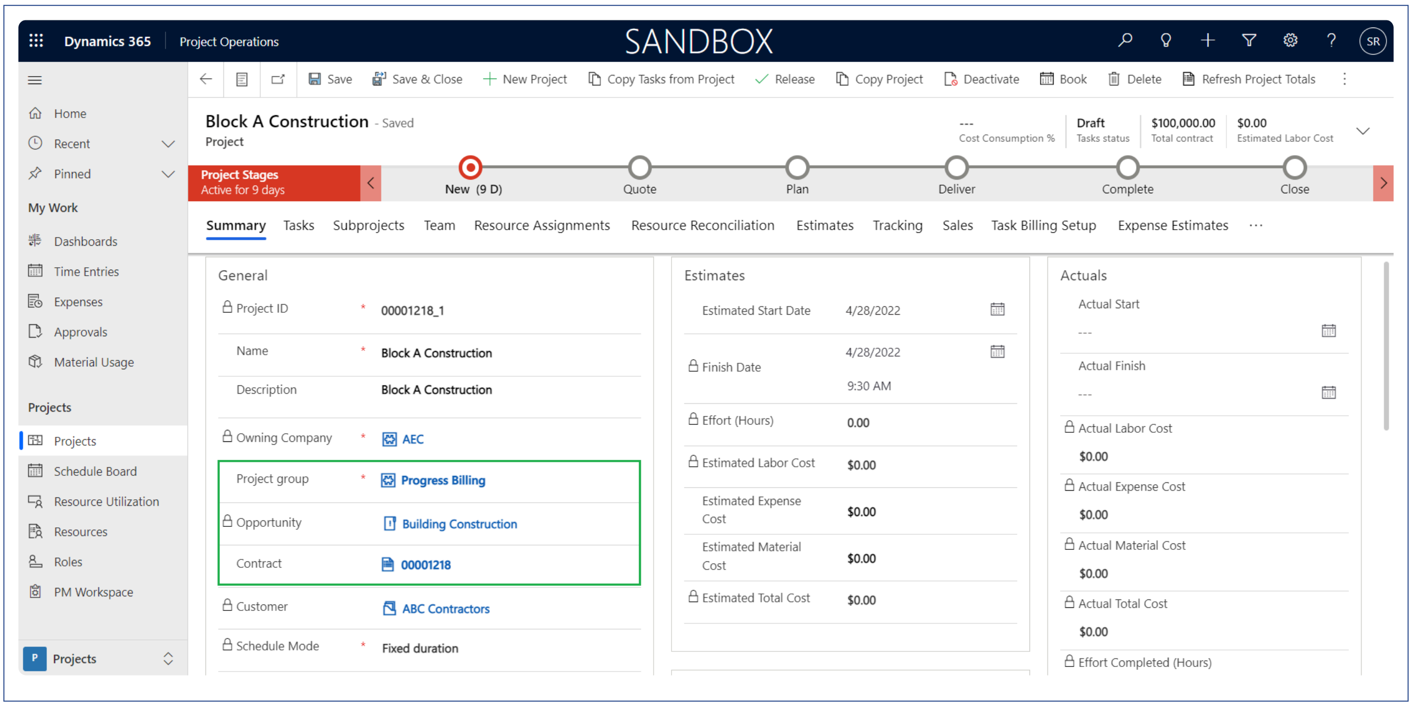
Select a section to view more details about them.

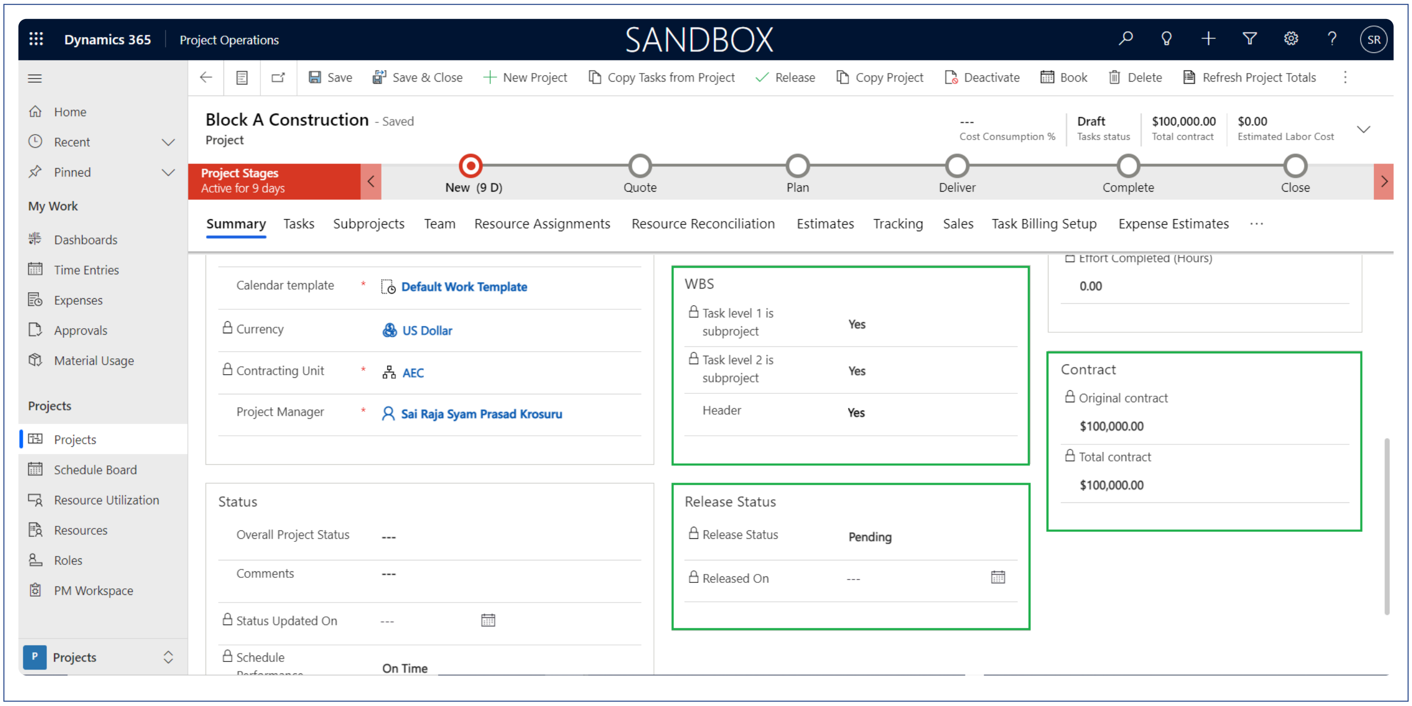
6.1. Projects

This section details out the various new fields and buttons added at Project level to enhance the functionalities. Users can create projects in Project Operations either manually or through opportunity management process. The new project will use a 'Project ID' based on the combination of 'Opportunity Id' + '_' + Opportunity line number, for ex: if the 'Opportunity Id' value is '00001218' and for the first opportunity line if we are applying either 'Create project draft' or 'Close as Won' then the value for field 'Project ID' for the newly created project will be '00001218_1'.

Users can also create new project directly from the Projects form by updating the required fields and the 'Project ID' value for these will be like 'P-001070-X', 'P-001074-W' …etc., using standard numbering sequence.

Go to Projects > Projects





Details of the new fields added on the Projects form 'Summary tab' are as follows:

Fields	Description
Project group	This field is editable and mandatory. Lists all the project groups available for selection. If project is created from opportunity management process then value will be defaulting from 'Project group' field of opportunity line.
Opportunity	This field optional and not editable, value for field will default from field 'Topic' from Opportunity form when the project is created through opportunity management process.
Contract	This field is optional and editable. Based on the 'Contract' selected 'Customer' will be defaulted from the selected 'Contract'. If the project is created through opportunity management process, the value for this field will be same as the Opportunity Name as Project Contract Name is ideally equal to Opportunity Topic Name but user can change name of Contract associated with Project.
WBS field group	
Task level 1 is subproject	This is optional and editable field, value for this field defaults from 'Company Parameters > Task level 1 is subproject' field. User can modify this value only when there are no tasks exists in the Tasks and WBS Tab.
Task level 2 is subproject	This is optional and editable field, value for this field defaults from 'Company Parameters > Task level 2 is subproject' field. User can modify this value only when there are no tasks exists in the Tasks and WBS tab. 'Task level 2 is subproject' can be selected as 'Yes' only if 'Task level 1 is subproject' set as 'Yes'.
Header	This is optional and editable field, value for this field defaults from 'Company Parameters > Default parent project as header' field. User can modify this value only when there are no tasks

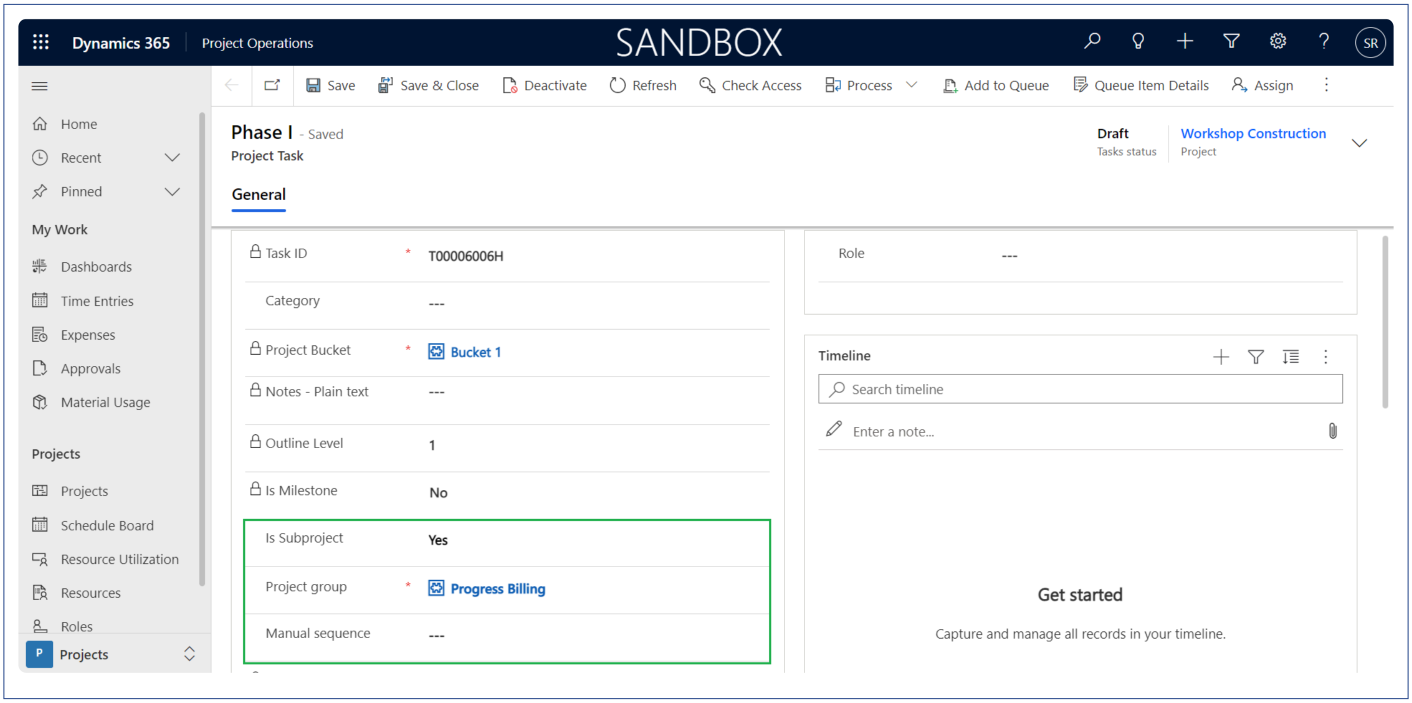
	exists in the Tasks and WBS tab.
Contract field group	
Original contract	This field is not editable. Displays the first contract line amount for the project.
Total contract	This field is not editable. Displays the sum of the all contract line amounts for the project.
Release status field group	
Release status	This field is not editable. Default status will be ‘Pending’ when the new project created. Other options for this field are ‘Released’ and ‘Release failed’. If ‘Auto-release P-project’/‘Auto-release project when opportunity is won’ is set to ‘Yes’ in Company Parameters then the Release status will be ‘Released’ once the project is created.
Released on	This field is not editable and date time field. This field will auto-populate with date and time once the ‘Release status’ is updated as ‘Released’.

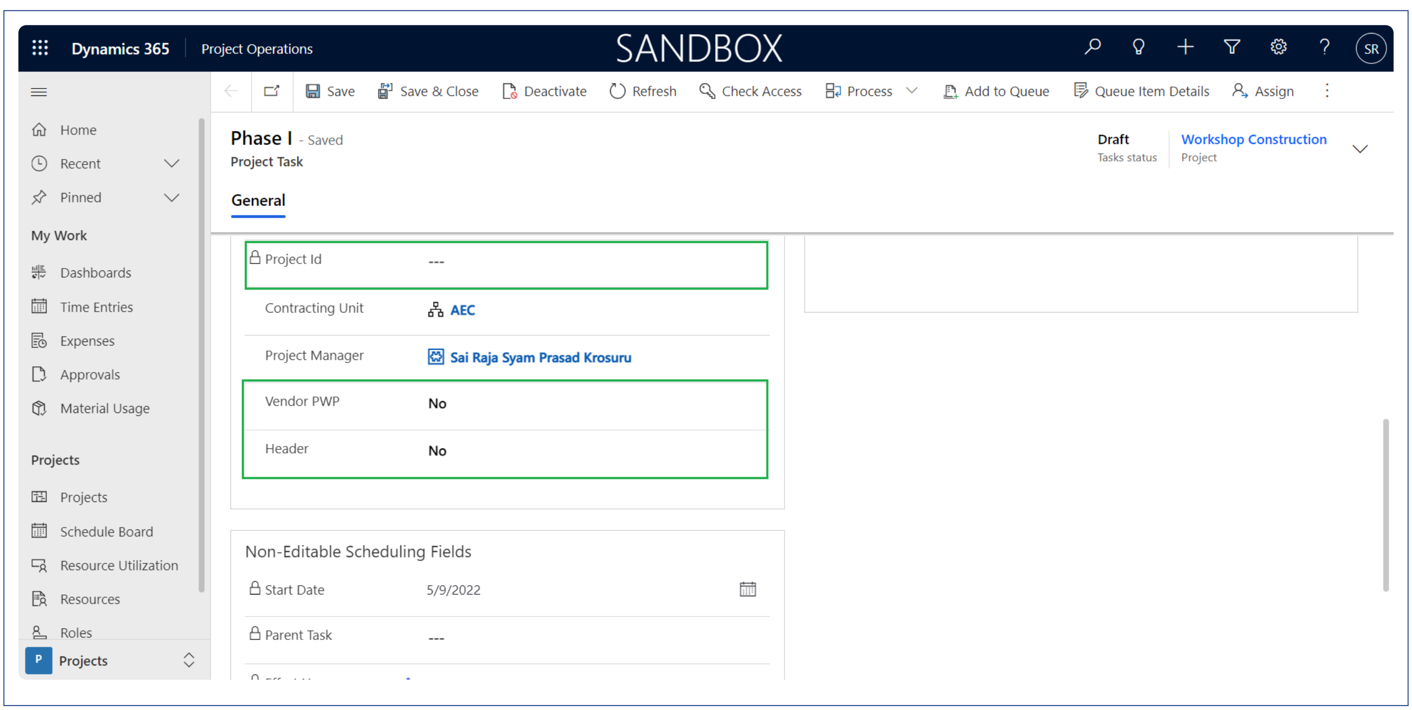
6.2. Project tasks

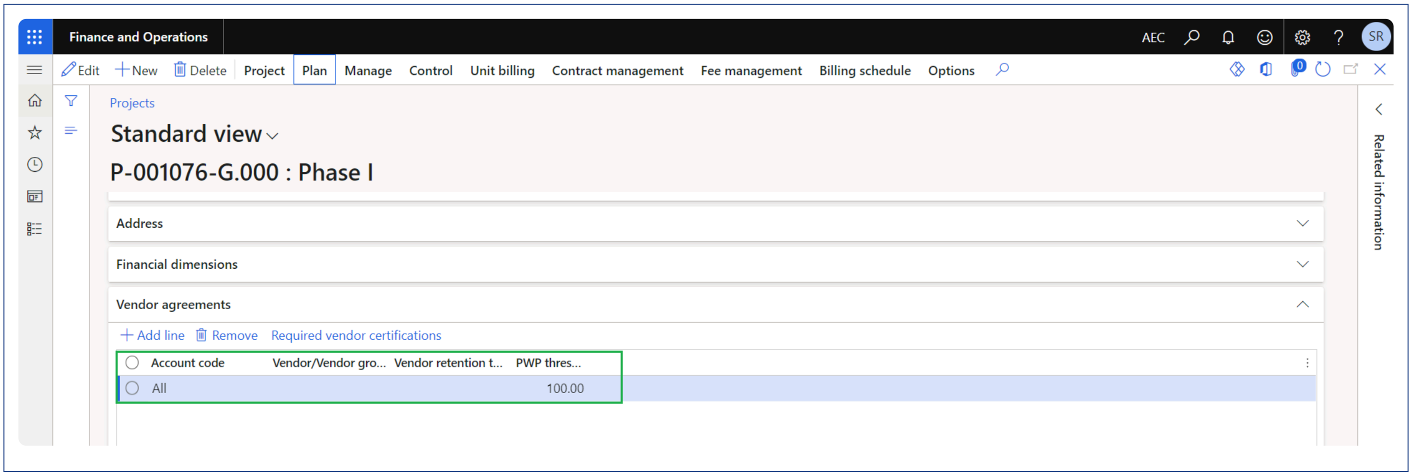
This section details out the new fields and additional functionalities added towards the Project Tasks of the Projects form in Project Operations.

Enhancements to Project tasks form

This section details out list of new fields and functionalities added as part of Project tasks form enhancement.

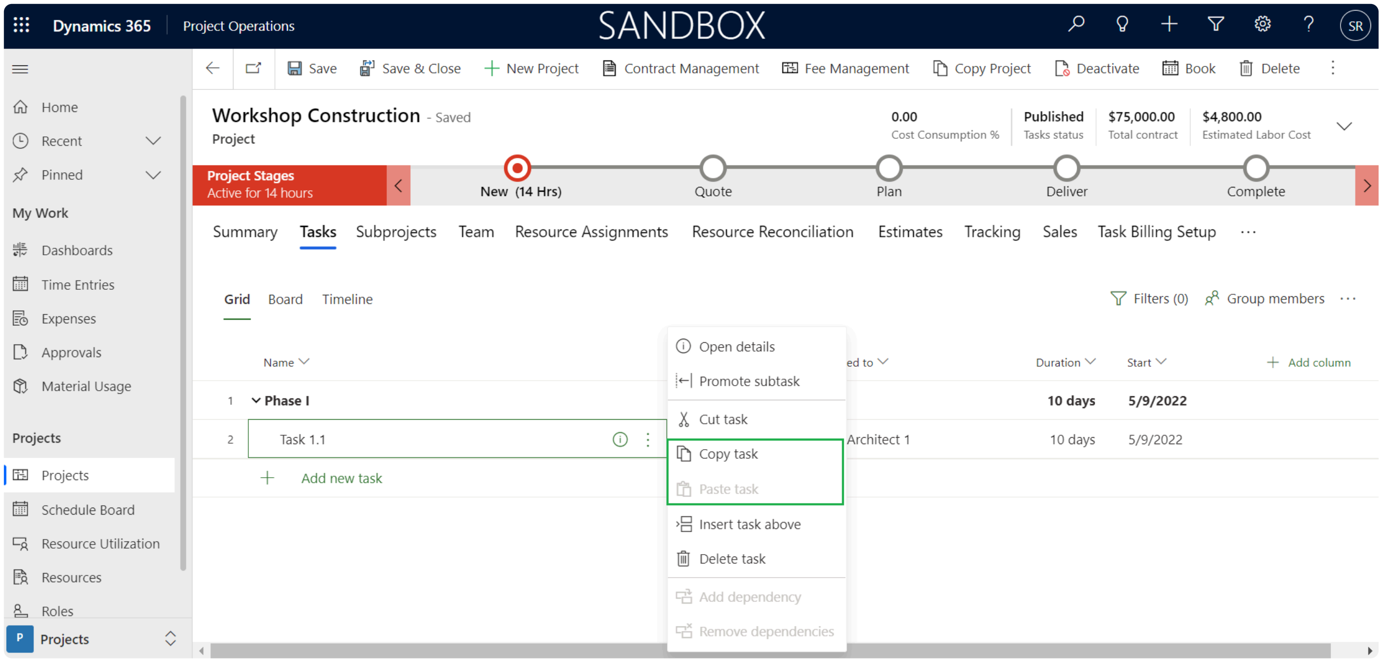






Details of newly added fields and their descriptions are as follows:

Fields	Description
Is Subproject	Defaults by WBS 'Project settings' based on 'Outline level' field value for either 1 or 2. The value will be always 'No' for any other level value. User can modify this field until the 'Release status' is 'Pending'.
Project group	This field will be editable and mandatory only if 'Is Subproject' is 'Yes'. Default value for this field will be from the related project.
Manual sequence	This field will be editable if the related project 'Release status' is 'Pending' and 'Is Subproject' is 'Yes'. If this field is specified with value, then it will be used during the release process to create the 'Project ID' using the 'Manual sequence' value. For ex: Subproject level 1, Subproject format = .###.##, Manual sequence = 999, then Project ID = 00001218_1.999 For ex: Subproject level 2, Manual sequence = 88, then Project ID = 00001218_1.999.88
Project Id	This field is not editable and populates automatically once the project is successfully released.
Vendor PWP	This field is editable only when 'Is Subproject' is 'Yes', If this field is updated as 'Yes' then a new 'Vendor agreement' record will be created during dual-write sync in Finance and Operations for the newly integrated project under Vendor agreements tab with 'Account code' as 'All' and 'PWP threshold percentage' as '100.00'.
Header	This field is editable only when 'Is Subproject' is 'Yes' and 'Release status' is 'Pending'. If this parameter is marked as 'Yes' then the 'Project' will be marked as header project. If the 'Task level 2 is subproject' is configured as 'Yes' for the main project, then subproject level 1 will be defaulted as 'Header' = 'Yes'. This 'Header' field value will be synced through dual-write to Finance and Operations 'Header' field for projects and subproject under 'Project hierarchy' tab.



Note – Existing 'Copy task' and 'Paste task' functionality enhanced at Tasks tab in order to accommodate the above newly added fields in the Projects tasks form.

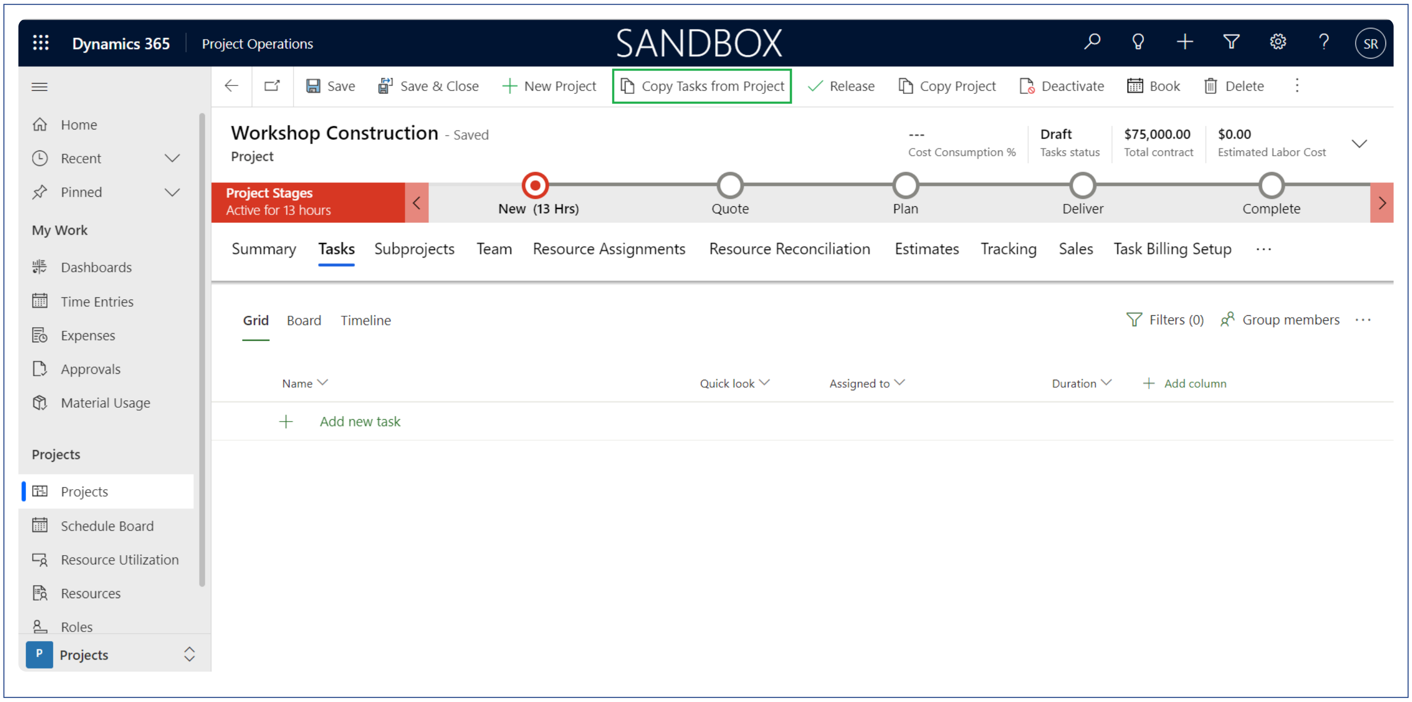
QUICK TIP

Troubleshoot working in the Task grid – This topic outlines the common issues that can impact the ability to render the grid or manage tasks in the work breakdown structure (WBS)

6.2.1. Copy Tasks from Project

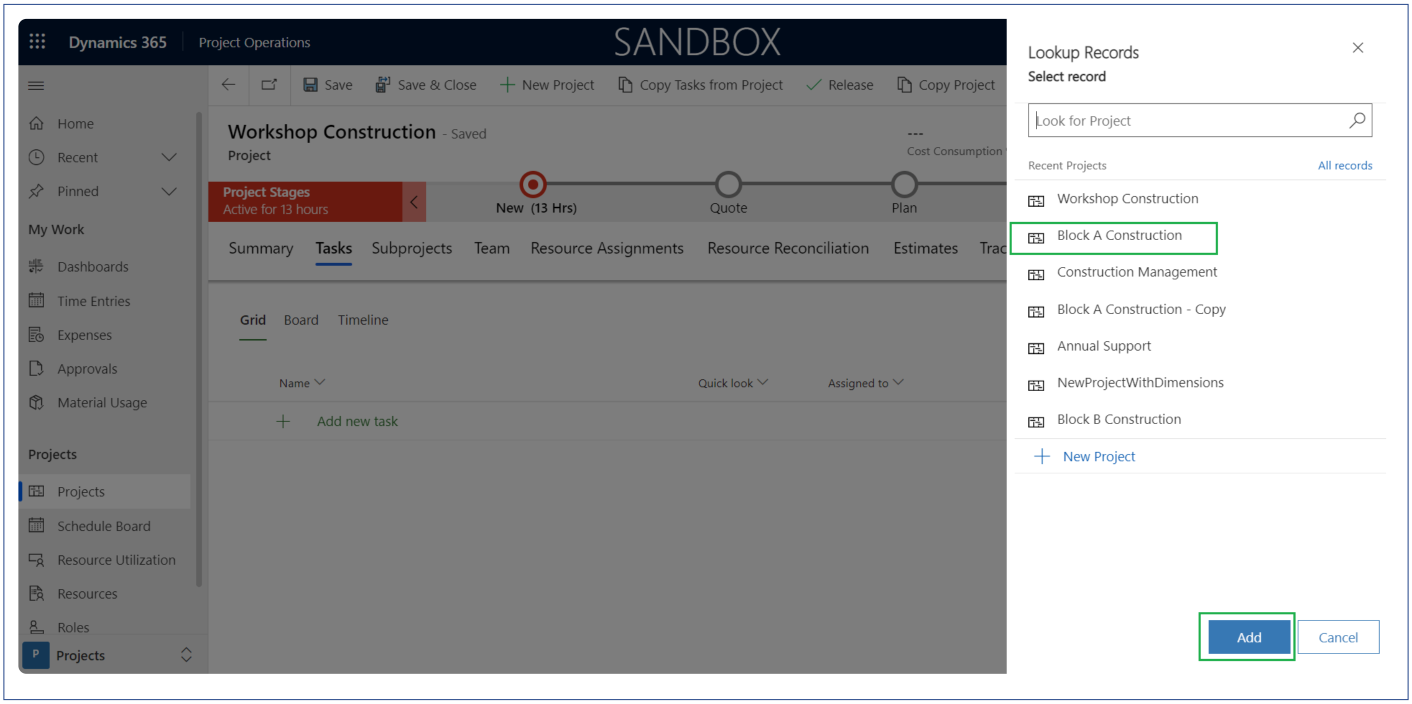
A new functionality added in Project Operations to copy tasks from the existing projects. This functionality will allow users to copy existing projects as templates. As part of this enhancement a new button ‘Copy Tasks from Project’ will be available when the project release status is still ‘Pending’.

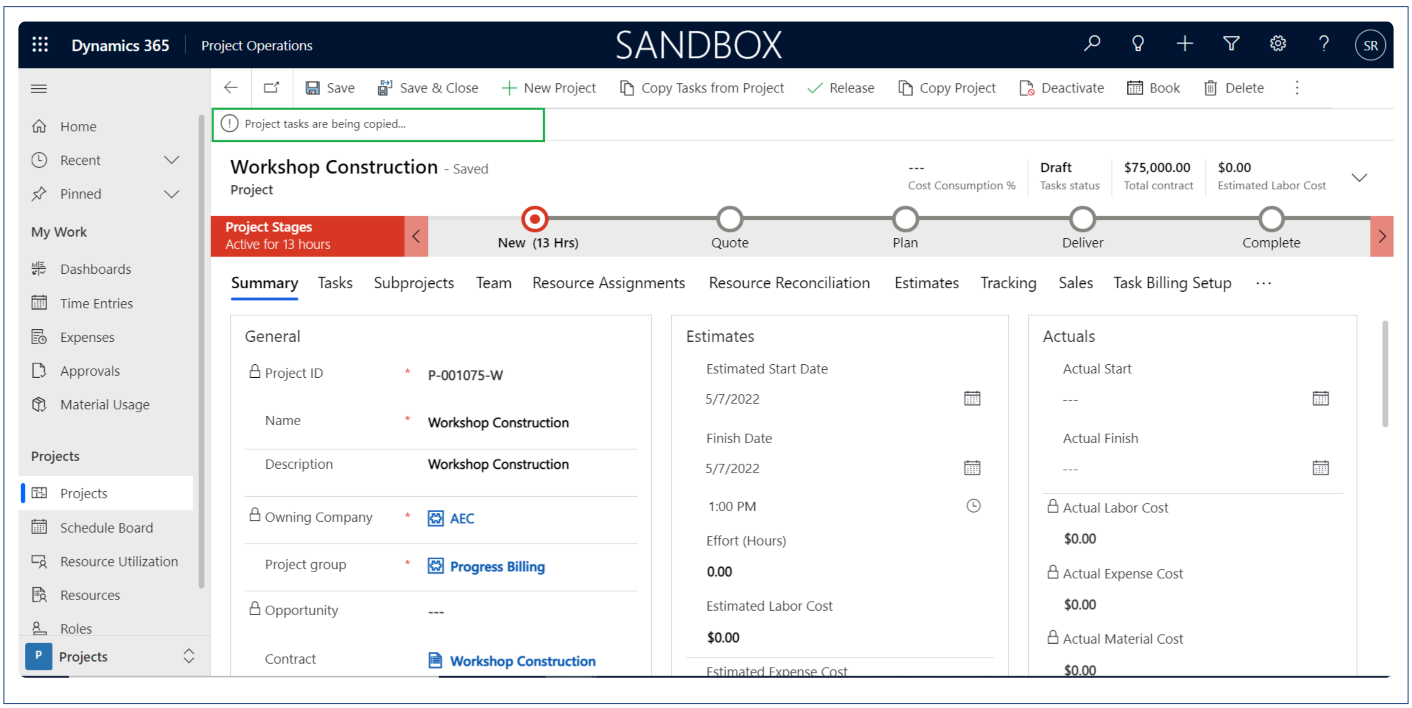
Go to Projects > Projects



Upon clicking “Copy Tasks from Project,” a dialog box prompts the user to select a mandatory “Project ID” from which tasks will be imported. After choosing the desired ID, clicking “Add” initiates the transfer of all existing tasks from the selected project to the currently active project within the Projects form. This process comprehensively replicates all task fields, mirroring the logic employed in the standard “Copy Project” functionality.

‘Generic resource positions’ will be created and assigned to each task copied where the original task has resource assigned. If there is a bookable resource assigned, then the role will be used to create a ‘Generic resource position’ and assign to the new task. It uses the standard logic to generate the position name i.e., Architect 1, Engineer 1 … etc.,


Dynamics 365
Project Operations
SANDBOX
Save
Save & Close
New Project
Copy Tasks from Project
Release
Copy Project
Workshop Construction - Saved
Project
Project Stages
Active for 13 hours
New (13 Hrs)
Quote
Plan
Summary
Tasks
Subprojects
Team
Resource Assignments
Resource Reconciliation
Estimates
Grid
Board
Timeline
Name
Quick look
Assigned to
Add new task
Home
Recent
Pinned
My Work
Dashboards
Time Entries
Expenses
Approvals
Material Usage
Projects
Projects
Schedule Board
Resource Utilization
Resources
Roles
Projects
Lookup Records
Select record
Look for Project
Recent Projects
All records
Workshop Construction
Block A Construction
Construction Management
Block A Construction - Copy
Annual Support
NewProjectWithDimensions
Block B Construction
New Project
Add
Cancel

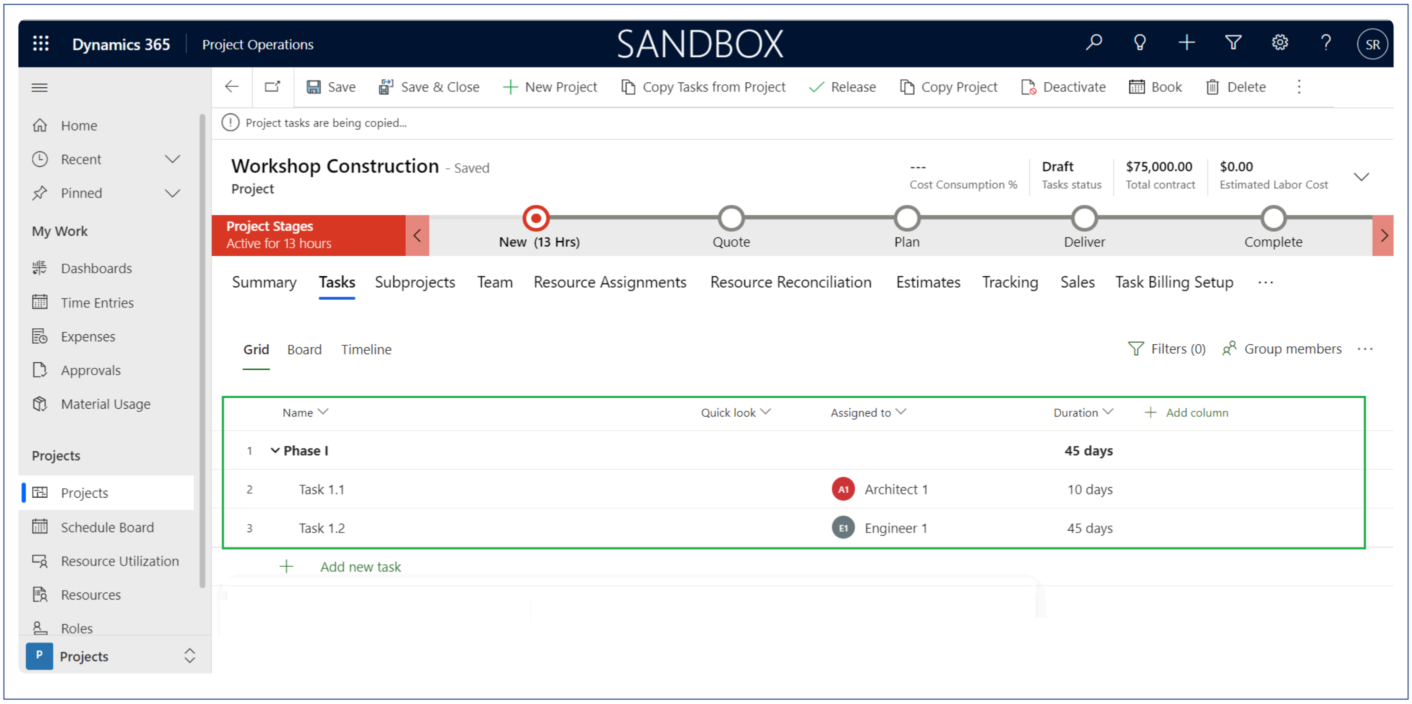

Dynamics 365
Project Operations
SANDBOX
Save
Save & Close
New Project
Copy Tasks from Project
Release
Copy Project
Deactivate
Book
Delete
Project tasks are being copied...
Workshop Construction - Saved
Project

Cost Consumption %
Draft
Tasks status
$75,000.00
Total contract
$0.00
Estimated Labor Cost
Project Stages
Active for 13 hours
New (13 Hrs)
Quote
Plan
Deliver
Complete
Summary
Tasks
Subprojects
Team
Resource Assignments
Resource Reconciliation
Estimates
Tracking
Sales
Task Billing Setup
General
Project ID
P-001075-W
Name
Workshop Construction
Description
Workshop Construction
Owning Company
AEC
Project group
Progress Billing
Opportunity

Contract
Workshop Construction
Estimates
Estimated Start Date
5/7/2022
Finish Date
5/7/2022
1:00 PM
Effort (Hours)
0.00
Estimated Labor Cost
$0.00
Estimated Expense Cost
Actuals
Actual Start

Actual Finish

Actual Labor Cost
$0.00
Actual Expense Cost
$0.00
Actual Material Cost
$0.00
Home
Recent
Pinned
My Work
Dashboards
Time Entries
Expenses
Approvals
Material Usage
Projects
Projects
Schedule Board
Resource Utilization
Resources
Roles
Projects


Dynamics 365
Project Operations
SANDBOX
Save
Save & Close
New Project
Copy Tasks from Project
Release
Copy Project
Deactivate
Book
Delete
Project tasks are being copied...
Home
Recent
Pinned
My Work
Dashboards
Time Entries
Expenses
Approvals
Material Usage
Projects
Projects
Schedule Board
Resource Utilization
Resources
Roles
Workshop Construction - Saved
Project
Cost Consumption %
Draft
Tasks status
$75,000.00
Total contract
$0.00
Estimated Labor Cost
Project Stages
Active for 13 hours
New (13 Hrs)
Quote
Plan
Deliver
Complete
Summary
Tasks
Subprojects
Team
Resource Assignments
Resource Reconciliation
Estimates
Tracking
Sales
Task Billing Setup
Grid
Board
Timeline
Filters (0)
Group members
Name
Quick look
Assigned to
Duration
Add column
1 Phase I 45 days
2 Task 1.1 Architect 1 10 days
3 Task 1.2 Engineer 1 45 days
Add new task

6.3. Effort Assignment

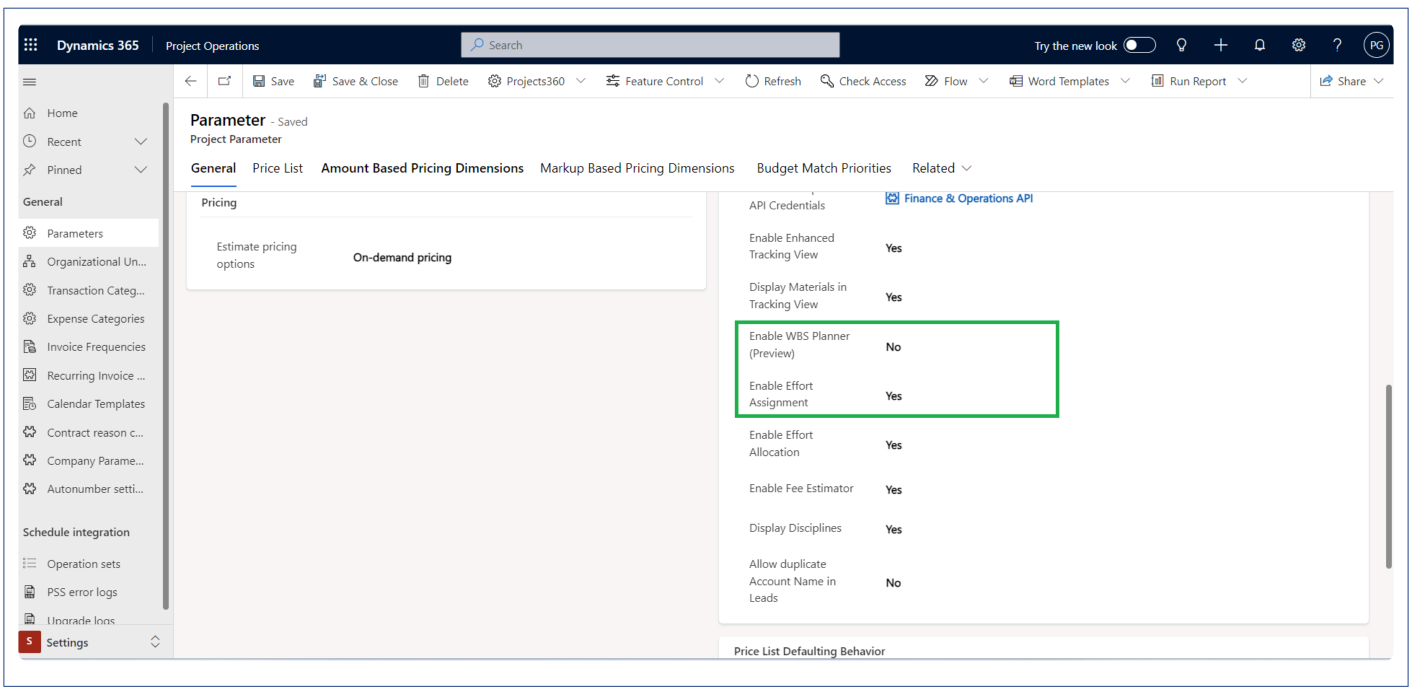
The “Effort Assignment” feature (formerly named Fee Builder) allows users to quickly enter the total number of hours for each project team member across all the tasks helping the project manager to build an Effort/Fee estimate in a few steps.

- Lotus360 solution + MS Editable Contours API are utilized to build this feature.
- Lotus360 provides a familiar UI for users similar to MS Excel.

Configuration

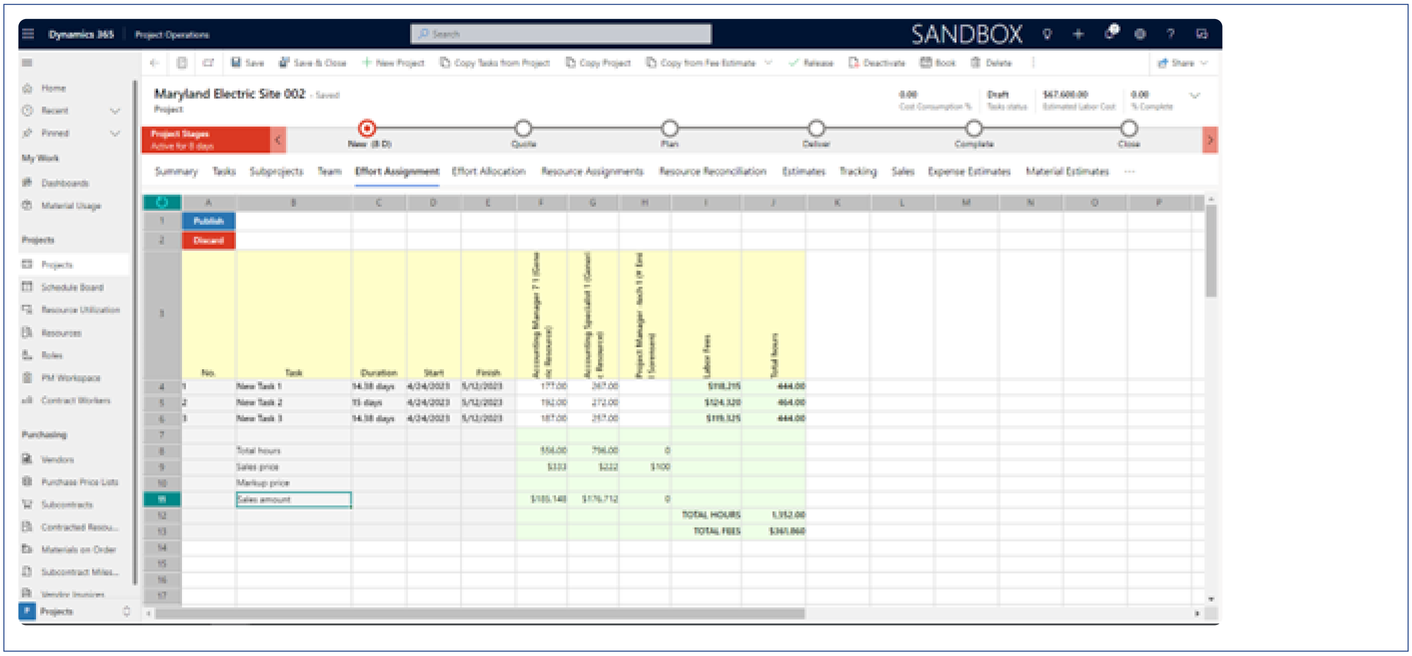
This feature can be enabled from *‘Parameters > General > Projects360 parameters > Enable Effort Assignment’*.
Note: *It is recommended to configure ‘Schedule Mode’ parameter as ‘Fixed duration’ since this mode allows to modify effort without recalculating Start/End dates every time a task is updated.*

Note – The Effort Assignment tab in the Projects form will only be visible if “Enable WBS Planner (Preview)” is set to “No”.



Effort Assignment (Fee Builder) spreadsheet

This section details out the “Effort Assignment” spreadsheet functionality and its fields.



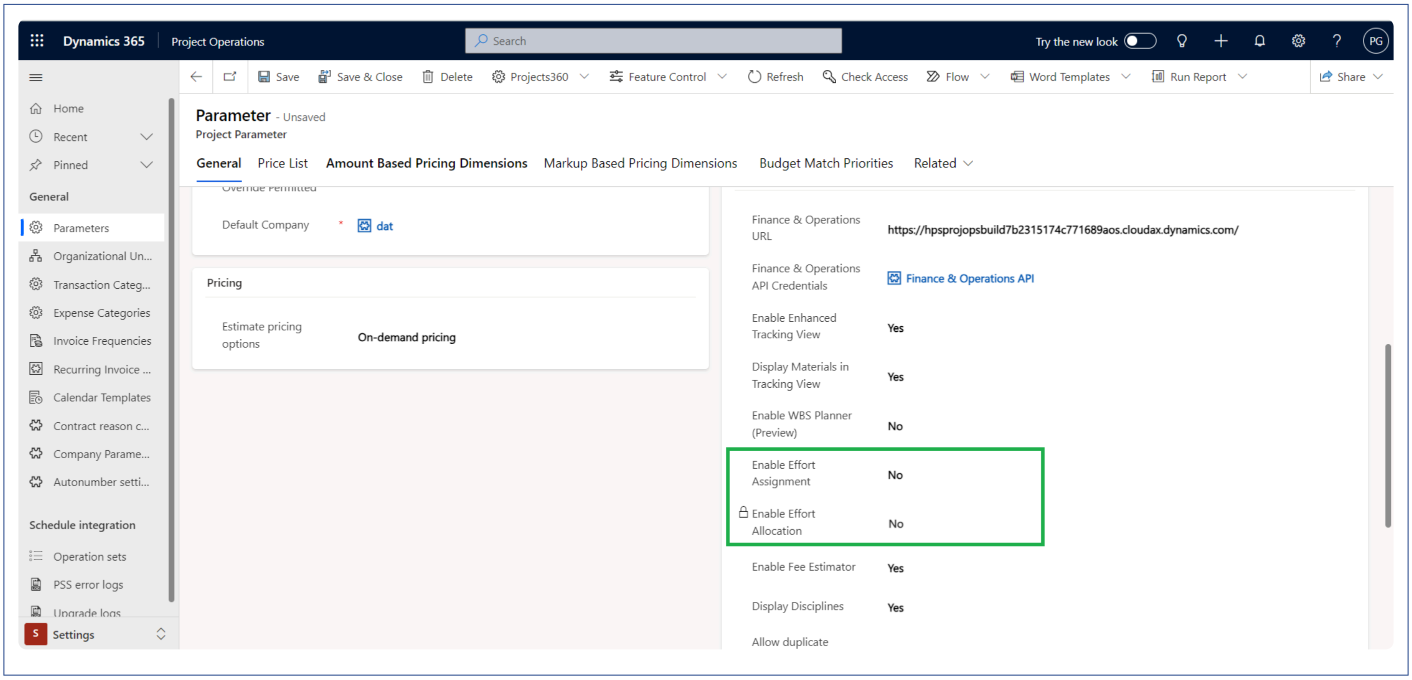
A ‘Draft’ version of the spreadsheet will be generated while the user starts updating values in different cells. After all the changes are made, the user will be able to either ‘Publish’ those changes to Projects for the Web or ‘Discard’ those changes by reloading the previously published version.

The following are the buttons available on the spreadsheet.

- **Publish:** This button will trigger the publishing process through the MS Editable Contours API to update Projects for the Web.
- **Discard:** This button will remove all the changes made in the ‘Draft” version updating all the values to the previous already published version.

If Enable Effort Assignment is set to No, then the user will not be able to see the Effort Assignment tab.

Note: *If Enable Effort Assignment is set to ‘No’ then Enter Effort Allocation will automatically be set to ‘No’ and locked.*



The spreadsheet's fields and totals are described below.

Fields	Description
No	This field is non-editable and displays the Task sorting/position number.
Task	This field is non-editable and displays the Task name. This field is updated from the 'Task' tab.
Duration	This field is non-editable and displays the task Duration in days. This field is updated from the 'Task' tab.
Start	This field is non-editable and displays the task Start date. This field is updated from the 'Task' tab.
Finish	This field is non-editable and displays the task Finish date. This field is updated from the 'Task' tab.
Team members	The spreadsheet will show a new column for each team member. The Role and Resource's name are displayed as part of the column caption. The user will be able to enter the total number of hours for each team member and task.
Total hours	Sum of all the hours allocated across team members and tasks.
Sales price	This field is non-editable and displays the Sales price is calculated for the specific Role/Resource based on the Price List configured at the Quote/Contract level.
Markup price	This field is non-editable and displays the Markup price is calculated for the specific Role/Resource based on the Price List configured at the Quote/Contract level.
Sales amount	This field is non-editable and displays the calculation of Total hours*(Sales price+Markup price).

6.4. Work Breakdown Structure

The Work Breakdown Structure helps users break down a project into smaller tasks and assign people or teams to do them. Users can easily estimate both labor and expense costs for their projects. The WBS helps by providing details about the roles involved and expenses incurred for each defined task. This makes it easier to track everything in a clear and organized way. The WBS is a helpful tool because everyone on the team can break down tasks, add smaller subtasks, and assign resources and expenses.

The WBS is a complete tool for users because it lets them track project estimates from different versions of a proposal. You can easily copy budgets and forecasts from the Fee Estimator to the WBS. Then, you can adjust things as needed by adding roles, expenses, or even new tasks. This automatically updates the overall estimates for labor, expense cost, effort allocation, and individual task expenses.

We decided to create the Work Breakdown Structure (WBS) feature because we noticed some things:

- Using tasks in Project Operations normally needs extra licensing with Microsoft Project Online. But the good news is, the Work Breakdown Structure (WBS) planner comes built-in! This means anyone on your project team can add tasks and estimate expenses and resources, as long as they have the right permissions.
- The WBS helps break down projects into smaller tasks, showing both the expected cost and sales price for each. It also calculates the profit and profit margin, making it easy for everyone to understand the financial picture of the project.
- This feature leverages the new xl360 platform built as canvas application.
- Disconnected from MS P4W, it will allow us to use almost unlimited level of tasks and resource assignments
- Tasks, Team members, Expenses and Effort assignments can be maintained on real time from a single screen directly in the Project form.

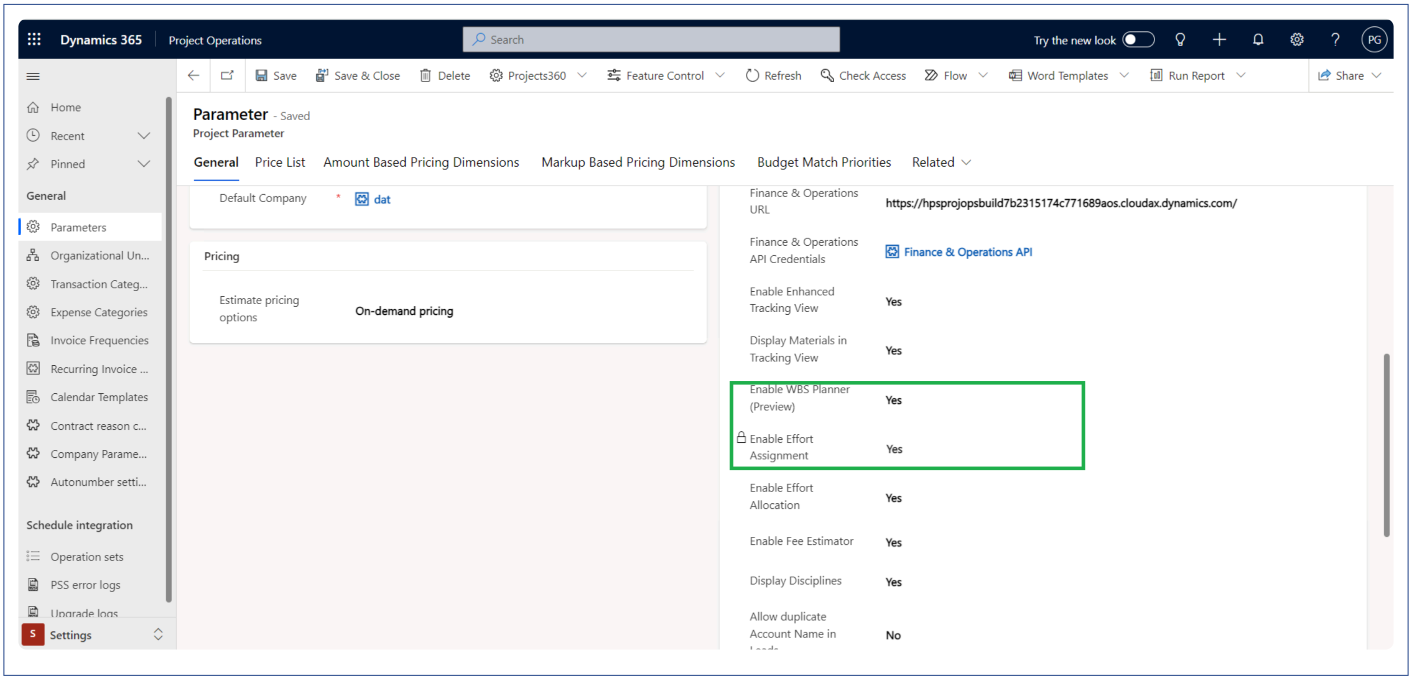
Configuration

The section highlighted below are the mandatory setups that needs to be configured by System Admin to use the WBS Planner.This feature can be enabled from the Parameters.

“WBS Planner (Preview)” is a key new feature that will replace MS Projects for the Web when activated. This feature will allow users to maintain the project structure, fee and expense estimates as well as resource assignment from just one view.

Go to Settings > General > Parameters -> Project360 -> Enable WBS Planner

Details of the fields required for WBS Planner Functionality are as follows:



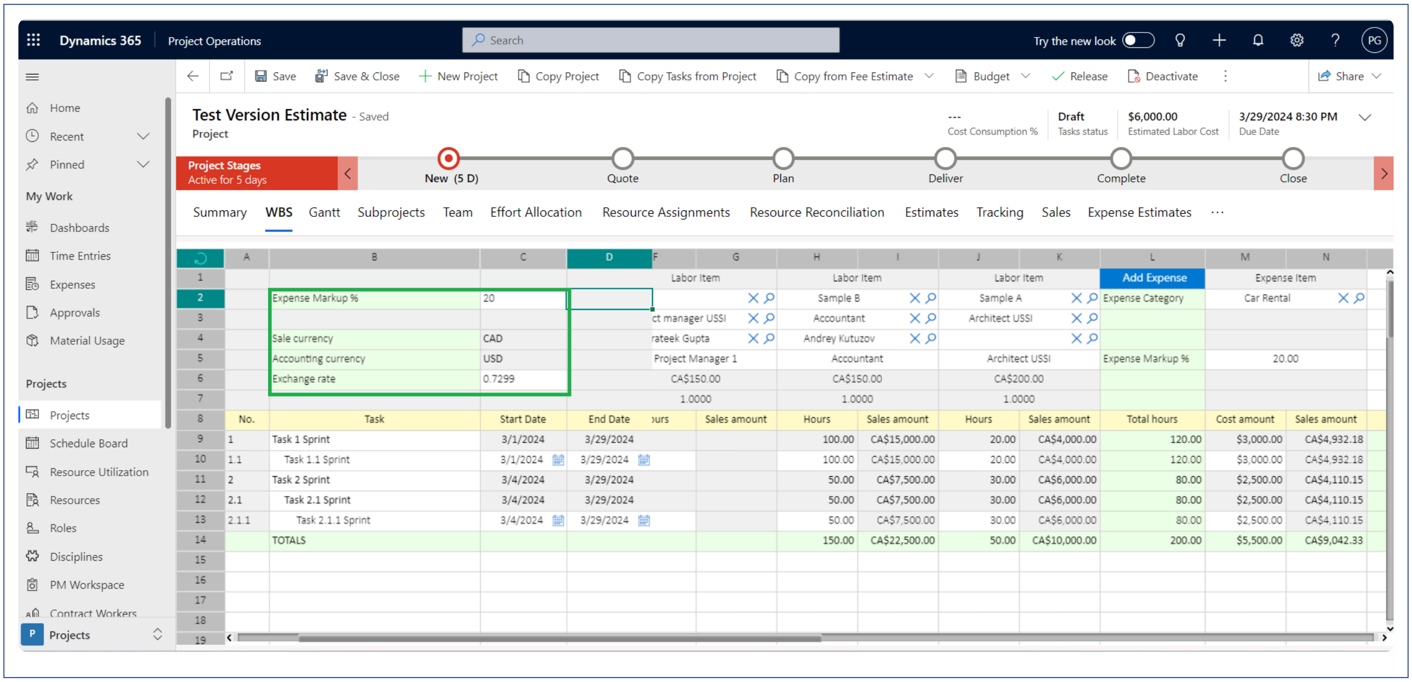
Fields	Description
Enable WBS Planner	Set as “Yes” to activate the new projects360 “WBS Planner” spreadsheet within the Project form.
Enable Effort Assignment	Set as “Yes” to activate the new projects360 “Effort Assignment” spreadsheet within the Project form.

Note – This is a “Preview” feature, and it can be activated and deactivated by configuration. Implementations using MS P4W can continue using it.

Work Breakdown Structure

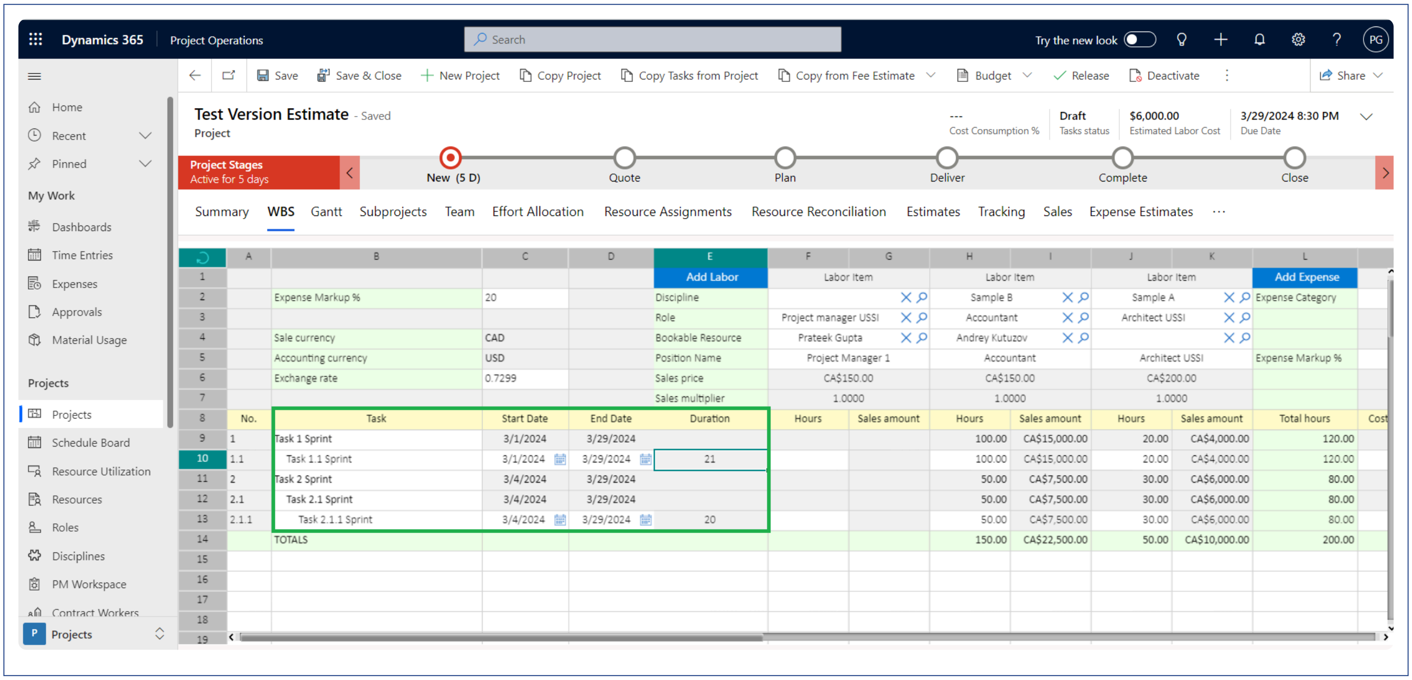
If you click on the WBS tab and copy Estimates using the “Copy from Fee Estimates Button”, all the Tasks, Roles, Expenses, Total Cost, Sales, Margin, Profit%, etc., will be transferred from the selected version. If no Estimates need to be copied, the WBS will have a Standard spreadsheet with various buttons like “Add Labour” and “Add Expense Button”, and multiple fields such as Expense Markup%, Sales Currency, etc.

The fields on the top left of WBS in the WBS planner spreadsheet are as follows:



Fields	Description
Expense Markup Percentage	• If Estimates are copied from the Fee Estimator, the Expense Markup Percentage field in the WBS will automatically fill with the defined percentage from the selected version, allowing users to modify it later during the project. • If no Estimates are copied, the Expense Markup Percentage field will be empty, allowing users to enter a value.
Sales Currency	Sales Currency shows the currency of Contract related to the Project.
Accounting Currency	Accounting Currency shows the currency of the “Contracting unit Company” to which the Project belongs. This means that WBS will use the same currency as the Project itself.

The fields highlighted in yellow contain the list of Tasks to be defined in the WBS. These tasks can be added manually or copied from Fee Estimates.

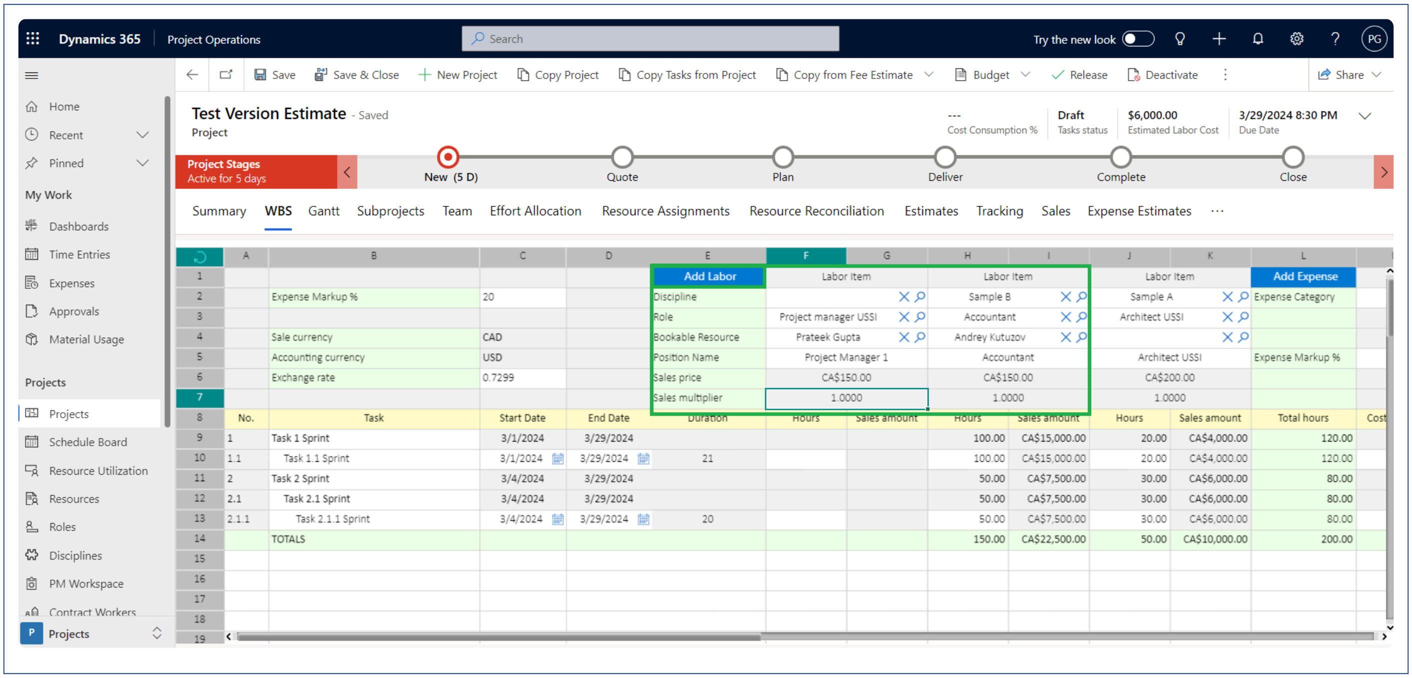


Fields	Description
Task	• Right-click any row, choose “Add Task,” and enter a name. • When adding a task, you’ll see options like “Add Subtask,” “Delete Task,” “Promote Task,” and “Make Subtask.” These are clearly labeled and easy to find. If you create a subtask, the main task becomes locked from editing so you can focus on the subtask first.
Start Date	Define the Start Date of Task.
End Date	Define the End Date of Task.
Duration	It is calculated based on the start and end dates you set. The difference between those dates determines how long the task takes.

There are two helpful blue buttons in the WBS that make managing roles and expenses easier:

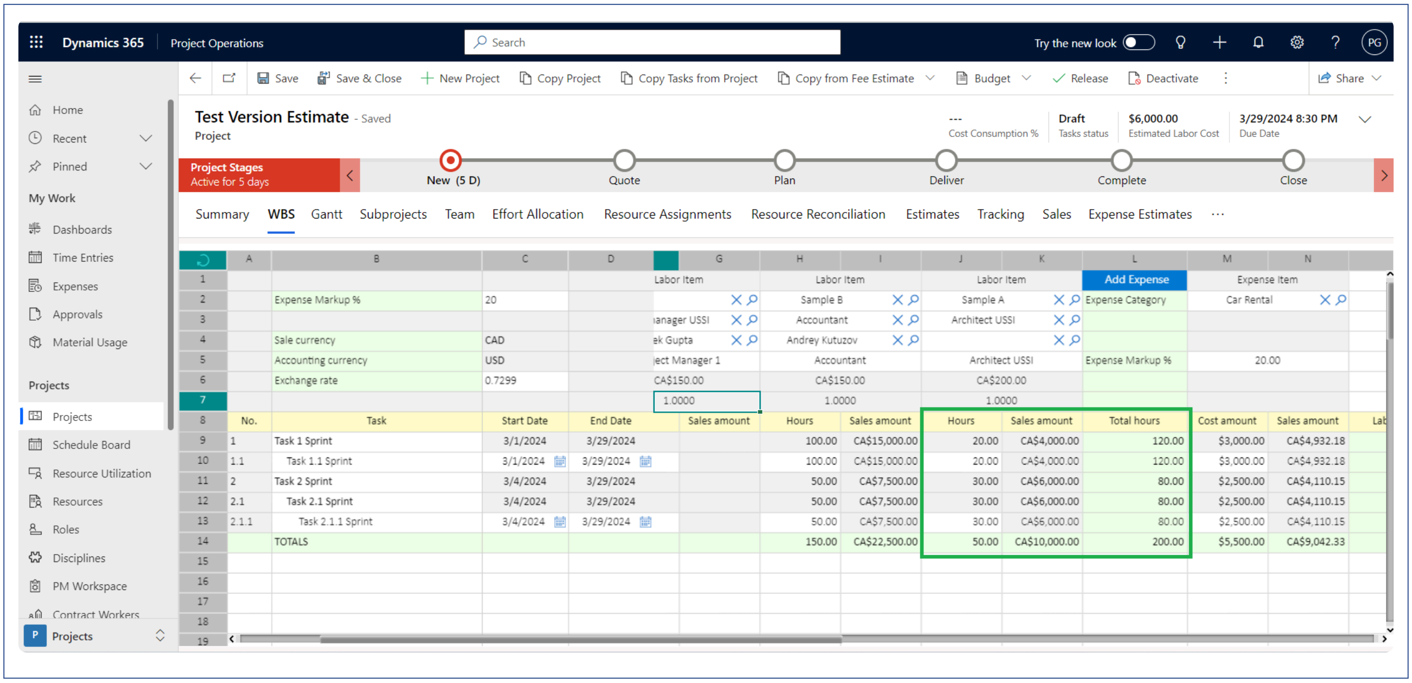
Add Labor button :
Clicking the “Add Labour” button opens a list where you can choose roles for a task. Click it multiple times to add as many roles as needed, making it easier to set budgets for everyone working on it. By default, you’ll see options like “Role,” “Person available,” “Job title,” “Price you charge,” and “Multiplier for adjusting the price.”

The fields which are part of “Labor button” are:



Fields	Description
Discipline	Disciplines can be defaulted for Roles and Bookable Resources.
Role	• If you’re copying estimates or starting a new WBS plan, the Project Manager will always be included. • Users can either manually select a role or use filter criteria based on Discipline.
Bookable Resource	Click the dropdown menu of Bookable Resources and choose the resource you want from the list. Bookable Resource is an optional field and can be left blank and users can only select the role, blank resources will be interpreted as generic resources by the system.
Position Name	When users choose a role, its description will default from the selected role.
Sales Price	The Sales Price value will be populated from the Sales Price list related to the Opportunity.
Sales Multiplier	The Sales Multiplier will be populated from Sales Price List markup and if there is no markup then it is defaulted as “1”. The Sales multiplier will be applied on top of Sales price to calculate the final Sales Amount.

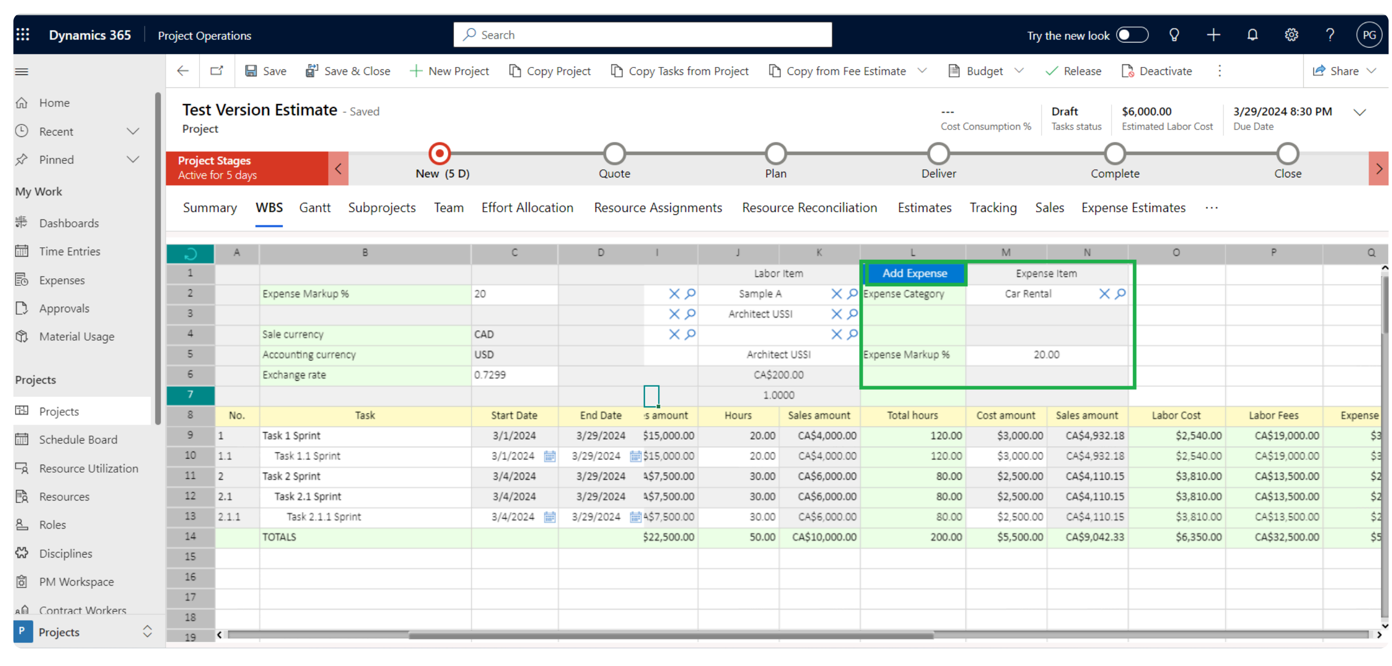
Users also have the flexibility to view different Cost and Sales Estimations for Roles . This helps them get an overview of the forecasting and make necessary adjustments if needed. Once labor items are added and necessary details are either auto-generated or manually added, users will be able to see below fields under different labor items.



Fields	Description
Hours	Users must manually input the total number of hours for the labor they will perform on a particular task.
Sales Amount	The Sales Amount of the Labor/Role will be calculated as **Sales Price * Sales Multiplier * Hours**.
Total Hours	Total Hours is the total number of hours estimated for labor across all tasks. • Row wise calculation : For every Tasks total number of Hours = Sum of number of hours every labour who has recorded some hours for the task. • Column wise calculation : The calculation of Total Hours = Sum of the total of Hours at each level of Tasks defined in Spreadsheet.

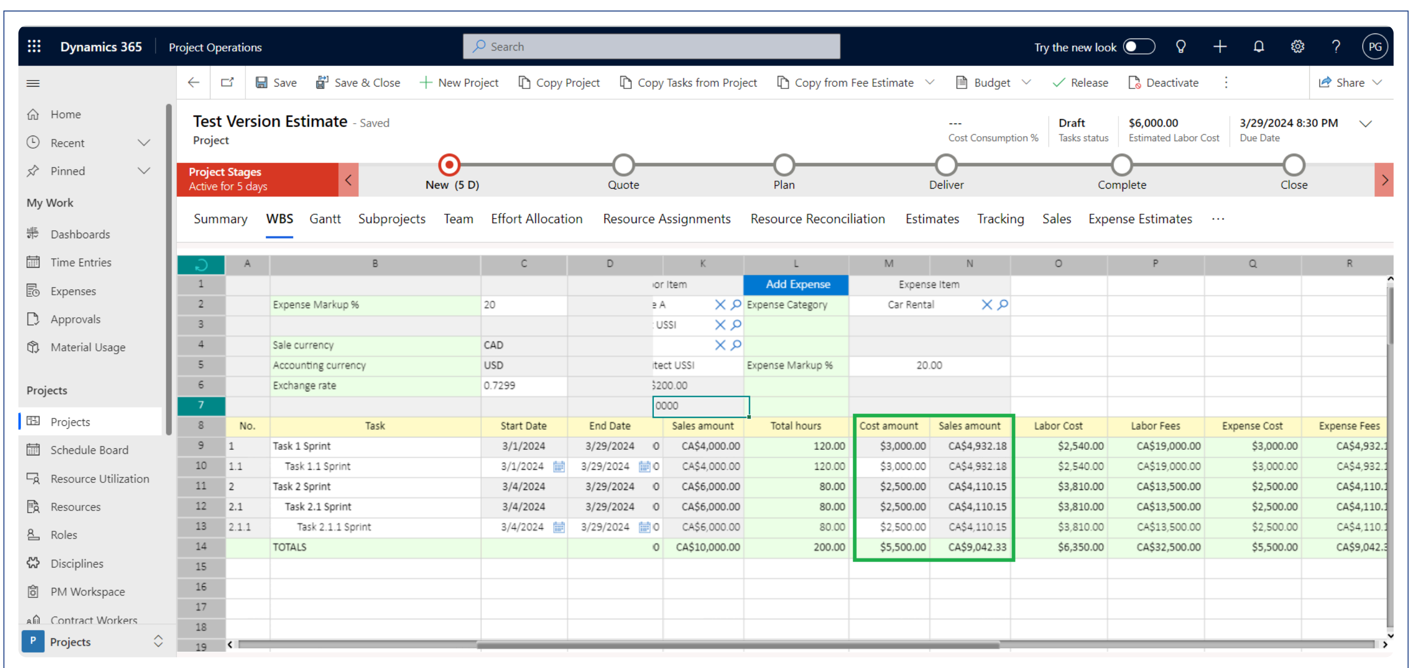
Add Expense Button

Clicking the "Add Expense" button lets you add different costs to a task. Click it multiple times to add as many cost categories as you need, making it easy to track everything. When you do this, you'll see fields like:



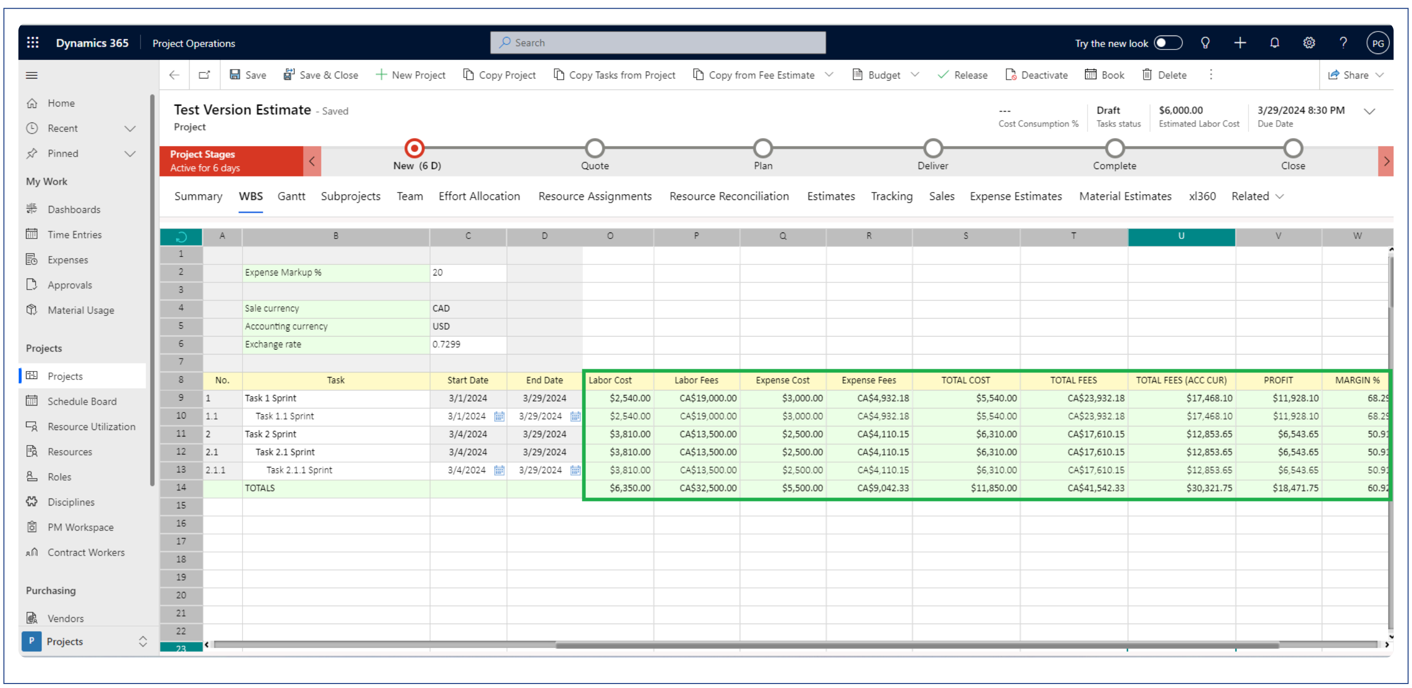
Fields	Description
Expense Category	The “Expense Category” field shows you all the types of expenses that are currently used in your system.
Expense Markup %	If you choose a Expense Markup % in WBS, then that percentage will be shown in the “Expense Markup%” field , but you can still change it for each individual expense category you add.

After adding expenses and filling in the details, you’ll see both the cost and sales amount for each expense. Here is detailed explanation of both the fields:



Fields	Description
Cost Amount	Users need to enter the cost amount for each expense they added under a expense category.
Sales Amount	Sales Amount calculation varies with Sales and Accounting currency, can be demonstrated with help of some scenarios: • If the “Expense Markup %” field has no value, and both the sales and accounting currencies are the same, then **Sales Amount = Cost Amount**. • If the “Expense Markup %” field has a value, and the Sales Currency and Accounting Currency are the same, then the **Sales Amount = Cost Amount {1+ [(Cost Amount * Expense Markup %)/100]}**. • If the “Expense Markup %” field doesn’t have a value, and the Sales Currency and Accounting Currency are different, then the **Sales Amount = Cost Amount / Exchange Rate**. • If the “Expense Markup %” field has a value, and the Sales Currency and Accounting Currency are different, then the **Sales Amount = Cost Amount {1+ [(Cost Amount * Expense Markup %)/100]}**.

There are even more useful fields in the WBS spreadsheet for managing expenses and roles. Here are the fields description highlighted below.



Fields	Description
Labor Cost	“Labor Cost” adds up the costs of all roles/resources assigned to different tasks in “Accounting Currency”.
Labor	The “Labor Fees” is sum of all the Sales Amount from all the tasks in “Sales Currency”.

Fees	
Expense Cost	The “Expense Cost” is the total of all the different costs added up for each task in “Accounting Currency” .
Expense Fees	“Expense Fees” are the total sum of all Sales Amounts for Expense Items defined at every task level in “Sales Currency”.
Total Cost	The “Total Cost” is the sum of the “Labor Cost” and the “Expense Cost” for a task in “Accounting Currency”.
Total Fees	The “Total Fees” is the sum of the “Labor Fees” and the “Expense Fees” for a task in “Sales Currency”.
Total Fees(ACC CUR)	• If “Sales Currency” is same as currency of “Accounting currency” then **Total Fees (ACC Cur) = Total Fees**. • If “Sales Currency” is different as currency of “Accounting currency” then **Total Fees (ACC Cur) = Total Fees * Exchange Rate**.
Profit	The WBS can be used to track and analyze the actual profit for a project by comparing the actual costs incurred with the originally planned costs and sales price. **Profit = Total Fees (ACC CUR) – Total Cost**.
Margin %	Margin percentage in a Work Breakdown Structure (WBS) is a measure of the profit or markup applied to the cost of work at each level of the breakdown. **Margin % = Profit/ Total Fees (ACC CUR)**.

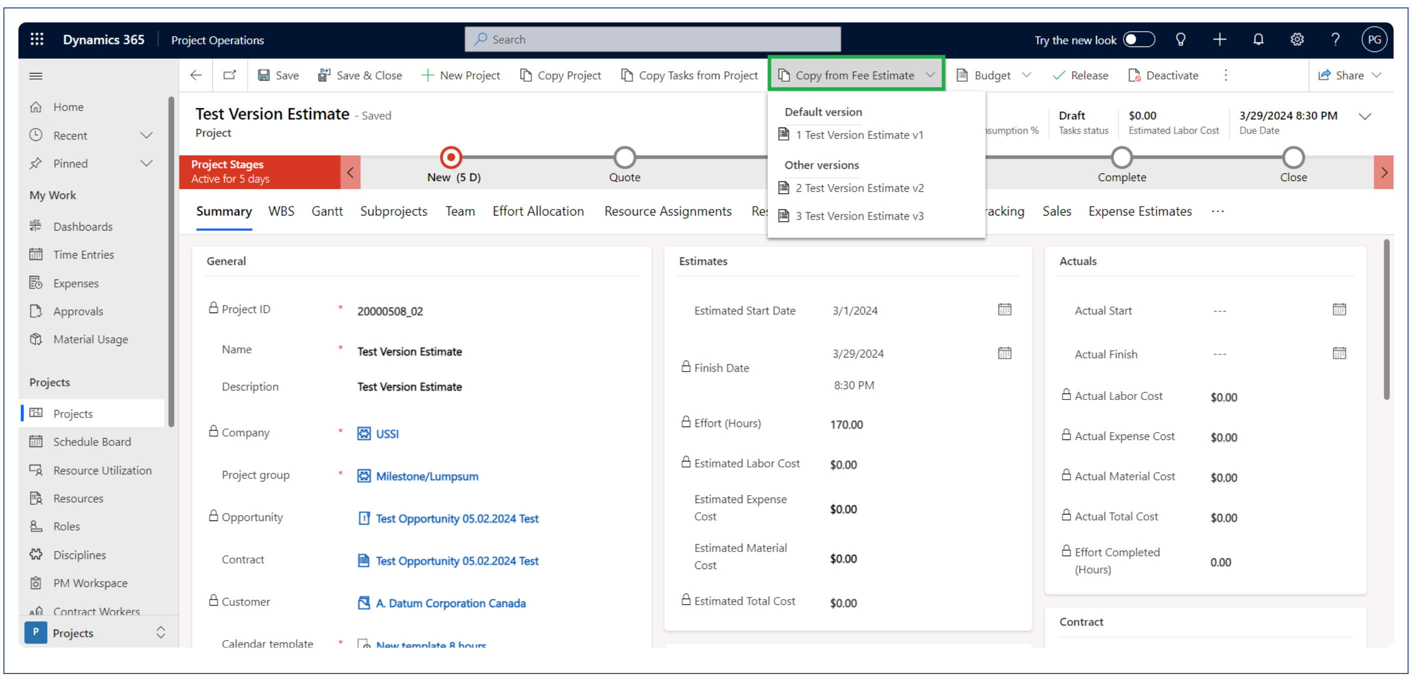
6.4.1. Copy from Fee Estimate to the Project WBS

Fee Estimates allow users to copy them into the Work Breakdown Structure (WBS). This feature proves useful as estimates are typically generated before a potential customer becomes a confirmed client. Moreover, each version displays the total estimated cost, sales price, and the variance between them directly within the WBS Planner interface. What sets this tool apart is its flexibility, enabling users to choose any version at any stage of the project to plan, track, and manage resource allocation.

Copying Fee Estimates transfers the assigned roles and bookable resources while also triggering the allocation of hours based on the Start/End dates. However, it’s important to note that labor costs and sales prices are not copied; instead, they will be calculated based on the configured price lists.

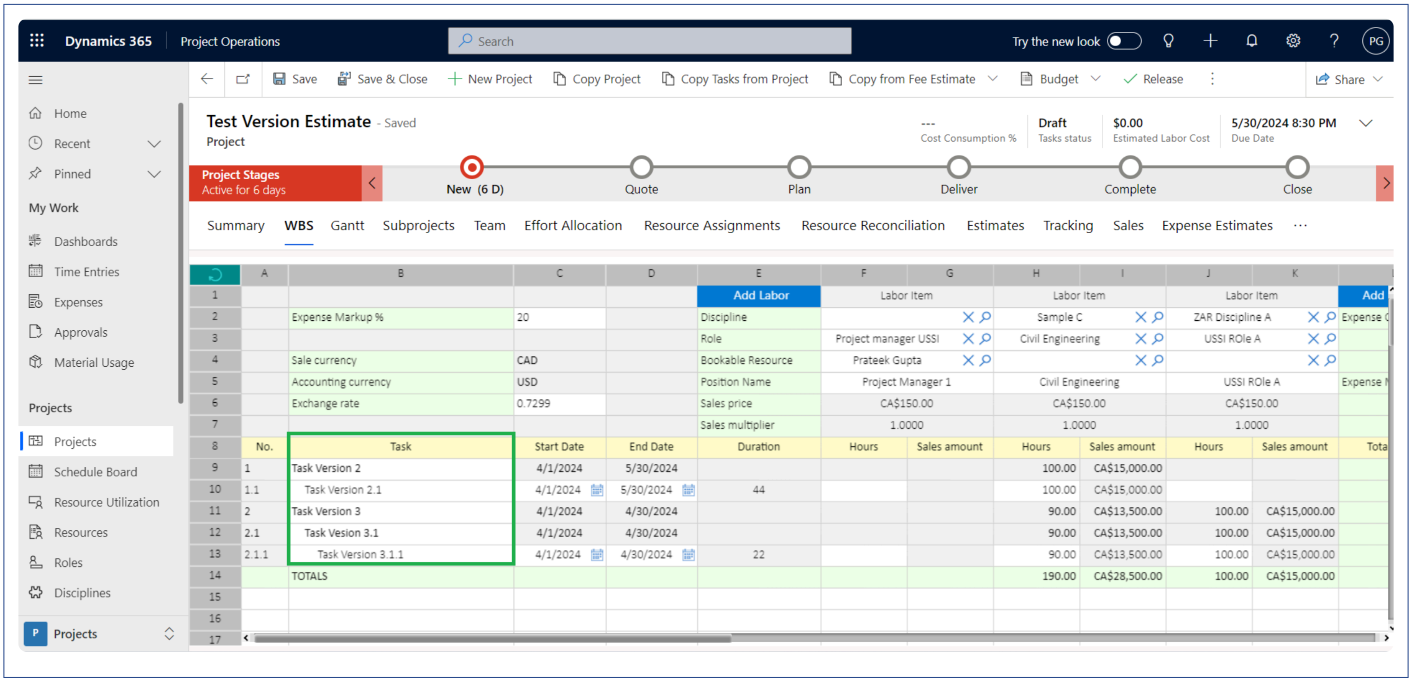
Go to Projects > Projects

Click on “Copy from Fee Estimate Button”

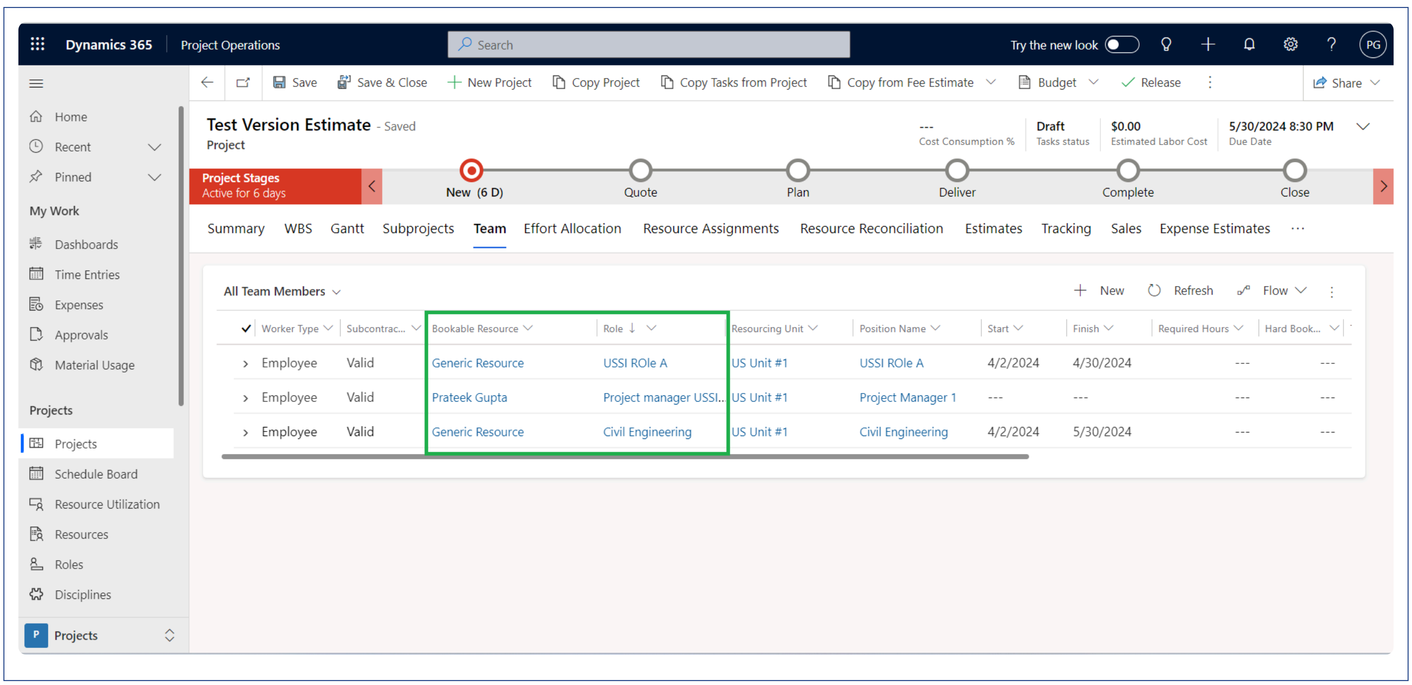


This new feature provides the ability to copy a “Fee Estimate Version” from the Opportunity Line to the Project.

- The users will be able to select between all the existing estimate versions.
    - Tasks will be copied creating the project structure.



- Labor items will be copied as Team members.



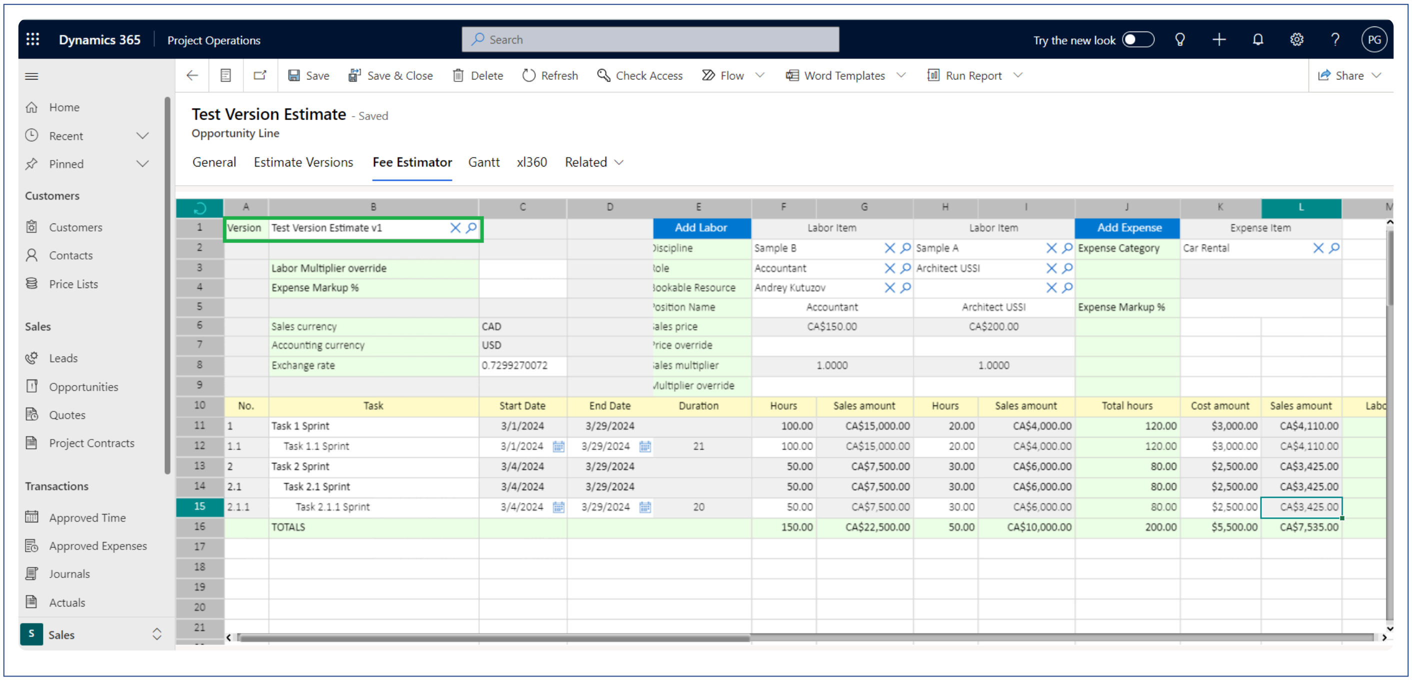
- Hours will be copied as assigned effort.
- Expense items will be copied as Expense estimates.

Copy fee estimate version to Project

Selecting a version in the project using the “Copy from Fee Estimate” button retrieves all the data from that version in the Fee Estimator and places it into the WBS planner spreadsheet. This includes details such as scheduling, task assignments, and costs, all of which are updated based on the chosen version. It’s important to keep in mind that each version has distinct plans, so switching versions alters the entire financial outlook of the project.

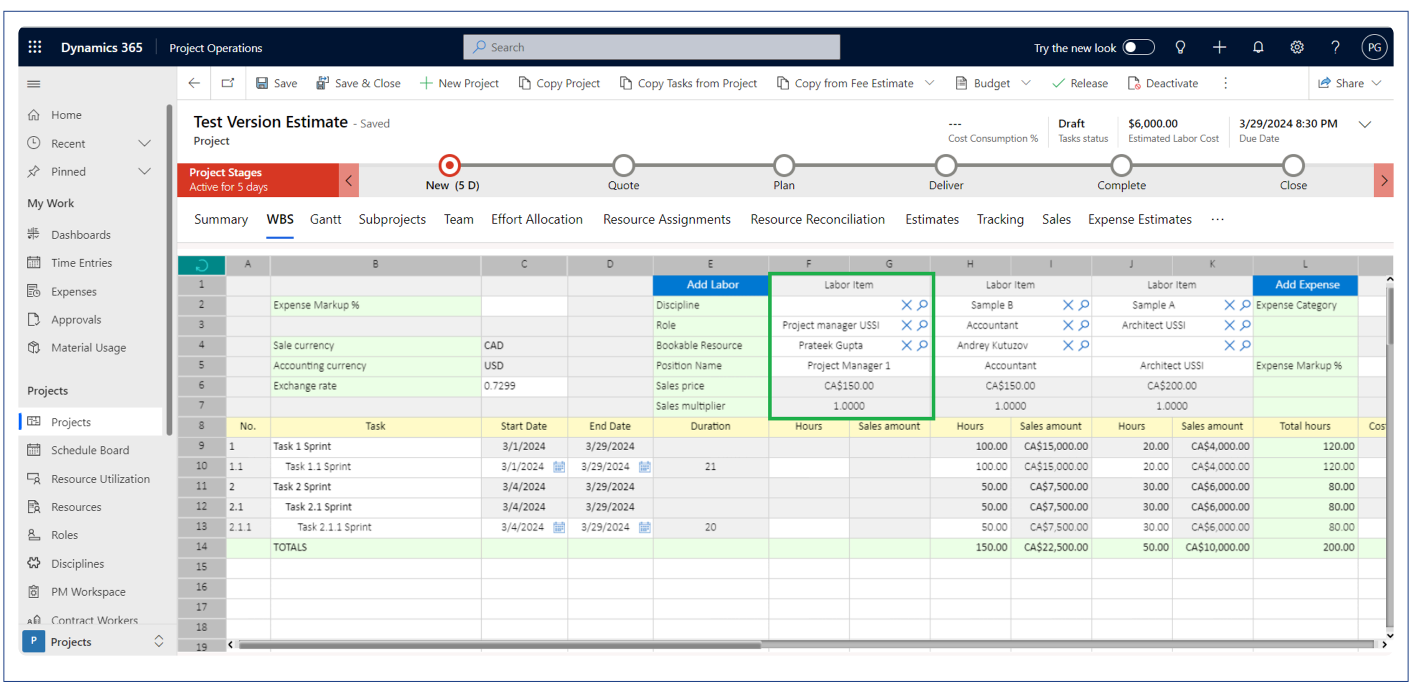
Like in the below screenshot we have selected **“Test Version Estimate V1”**, the same data will get copied from “Fee Estimator” to “WBS planner” spreadsheet.

Fee Estimator



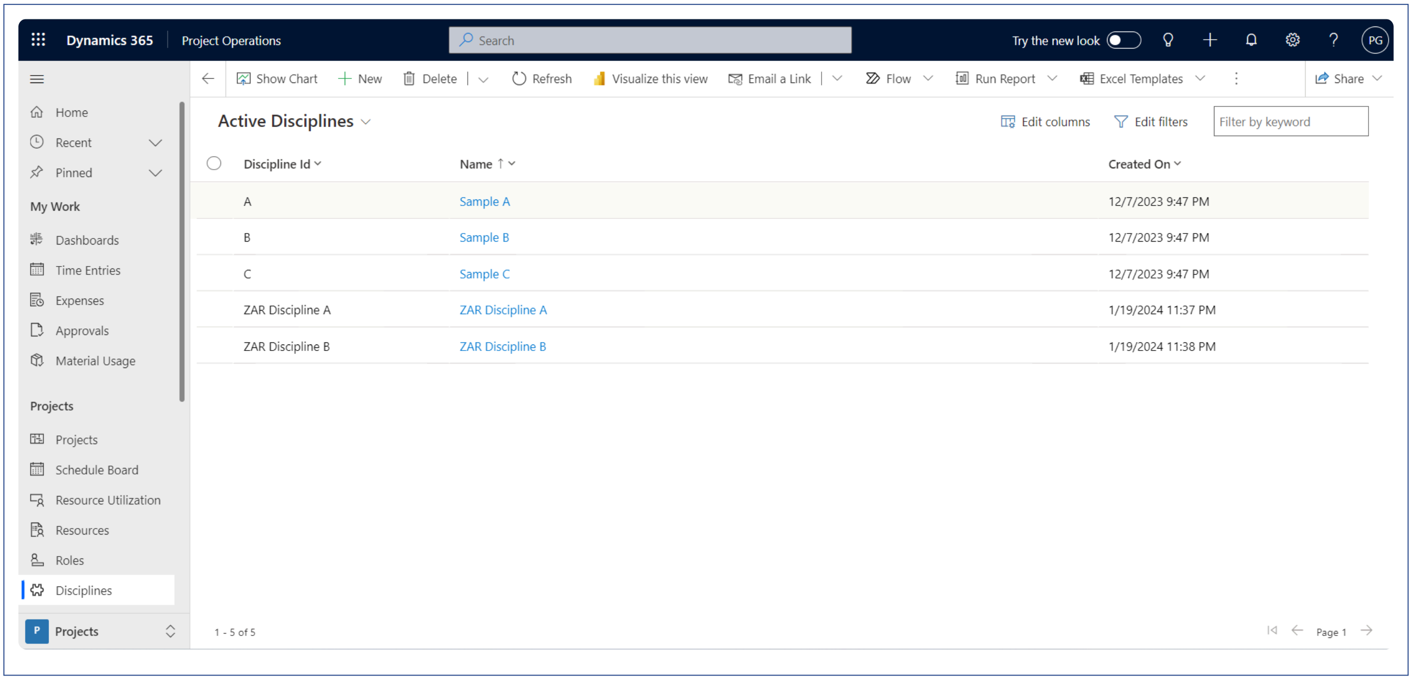
WBS Planner

The Project Manager Labor item will always be included in the Work Breakdown Structure Planner, no matter which version you choose.



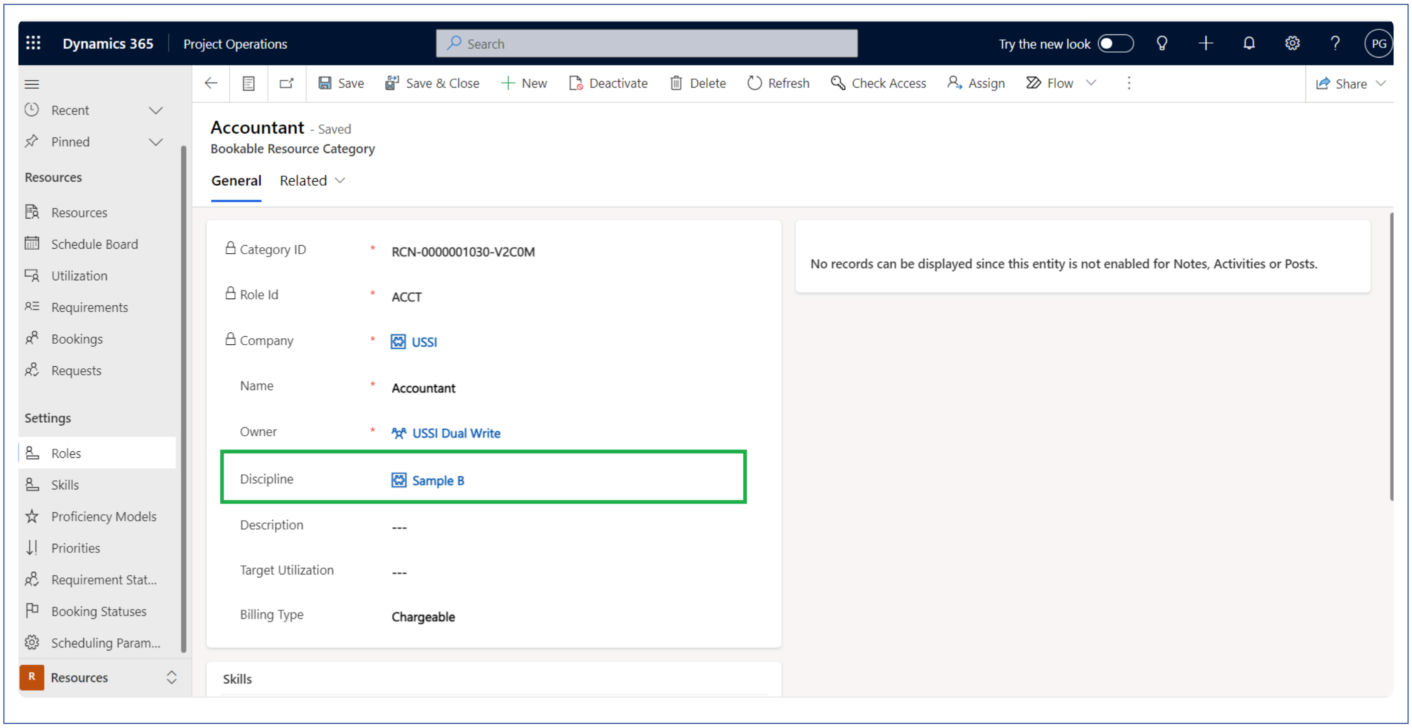
6.4.2. Disciplines

A new entity named “Disciplines” is now accessible in Project Operations.
The user will be able to assign Disciplines to team members (Roles) and resources (Bookable Resources). When you assign these team members or resources to tasks in the WBS Planner or Fee Estimator spreadsheet, their corresponding Discipline will be automatically defaulted, saving you time.

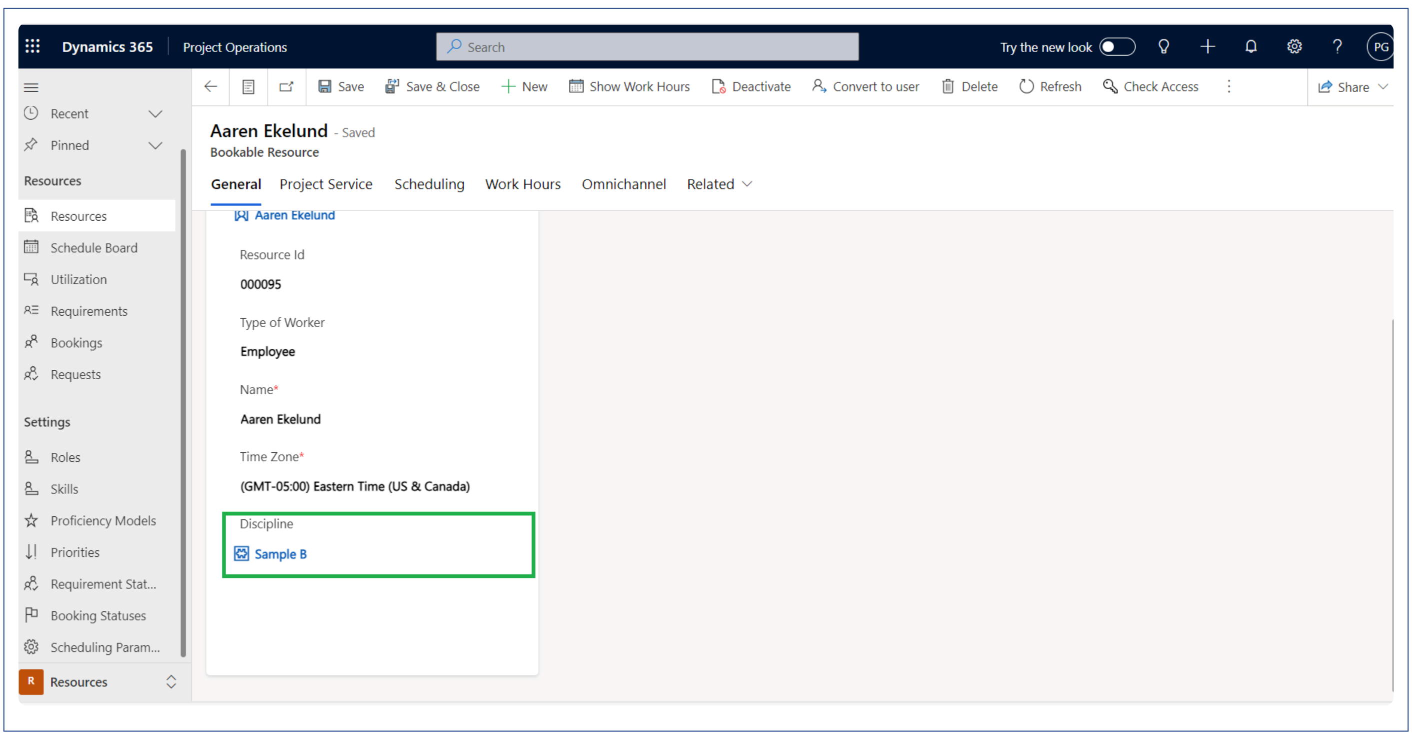


We can assign Disciplines from the following forms.

- **Roles**: Each role can have a discipline assigned.

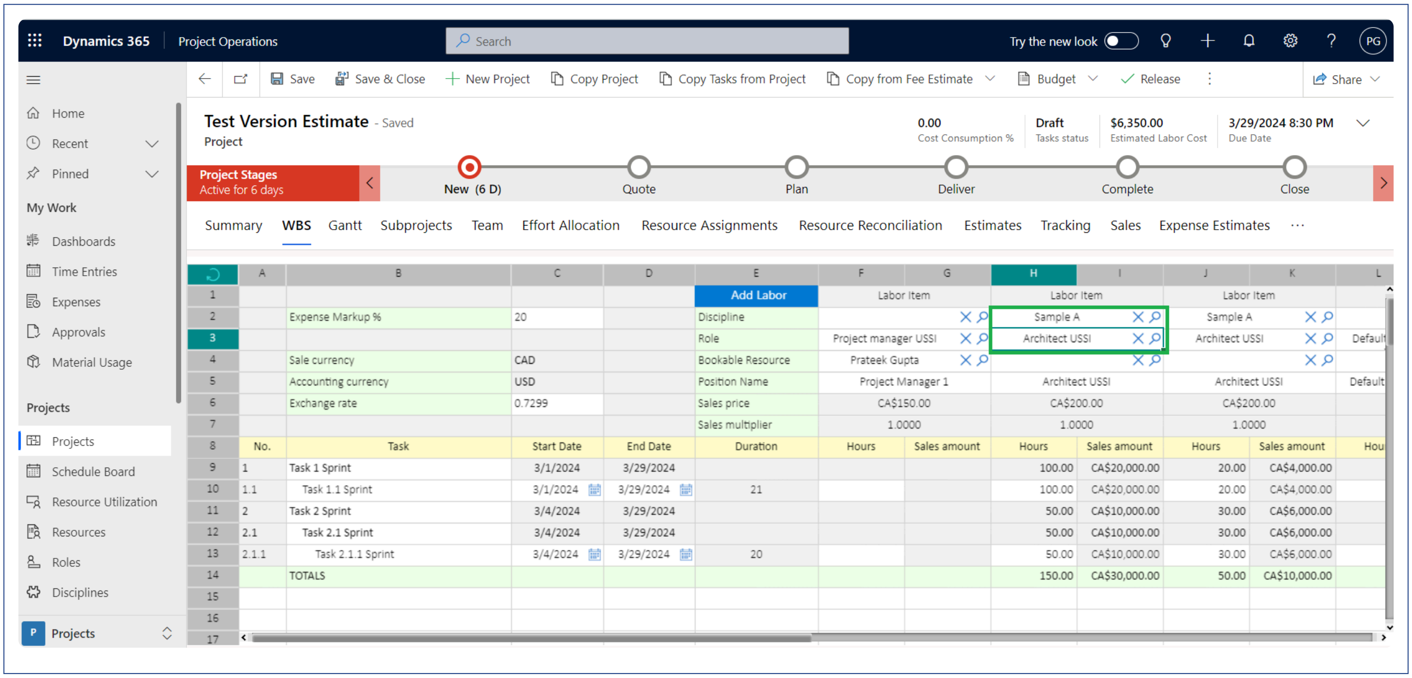


- **Resources** : Each bookable resource can have a discipline assigned.

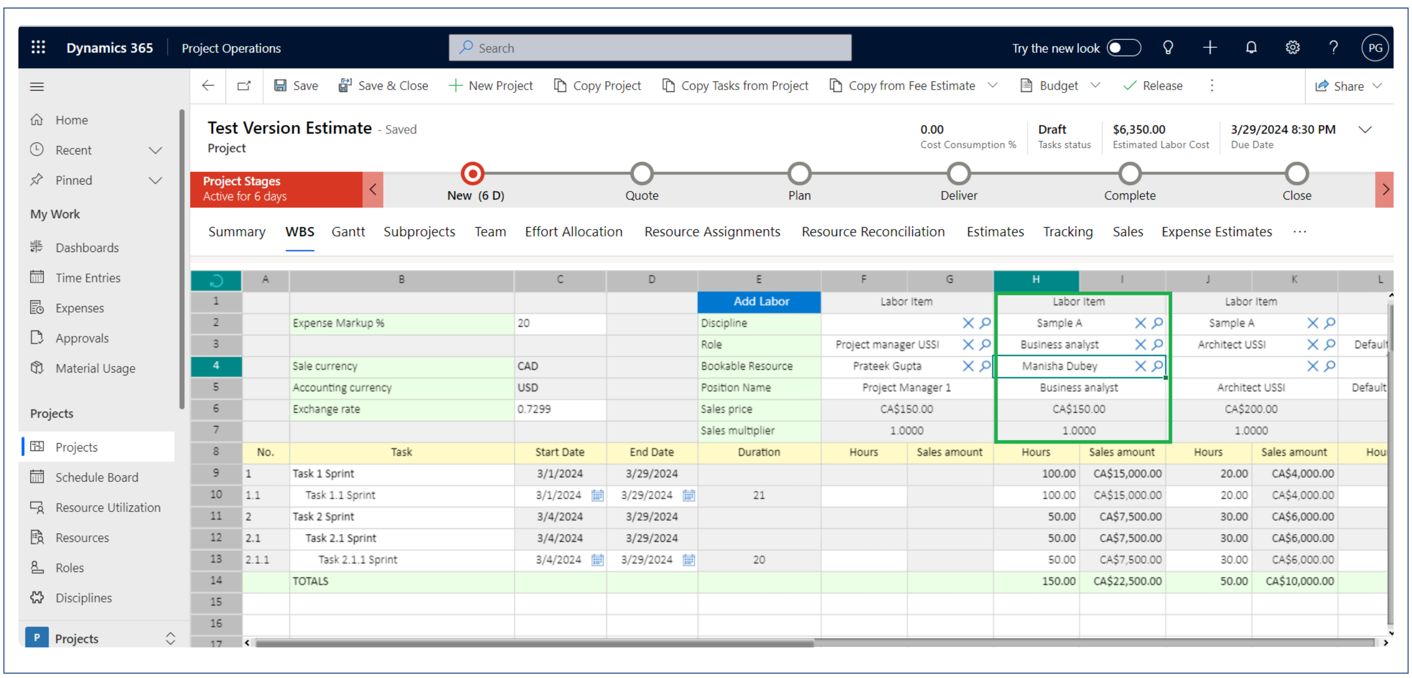


When roles and resources are added to the spreadsheet, the “Discipline” field will be automatically defaulted based on discipline they’re assigned to.

- When “Role” is added and “Bookable Resources” is blank in WBS, then Discipline is automatically populated.

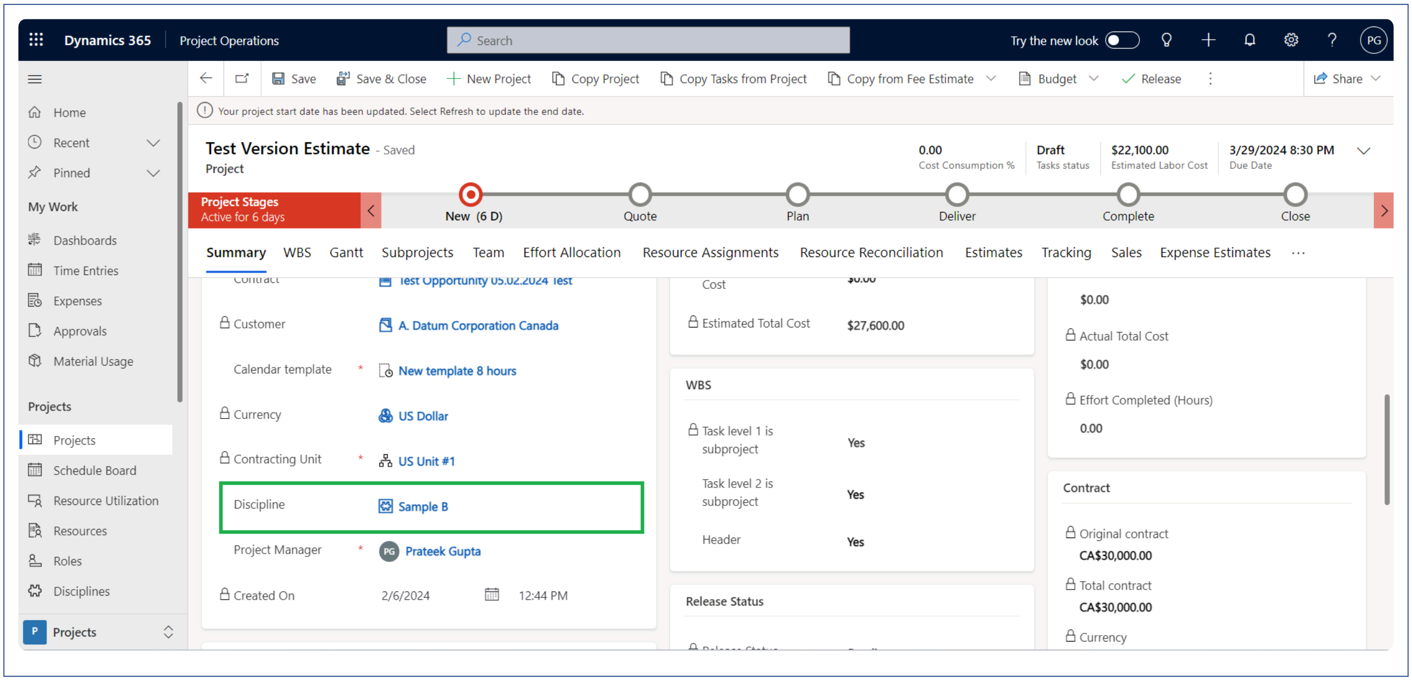


- When you assign a “Bookable Resource” to a task in the WBS, the “Discipline” field automatically gets populated. Their role, position, and Sales price will also be automatically populated.

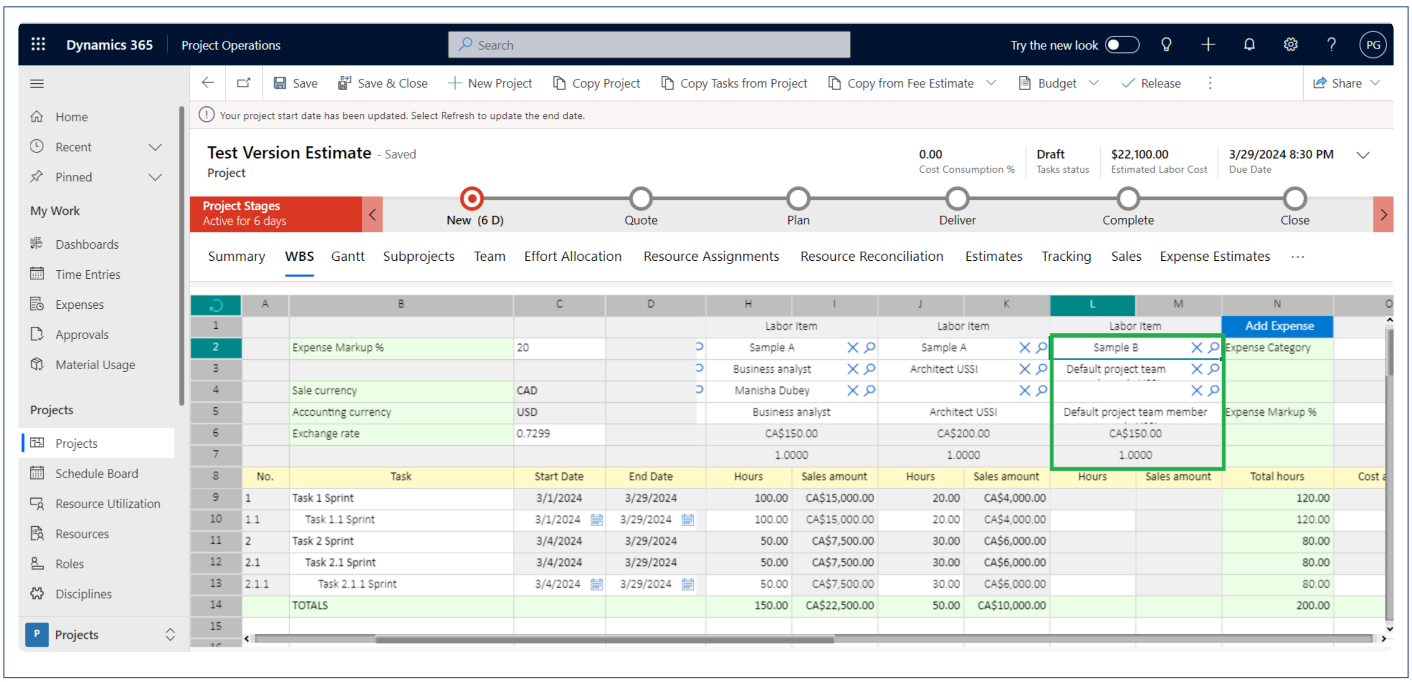


When users default a Discipline in the Opportunity line or Project, it will automatically default in the “Discipline” field for Labor items in both the Fee Estimator and WBS Planner spreadsheet. This saves you time by automatically defaulting this information across the different spreadsheets.

Projects:



When users add a new “Labor Item” in the WBS, the chosen “Disciplines” from the project will automatically be included by default.



Note – Disciplines can be defined at Project or Subproject level and used as financial dimension if needed.

6.4.3. Move Task Dates/ Move All Task Dates

This new feature provides the ability to move specific Task dates or All Task Dates forward or backward in time.

- The feature is available from WBS Planner, Fee Estimator and Effort Allocation xl360 spreadsheets.
- In WBS Planner and Effort Allocation when this process is executed both the task dates as well as the allocated effort assigned to resources will be moved accordingly.

Move Task Dates/Move All Task Dates

Hover to the Task or Subtask and then double click on the Task/subtask, a new dialog box will appear where user will be able to see two different sections like Dates and Move section.

Date Section will comprise of two different fields primarily as:

<table>
<tr><th>Fields</th><th>Description</th></tr>
<tr><td>Start Date</td><td>Users can choose a date in the WBS Planner, Effort Allocation, or Fee Estimator spreadsheet. This date will automatically become the default Start Date in all “Move Task Dates” Dialog Box. You can adjust this Start Date later, moving it forward or backward as needed.</td></tr>
<tr><td>New Start Date</td><td>Users can pick any date they like in this box.

If the New Start Date is before the Start Date:

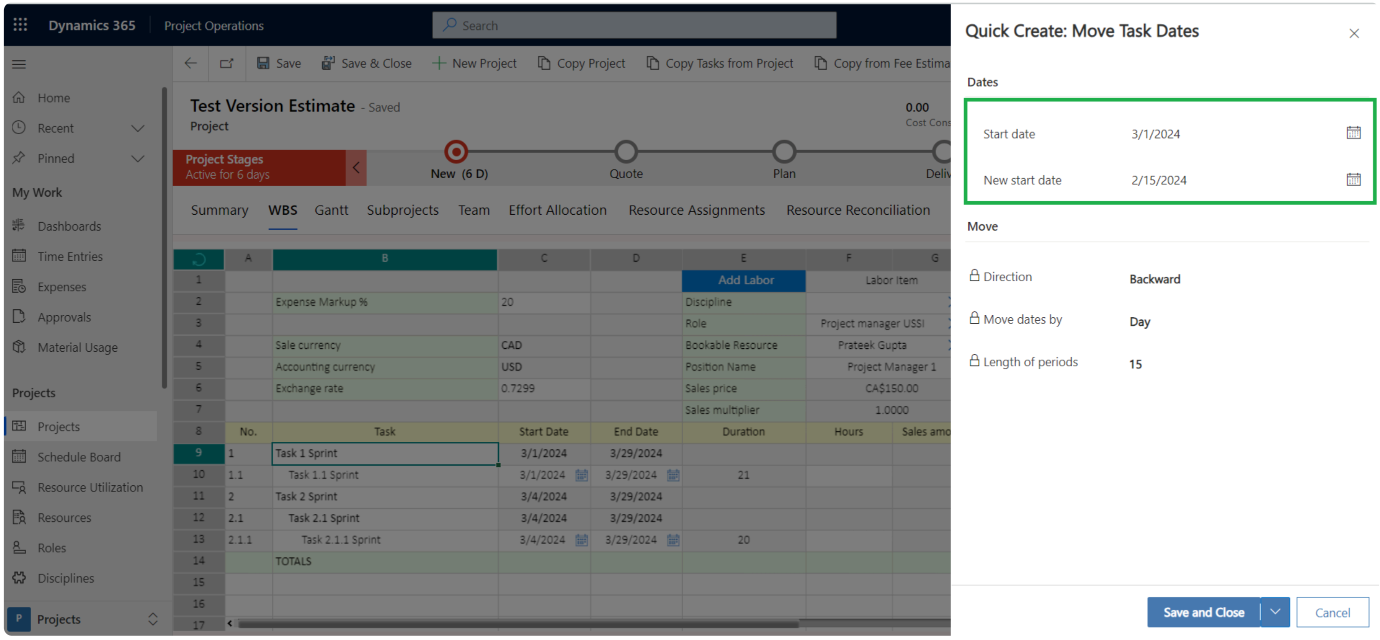
The “Direction” field in the “Move” section of the “Move Task Dates” dialog box will be set to “Backward” and locked.
The “Move Dates by” field will default to “Day” and remain locked.
The “Length of Periods” difference between the Start Date and New Start Date will be calculated based on the number of days, including Saturdays and Sundays.

If the New Start Date is after the Start Date:

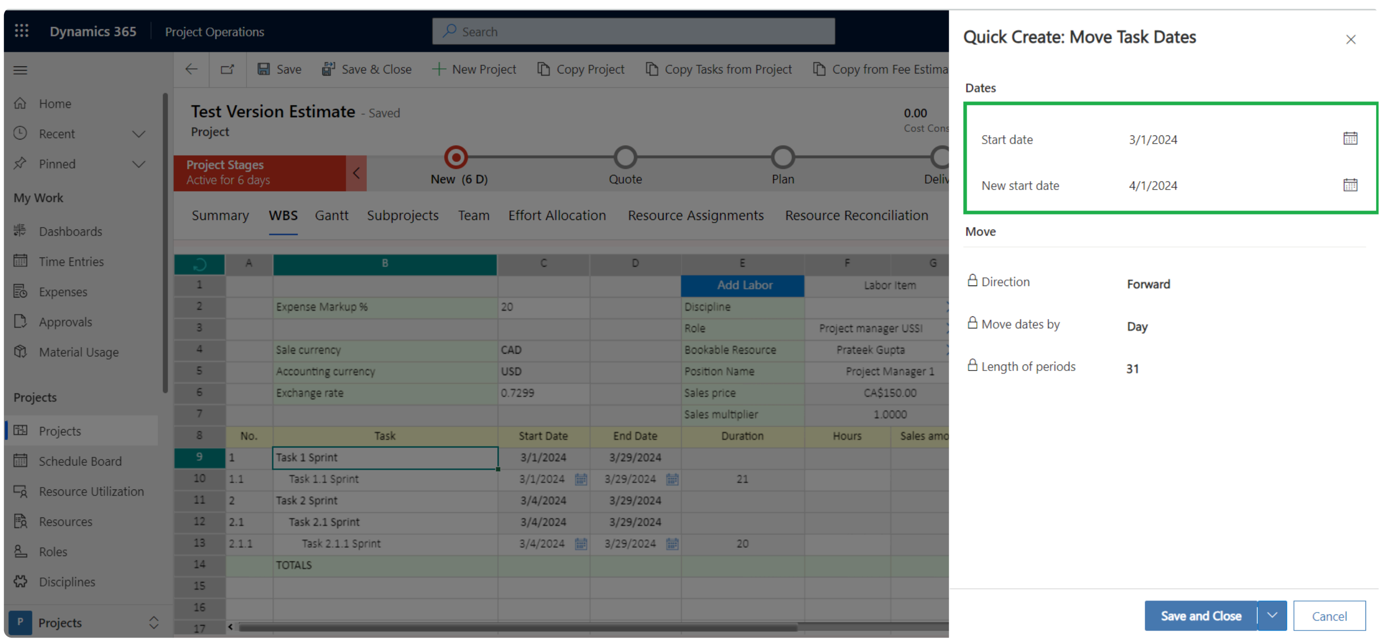
The “Direction” field will be set to “Forward” and locked.
The “Move Dates by” field will default to “Day” and remain locked.
The “Length of Periods” difference between the Start Date and New Start Date will be calculated based on the number of days, including Saturdays and Sundays.

</td></tr>
</table>

When **New Start Date** is before the **Start Date** of Task



When **New Start Date** is after the **Start Date** of Task

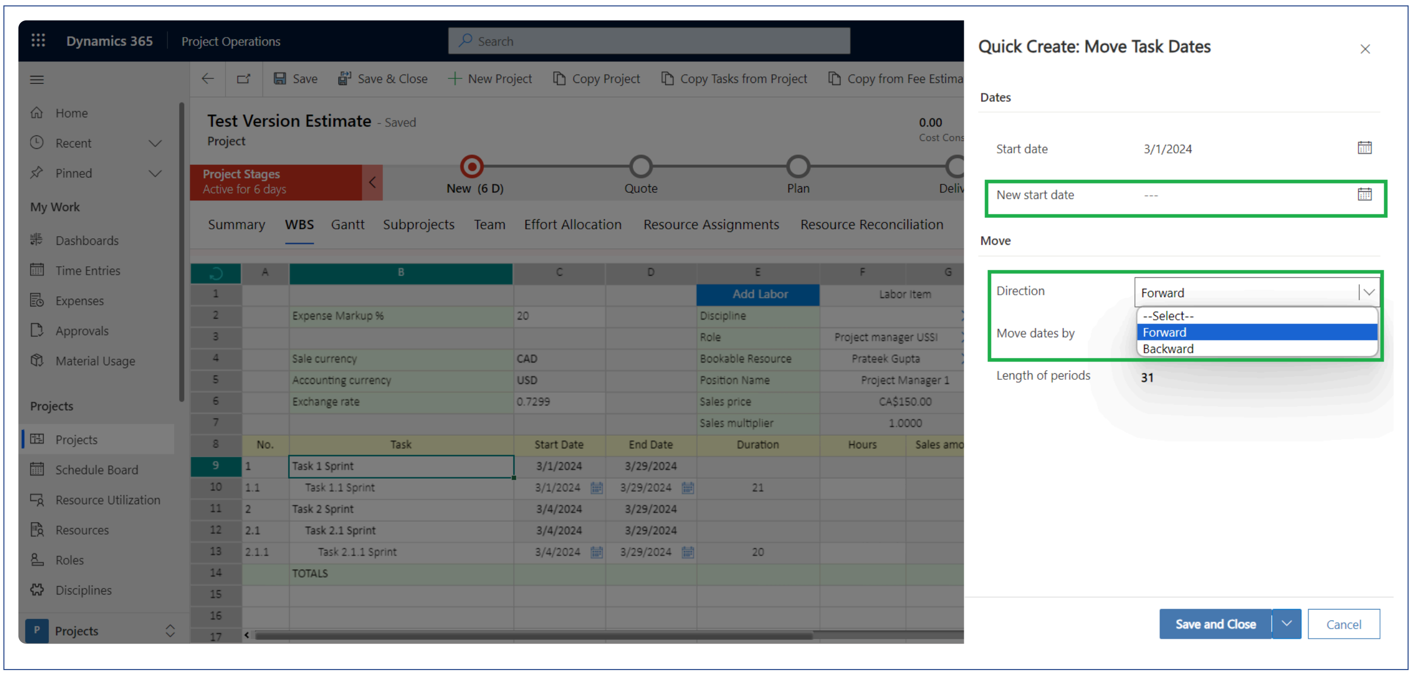


Move Section will comprise of three different fields primarily as:

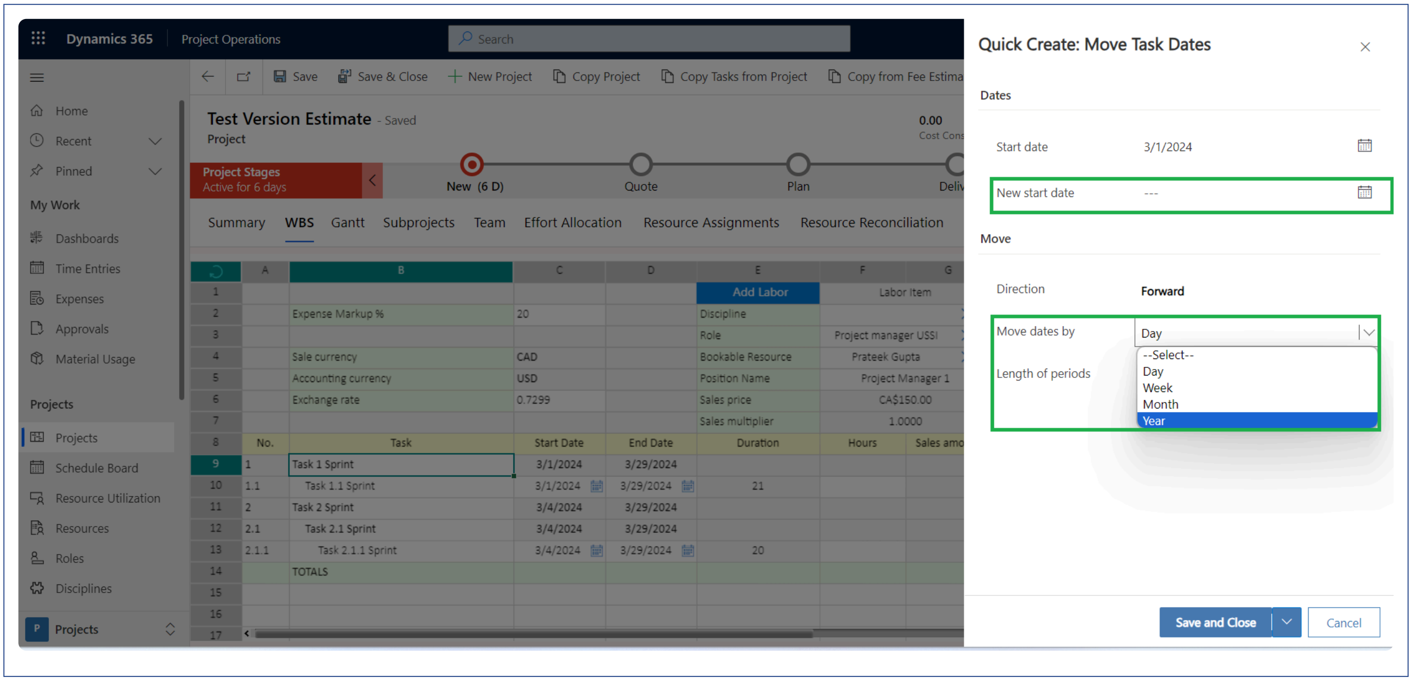
Fields	Description
Direction	• The field will be locked if there's a date in the New Start Date field. It will show either "Forward" or "Backward," as we explained earlier in the Dates section. • The field will be unlocked if the user doesn't enter any date in the New Start Date field. This gives users the flexibility to manually choose the Direction as either "Forward" or

	"Backward".
Move Dates By	• The field will be locked if there's a date in the New Start Date field. It will also be set to "Day" and locked, as we explained earlier in the Dates section. • The field will be unlocked if the user doesn't enter any date in the New Start Date field. This gives users the flexibility to move dates by "Day," "Week," "Month," or "Year".
Length of Periods	• This field will be locked if there's a date in the New Start Date field. It will be set based on the time frame of days between the Start Date and the New Start Date, as we already explained in the Dates section. • The field will be unlocked if users do not provide any date in the New Start Date field. This allows users to provide the length of the period depending on the selection made in the "Move Dates By" field.

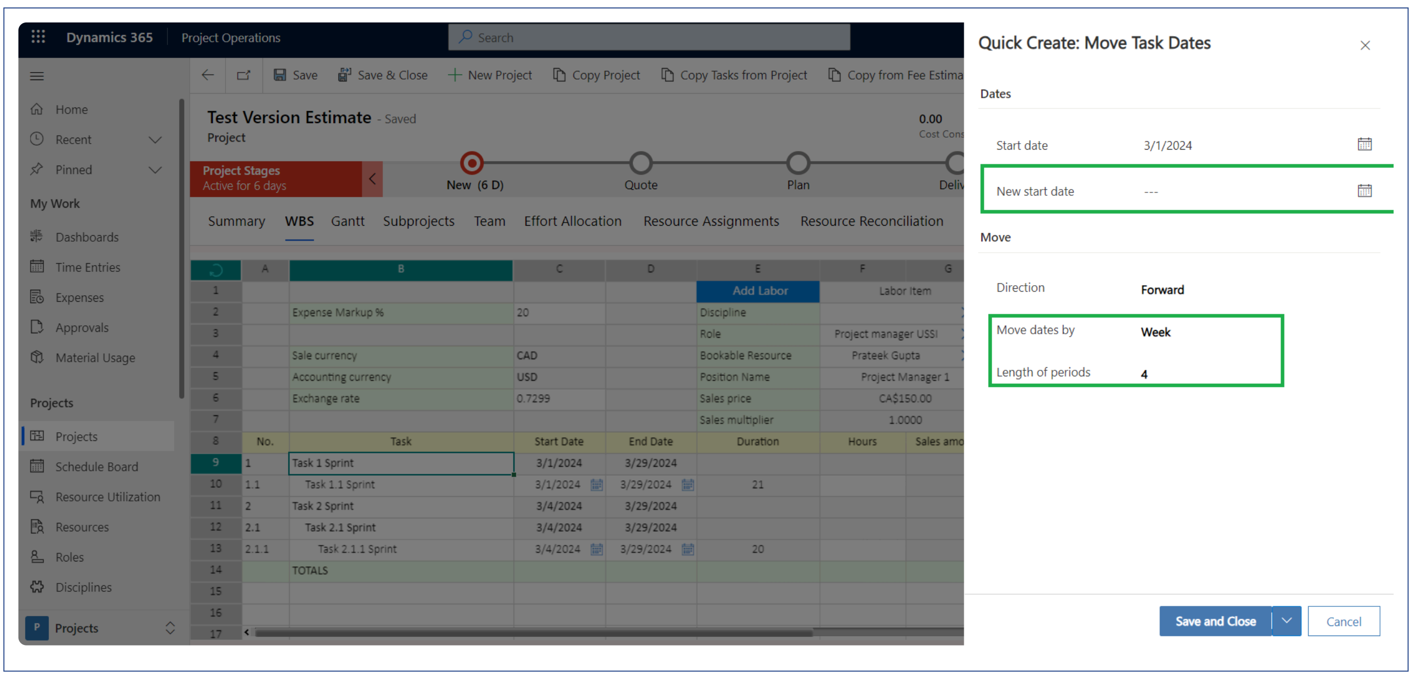
Direction field in "Move" section.



Move Dates By field in "Move" section.



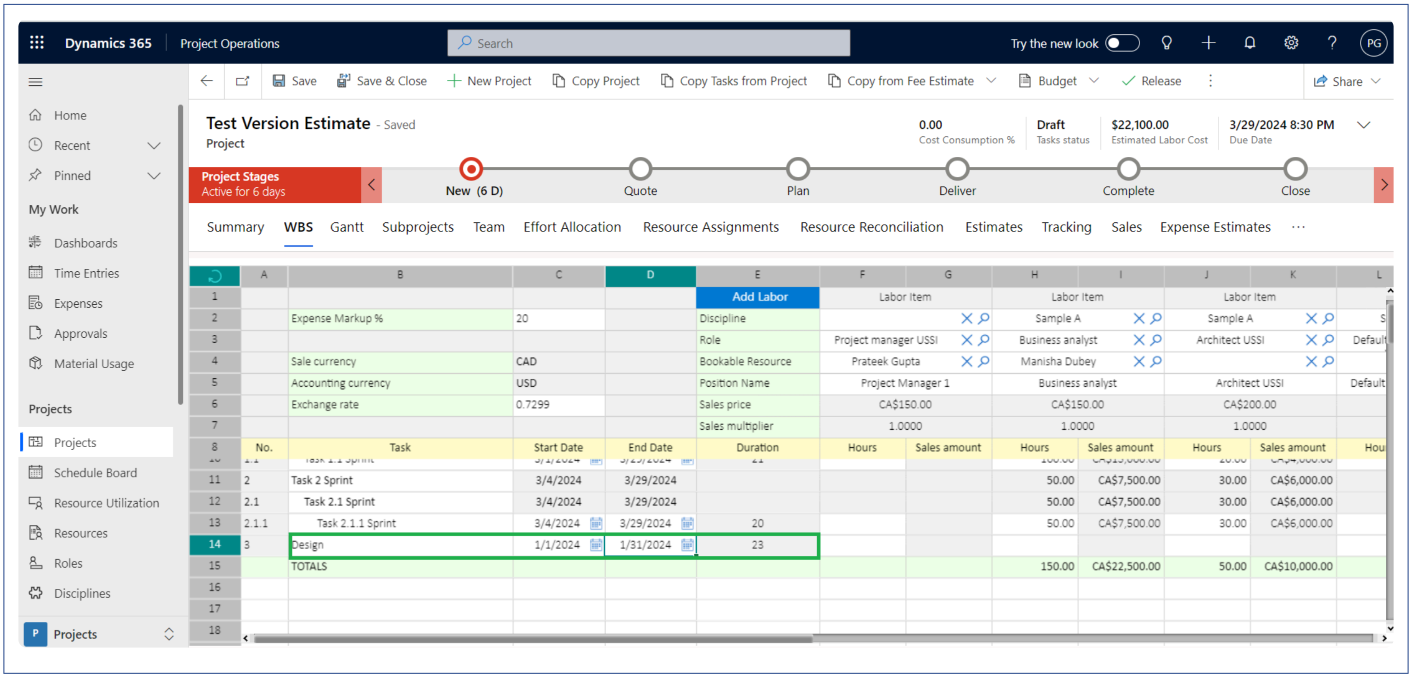
Length of Periods field in “Move” section.



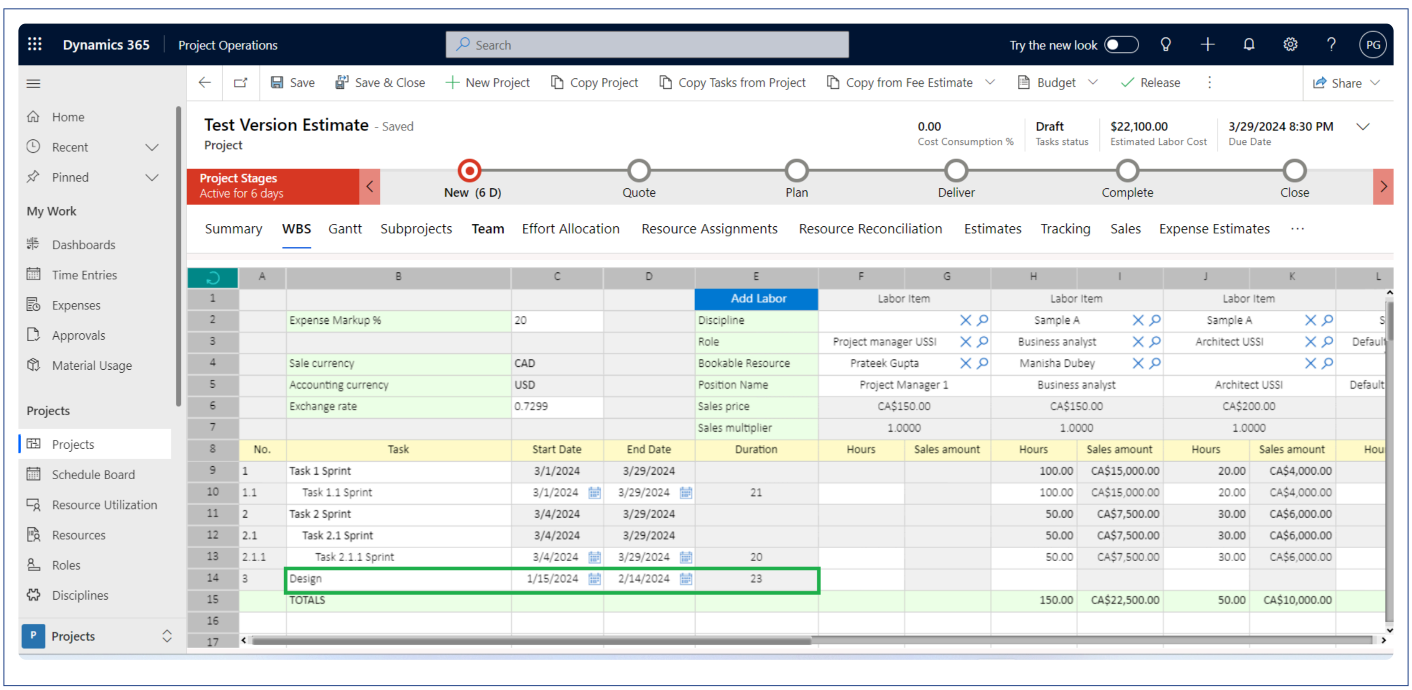
Note – Depending on the direction of the move, the selected frequency (daily, weekly, monthly, or yearly), and the length of the periods set in the “Move Task Dates” dialog box, the tasks in the spreadsheet will move backward or forward accordingly.

The same can be understood with help of one example:

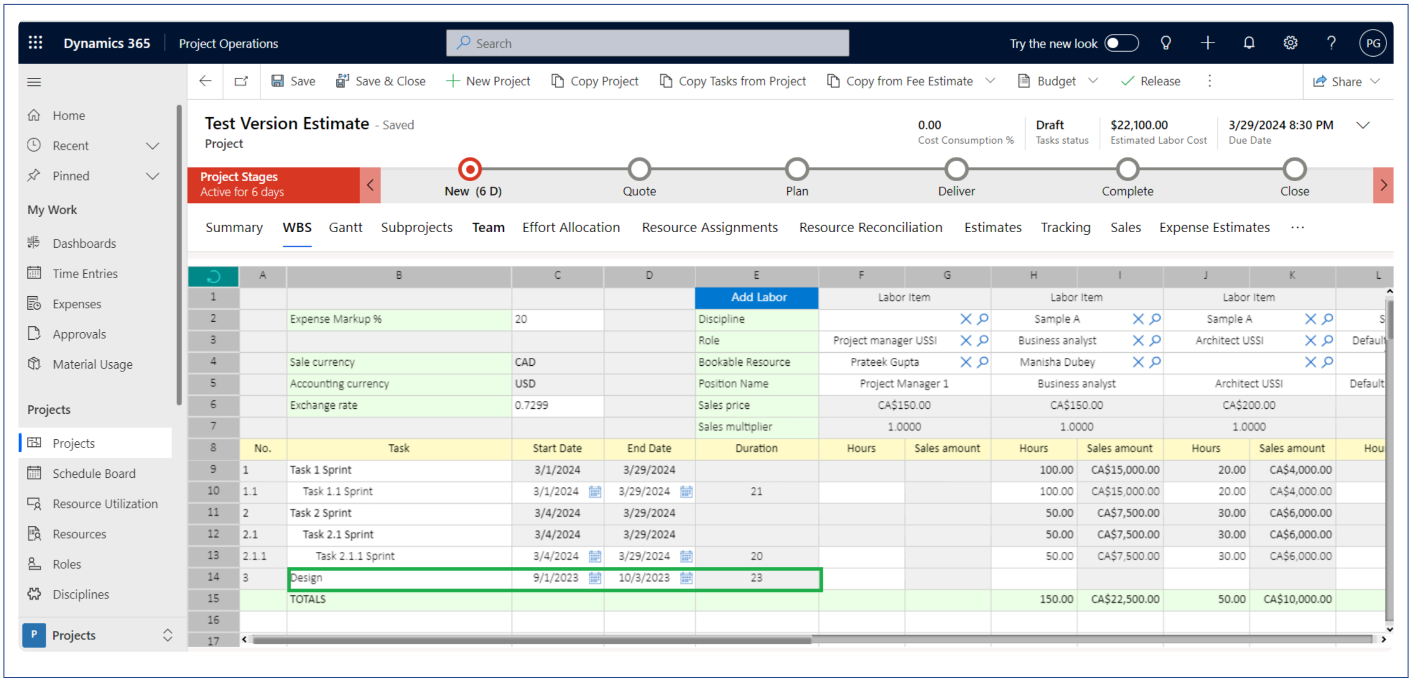
If Task “Design phase has” start date as “1st January 2024 and “End Date” as “31st January 2024” and system will automatically calculate “Duration” which is non editable field and showing as “23”.



- If the Direction is set as “Forward,” the “Move dates by” field is set as “Week,” and the Length of Period is set as “2,” then the Task Start Date of the “Design phase” task will move forward by 2 weeks. The New Start date of the Task will become “January 15th, 2024,” and based on the Duration set for the task, the End Date of the Task will automatically get updated.



- If the Direction is set as “Backward,” the “Move dates by” field is set as “Month,” and the Length of Period is set as “4,” then the Task Start Date of the “Design phase” task will move backward by 4 months. The New Start date of the Task will become “September 1st, 2023,” and based on the Duration set for the task, the End Date of the Task will automatically get updated.



6.5. Gantt View

The “Gantt view” is a type of visual representation used in project management to illustrate the schedule of tasks or activities in a project. It typically displays tasks as horizontal bars along a timeline, allowing you to see the start and end dates of each task, as well as their duration and dependencies. This view helps project managers and team members understand the sequence of tasks, identify potential bottlenecks, and track progress more effectively. Gantt charts are widely used because they provide a clear and intuitive way to plan and manage projects.

The Gantt view follows the steps like this:

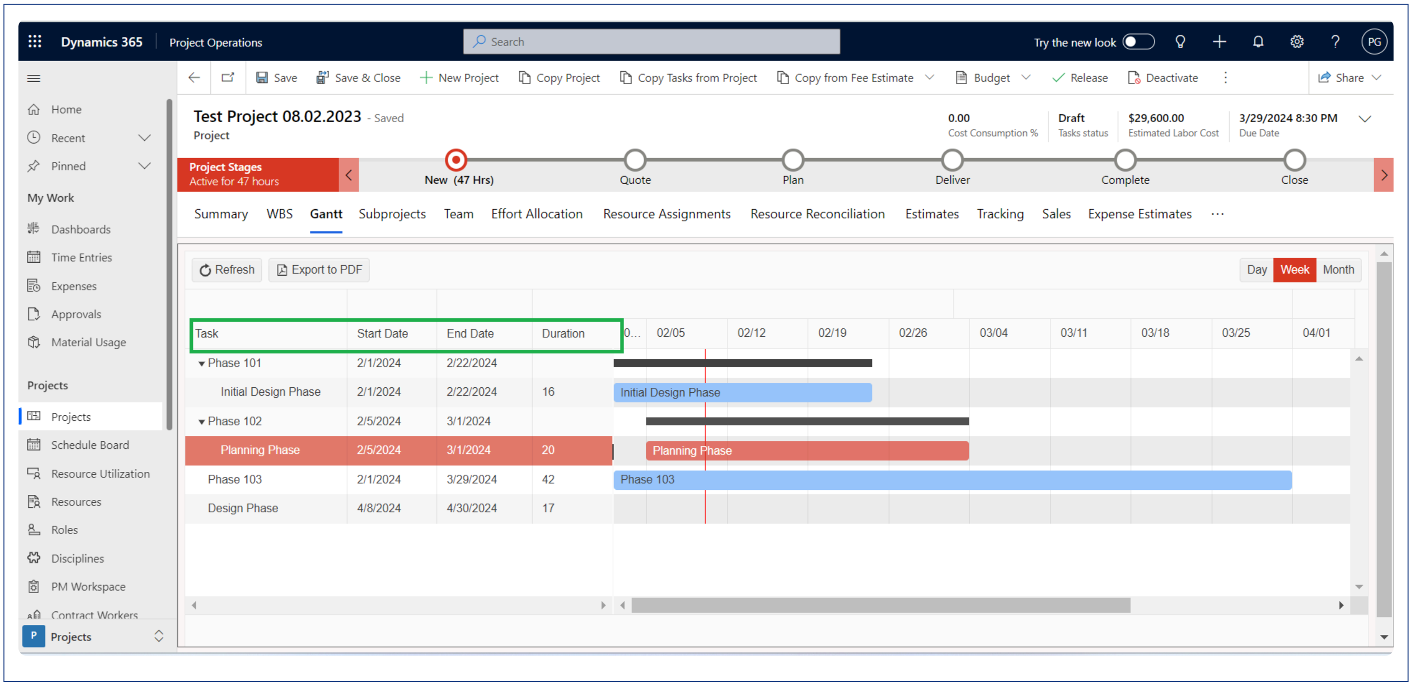
- **When each task starts**: Imagine the left edge of the bar marking the day you begin working on it.
- **When each task ends**: The right edge shows the day, week, month user expects to finish.
- **How long each task takes**: The width of the bar represents the time it takes to complete the task.
- **How tasks depend on each other**: Some tasks can’t start until others are finished. These connected tasks might have arrows or colors showing their relationships.

Gantt View Process

The Gantt View will be available from Project and Opportunity Line forms if either WBS Planner or Effort Estimator are activated.
Gantt views show your project tasks like a calendar, making it easy to see what needs to be done and when. They work closely with:

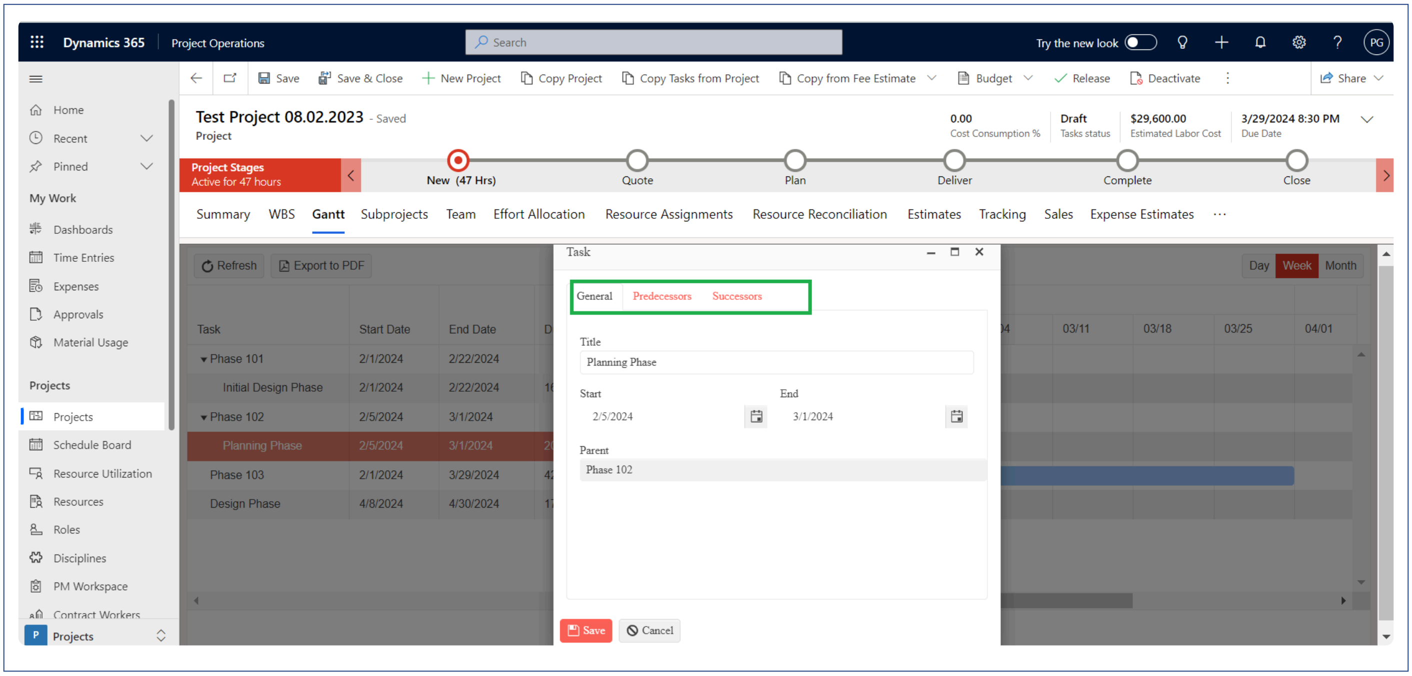
- **Projects**: They connect to WBS (Work Breakdown Structure) and Effort Allocation spreadsheets. Changes made in these spreadsheets automatically update the Gantt view when you click “Refresh” (top left corner).
- **Opportunity Lines**: They interact with the Fee Estimator. Any updates in the Estimator get reflected in the Gantt view by clicking “Refresh.”

The main fields displayed in the Gantt view are:



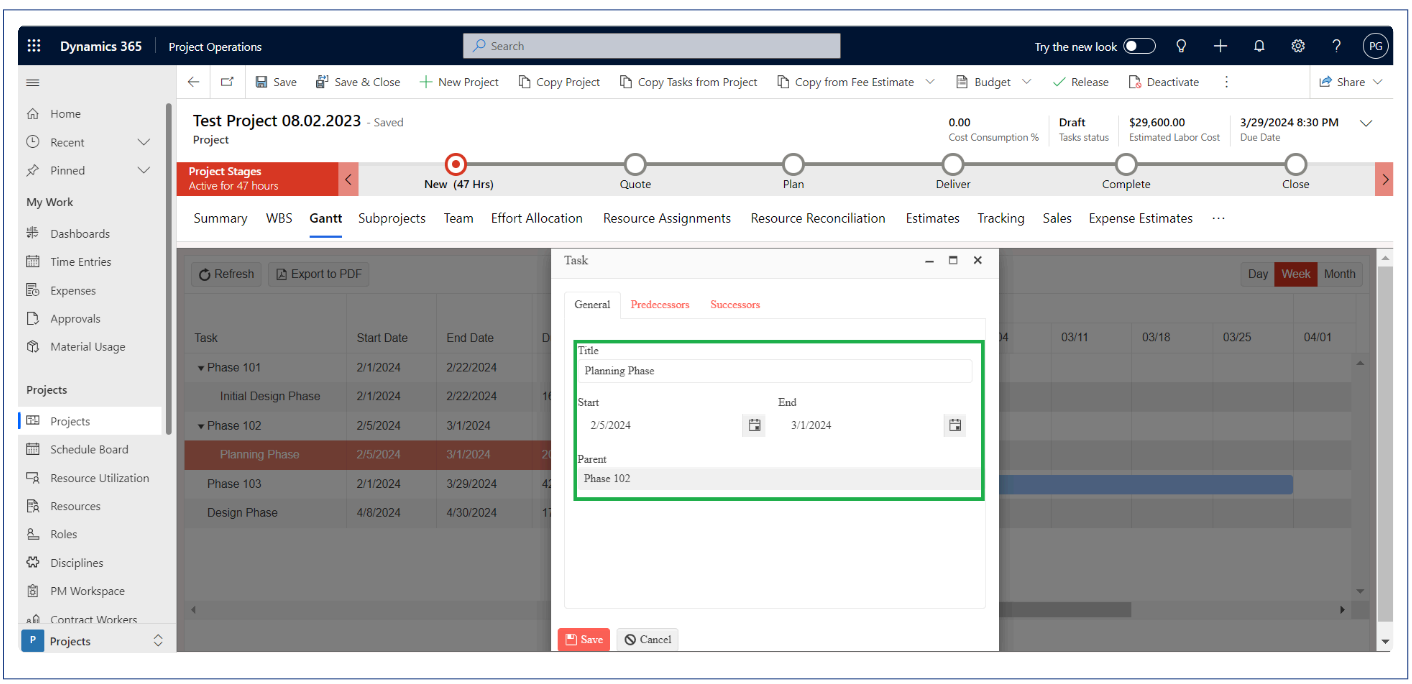
Fields	Description
Task	The Gantt view shows all your tasks and subtasks. It pulls them from three places which are WBS Planner, Effort Allocation and Fee Estimator Spreadsheets.
Start Date	This tells you exactly when each task is scheduled to begin.
End Date	This is the finish line for each task, letting you know exactly when it's expected to be completed.
Duration	This tells you how long each task takes, from start to finish. The length of time is calculated based on a special calendar called the Work Hour Calendar. You set this calendar when you plan your project or opportunity, and it considers things like holidays, weekends, and specific team working hours. This way, the duration reflects the actual time needed to complete the task, not just a straight line between the start and end dates.

A task's detail form will appear when double-clicking the horizontal bar for any task, This form includes different tabs, like "General," "Predecessors," and "Successors," giving you useful information about each task at a glance.



General Tab

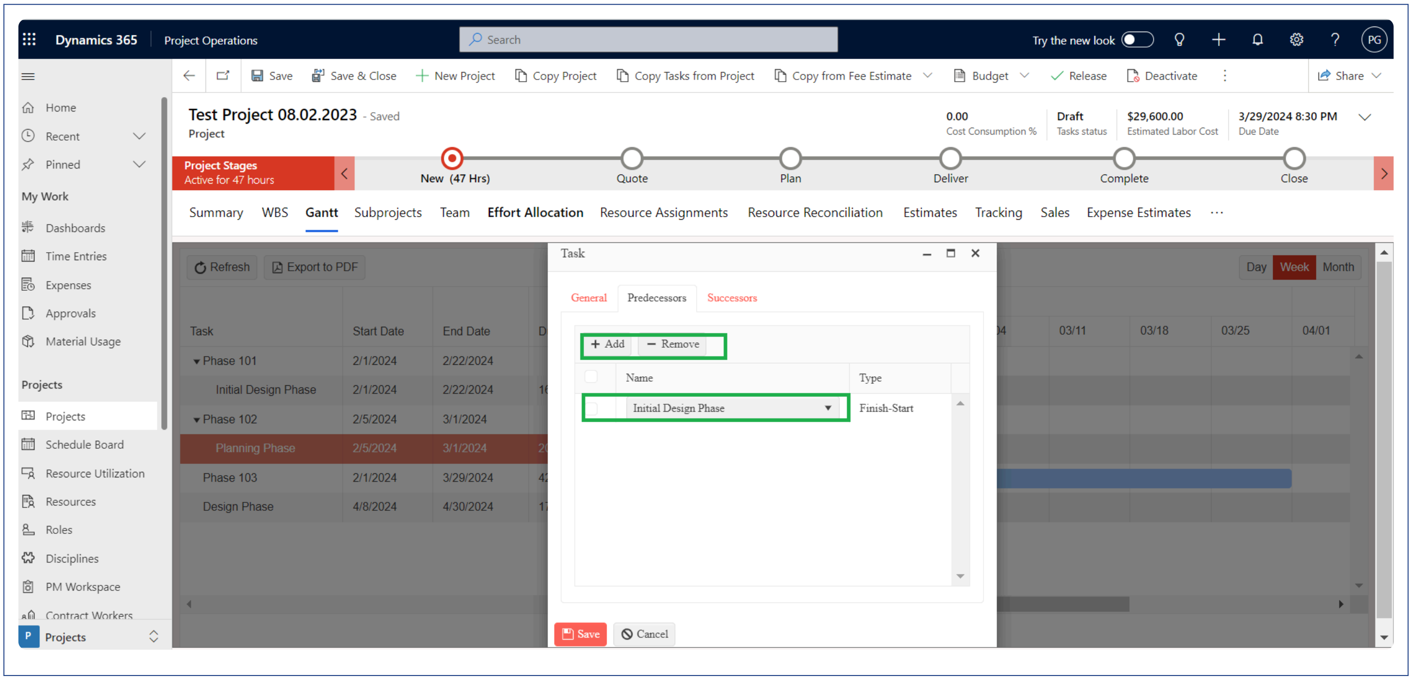
“In the Gantt view, you can see various task-related fields such as Task Title, Start and End Date, and Parent. The Parent field indicates the main task associated with a subtask, providing the project manager with a clear overview of task relationships. For main tasks, the Parent field is set to ‘None’.



Predecessors Tab

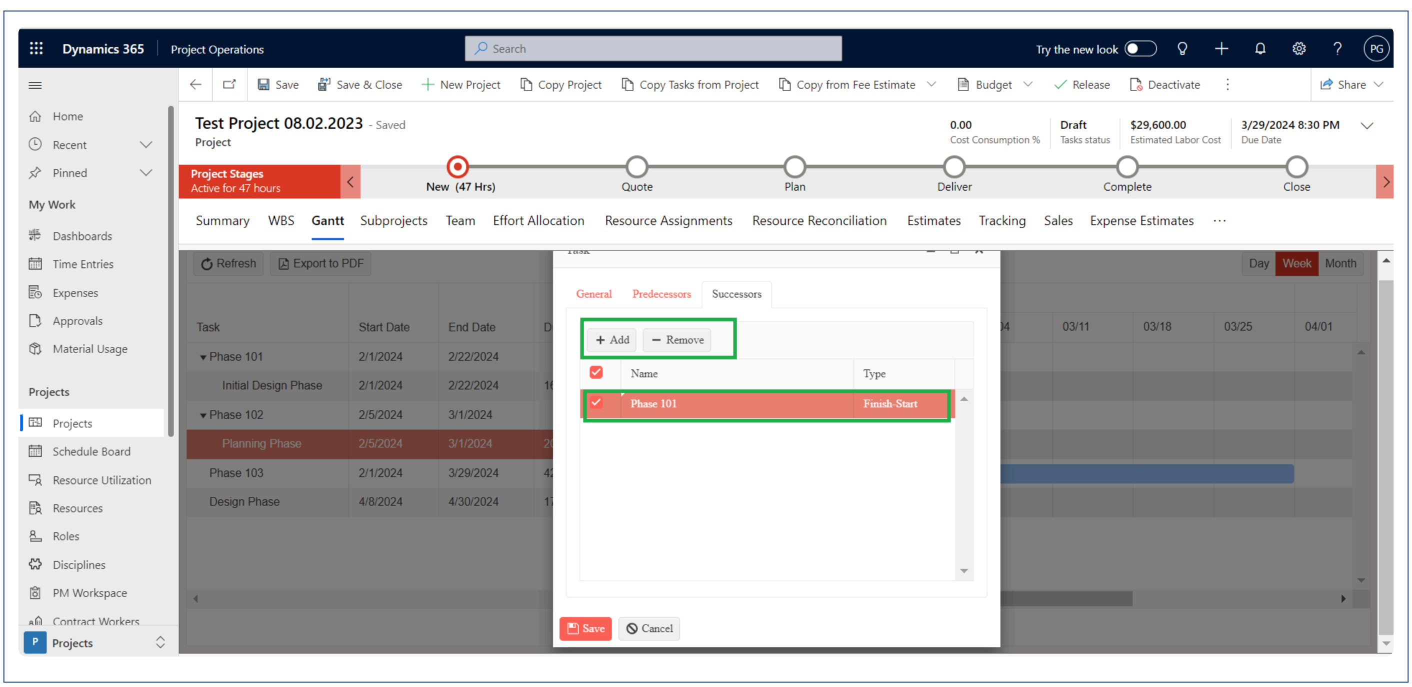
- Lets you choose multiple tasks that must be done before a specific task.
- Once chosen, arrows appear in the Gantt view, clearly showing which tasks depend on each other.
- Use the “Add” and “Remove” buttons to manage these dependencies:

- **Add**: Connect tasks that must be done first.
- **Remove**: Break the link between tasks, making them independent.



Successors Tab

- Lets you choose multiple tasks that can only start after a specific task.
- Once chosen, arrows appear, showing which tasks follow others.
- Use the “Add” and “Remove” buttons to manage these dependencies:
  - **Add**: Connect tasks that follow another task.
  - **Remove**: Break the link between tasks, making them independent.



	Note – When a Project Manager sets one task as a predecessor to another task, the same task will automatically become a successor in the Successor tab of Tasks. Similarly, if a Project Manager designates one task as a successor to another task, the same task will be recorded as a predecessor in the Predecessor Tasks tab. For instance, let's say there are two tasks, 'Task A' and 'Task B'. If the user sets 'Task B' as a predecessor to 'Task A', then 'Task A' will also be listed as a successor in the 'Task B' successor tab. Establishing or removing these connections between tasks demonstrates the dependency between predecessors and successors.

6.5.1. WBS dependencies between tasks

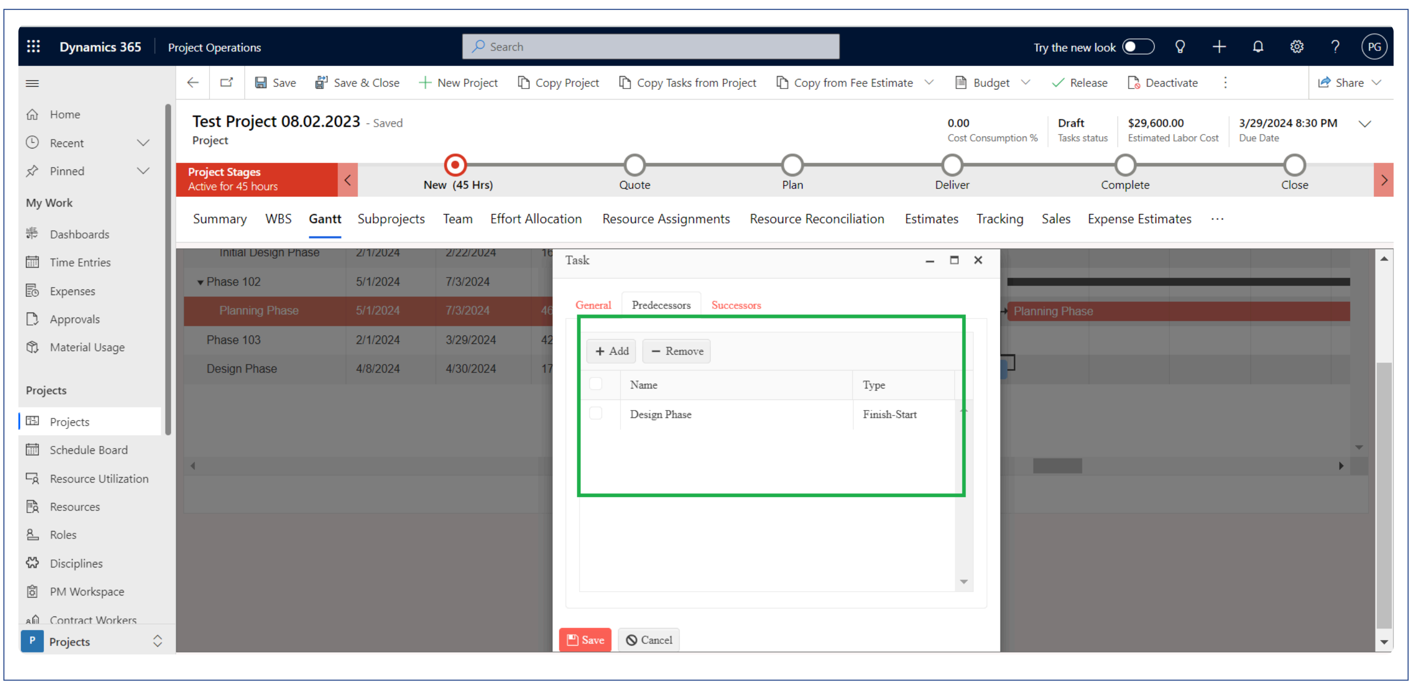
. Finish to Start dependencies between Tasks have been added to WBS Planner and Effort Allocation existing features.

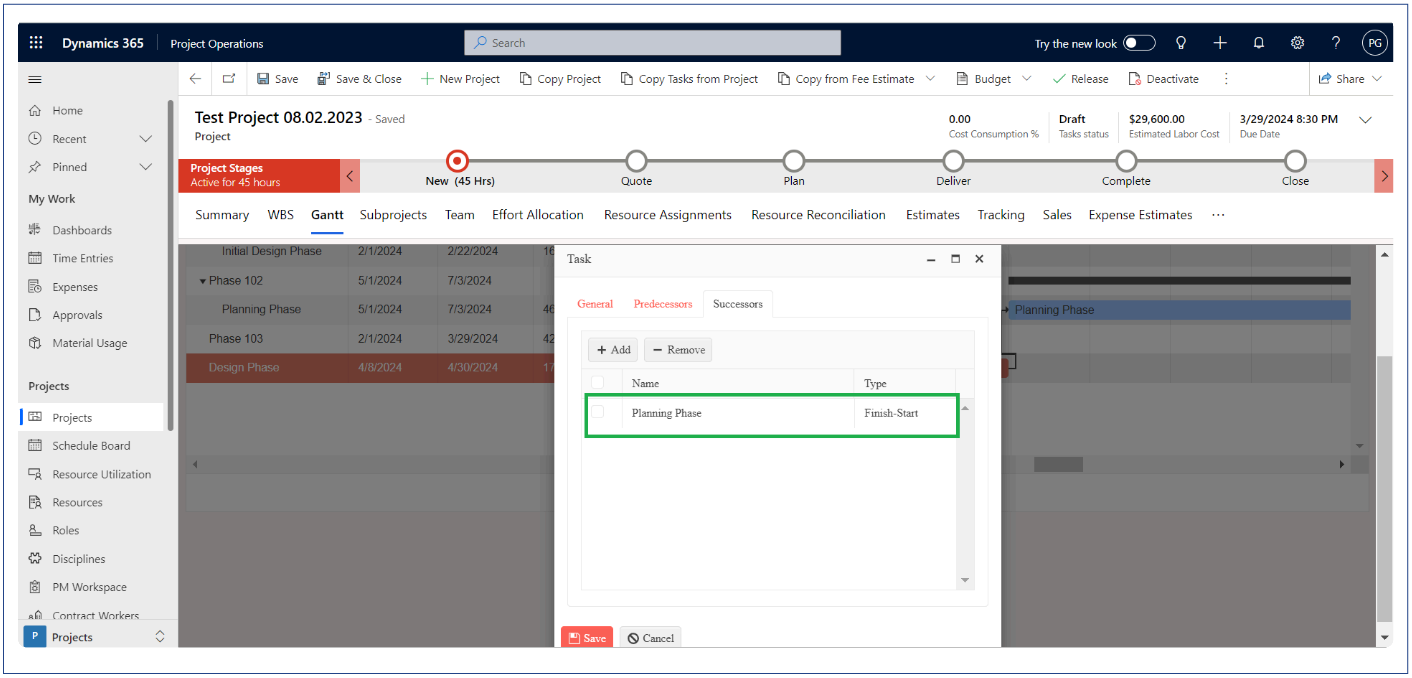
- Predecessors and Successors can now be defined from the Gantt View.
- Start Date will be automatically re-calculated for successor tasks when a predecessor task is moved in time.

Let’s use an example to understand how Predecessor and Successor tasks change their Start and End dates when we connect them. We’ll also see how the connection is affected when a Successor task starts before and after the Predecessor task.

Imagine you’re working on a project with two phases: Planning Phase and Design Phase. Since planning can’t happen until the design is finalized, **the Planning Phase is a successor to the Design Phase.** This means:

- The Planning Phase can only start after the Design Phase is finished.
- Once you link these phases in the Gantt view, the Planning Phase’s start date will automatically adjust to be after the Design Phase’s end date.
- If you update the Design Phase’s dates, the Planning Phase’s dates will automatically shift to maintain the dependency.





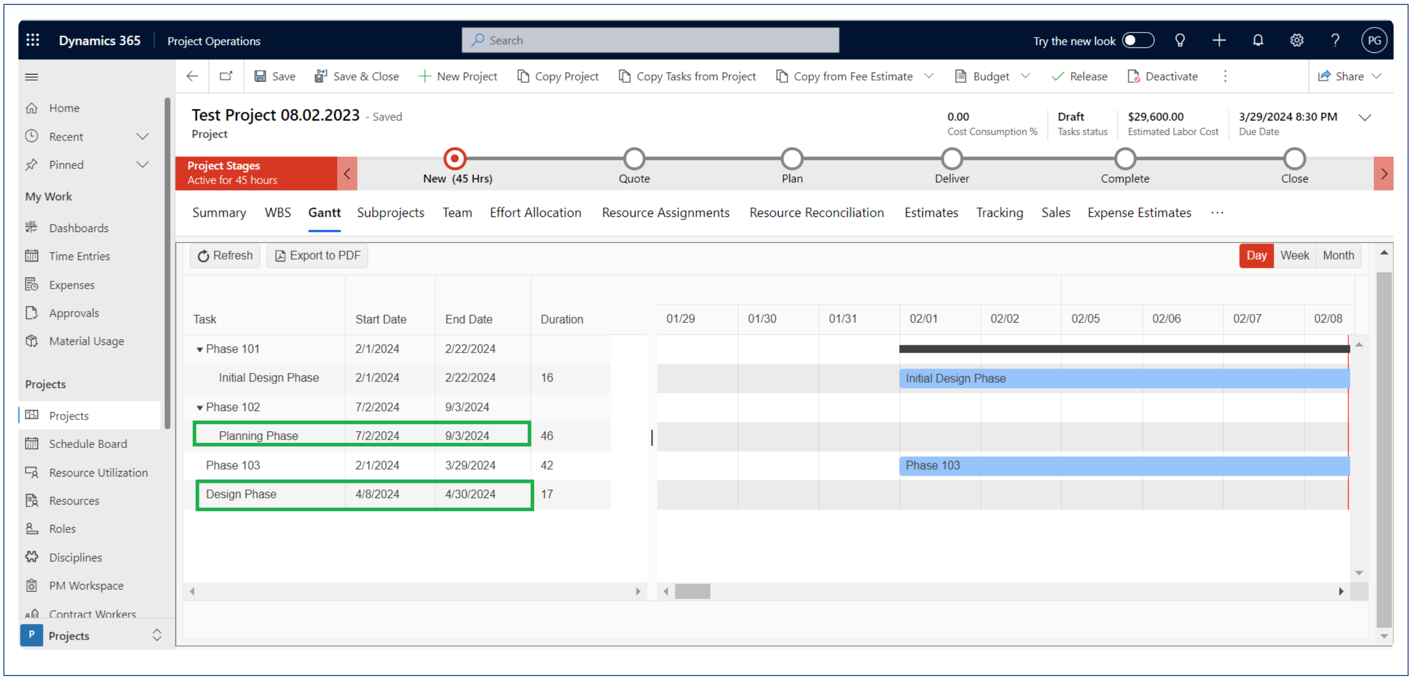
First Scenario

- In the first scenario, when we move the start date of the Predecessor Task **"Design Phase"**, whether it's set in the future or the past in relation to the Successor Task **"Planning Phase"**.

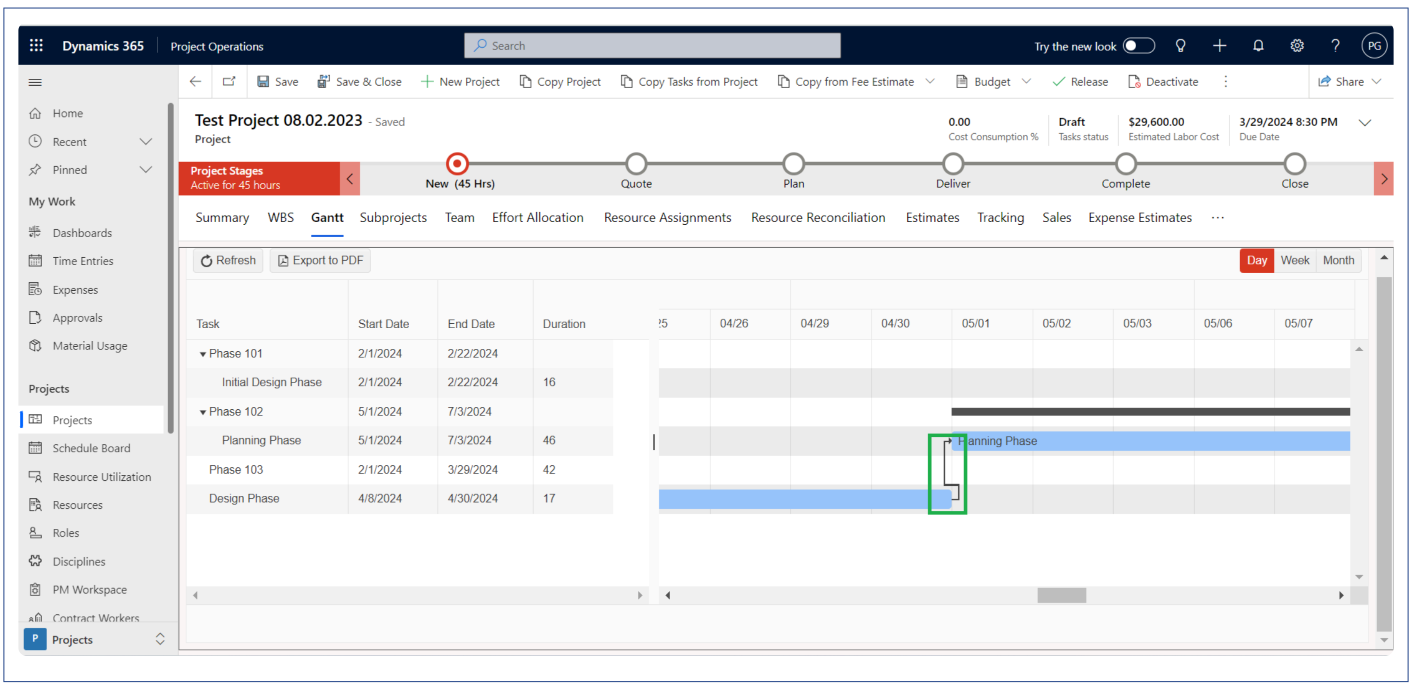
The below screenshot shows the following Task Dates:

- **Planning Phase:**
  - **Start Date:** July 2nd, 2024
  - **End Date:** September 3rd, 2024

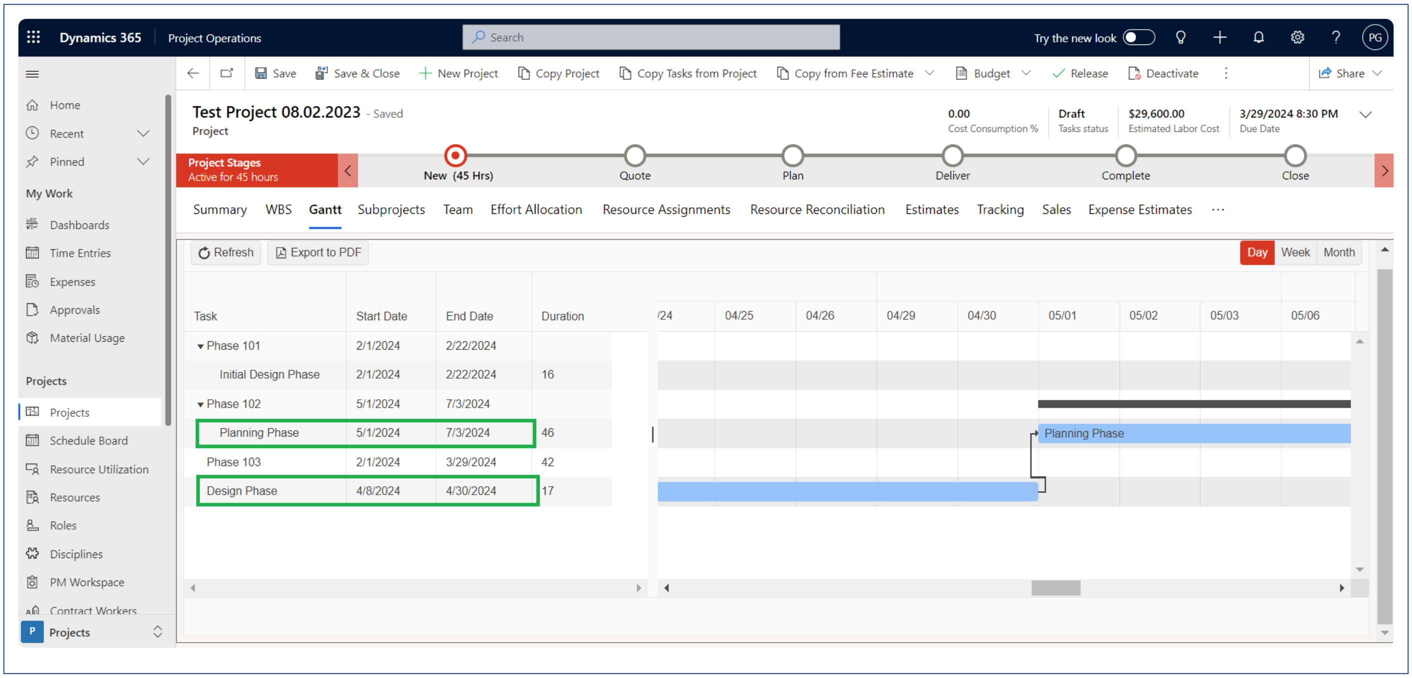
- **Design Phase:**
  - **Start Date**: April 8th, 2024
  - **End Date**: April 30th, 2024



- After creating the association, as shown in the screenshot below, which highlights the relationship between Predecessor Task "**Design Phase**" and Successor Task **"Planning Phase**".



- After connecting the tasks as shown in the previous screenshot, where the **"Design Phase"** became the predecessor and the **"Planning Phase"** the successor, the Planning Phase's start date automatically adjusted. As you can see in the new screenshot, the Planning Phase now starts immediately after the Design Phase ends, on May 1st, 2024. Its end date will also update automatically based on the pre-defined duration of the Planning Phase task.



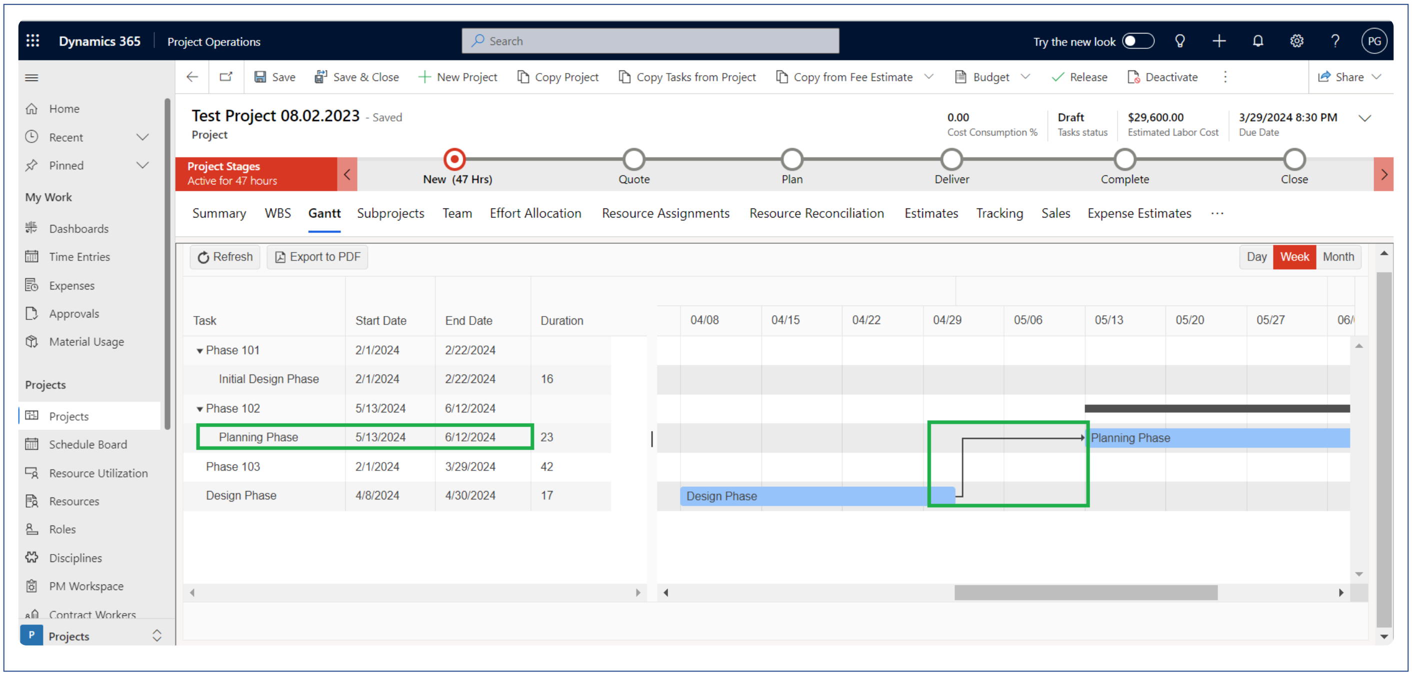
Second Scenario

- “When the Successor Task **“Planning Phase”** is moved to a future date in relation to the Predecessor Task **“Design Phase”**.”
- The below screenshot shows the **“Planning Phase”** (successor) with these new dates:
    - **Start Date**: May 13th, 2024
    - **End Date**: June 12th, 2024

Since you moved the end date earlier, a few things happen:

- **Duration update**: The duration of the “Planning Phase” task will automatically adjust to reflect the new start and end dates.
- **Relationship shift**: The **visual connection between the “Planning Phase” and “Design Phase” (predecessor) will move in the Gantt view. This shows the updated timeline.
- **Arrow emphasis**: The arrow connecting the tasks might enlarge or become more prominent to highlight the changed dependency.

This means even though you only moved the successor’s end date, the system automatically updates the duration and visually reflects the impact on the overall project flow.



	Note – Moving the successor (Planning Phase) usually updates its duration and visually adjusts the timeline, but doesn't directly affect the predecessor (Design Phase).

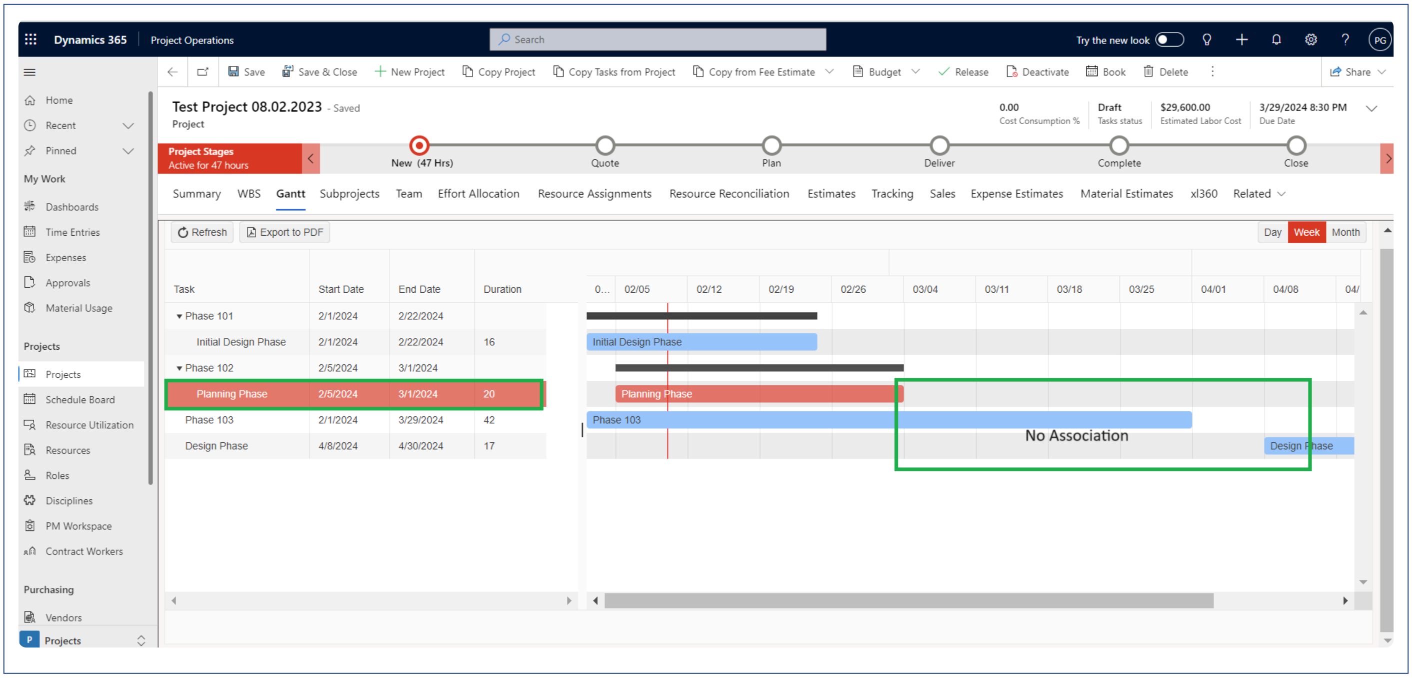
Third Scenario

- When the Successor Task **"Planning Phase"** is moved to a past date in relation to the Predecessor Task* "Design Phase"*.
- The below screenshot shows the **"Planning Phase"** (successor) with these new dates:
  - **Start Date**: February 5th, 2024
  - **End Date**: March 1st, 2024

Since you moved the end date earlier than the **"Design Phase"** (predecessor), a few things happen:

- **Duration**: The **"Planning Phase**" duration will automatically adjust to reflect the new dates.
- **Disassociation**: The link between **"Planning Phase"** (successor) and **"Design Phase"** (predecessor) will be removed. This means they are no longer dependent on each other in terms of timing.
- **Arrow Removal**: The arrow connecting the tasks will disappear. This visually shows that they are now independent.

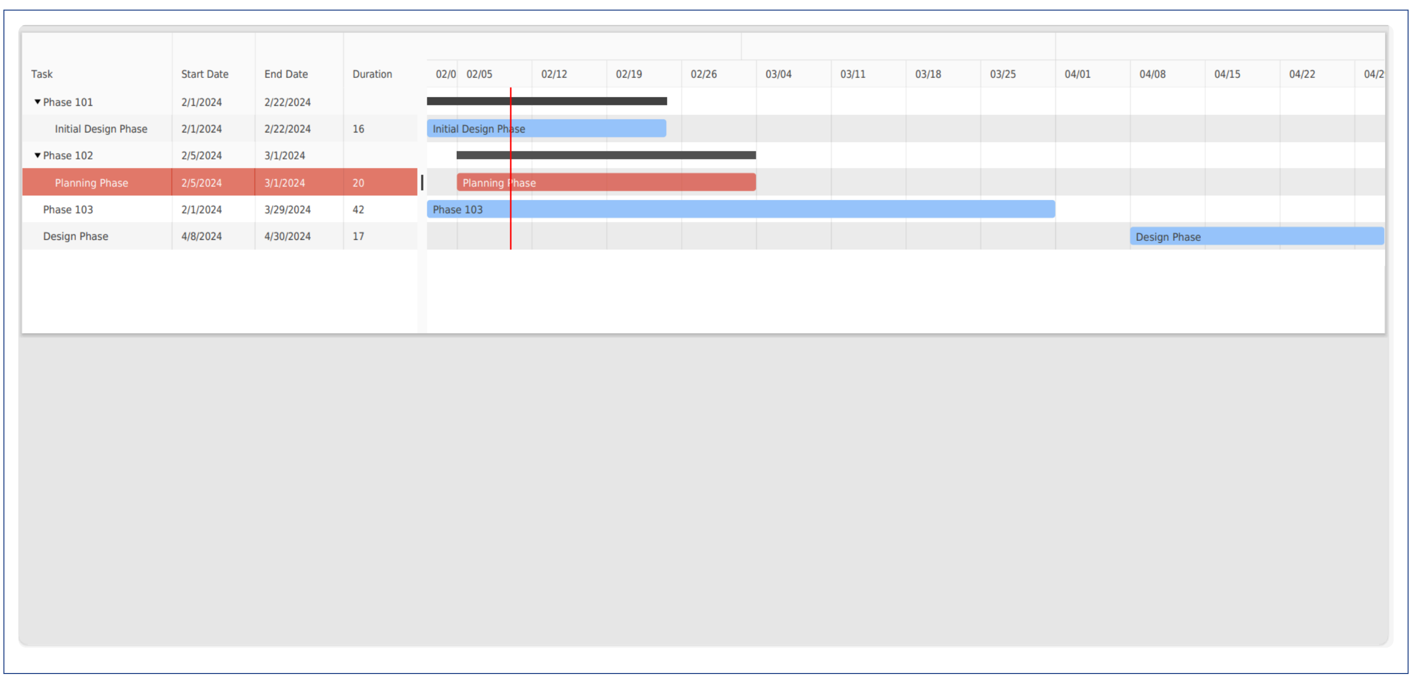
In simpler terms, moving the "Planning Phase" end date earlier breaks the connection it had with the "Design Phase." They can now start and finish at any time without directly affecting each other.



Note – When you move a successor's end date earlier than the predecessor's, it breaks the dependency and removes the connecting arrow..

Export to PDF:

CRM systems often offer Gantt view functionality, letting you see your project tasks like a calendar. This visual representation isn't just pretty, it's powerful! Here's what it offers:



- **Export to PDF**: Capture the entire project layout in a PDF for deeper analysis. Share it with your team or take it on the go for offline planning.

  - **Task Dependency Analysis**: Easily understand how tasks connect and rely on each other. See which tasks absolutely must be finished before others can even start (predecessors) and which tasks come afterwards (successors).
  - **Clear and Intuitive**: Unlike complex spreadsheets, Gantt charts use bars and arrows to show the flow of your project. It's like a roadmap, making planning and managing tasks a breeze.
  - **Plan smarter**: Visualize project flow and identify potential bottlenecks.
  - **Communicate effectively**: Share clear, easy-to-understand project timelines with your team.
  - **Stay on track**: Monitor progress and ensure tasks are completed in the right order.

In short, Gantt charts offer a clear and powerful way to manage projects, and now you can take your plans beyond the screen with convenient PDF exports.

6.6. Subprojects

This section elaborates on the Subprojects feature, empowering users to clearly define which tasks qualify as Subprojects.. When a new project task is created in Project Operations, a corresponding subproject or WBS task will be automatically created or updated in Finance and Operations, replicating the functionality of Microsoft's standard dual-write for projects.

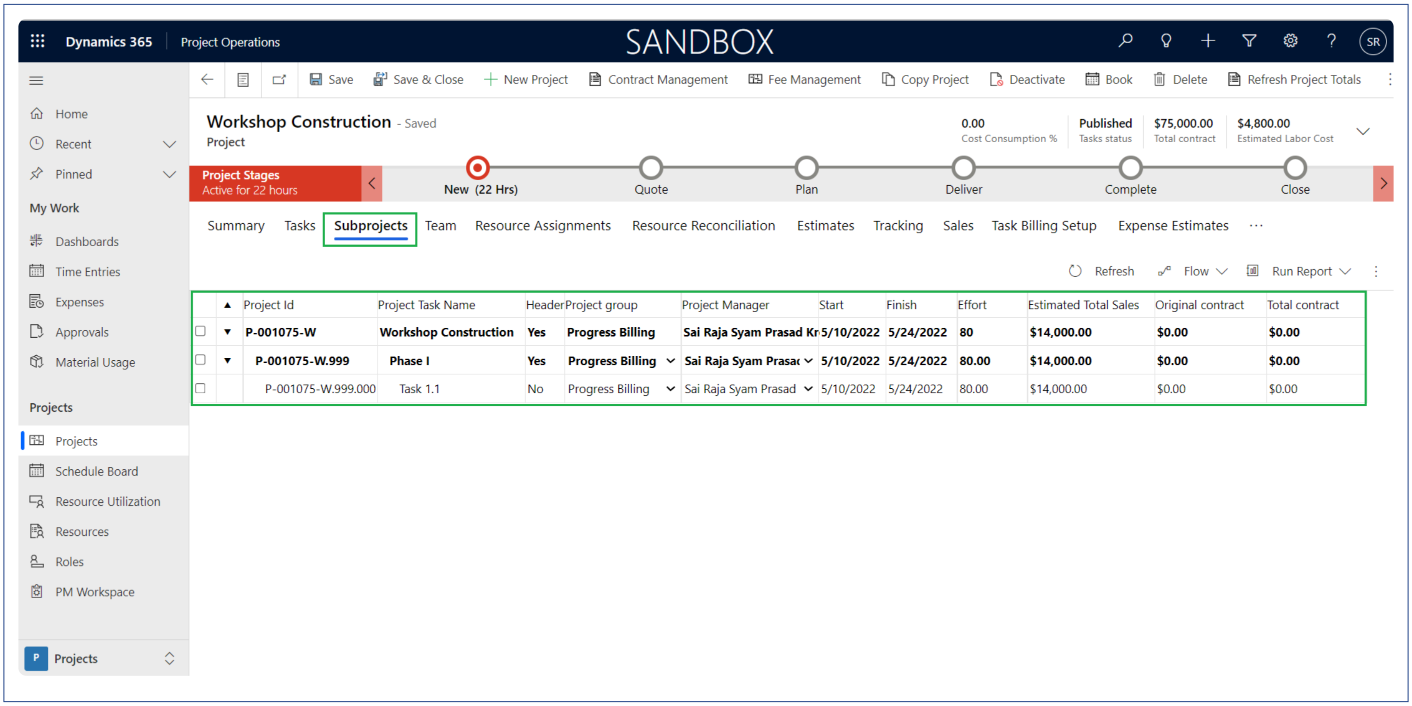
- If Task's field 'Is Subproject' is set as 'Yes', then a subproject will be created in Finance and Operations instead of WBS activity.
  - The subproject will be created using the 'Project group' from task.
  - Project's start and end dates will be initialized from Task fields.
- If Task's field 'Is Subproject' is set to 'No', then a WBS activity/task will be created in Finance and Operations like the standard dual-write integration does. However, the WBS activity/task will be created under the parent project/subproject related within Project Operations WBS.
- When a task is deleted in Project Operations, it should delete the already created WBS activity/task or subproject in Finance and Operations. If the activity or subproject can't be deleted in Finance and Operations, then and error message should stop the user to delete the task in Project Operations.

Note – Dual-write Integration of subproject or WBS activity/task create or update to Finance and Operations depends on the Release or Publish tasks options at project level in Project Operations.

Subprojects tab

As part of this enhancement a new tab called 'Subprojects' added to projects form in Project Operations. The new tab will allow the user to update relevant information about subprojects within the task.

Go to Projects > Project > Subprojects tab



Note – Task within 'Subprojects' will be ordered using the sorting number displayed in the 'Tasks' tab.

Details of the fields available on the Subprojects tab are as follows:

Fields	Description
Project Id	This is non-editable field. This new field will sync the the 'Project ID' from Finance and Operations when the project/subproject gets created.
Project Task Name	This field is non-editable and defaults from existing field 'Name' from Task.
Header	This field is non-editable and value for this defaults from existing field 'Header' from Task.
Project group	This field is editable and value for this field defaults from 'Project group' field from Task.
Project Manager	This field is editable, Defaulted by 'Project Manager' from Project when task gets created. This new field will be utilized to sync the 'Project manager' in Finance and Operations for subprojects.
Start	This field is non-editable and value for this field defaults from existing field 'Start Date' from Task.
Finish	This field is non-editable and value for this field defaults from existing field 'End Date' from Task.
Effort	This field is non-editable and value for this field defaults from existing field 'Effort Hours' from Task.
Estimated	This field is non-editable and value defaults with 'Total Sales Price' for the effort hours. This field

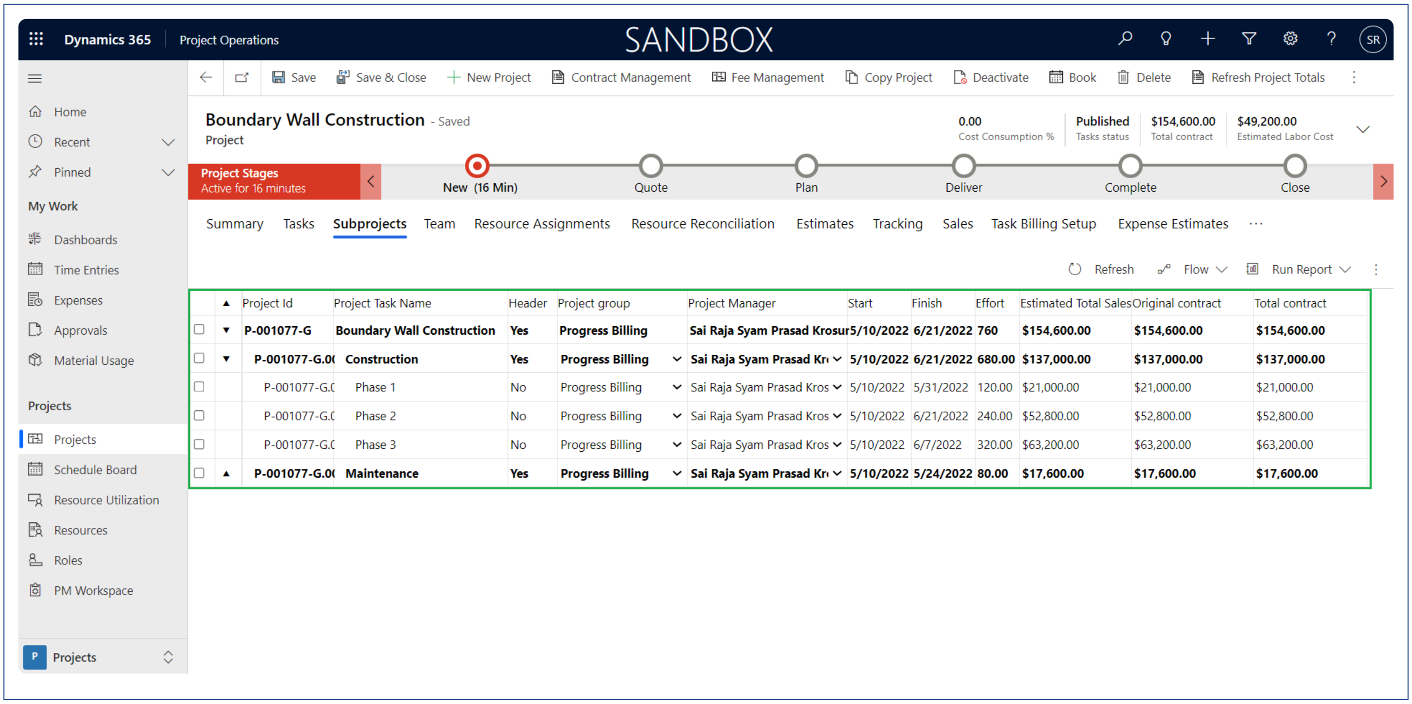
Total Sales	will be sum of the 'Total Sales Price' value grouping by subproject. This calculation should include any task within the specific subproject.
Original contract	This field is editable and user can allocate contract amount against each subproject. Sum of all 'Contract amount' from subprojects can't greater than 'Amount' from Contract line related with the project. An error message should populate 'Total allocated contract amount cannot be bigger than %1' where %1 is contract line amount.
Total contract	This field is non-editable. The system should update this field at subproject level in Project Operations for the below scenarios: When 'Contract value' field is updated in Finance and Operations for an existing agreement line – 'Total contract' will be calculated and updated if needed. When a new agreement line is created in Finance and Operations – 'Total contract' will be calculated and updated if needed. When 'Status' field is updated in Finance and Operations for an existing agreement header. – 'Total contract' will be calculated and updated if needed.

Note – Subproject 'Total contract' value should be equal to the sum of all agreement lines in Finance and Operations related to the subproject 'Project Id' where agreement status is equal to 'Pending' or 'Approved'.

'Tree view' rolling up Subprojects

As part of this enhancement, 'Subprojects' grid will show a tree structure with indented subprojects.

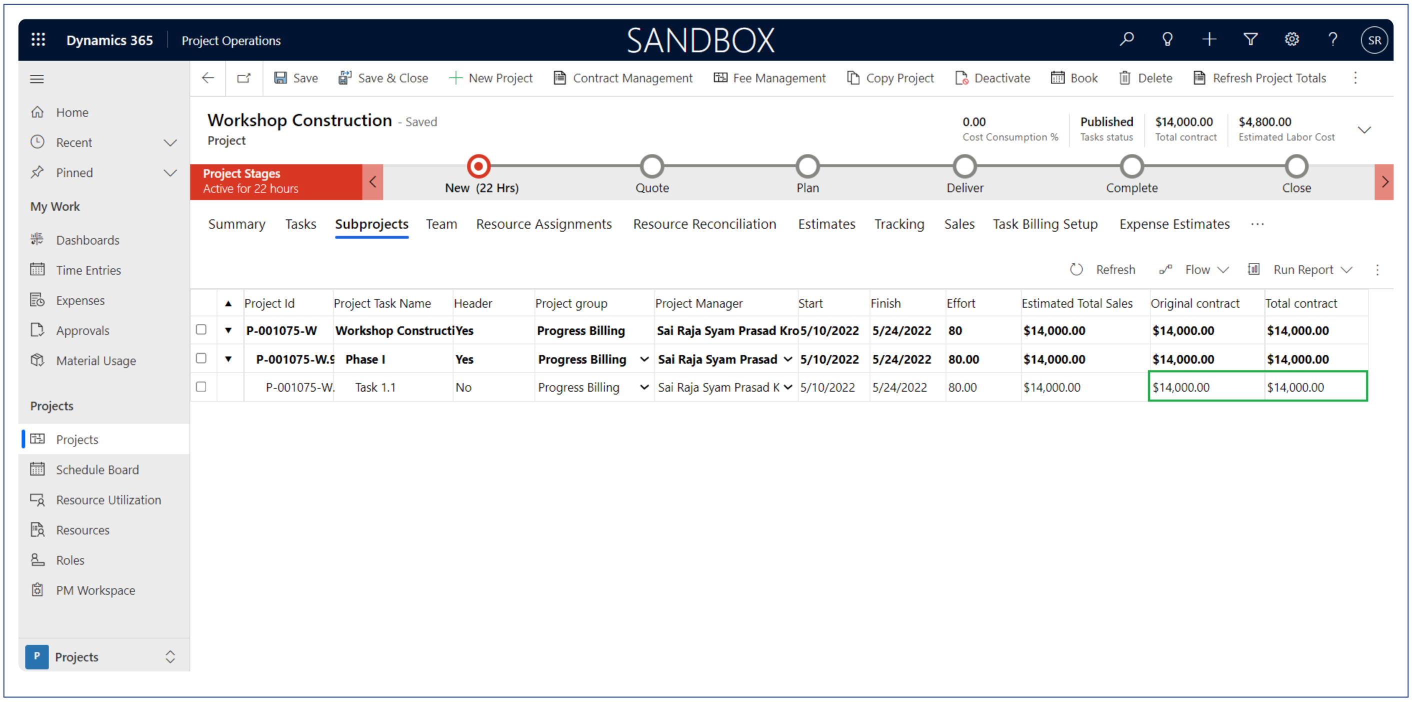
- Subprojects level 2 will be displayed underneath their parent Subprojects level 1 showing as tree structure.
    - Parent subprojects level 1 will be displayed on bold letters
    - 'Project Task Name' will be tabulated for subprojects level 2
    - The following fields will be displayed as level 1 aggregated data from underneath subprojects level 2
        - Effort
        - Estimated Total Sales
        - Original contract
        - Total contract
- In addition, Project totals will be displayed for the following fields.
    - Estimated Total Sales, Original contract and Total contract



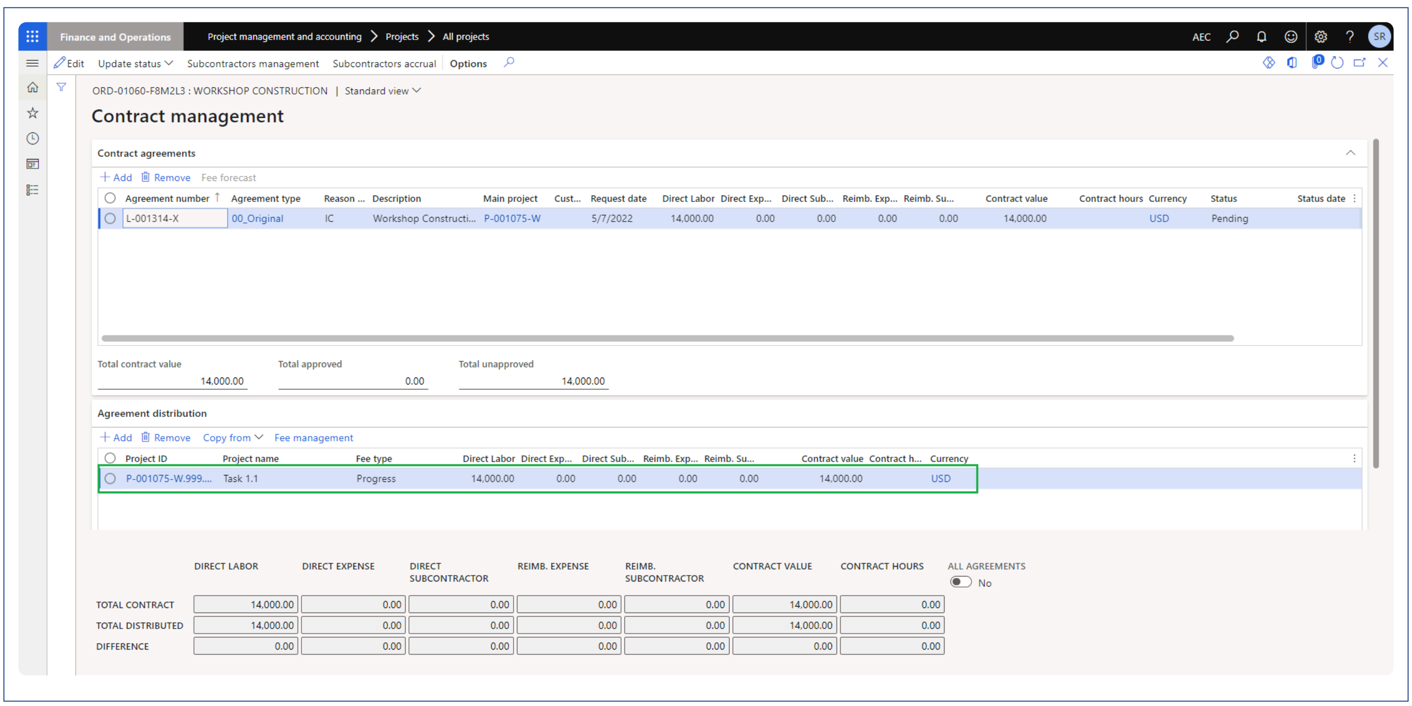
Note – ‘Original contract’ won’t be editable for parent subproject level 1 with children subprojects underneath.

Agreement distribution in Contract management

As part of this enhancement, user can manually update ‘Original contract’ field value across subprojects at Subprojects tab in Project Operations, this will sync them as agreement lines in Finance and Operations. A new contract agreement line will be created in Finance and Operations for each subproject under the contract agreement created from the project contract line. Agreement ‘Contract value’ field in Finance and Operations will be populated with ‘Original contract’ field value in Project Operations.



Go to Project management and accounting > Projects > All projects > action pane Contract management > Contract management button

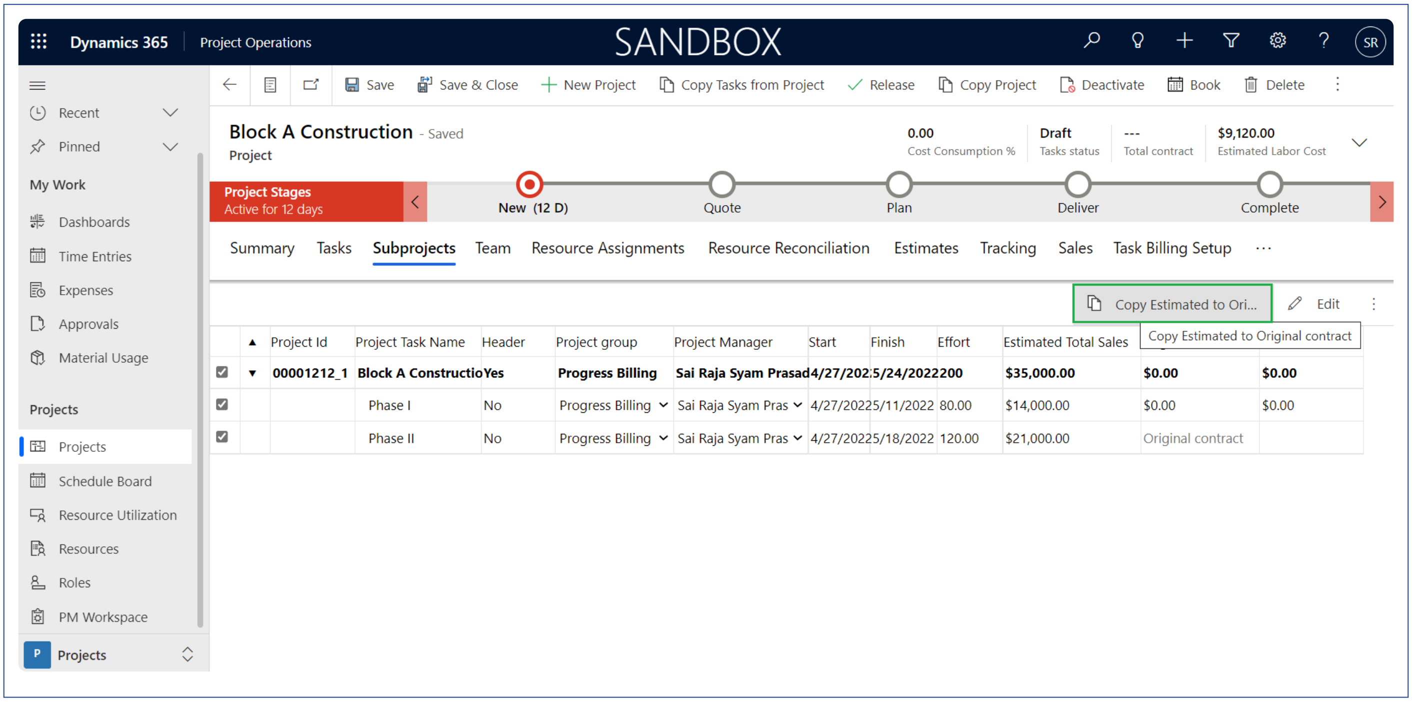


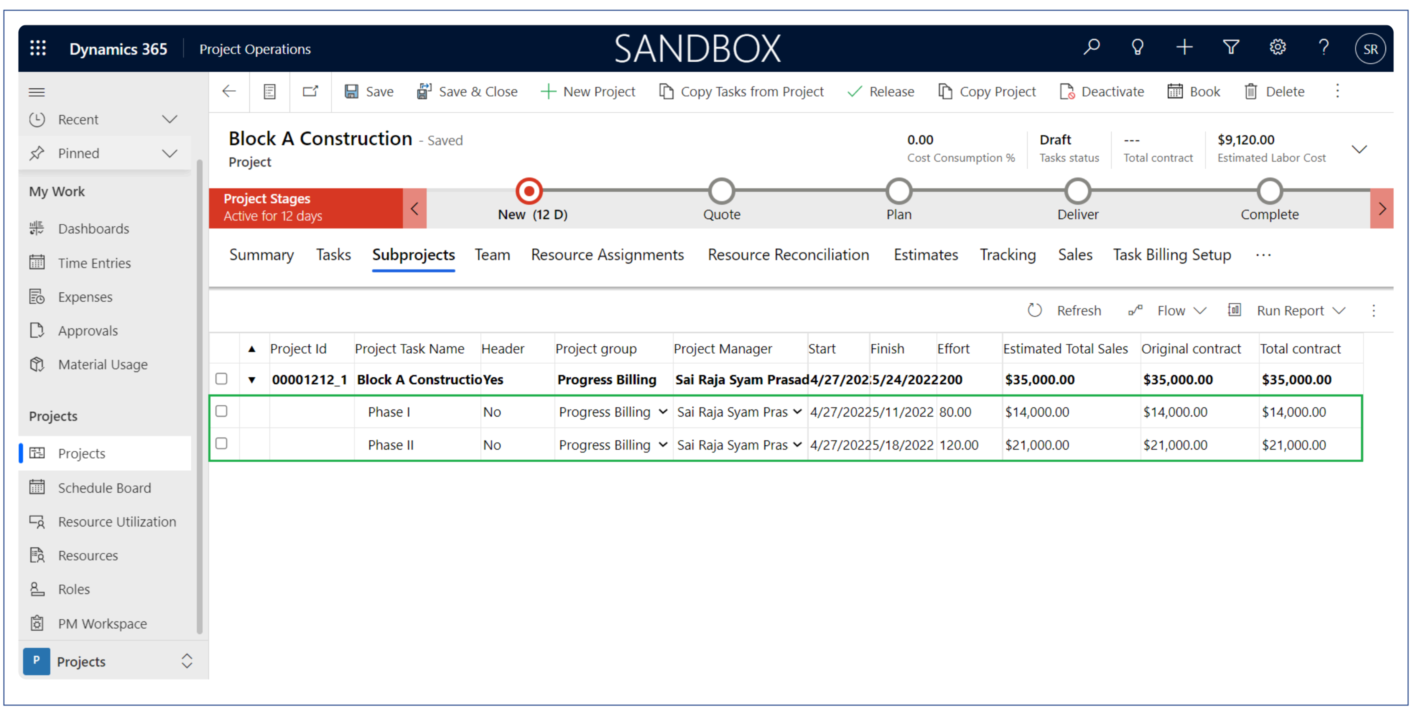
Note – 'Contract value' field will be editable only if the contract agreement is not yet approved in Finance and Operations.

6.6.1. Copy Estimated to Original contract

A new “Copy Estimated to Original Contract” button on the Subprojects tab automates the allocation of the “Estimated Total Sales” value to the “Original Contract” field for each subproject. This action triggers the creation of agreement distributions upon project release. Users can either select the header project and apply the copy function to all subprojects simultaneously, or they can selectively apply it to individual subprojects as needed..

Go to Projects > Projects > Subprojects tab > Copy Estimated to Original contract button





Note – This button will be available only if the project is not released yet.

6.7. Enhanced Tracking View

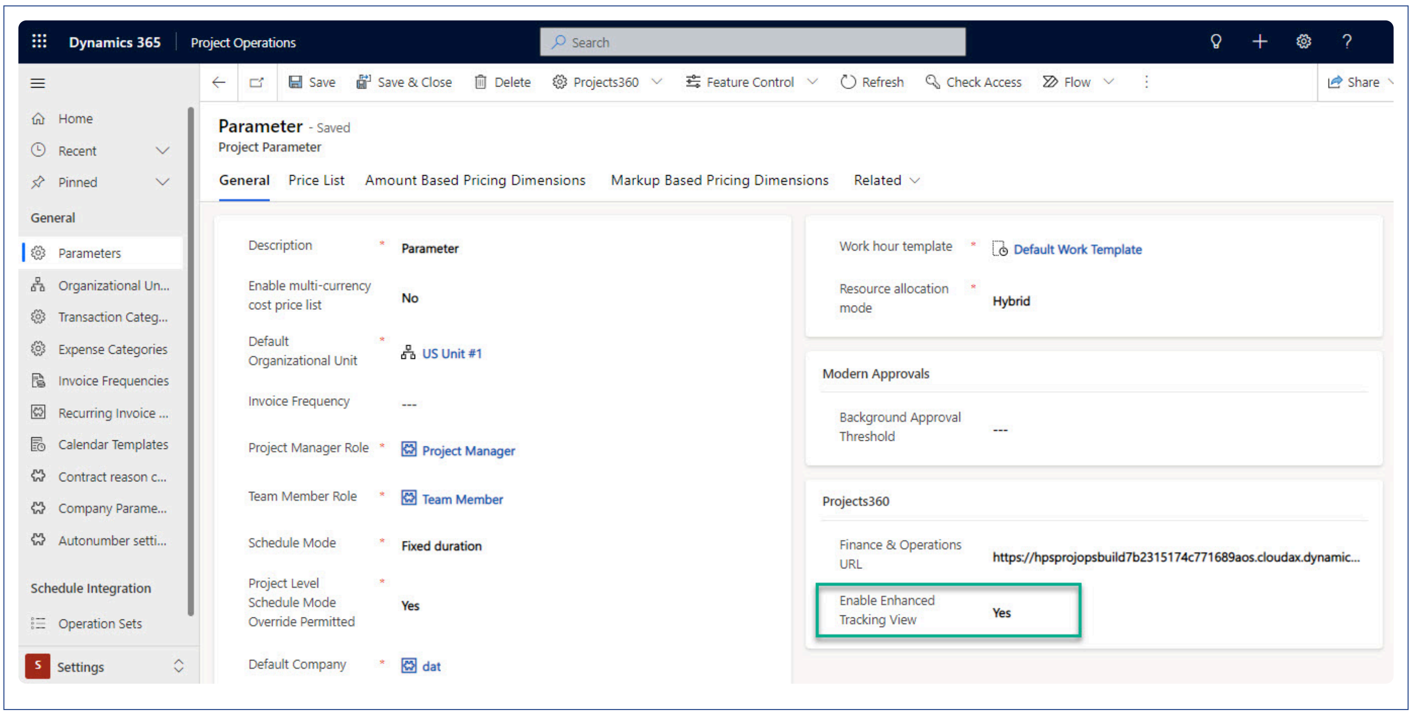
This feature provides two enhanced tracking views: “Effort tracking” and “Cost tracking”.

- EAC and ETC information is calculated for both views.
- Remaining Effort/Cost is synced to F&O as ETC forecast.

Configuration

This feature can be enabled from *‘Parameters > General > Projects360 parameters > Enable Enhanced Tracking View’*.

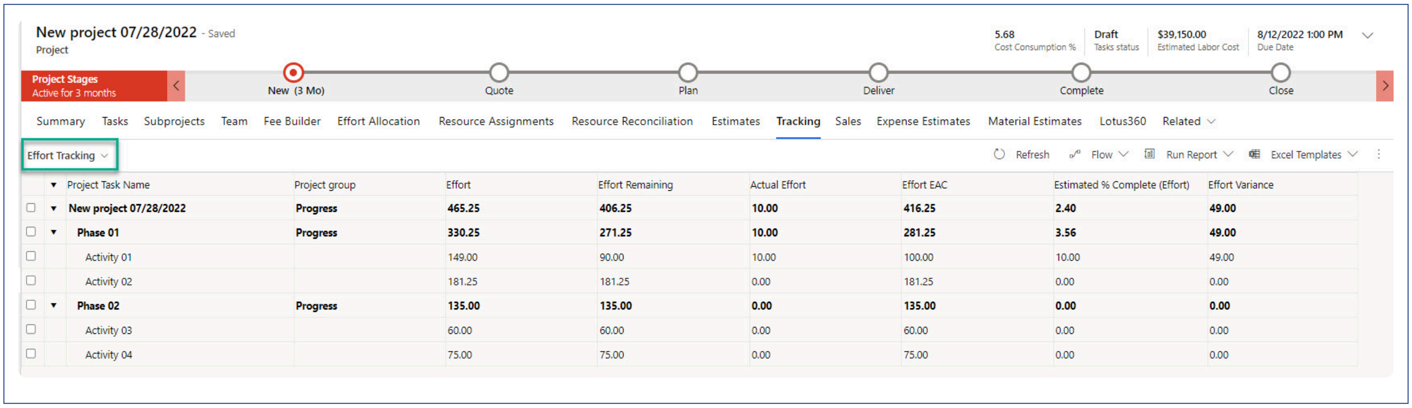
- This enhanced Tracking view will replace the MS standard one when activated.



Effort Tracking

This view gives project managers a clear picture of EAC/ETC information for all the tasks of the project based on pure effort.

- “Effort tracking view” displays key information such as planned, actual and remaining effort as well as EAC and % Complete.
- “Effort remaining” and “% Complete” can be manually updated by the user anytime.



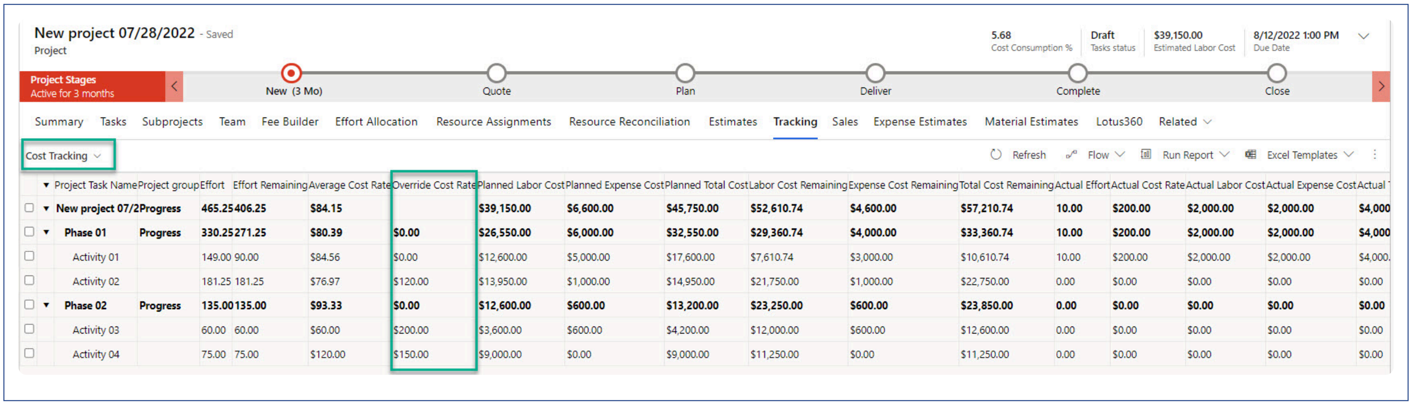
- View fields are listed below.

Fields	Description
Project Task Name	Displays name from project or Task
Project group	Project group from project or task
Effort	Effort from task. This field is rolled up by parent task
Effort Remaining	Effort remaining from task. This field is rolled up by parent task. Editable at lowest level only
Actual Effort	Number of hours posted by task. This field is rolled up by parent task
Effort EAC	Effort EAC = Effort remaining + Actual effort Effort Estimate at Complete from task. This field is rolled up by parent task
Estimated % Complete (Effort)	% Complete = Actual Effort/ Effort EAC This field is editable allowing the user to enter a new value if needed. Effort remaining will be calculated when a new value is entered
Effort Variance	Effort Variance = Effort – Effort EAC This field is rolled up by parent task

Cost Tracking

This view gives project managers a bigger understanding of the EAC/ETC project situation based on cost for both Labor and Expenses.

- “Cost tracking view” displays key information like planed, actual and remaining cost for both labor and expense in only one view.
- “Override cost rate” provides a way of manually overriding the cost for estimation purposes.



- View fields are listed below.

Fields	Description
Project Task Name	Displays name from project or Task
Project group	Project group from project or task
Effort	Effort from task. This field is rolled up by parent task
Effort Remaining	Effort remaining from task. This field is rolled up by parent task. Editable at lowest level only
Average Cost Rate	It is the average price from all resources assigned to the Task
Override Cost Rate	This field allows to override the average cost If a value is entered/updated then “Cost Remaining”, “Cost EAC” and “Estimated % Complete” will be updated as well
Planned Labor Cost	Planned Labor Cost = Effort * Average Cost Rate This field is rolled up by parent task
Planned Expense Cost	Sum of all “Total Cost Price” from Expense Estimates related to the specific Task This field is rolled up by parent task
Planned Total Cost	Planned Total Cost = Planned Labor Cost + Planned Expense Cost This field is rolled up by parent task
Labor Cost Remaining	If there is “Override Cost Rate”: Cost Rem = Effort Remaining * Override Cost Rate If there is no “Override Cost Rate”: Cost Rem = Effort Remaining * Average Cost Rate This field is rolled up by parent task
Expense Cost Remaining	Expense Cost Remaining = Planned Expense Cost – Actual Expense Cost This field is rolled up by parent task
Total Cost Remaining	Total Cost Remaining = Expense Cost Remaining + Labor Cost Remaining This field is rolled up by parent task

Actual Effort	Number of hours posted by task. This field is rolled up by parent task
Actual Cost Rate	Actual Cost Rate = Actual Labor Cost / Actual effort
Actual Labor Cost	Actual cost rate from posted transactions
Actual Expense Cost	Sum of the “Amount” from Actual transactions where “Transaction type” is “Expense” and “Transaction Class” is “Cost” related to the specific Task
Actual Total Cost	Total Cost = Actual Labor Cost + Actual Expense Cost This field is rolled up by parent task
Cost EAC	Effort EAC = Total Cost Remaining + Actual cost
Estimated % Complete (Cost)	% Complete = Actual Total Cost/Cost EAC
Cost Variance	Cost Variance = Planned Total Cost – Cost EAC This field is rolled up by parent task

6.8. Effort Allocation

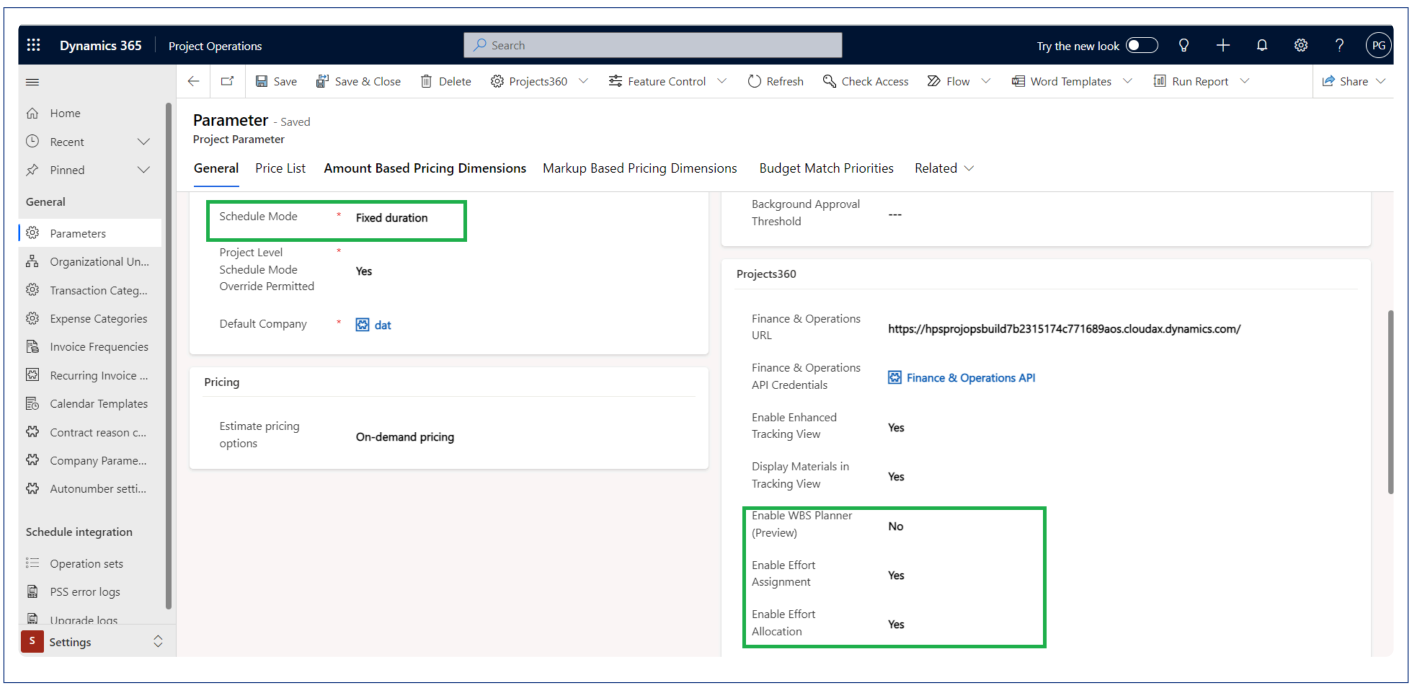
The “Effort Allocation” feature streamlines the assignment of hours to specific resources and tasks across predefined periods, such as days, weeks, and months. It seamlessly integrates with “Projects for the Web,” ensuring that any updates or modifications to role and resource effort within the Effort Allocation spreadsheet are immediately reflected online.

- Lotus360 solution + MS Editable Contours API are utilized to build this feature.
- Lotus360 provides a familiar UI for users similar to MS Excel.

Configuration

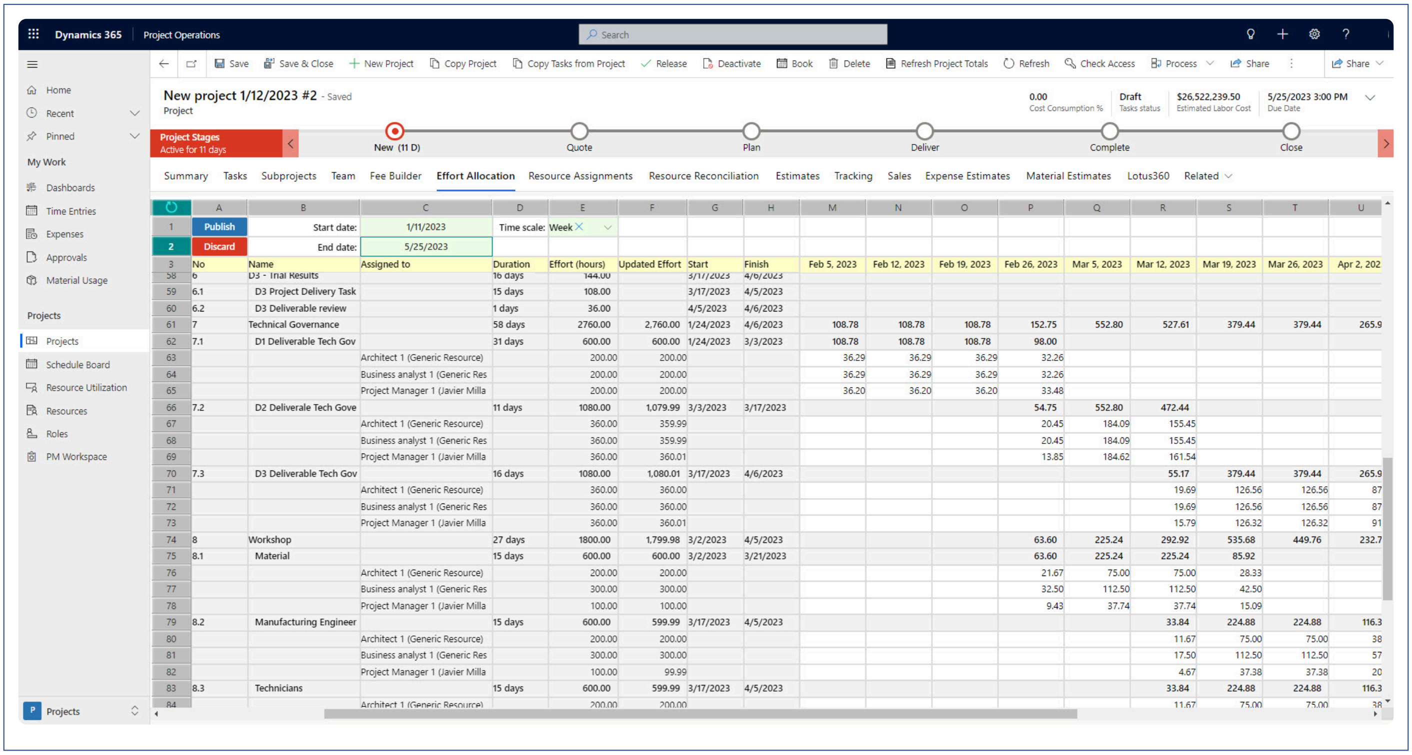
This feature can be enabled from *‘Parameters > General > Projects360 parameters > Enable Effort Allocation’*.

Note – As per standard practice, the Effort Allocation feature, tightly coupled with ‘Projects for the Web,’ should have the WBS planner feature disabled.



Effort Allocation spreadsheet

This section details out the “Effort Allocation” spreadsheet functionality and its fields.



A ‘Draft’ version of the spreadsheet will be generated while the user starts updating values in its cells. After all the changes are made, the user will be able to either ‘Publish’ those changes to Projects for the Web or ‘Discard’ those changes reloading the previous already published version.

The following are the spreadsheet’s available buttons and settings.

- **Publish:** This button will trigger the publishing process through the MS Editable Contours API to update Projects for the Web.
- **Discard:** This button will remove all the changes made in the ‘Draft” version updating all the values to the previous already published version.
- **Start date:** This setting allows to define the ‘Start date’ used to calculate the periods displayed on this spreadsheet. This date cannot be earlier to the projected start date.
- **End date:** This setting allows to define the ‘End date’ used to calculate the periods displayed on this spreadsheet. This date cannot be later to the projected end date.
- **Time scale:** This setting allows to define the time scale that the user wants to use to enter the effort. We can select between values such as Day, Week, Month and Year. The column-period will be visualized based on this setting. *Note: Time scale can be only modified before a new Draft is created.*

The spreadsheet’s fields and totals are described below.

Fields	Description
No	This field is non-editable and displays the Task sorting/position number.
Name	This field is non-editable and displays the Task name. This field is updated from the ‘Task’ tab.
Assigned	This field is non-editable and displays the Role and Resource’s name assigned to the task.

to	
Duration	This field is non-editable and displays the task Duration in days. This field is updated from the ‘Task’ tab.
Effort (hours)	This field is non-editable and displays the total effort already published for that specific task.
Updated Effort	This field is non-editable and displays the total effort for that specific task but non-published yet.
Start	This field is non-editable and displays the task Start date. This field is updated from the ‘Task’ tab.
Finish	This field is non-editable and displays the task Finish date. This field is updated from the ‘Task’ tab.
Periods	A column for each period will be displayed based on the selected ‘Time scale’. The user will be able to enter the effort for each period.

6.9. Enhanced Effort Allocation

Effort Allocation is enhanced to use our new “WBS planner” feature leveraging the new xl360 Canvas platform.

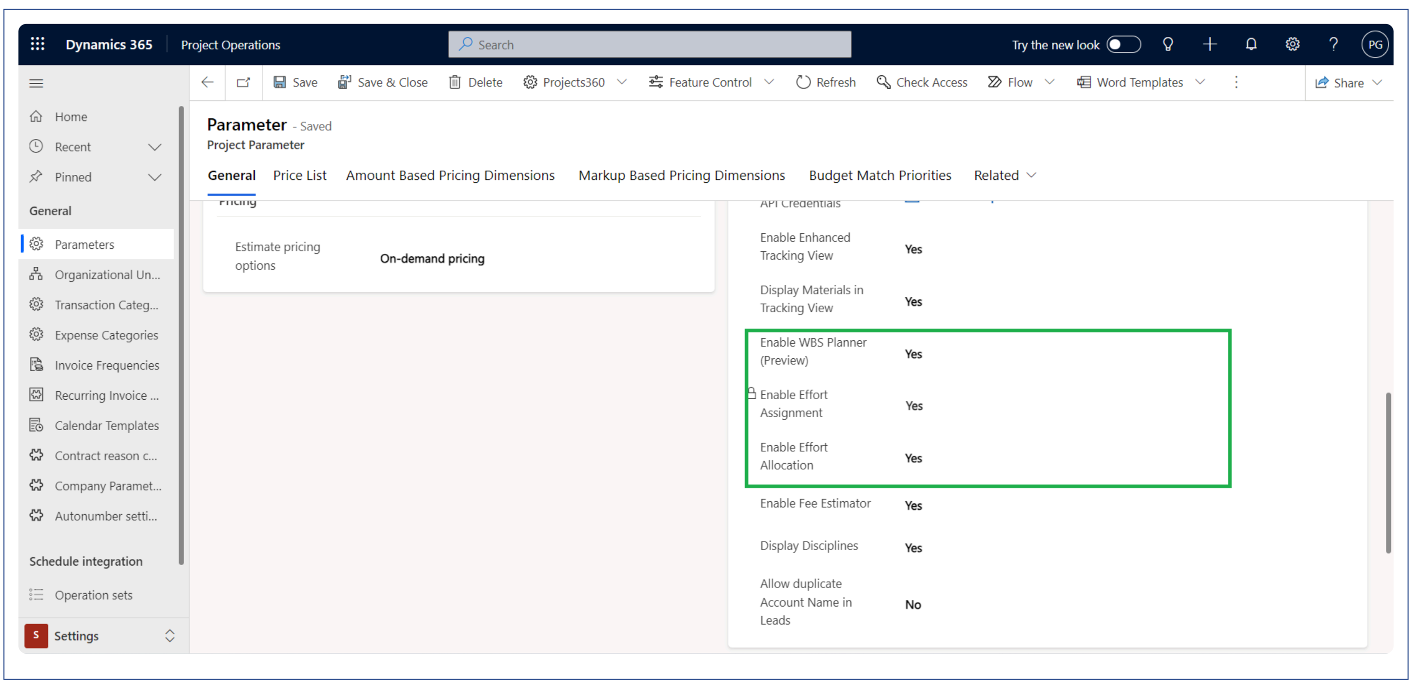
- Effort Allocation displays the resources and effort assigned to the WBS tasks, allowing to visualise and maintain the information in different time units such as day, week, month, or year.
  This view also provides the following capabilities:
- Assign new team members to tasks.
- Maintain the project structure adding new tasks, subtasks.

Configuration

The Enhanced “Effort Allocation” will be activated automatically when “WBS Planner (Preview)” feature is activated. The enhanced experience will allow users to maintain Tasks, Team members and Effort assignments directly from the same “Effort allocation” screen.

Go to Settings > General > Parameters > Projects360 > Enable WBS Planner
Go to Settings > General > Parameters > Projects360 > Enable Effort Allocation

Details of the fields required for Enhanced Effort Allocation functionality are as follows:

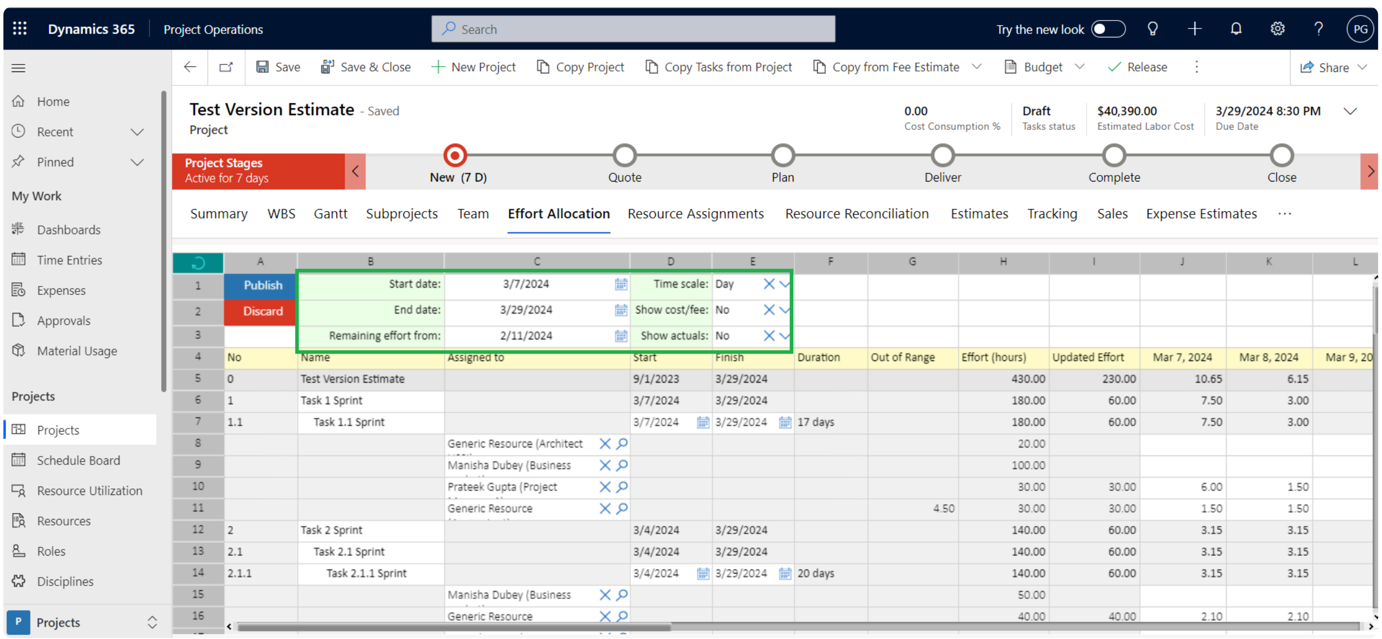


Fields	Description
Enable WBS Planner	Set as “Yes” to activate the new projects360 “WBS Planner” spreadsheet within the Project form.

Enable Effort Assignment	Set as “Yes” to activate the new projects360 “Effort Assignment” spreadsheet within the Project form.
Enable Effort Allocation	Set as “Yes” to activate the projects360 “Effort Allocation” spreadsheet within the Project form.

Enhanced Effort Allocation

The Effort Allocation Spreadsheet has basic fields like start and end dates for each task, which match the ones in the WBS. It also lets you choose how often you want to track time (daily, weekly, etc.). Based on this choice and the costs for each person working on the tasks, it estimates how much everything will cost. Users can then compare this estimate to the actual costs by turning on the “Show Actuals” feature.
To better understand, let’s take a closer look at these fields.



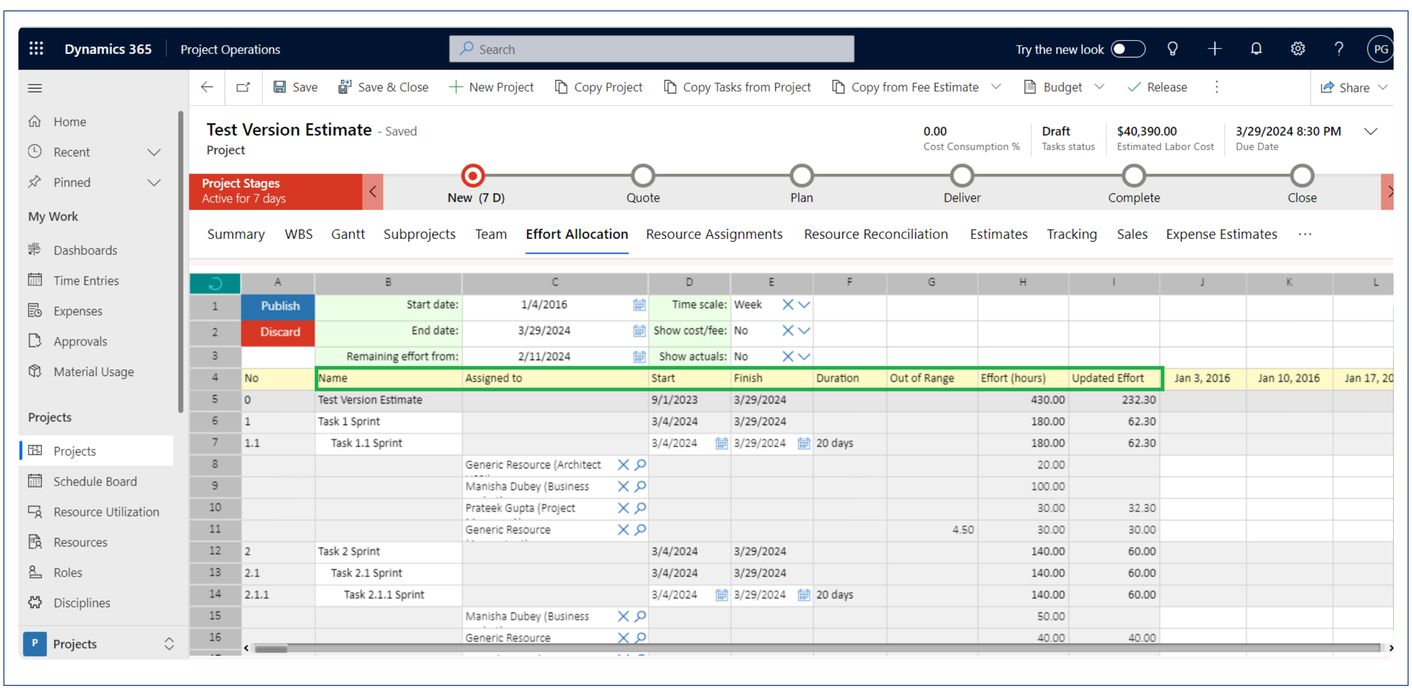
Fields	Description
Start Date	When you set a start date for a task in the WBS, it automatically shows up on the Effort Allocation spreadsheet. If you change the start date later, the Effort Allocation automatically updates to reflect the new dates.
End Date	The end date for each task in the WBS automatically sets the end date for that task in the Effort Allocation spreadsheet. You can change the end date in the spreadsheet, and this will directly affect how much time each person is assigned to the task.
Time Scale	The “Time Scale” lets users see different views of project data like effort, cost, fees, and actuals for people working on tasks. It shows this information based on what time frame they’re interested in, like daily, weekly, monthly, or yearly. Remember, this view depends on the start and end dates entered in the Effort Allocation spreadsheet, so changing those dates will update the information you see.

Show Cost/ Fee	"Show Cost/Fee" makes it easy to see estimated costs and fees for each task. • For each person working on a task (Roles/Resources) users will see their estimated cost and fees. • Helps to analyse cost and fees are based on the work planned in the WBS. • Helps to analyse cost and fees changes after you adjust the amount of work people do in the Effort Allocation spreadsheet.
Show Actuals	"Show Actuals" gives you a clear view of : • Time resources/roles have actually spent on tasks(Actual Effort). • Time resources/roles are left to finish tasks(Remaining Effort). • Time resources/roles were originally expected to spend(EAC Effort).

> Note – Changes to hours for individual roles in the WBS automatically update the Effort Allocation spreadsheet. However, changing efforts directly in the Effort Allocation spreadsheet won't update the WBS until you click "Publish." So remember, updates flow one way automatically, but the other way needs a final confirmation.
> This means you can budget and estimate how much resources each task needs, all within the Effort Allocation spreadsheet and reflected in the WBS whenever you save your changes.

To understand how effort allocation, cost, and fees for Roles/Resources working on tasks can be affected, let's look at a few scenario.

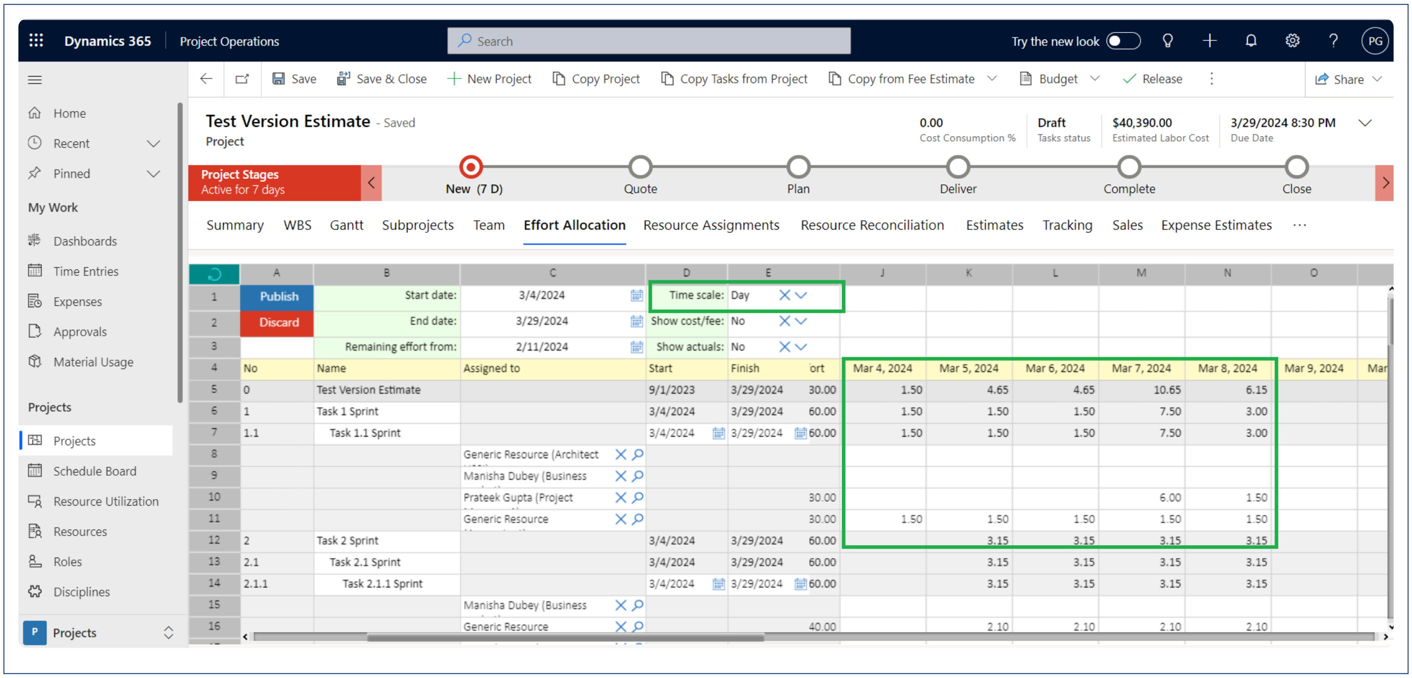
Scenario 1: When Time Scale is set as "Week" and Show Cost/Fee is set as "No" and Show Actuals is also set as "No".
Users can see this information for the whole project (header level) and for each person working on it (individual level). Since it is set to weekly, it shows hours worked week by week. This report updates automatically if you change the time frame to daily, monthly, or yearly. Let's take a closer look at each field.



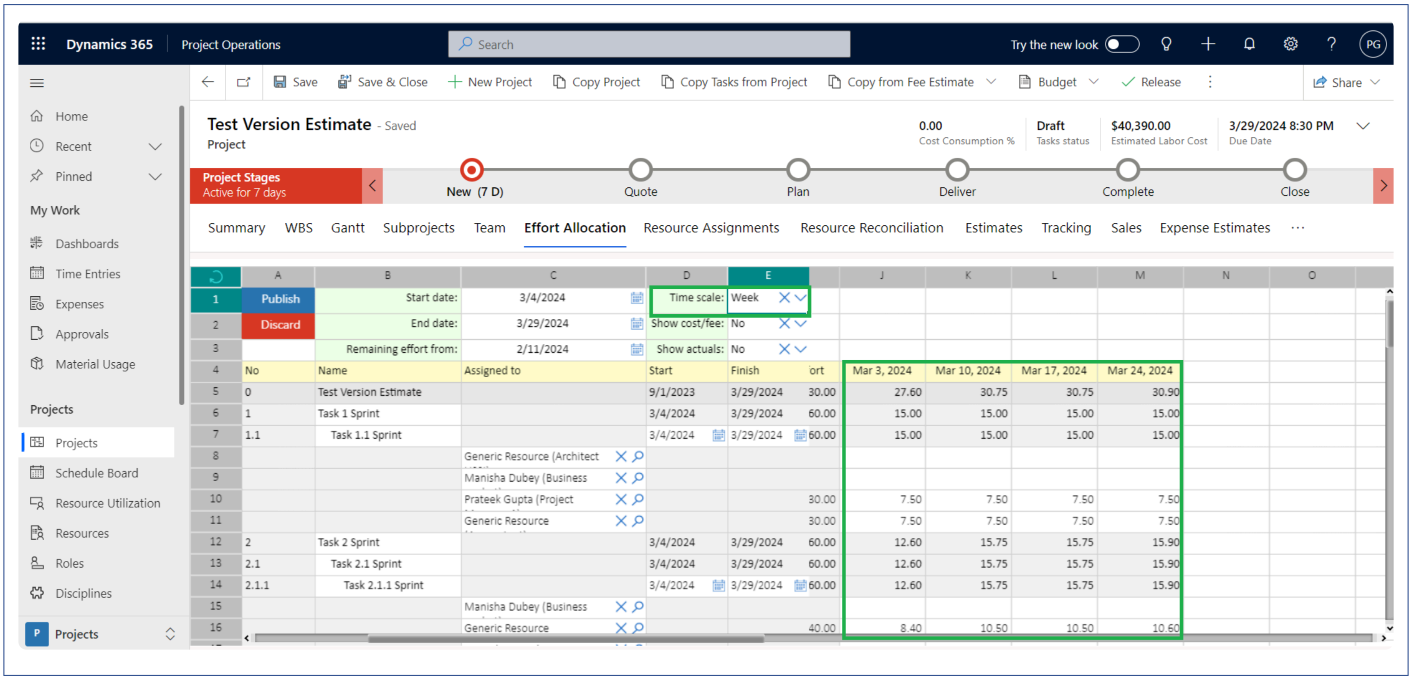
Fields	Description
Name	The “Name” column shows both the project name and any tasks inside that project. This information is shown for both the main project and all its subtasks.
Assigned to	The “Assigned to” field shows who’s working on each task, including their names and assigned roles. This helps users easily see everyone involvement in each task. If users are not sure whom to assign to a task, a generic resource will be automatically assigned and shown in the “Assigned to” field. Right-clicking “Assigned to” allows for efficient resource allocation. You can assign existing Bookable resource or create new generic resources, facilitating resource booking. • **Assign an existing team member** : This replaces the generic placeholder with their name and role, reflecting their availability in booking and scheduling. • **Add a new team member** : This creates a new person with a specific role, making them available for scheduling and costing.
Start	When creating a project, the start date is automatically set to the earliest start date of all its subtasks. You can still see the start date of each individual task. You can even change them one by one, and these changes will update in the WBS once you save them.
Finish	When creating a project, the finish date is automatically set to the latest date of all its subtasks. You can still see the finish date for each individual task. You can even change them one by one, and these changes will update in the WBS once you save them.
Duration	Task duration shows how many workdays it takes in total, from start to finish. But it only counts actual workdays for tasks where someone is assigned.
Out of Range	The “Out of Range” field shows the total efforts of resources that do not fall between the start date and end date of the task.
Effort	When tasks are automatically created from the WBS, their effort levels generates from the WBS itself. You can’t directly change these values in the Effort Allocation spreadsheet. However, you can adjust the effort for each resource by choosing a specific timeframe (daily, weekly, etc.). These adjustments will increase or decrease the overall effort and update both the resource level and task level in the Effort Allocation spreadsheet and WBS once you publish the changes.
Updated Effort	When you first assign resources to tasks from the WBS, the “Effort” and “Updated Effort” fields show the same amount of time. But the “Effort Allocation” tool lets you adjust the time each resource spends on a task (increase or decrease it). These changes automatically update the “Updated Effort” field for both the resource and the overall task.

When you open the Effort Allocation spreadsheet, you can choose how you want to see time, like by day, week, or year. This lets you see the Resource allocation and assignment details for that specific timeframe.

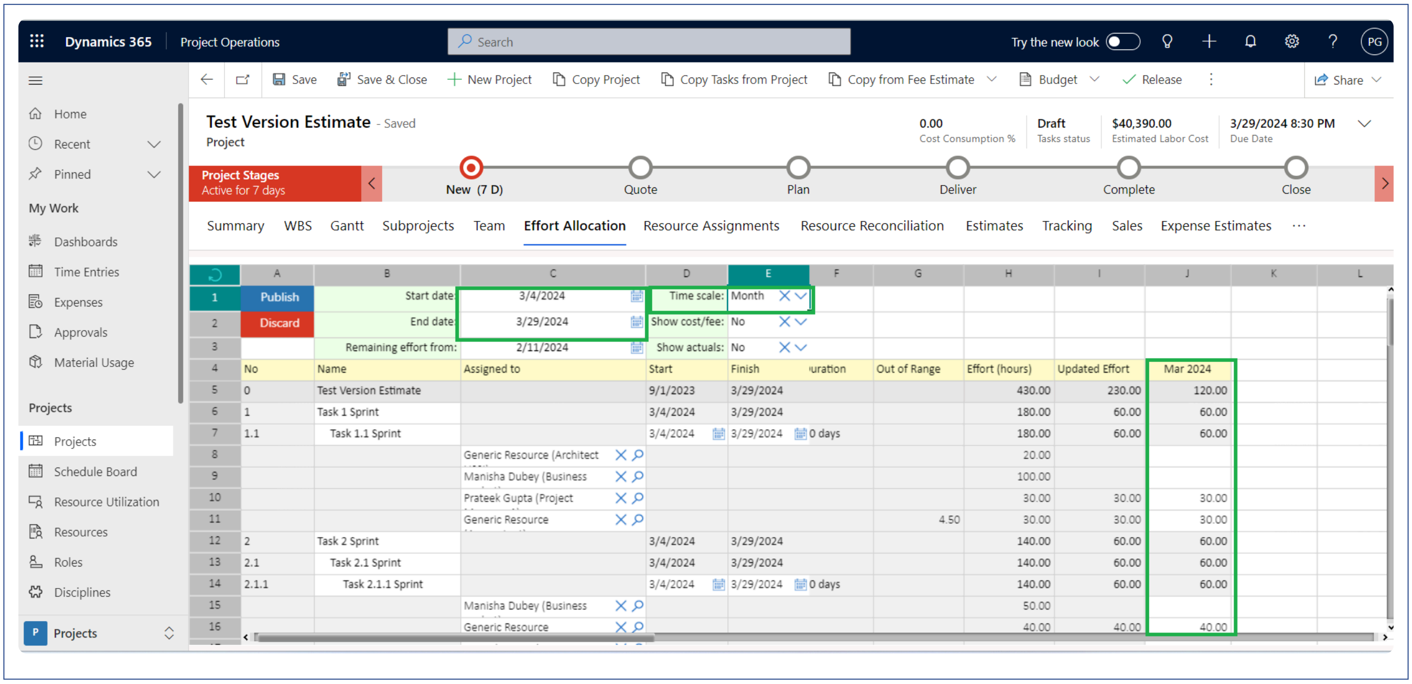
- When you choose “Day” for the time scale, you will see all the dates from the start date at the top to the end date at the bottom in the Effort Allocation spreadsheet. But remember, it only shows effort for workdays. For non-working days, you won’t see any data.



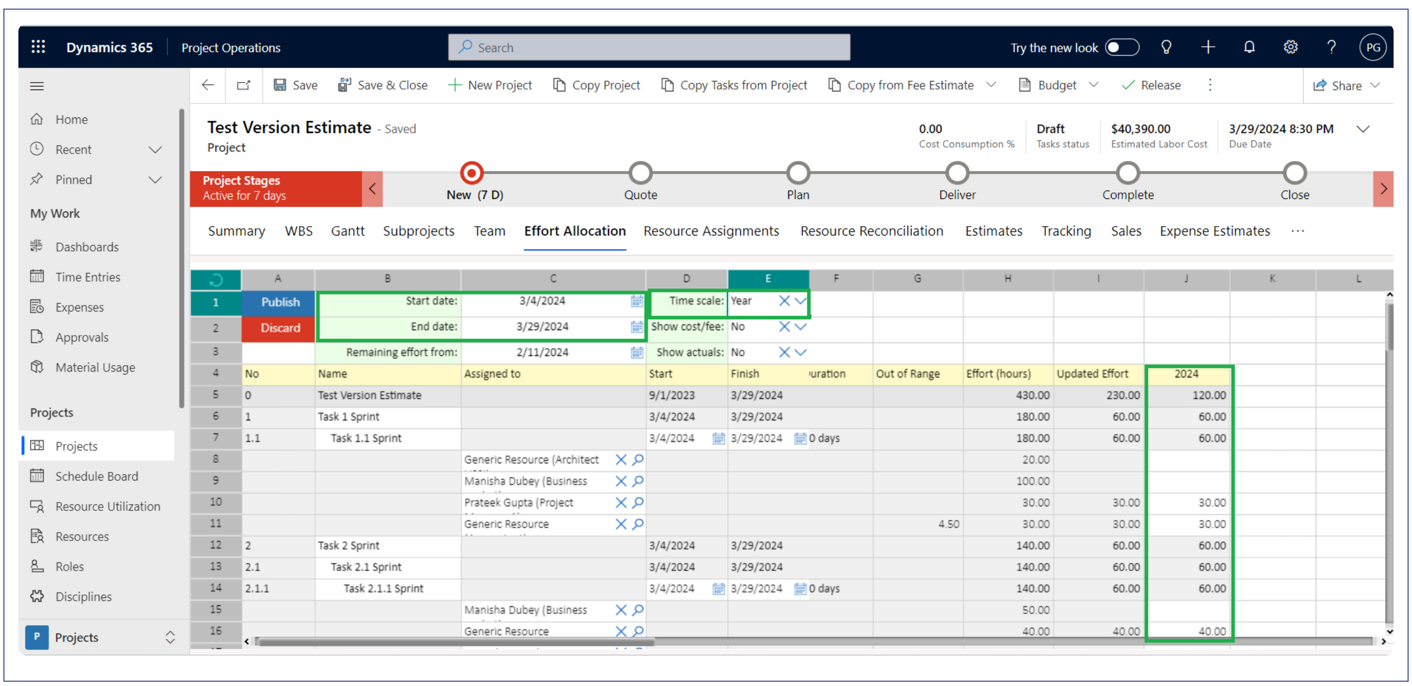
- When you choose “Weekly” in the Time scale, you’ll see the weekly schedule based on the spreadsheet’s start and end dates. The total effort for each week is shown at the resource level, task level, and summed up for the entire project. You can only adjust the effort at the resource level, and these changes will update both the “Effort” and “Updated Effort” fields for both resources and tasks.



- When you choose “Monthly” as the time scale, the system shows the month for each task’s start and end date. It then groups effort by month for resources, tasks, and the whole project. You can only adjust effort for resources, and those changes affect both the original “Effort” and the updated “Updated Effort” fields at both the resource and task levels.

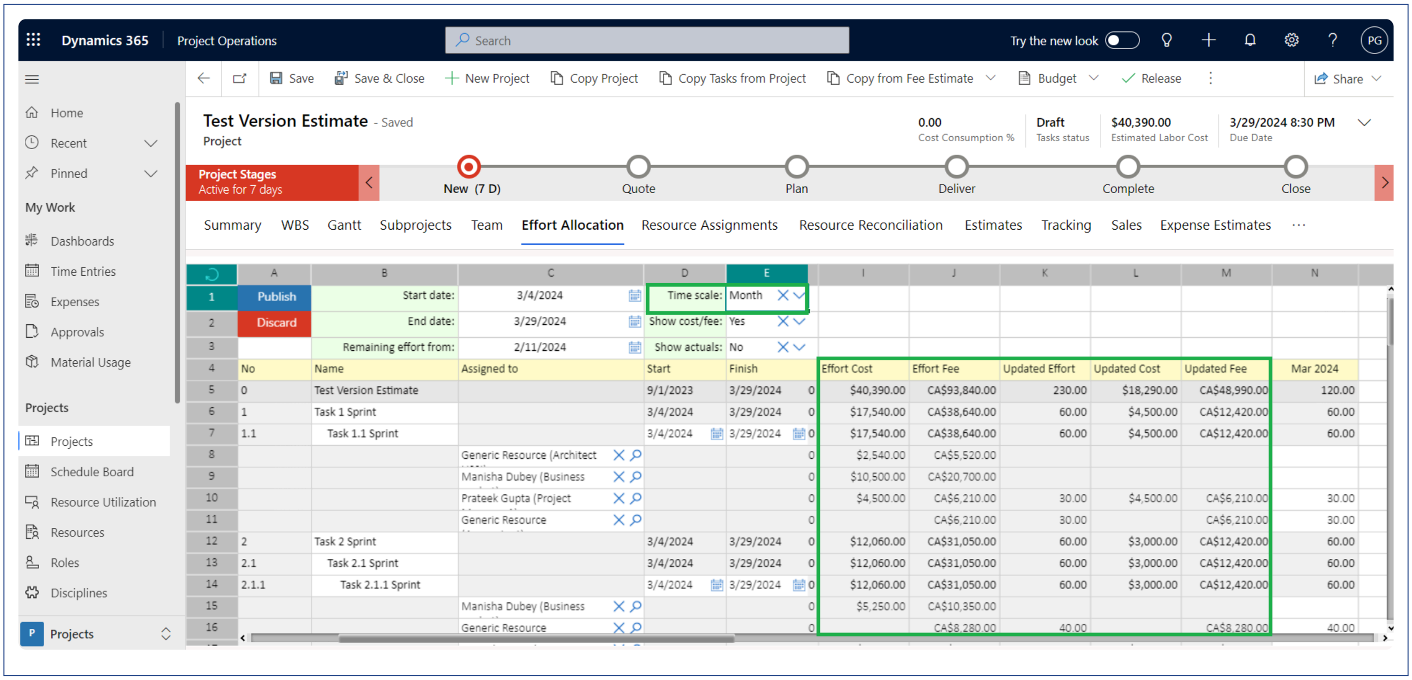


- When you choose "Yearly" as the time scale, you'll see which year each task start and end date falls in. This way, you can easily see the total effort for each year, both for individual resources and tasks, as well as the overall project total. You can only adjust the effort for individual resources within this view, and the changes will affect both the "Effort" and "Updated Effort" fields for both the resource and the task.



Scenario 2: When Time Scale is set as **"Month"** and **Show Cost/Fee** is set as "Yes" and **Show Actuals** is set as "No".

If you turn on "Show Cost/Fee" in the Effort Allocation spreadsheet, you'll see all the information from before (like in Scenario 1) plus some new fields. These new ones track both cost and fees, like “Effort Cost” and “Updated Effort Cost”. Let’s dive into one of these new fields:



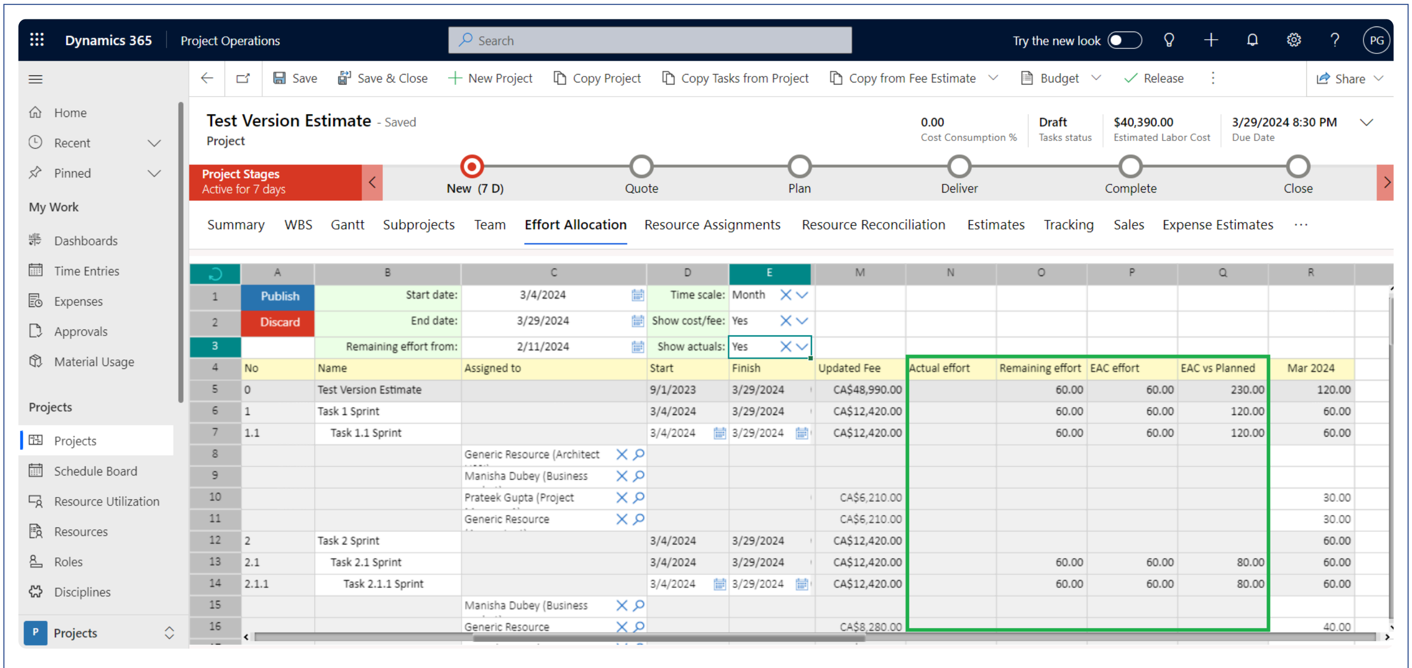
Fields	Description
Effort Cost	“Effort Cost” shows how much it costs to have each person work on a task. The total cost adds up for each task and is shown at the top. It’s calculated by formula **Effort Cost : Effort(Hours) * Cost price of Role/Resource**. We set these rates in the “Cost Price” list under Project Parameter settings.
Updated Effort Cost	The “Updated Effort Cost” shows how much it costs to have people working on each task. This cost is calculated by formula **Updated Effort Cost : Updated Effort * Cost Price of the Resource/Role**. You can change the Updated Effort for each person to adjust the overall cost. All these costs are added up and shown at the top of each task.
Effort Fee	The Effort Fee shows how much each assigned resource will cost based on their effort (time spent) and hourly rate. The total cost for each task is shown at the top. Here’s how it works: • **Effort Fee : Effort (hours) * Resource Hourly Rate** • Effort: The total time each resource spends on a task. • Resource Hourly Rate: The cost per hour for each resource, which you can set in the project parameter settings.
Updated Effort Fee	The “Updated Effort Fee” shows the total cost for each assigned resource on a task. This cost of **Updated Effort Fee : Resource’s updated effort (how much time they spend on the task) * hourly rate (set in the cost price list)**. It also gets added up for all resources working on the same task, giving you a total “Updated Effort Fee” for the whole task.

Note – Once you make changes in the “Effort Allocation” spreadsheet and publish it, the number of hours each person spends on a task (Efforts) will eventually match the updated hours. This means the

	cost and fee for each person's effort will also be updated. Basically, everything gets recalculated in the WBS to reflect the new effort levels, including hours, sales, and costs for each resource assigned to tasks.

Scenario 3 : When Time Scale is set as "Yearly" and Show Cost/Fee is set as "Yes" and Show Actuals is set as "Yes".

Turning on "Show Actuals" in the Effort Allocation spreadsheet shows even more information! You'll see everything from Scenario 1 and 2, plus additional fields like :



Fields	Description
Actual Effort	The "Actual Effort" field shows the total time people actually spent on each task. This gets added up to show the total project time at the top of the spreadsheet. Once Actual efforts are updated, it can't be edited again.
Remaining Effort	The "Remaining Effort" shows how much work is left on each task. It's calculated by adding up the estimated time for all assigned resources and displaying it both at the individual task level and as a combined total for the entire project at the top of the spreadsheet.
EAC Effort	"EAC Effort" in project management refers to the Estimate at Completion (EAC) of effort required to complete a project.EAC effort helps users in assessing project performance, making adjustments to resource allocation, and ensuring that the project stays on track to meet its goal.
EAC vs Planned	It is the total planned value for the project, determined at the beginning of the project and based on the project work.

6.10. ETC/EAC Management

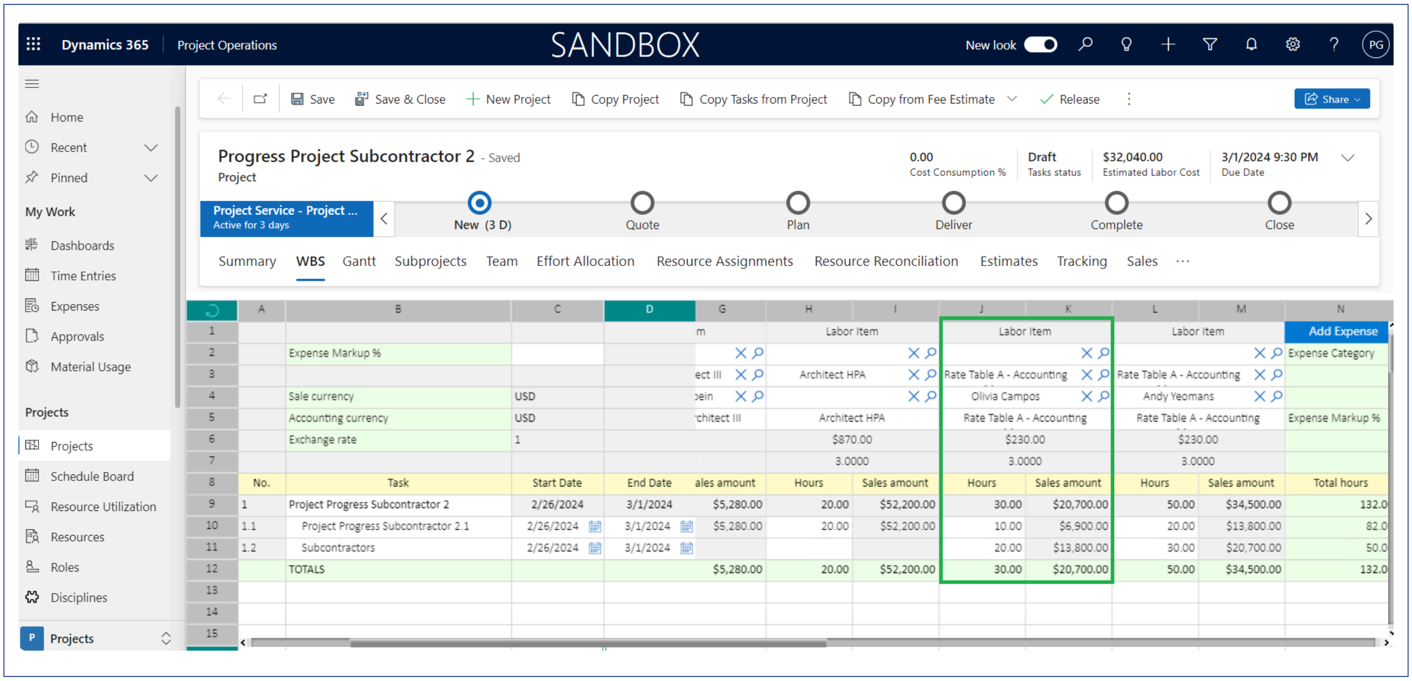
6.11. Direct Booking

This new feature provides the ability to generate booking directly from the “Team members” tab in the “Project” form.

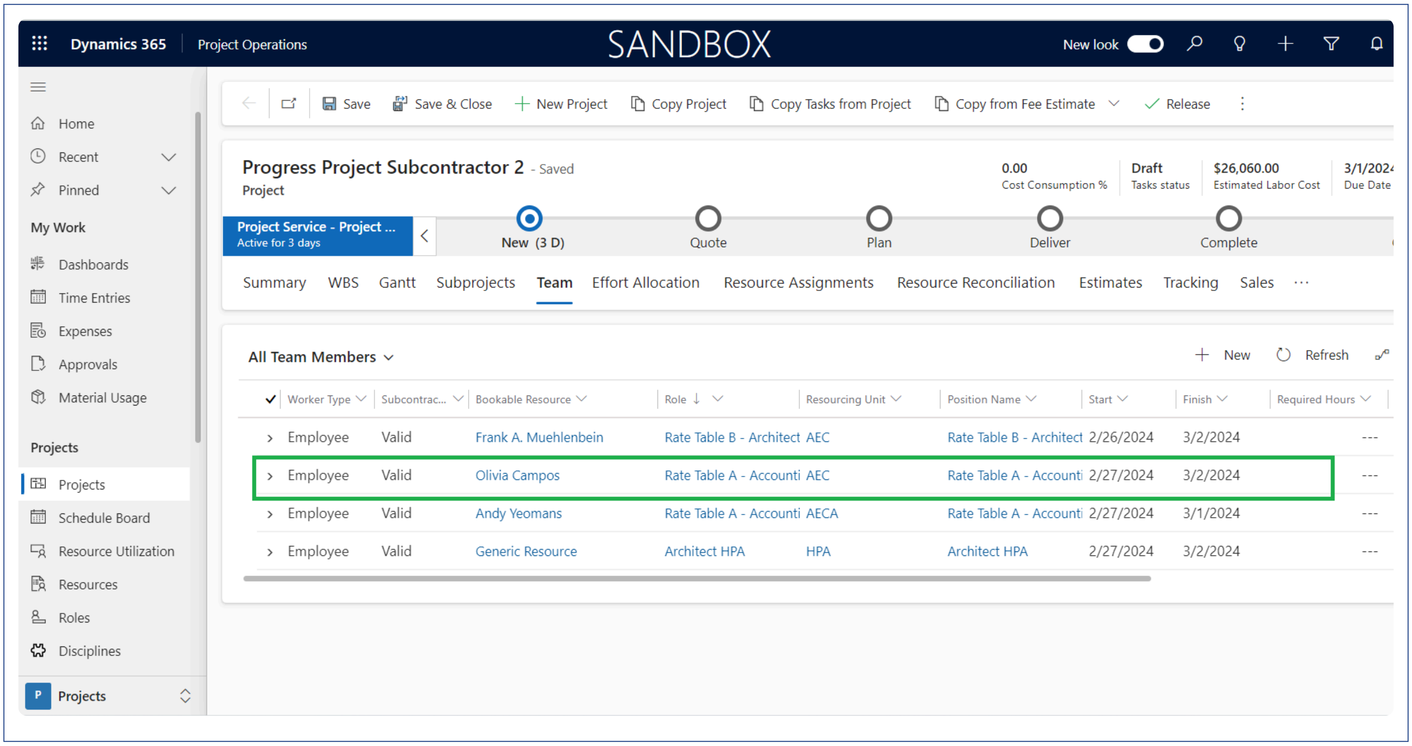
- The user will be able to select the type of booking (Hard/Soft/Custom type).
- The booking will be directly made based on the effort allocation data in a single click to automatically book the Bookable Resource, eliminating the need for time-consuming search through the Schedule Board.

Direct Booking Process

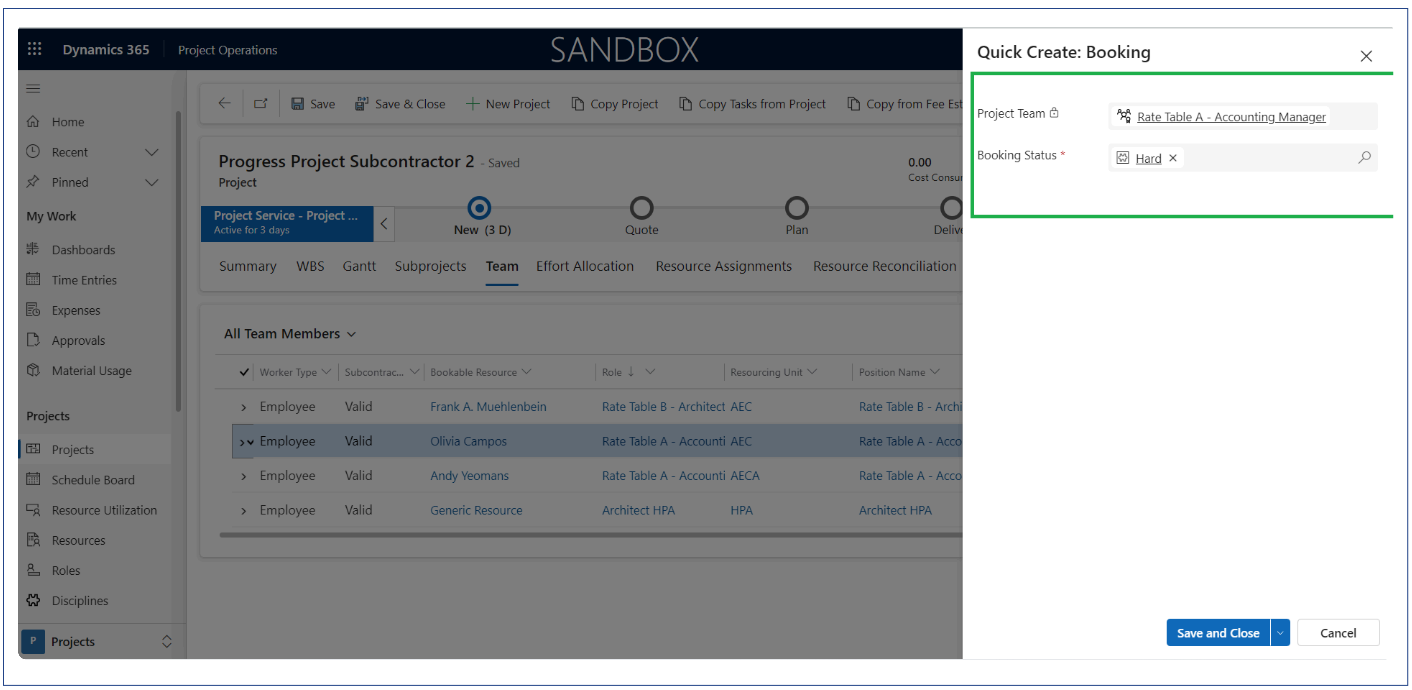
- You can add as many tasks as you need. Just fill in the start and end dates for each task, and the system will figure out duration.
- Users will add labor items in the WBS planner or Effort Allocation spreadsheet. They will fill in the necessary details like Role and Bookable Resources.



Once these two steps mentioned above are completed, users will be able to view the Bookable Resources added in the Teams tab of Projects. The start and end dates will be taken from the first start date and last end date of tasks. The total hours will be recorded in the Total Effort (hours) column.



Choose the Bookable Resource, just click on it and then hit the Direct Booking button. This will prompt a quick create dialog box to pop up, displaying two fields:

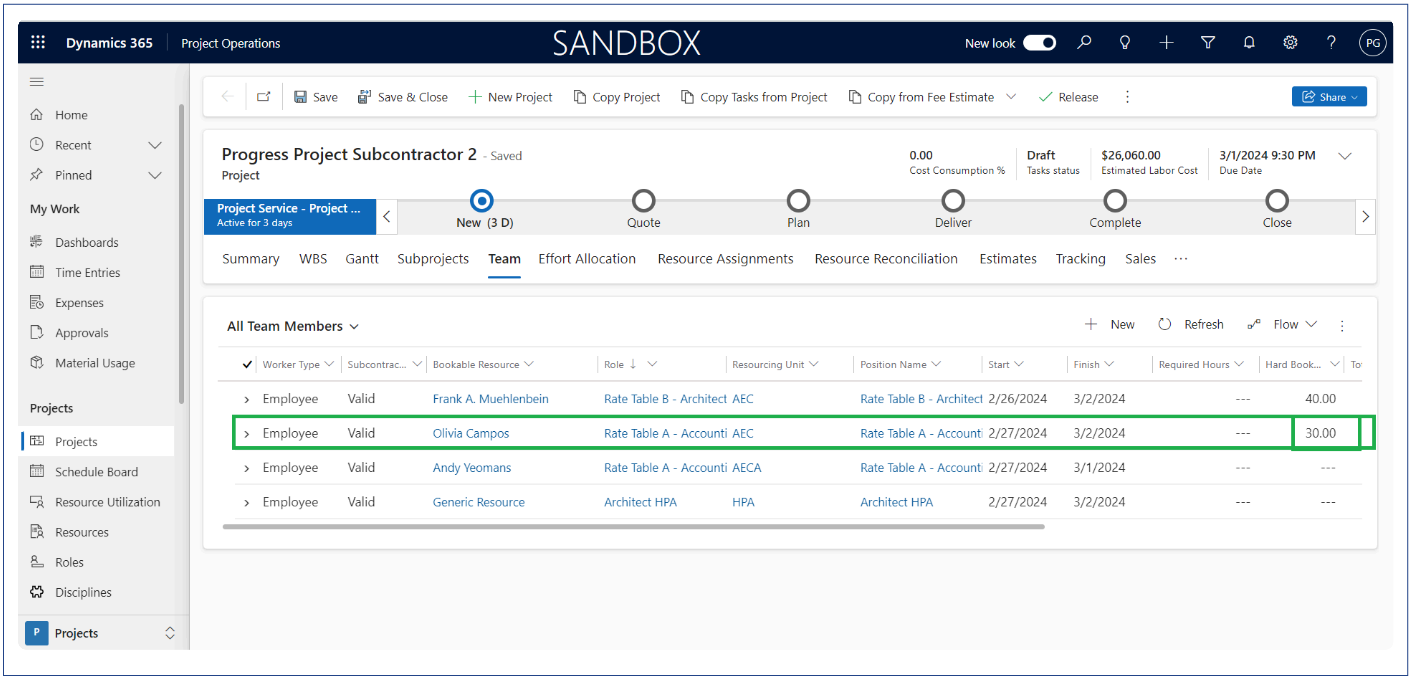


Fields	Description
Project Team	The field will display the role of Bookable Resource, and it is locked.
Booking Status	Please choose the type of booking for the Bookable resource: Hard, Custom, or Soft.

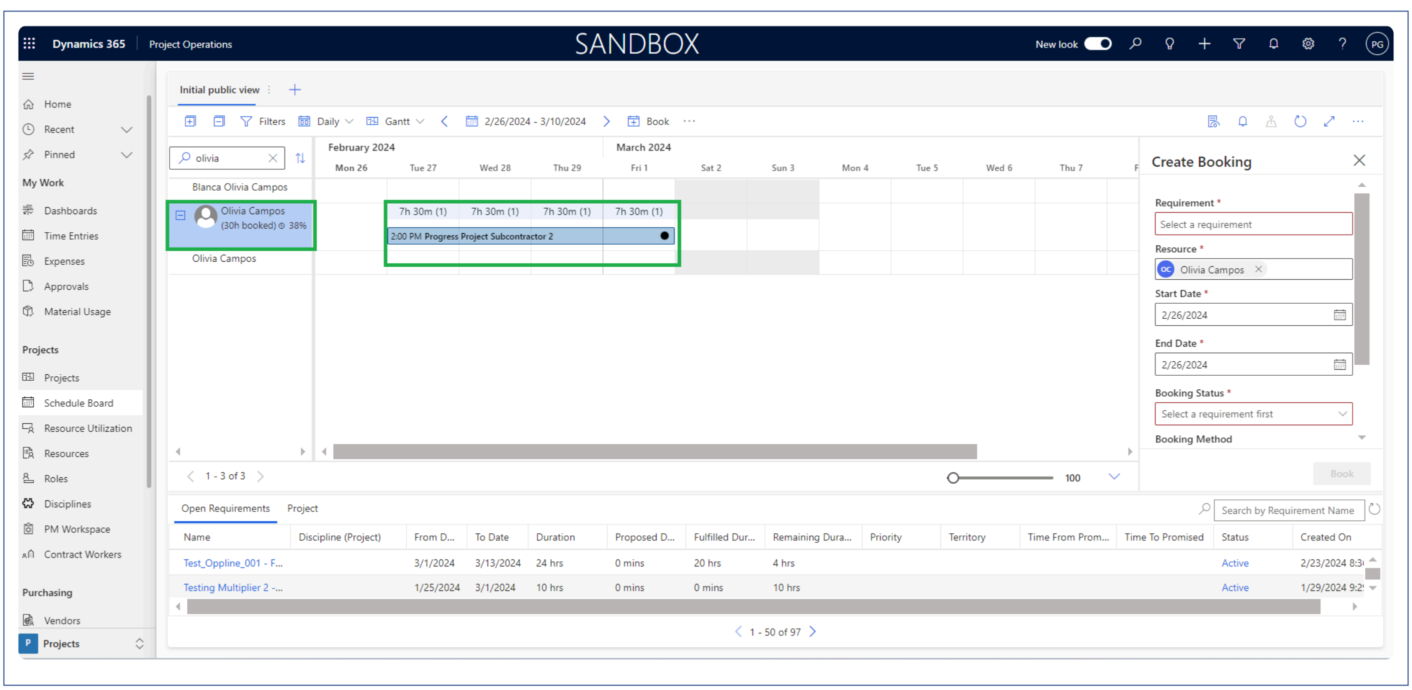
When a user clicks on the “Save” button and chooses the booking type as “Hard,” the total effort in hours will be converted to “Hard Book” hours. A booking for the bookable resource will then be created on the Schedule Board. Additionally, in the Resource Reconciliation view, the user will be able to see the booking and assigned status.

Note: *You can only use Direct Booking button to book Bookable resources, not generic ones.*

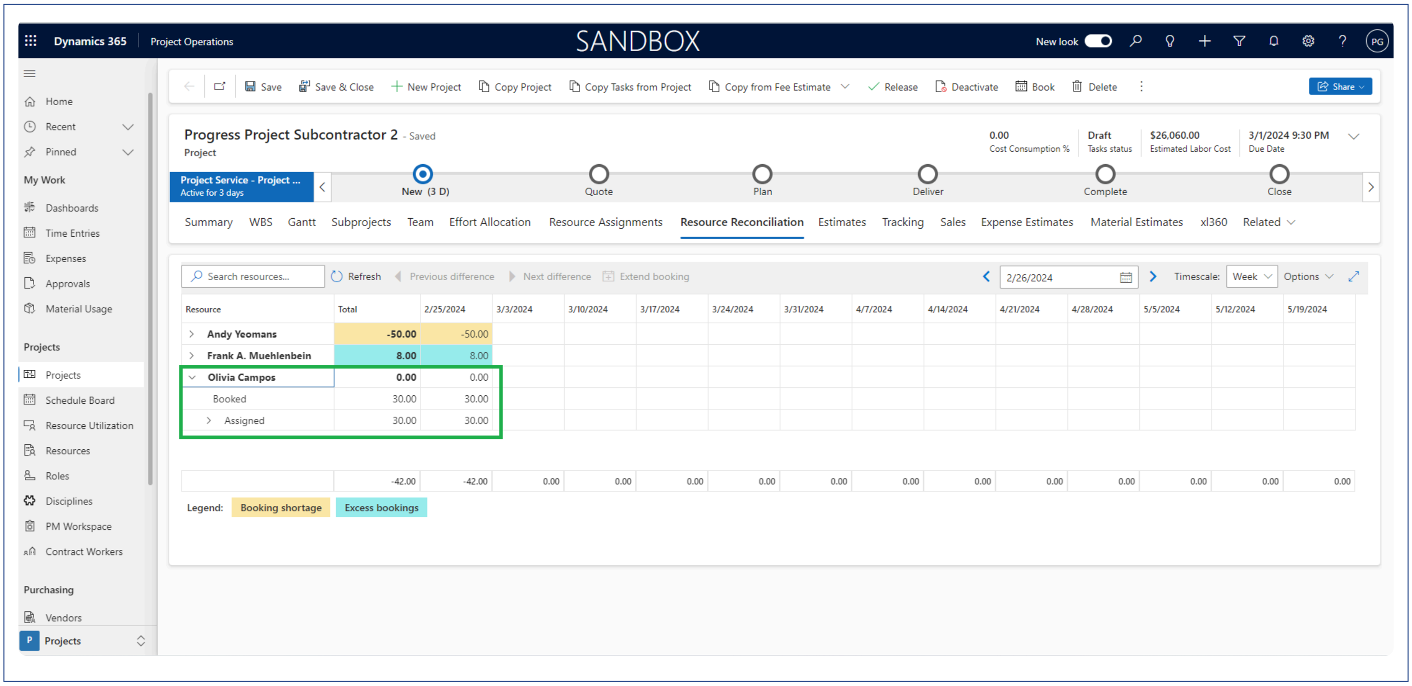
- **Teams Tab**:



- **Schedule Board**:



- **Resource Reconciliation view**

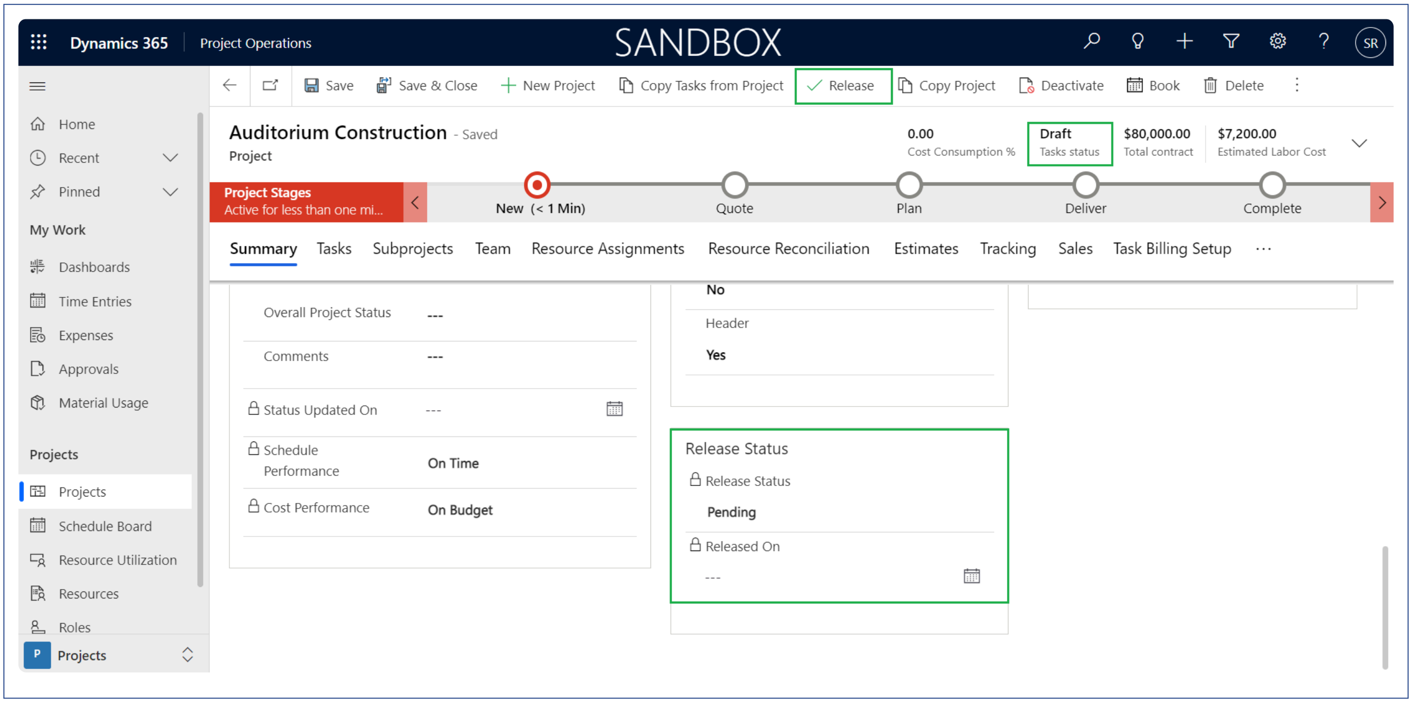


Note – The Direct Booking feature lets users choose several Bookable Resources with just one click. Users can do booking from one dialog box. In this box, users can set the Booking status. This makes it simple for users to book multiple Bookable resources on the Schedule board.

6.12. Release process

This section dives into the “Release status” and release process for projects in Project Operations. A new “Release” button has been added to the Projects form, but it is only visible when the project’s “Release status” is “Pending.” This new field directly affects the following dual-write synchronization processes:.

- Project sync
- Tasks sync
- Assigned resources sync



A new release process will be executed when ‘Release’ button is clicked on projects form. If the ‘Release status’ is ‘Releasing’ then the process is currently happening between Project Operations and Finance and Operations. Once the release process is completed the projects form will refresh in Project Operations.

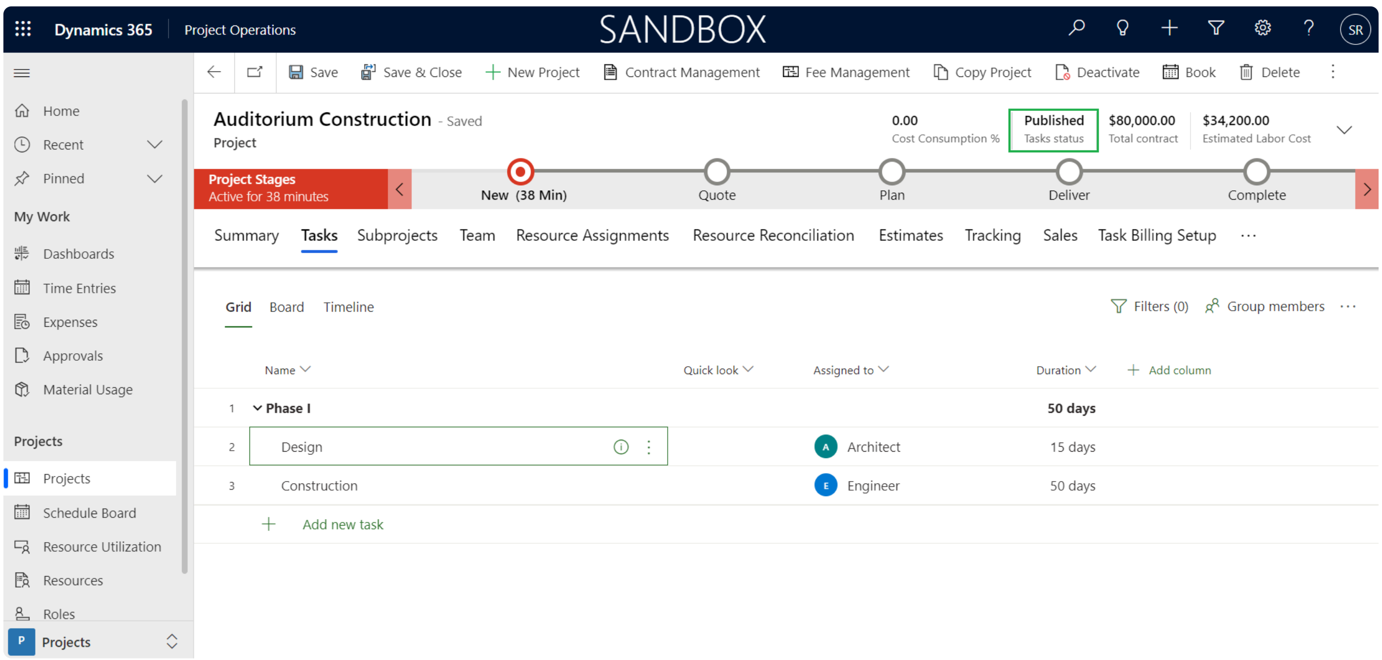
During the release process field updates and dual-write synchronization processes will be executed:

- Project ‘Release status’ field will be updated as ‘Released’.
- Project ‘Released on’ field will be updated with Current date and time.
- Project sync
  - Creation of project and Billing rules against Project contract in Finance and Operations.
  - Contract lines will be created in Finance and Operations.
- Tasks sync
  - Creation of subprojects and WBS activities in Finance and Operations.
- Assigned resources sync
  - Creating forecast hours against the created project in Finance and Operations.

Note – The project release process includes a validation check to ensure that both “Contract” and “Customer” fields have valid values for all non-internal projects. Additionally, any expense estimates associated with the project are only synchronized to Finance and Operations after the project officially “Releases”.

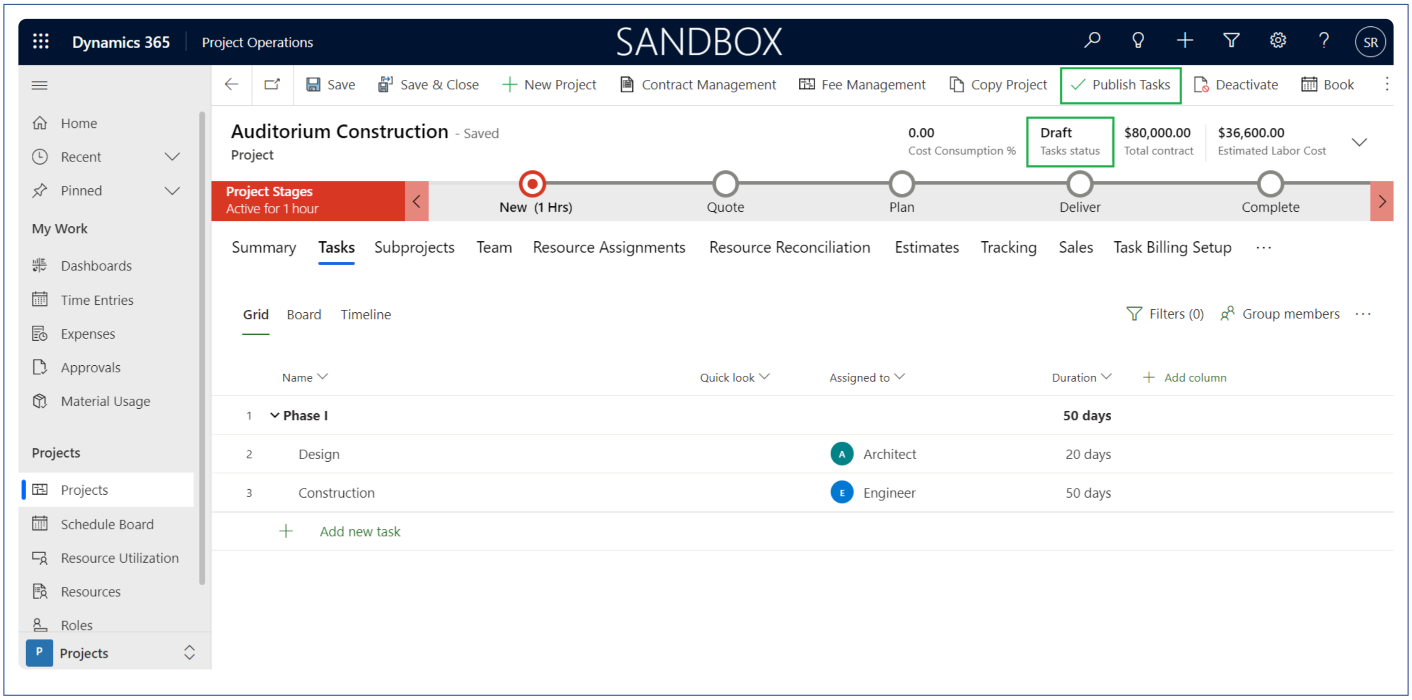
Publish tasks

This section explains how changes to tasks are handled after a project is released for publication or ‘publishing’. A new field named “Task status’” has been added to the Project record in Project Operations to indicate this state change.



Note – Upon modifying any linked task for a project already released with a “Published” Task status, the system automatically reverts the Task status to “Draft”.

A new “Publish tasks” button has been introduced to the Projects form, but it only becomes visible when the project has a “Released” status and the “Task status” is “Draft.” Engaging this button initiates the “Publish tasks” process, during which the “Task status” temporarily shifts to “Publishing” and the tasks grid becomes non-editable to ensure data integrity.



Note – Modifying certain task details or subproject fields, such as “Is subproject,” “Project group,” “Project Manager,” and “Vendor PWP,” should automatically trigger a change in the “Task status” back to “Draft”.

6.13. Actuals

This section explains how project transactions are synchronized between Finance and Operations and Project Operations using dual-write. Whenever a project transaction is posted or updated in Finance and Operations, a corresponding transaction is automatically created or updated in Project Operations. Only transactions originating in Finance and Operations are synchronized.

Go to projects360 integrations > Periodic tasks > Project Operations integration > Create actuals in PO

Hour transactions

Project Operations automatically reflects any actual time transactions recorded in Finance and Operations through dual-write synchronization. This process creates or updates two corresponding “Actual” transactions in Project Operations: one for “Cost” and another for “Revenue”.

Cost transaction
Details of field specifications in Project Operations when the actuals are integrated from Finance and Operations:

Fields	Description
Record Id	‘Record Id’ field value from ‘ProjEmplTrans’ in Finance and Operations.
Transaction Class	Fixed value: ‘Time’
Transaction Type	Fixed value: ‘Cost’
Not-to-exceed Status	‘Not Applicable’
Adjustment Status ID	If ‘Invoice status’ is ‘Adjusted’ in Finance and Operations, then set as ‘Adjusted’ in Project Operations. Otherwise, set as ‘Unadjustable’.
Document Date	‘Project date’ field value from ‘ProjEmplTrans’ in Finance and Operations.
Project Contract ID	Initialize by ‘Contract’ field from Project in Project Operations.
Project Contract Line	Initialize by ‘Contract Line’ from Project in Project Operations. (Write-In Product)
Project Contract	Initialize by ‘Contract Line’ from Project in Project Operations. (Customer associated)

Line Customer	
Project ID	‘Main project’ (Project level zero) related with Project Id from ‘ProjEmplTrans’ in Finance and Operations.
Task ID	For project employee transactions (ProjEmplTrans) in Finance and Operations, the system associates them with tasks based on the following logic: 1) If an “Activity number” is present, the “Task ID” linked to that activity is used. 2) If no activity number exists but a parent project is identified, the “Task ID” related to the corresponding subproject is employed.
Resource role ID	‘Role Id’ field value from ‘ProjEmplTrans’ in Finance and Operations.
Resource Id	‘Resource’ field value from ‘ProjEmplTrans’ in Finance and Operations.
Transaction category ID	‘Category’ field value from ‘ProjEmplTrans’ in Finance and Operations.
Contracting Unit	Blank
Resourcing Company	‘Legal entity’ field value from ‘ProjEmplTrans’ in Finance and Operations.
Resourcing Unit	Blank
Quantity	‘Hours’ field value from ‘ProjEmplTrans’ in Finance and Operations.
Unit of measure	Defaults from Transaction category
Price	‘Cost price’ field value from ‘ProjEmplTrans’ in Finance and Operations.
Amount	‘Total cost amount’ field value from ‘ProjEmplTrans’ in Finance and Operations.
Tax	Blank
Extended Amount	‘Total cost amount’ field value from ‘ProjEmplTrans’ in Finance and Operations.
Currency	‘Sales currency’ field value from ‘ProjEmplTrans’ in Finance and Operations.
Billing Type	Convert ‘Line property’ field using parameters ‘Billing type defaults’ from ‘projects360 integration parameters’
Created On	Date and time on which transaction is created in Project Operations.

Revenue transaction

Details of field specifications in Project Operations when the actuals are integrated from Finance and

Operations:

Fields	Description
Record Id	‘Record Id’ field value from ‘ProjEmplTrans’ in Finance and Operations.
Transaction Class	Fixed value: ‘Time’
Transaction Type	If ‘Invoice’ field from ‘ProjEmplTrans’ in Finance and Operations has a value, then apply ‘Billed Sales’ value. Otherwise, apply ‘Unbilled Sales’ value.
Not-to-exceed Status	‘Not Applicable’
Adjustment Status ID	If ‘Invoice status’ is ‘Adjusted’ in Finance and Operations, then set as ‘Adjusted’ in Project Operations. Otherwise, set as ‘Unadjustable’.
Document Date	‘Project date’ field value from ‘ProjEmplTrans’ in Finance and Operations.
Project Contract ID	Initialize by ‘Contract’ field from Project in Project Operations.
Project Contract Line	Initialize by ‘Contract Line’ from Project in Project Operations. (Write-In Product)
Project Contract Line Customer	Initialize by ‘Contract Line’ from Project in Project Operations. (Customer associated)
Project ID	‘Main project’ (Project level zero) related with Project Id from ‘ProjEmplTrans’ in Finance and Operations.
Task ID	If ‘Activity number’ is populated in ProjEmplTrans, then use Task Id related with activity in Finance and Operations. If there is no activity but there is a parent project, then use Task Id related with subproject in Finance and Operations.
Resource role ID	‘Role Id’ field value from ‘ProjEmplTrans’ in Finance and Operations.
Resource Id	‘Resource’ field value from ‘ProjEmplTrans’ in Finance and Operations.
Transaction category ID	‘Category’ field value from ‘ProjEmplTrans’ in Finance and Operations.
Contracting Unit	Blank

Resourcing Company	'Legal entity' field value from 'ProjEmplTrans' in Finance and Operations.
Resourcing Unit	Blank
Quantity	'Hours' field value from 'ProjEmplTrans' in Finance and Operations.
Unit of measure	Defaults from Transaction category
Price	'Sales price' field value from 'ProjEmplTrans' in Finance and Operations.
Amount	'Total sales amount' field value from 'ProjEmplTrans' in Finance and Operations.
Tax	Blank
Extended Amount	'Total sales amount' field value from 'ProjEmplTrans' in Finance and Operations.
Currency	'Sales currency' field value from 'ProjEmplTrans' in Finance and Operations.
Billing Type	Convert 'Line property' field using parameters 'Billing type defaults' from 'projects360 integration parameters'
Created On	Date and time on which transaction is created in Project Operations.

Expense transaction

Recorded actual expense transactions from Finance and Operations are automatically reflected in Project Operations through dual-write synchronization. This process creates or updates two corresponding "Actual" transactions in Project Operations: one for "Cost" and another for "Revenue".

Cost transaction

Details of field specifications in Project Operations when the actuals are integrated from Finance and Operations:

Fields	Description
Record Id	'Record Id' field value from 'ProjCostTrans' in Finance and Operations.
Transaction Class	Fixed value: 'Expense'
Transaction Type	Fixed value: Cost
Not-to-exceed Status	'Not Applicable'

Adjustment Status ID	If ‘Invoice status’ is ‘Adjusted’ in Finance and Operations, then set as ‘Adjusted’ in Project Operations. Otherwise, set as ‘Unadjustable’.
Document Date	‘Project date’ field value from ‘ProjCostTrans’ in Finance and Operations.
Project Contract ID	Initialize by ‘Contract’ field from Project in Project Operations.
Project Contract Line	Initialize by ‘Contract Line’ from Project in Project Operations. (Write-In Product)
Project Contract Line Customer	Initialize by ‘Contract Line’ from Project in Project Operations. (Customer associated)
Project ID	‘Main project’ (Project level zero) related with Project Id from ‘ProjCostTrans’ in Finance and Operations.
Task ID	If ‘Activity number’ is populated in ProjCostTrans, then use Task Id related with activity in Finance and Operations. If there is no activity but there is a parent project, then use Task Id related with subproject in Finance and Operations.
Resource role ID	‘Role Id’ field value from ‘ProjCostTrans’ in Finance and Operations.
Resource Id	‘Resource’ field value from ‘ProjCostTrans’ in Finance and Operations.
Transaction category ID	‘Category’ field value from ‘ProjCostTrans’ in Finance and Operations.
Contracting Unit	Blank
Resourcing Company	‘Legal entity’ field value from ‘ProjCostTrans’ in Finance and Operations.
Resourcing Unit	Blank
Quantity	‘Quantity’ field value from ‘ProjCostTrans’ in Finance and Operations.
Unit of measure	Defaults from Transaction category.
Price	‘Cost price’ field value from ‘ProjCostTrans’ in Finance and Operations.
Amount	‘Total cost amount’ field value from ‘ProjCostTrans’ in Finance and Operations.
Tax	Blank

Extended Amount	‘Total cost amount’ field value from ‘ProjCostTrans’ in Finance and Operations.
Currency	‘Sales currency’ field value from ‘ProjCostTrans’ in Finance and Operations.
Billing Type	Convert ‘Line property’ field using parameters ‘Billing type defaults’ from ‘projects360 integration parameters’
Created On	Date and time on which transaction is created in Project Operations.

Revenue transaction

Details of field specifications in Project Operations when the actuals are integrated from Finance and Operations:

Fields	Description
Record Id	‘Record Id’ field value from ‘ProjCostTrans’ in Finance and Operations.
Transaction Class	Fixed value: ‘Expense’
Transaction Type	If ‘Invoice’ field from ‘ProjCostTrans’ in Finance and Operations has a value, then apply ‘Billed Sales’ value. Otherwise, apply ‘Unbilled Sales’ value.
Not-to-exceed Status	‘Not Applicable’
Adjustment Status ID	If ‘Invoice status’ is ‘Adjusted’ in Finance and Operations, then set as ‘Adjusted’ in Project Operations. Otherwise, set as ‘Unadjustable’.
Document Date	‘Project date’ field value from ‘ProjCostTrans’ in Finance and Operations.
Project Contract ID	Initialize by ‘Contract’ field from Project in Project Operations.
Project Contract Line	Initialize by ‘Contract Line’ from Project in Project Operations. (Write-In Product)
Project Contract Line Customer	Initialize by ‘Contract Line’ from Project in Project Operations. (Customer associated)
Project ID	‘Main project’ (Project level zero) related with Project Id from ‘ProjCostTrans’ in Finance and Operations.
Task ID	If ‘Activity number’ is populated in ProjCostTrans, then use Task Id related with activity in Finance

	and Operations. If there is no activity but there is a parent project, then use Task Id related with subproject in Finance and Operations.
Resource role ID	'Role Id' field value from 'ProjCostTrans' in Finance and Operations.
Resource Id	'Resource' field value from 'ProjCostTrans' in Finance and Operations.
Transaction category ID	'Category' field value from 'ProjCostTrans' in Finance and Operations.
Contracting Unit	Blank
Resourcing Company	'Legal entity' field value from 'ProjCostTrans' in Finance and Operations.
Resourcing Unit	Blank
Quantity	'Quantity' field value from 'ProjCostTrans' in Finance and Operations.
Unit of measure	Defaults from Transaction category
Price	'Sales price' field value from 'ProjCostTrans' in Finance and Operations.
Amount	'Total sales amount' field value from 'ProjCostTrans' in Finance and Operations.
Tax	Blank
Extended Amount	'Total sales amount' field value from 'ProjCostTrans' in Finance and Operations.
Currency	'Sales currency' field value from 'ProjCostTrans' in Finance and Operations.
Billing Type	Convert 'Line property' field using parameters 'Billing type defaults' from 'projects360 integration parameters'
Created On	Date and time on which transaction is created in Project Operations.

Fee transactions

Actual fee transactions recorded will be created or updated in Project Operations from Finance and Operations. This syncing process will create or update only one 'Actual' transactions in Project Operations i.e., a 'Revenue' transaction.

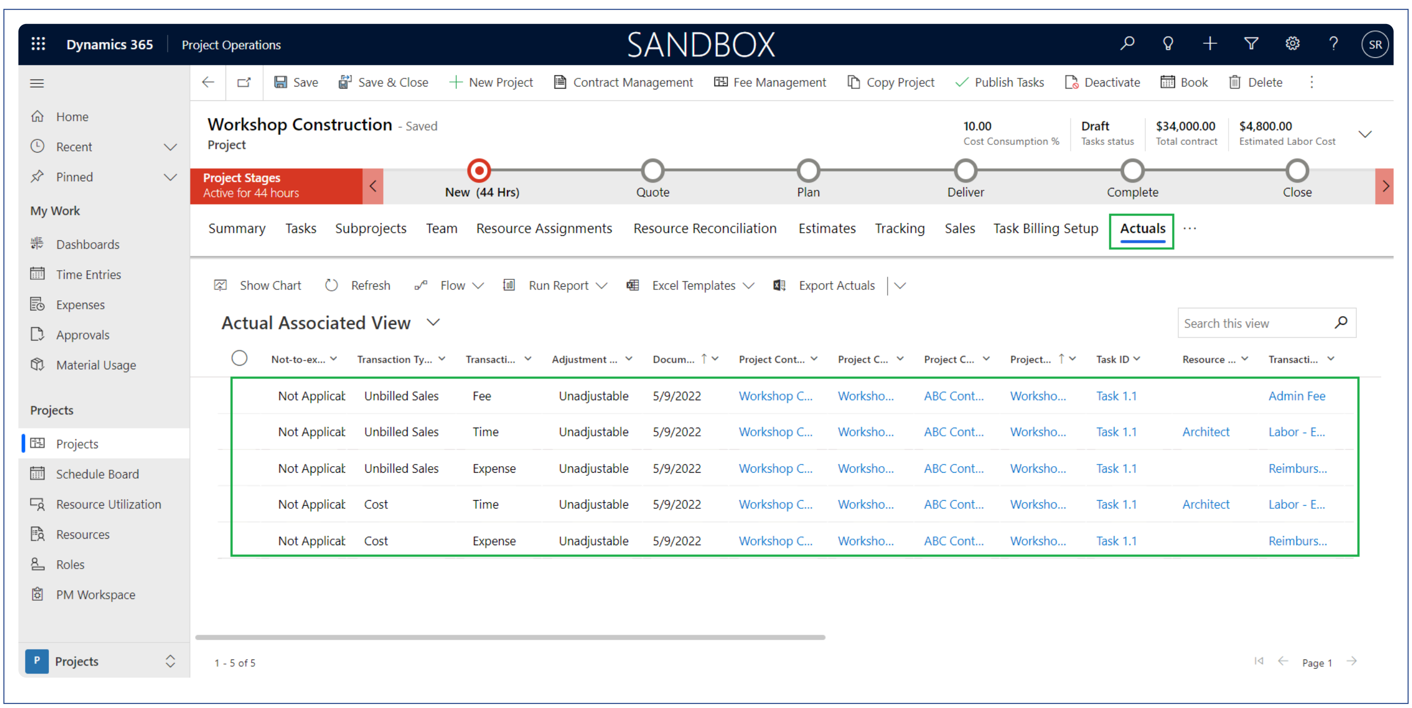
Revenue transaction

Details of field specifications in Project Operations when the actuals are integrated from Finance and Operations:

Fields	Description
Record Id	'Record Id' field value from 'ProjRevenueTrans' in Finance and Operations.
Transaction Class	Fixed value: 'Fee'
Transaction Type	If 'Invoice' field from 'ProjRevenueTrans' in Finance and Operations has a value, then apply 'Billed Sales' value. Otherwise, apply 'Unbilled Sales' value.
Not-to-exceed Status	'Not Applicable'
Adjustment Status ID	If 'Invoice status' is 'Adjusted' in Finance and Operations, then set as 'Adjusted' in Project Operations. Otherwise, set as 'Unadjustable'.
Document Date	'Project date' field value from 'ProjRevenueTrans' in Finance and Operations.
Project Contract ID	Initialize by 'Contract' field from Project in Project Operations.
Project Contract Line	Initialize by 'Contract Line' from Project in Project Operations. (Write-In Product)
Project Contract Line Customer	Initialize by 'Contract Line' from Project in Project Operations. (Customer associated)
Project ID	'Main project' (Project level zero) related with Project Id from 'ProjCostTrans' in Finance and Operations.
Task ID	If 'Activity number' is populated in ProjCostTrans, then use Task Id related with activity in Finance and Operations. If there is no activity but there is a parent project, then use Task Id related with subproject in Finance and Operations.
Resource role ID	Blank
Resource Id	Blank
Transaction category ID	'Category' field value from 'ProjRevenueTrans' in Finance and Operations.
Contracting Unit	Blank
Resourcing	'Legal entity' field value from 'ProjCostTrans' in Finance and Operations.

Company	
Resourcing Unit	Blank
Quantity	‘Quantity’ field value from ‘ProjRevenueTrans’ in Finance and Operations.
Unit of measure	Defaults from Transaction category
Price	‘Sales price’ field value from ‘ProjRevenueTrans’ in Finance and Operations.
Amount	‘Total sales amount’ field value from ‘ProjRevenueTrans’ in Finance and Operations.
Tax	Blank
Extended Amount	‘Total sales amount’ field value from ‘ProjRevenueTrans’ in Finance and Operations.
Currency	‘Sales currency’ field value from ‘ProjRevenueTrans’ in Finance and Operations.
Billing Type	Convert ‘Line property’ field using parameters ‘Billing type defaults’ from ‘projects360 integration parameters’
Created On	Date and time on which transaction is created in Project Operations.

Go to Projects > Projects > Actuals tab



7. Version History

7.1. Release Notes v10.0.39

Version 10.0.39.20240405 | Major Release | April 05, 2024

Work item type	Title	VSTS ID	Version
Enhancement	Apply rounding to each expense sales amount in WBS emulating Microsoft estimate logic	83572	10.0.39.20240405
Enhancement	Gantt tab in ‘Fee estimator’ should be showing the Gantt related with the selected version	82267	10.0.39.20240405
Enhancement	Add button to export to Excel	87047	10.0.39.20240405
Enhancement	Possibility to apply new start date while copying “Fee estimate version” between different opportunities	80540	10.0.39.20240405
Enhancement	Add PM field in Opportunity Line	86998	10.0.39.20240405
Enhancement	Hide Remove Column / Add column to Left options when right click on the columns in Fee Estimator, WBS and Effort Allocation	83472	10.0.39.20240405
Enhancement	Display only Active bookable resources in Fee Estimator, WBS and Effort allocation	83473	10.0.39.20240405
Issue	When there is no end date defined for task in WBS, then Effort allocation spreadsheet is not getting loaded	87829	10.0.39.20240405
Issue	Copying tasks from P4W projects to external scheduled Projects, then system is throwing error	87830	10.0.39.20240405
Issue	Can not assign just created new team member for different task	86555	10.0.39.20240405
Issue	Relationship between Successor and Predecessor task is getting removed after refreshing the Gantt tab which should ideally not happen	87314	10.0.39.20240405
Issue	Task are not getting added in the Fee Estimator, WBS planner and Effort allocation spreadsheet after we are refreshing the spreadsheet	87827	10.0.39.20240405

Version Information

Package Name	Model Name	Version

projects360 for Project Operations	ProjOperations	10.0.39.20240405