Dynamics 365 PSA to Project Operations Upgrade Playbook

Ensure optimal transition from D365 PSA to Dynamics 365 for Project Operations (Lite)

FastTrack for Dynamics 365 Apps

Microsoft

Purpose and Scope

THE SITUATION

- The goal is migrating all PSA 3.x Customers to Project Operations Lite by September 2024.

PURPOSE

The purpose of this playbook is to provide a framework for customers to effectively:

1. Understand why upgrade is important and necessary
2. Understand the prerequisites needed to support upgrade.
3. Plan their resources needed to support the upgrade process.
4. Gain clarity on the expected changes in the application post upgrade.

Audiences:

- Customer Solution Architects
- Partner Solution Architects

In summary, this guide will help you with:

- ✓ Awareness of challenges for IT.
- ✓ Understanding of tools and techniques that would ensure an optimal upgrade.

PROJECT OPERATIONS LITE FOR DYNAMICS 365

With Project Operations Lite, you can…

- Manage schedules with the new Project for the Web Experience
- Book resources with the new schedule board
- Adopt new billing and pricing features
- Support project with subcontracted resources

INSIDE THIS PLAYBOOK:

Chapter 1: Introduction	Chapter 2: Features	Chapter 3: Adoption	Appendix
What is PO Lite?	**Assess existing PSA implementation**	***Upcoming version…***	**Available Resources**
Feature comparison PSA v. PO?	**Plan for an upgrade**	***stay tuned!***	

PSA* Project Service Automation

PO* Project Operations Lite

Chapter 1
Introduction

- Why upgrade to Project Operations Lite?
- Project Service Automation (PSA) to Project Operations
- Currently Released Features
- Major Functionality Changes
- Supported Upgrade Scenarios
- Phases & Timeline
- Upgrade Prerequisites
- Upgrade Process overview
- Licensing Model

Resources

Chapter 2
Features

- What is Project Operations Lite?
- Project Features with Project for the Web
- material usage on projects and project tasks
- Subcontract management
- Advances and retainer-based contracts
- Contract not-to-exceed status and validations
- Task based billing

Resources

Chapter 3
Adoption

Coming soon…

Resources

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Chapter 1: Introduction

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Our Vision

Upgrading customers from Project Service Automation (PSA) to Project Operations Lite will enable Microsoft to more deeply invest in the best project management experiences for service-based organizations. Our customers will benefit from upcoming enhancements in the billing and pricing capabilities of the application along with refinement for service and material-based scenarios. Investments will be made to focus on supporting larger organizations who require more robust scale in size of projects and transactional throughput.

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Project Service Automation (PSA) to Project Operations

Transition to Project Operations Lite to leverage exciting new features.

This feature enables existing PSA customers to upgrade to the latest Project Operations Lite deployment where they can enjoy new features such as:

- New Project Scheduling and Scheduling Modes
- Recording material usage on projects and project tasks
- Subcontract management
- Advances and retainer-based contracts
- Contract not-to-exceed status and validations
- Task-based billing
- Split Billing

The process maintains your data and allows partners and customers to focus on updating security roles and customizations.

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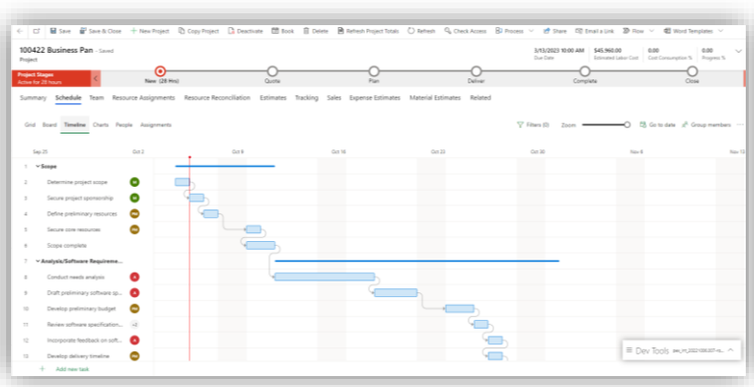
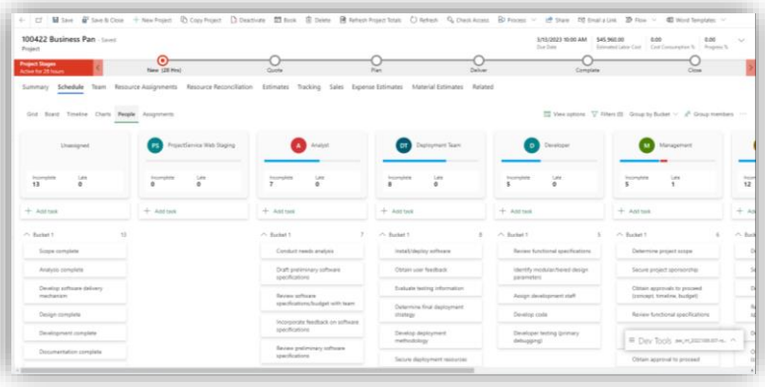
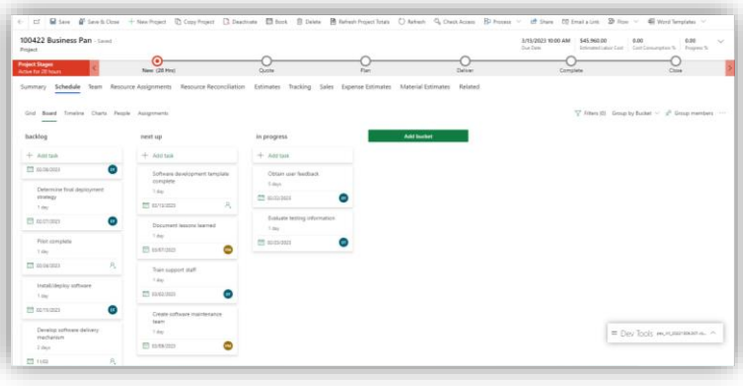
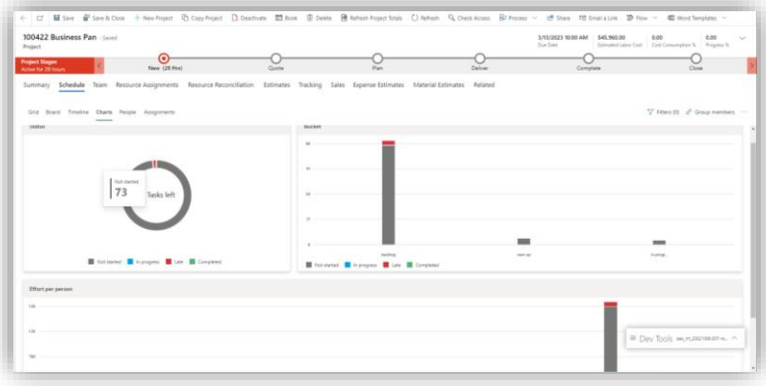
Currently Released Features

Transition to Project Operations Lite to leverage exciting new features.









"Do more than just moving Project Management"

Short description of the extended value for Project Operations Lite

- New interactive Gantt
- People and Task summary views
- Board view for agile execution
- Desktop controls including cut & paste, undo/redo
- Co-authoring

Major Functionality Changes

Project Features: Project for the Web replaces legacy project Features capabilities.

Project Templates: OOB Support for project templates have been removed, however, customers can leverage the Project Copy API to achieve similar functionality.

Project Desktop Add-in: Phase 1 and Phase 2 of upgrade do not support the desktop client add-in.

Writing to WBS Entities: Project schedules managed by Project for the Web, must use the project scheduling APIs create WBS records outside of the UI.

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Supported Upgrade Scenarios

Source	Target	Status
Project Service Automation (PSA 3.x)	Lite Deployment	Supported
Project Service Automaton (PSA 3.x)	Resource/non-stocked Deployment	Not currently supported
Project Service Automaton (PSA 3.x)	Stocked/production-based Deployment	Not currently supported
D365 Finance Project Management and Accounting	Lite Deployment	Not currently supported
D365 Finance Project Management and Accounting	Resource/non-stocked Deployment	Not currently supported
Project for the Web (dedicated environment)	Lite Deployment	Not currently supported

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Phasing

Phase 1 – No WBS

[November 2021]

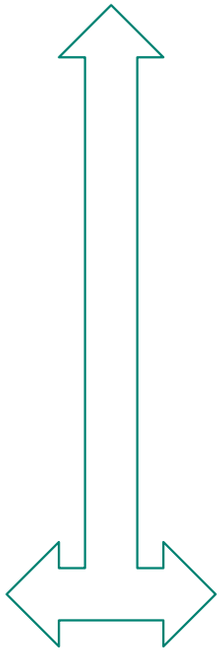
Phase 2 –within WBS limits

[November 2022]

Phase 3 – above supported WBS limits

[April Wave 2023]

Project Limits	
Field	**Limit**
Maximum total tasks for a project	500
Maximum total duration for a project	3650 days (10 years)
Maximum total resources for a project	300
Maximum total links (successor only) for a project	600
Maximum total custom fields for a project	10
Maximum checklist items per task	20



Task Limits	
Field	**Limit**
Maximum hierarchy level	10 levels
Maximum links (successor + predecessor)	20
Maximum duration of leaf task	1250 days
Maximum duration of a summary task	3650 days (10 years)
Maximum resources assigned to a task	20 resources
Supported date range for a task	1/1/2000 - 12/31/2149

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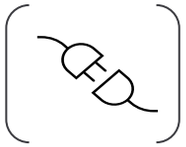
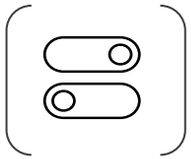
Features required to fulfill functional requirements for Upgrade

Pre-validation Rules – Surface errors to the administrator when specific pre-validation rules fail as the first step in upgrade providing a means for administrators to better diagnose failed upgrades.



Disable Project for the Web – Allow native CUD on WBS related entities, disable on CDS to PSS calls and remove access to the Modern Project Grid for all legacy projects brought forward during upgrade.

Read only WBS – Allow customers to view legacy projects, regardless of WBS limit, in the native CDS app.



On demand conversion – provide the ability for the PM to convert a legacy project to a modern project from the Project Main form for projects that conform to the current WBS limits of Project for the Web.

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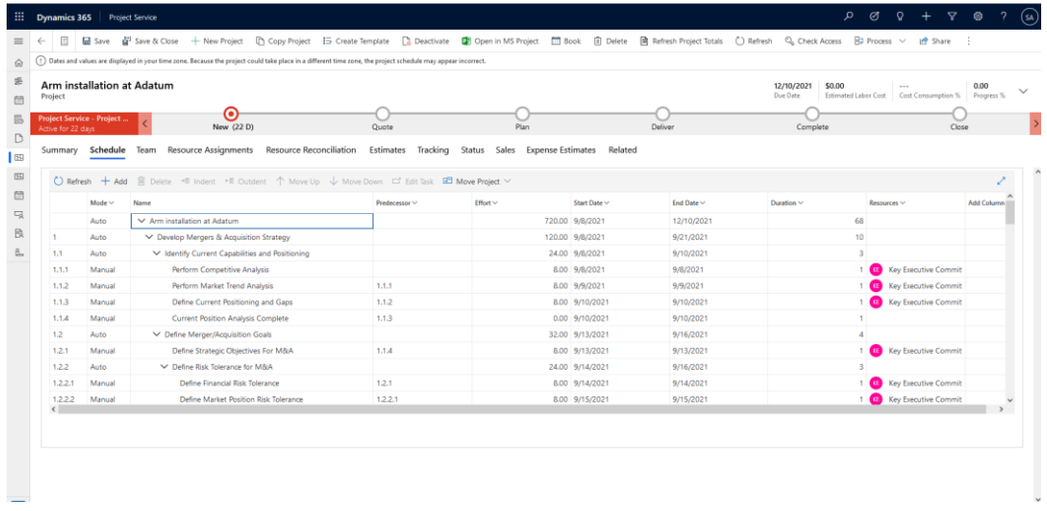
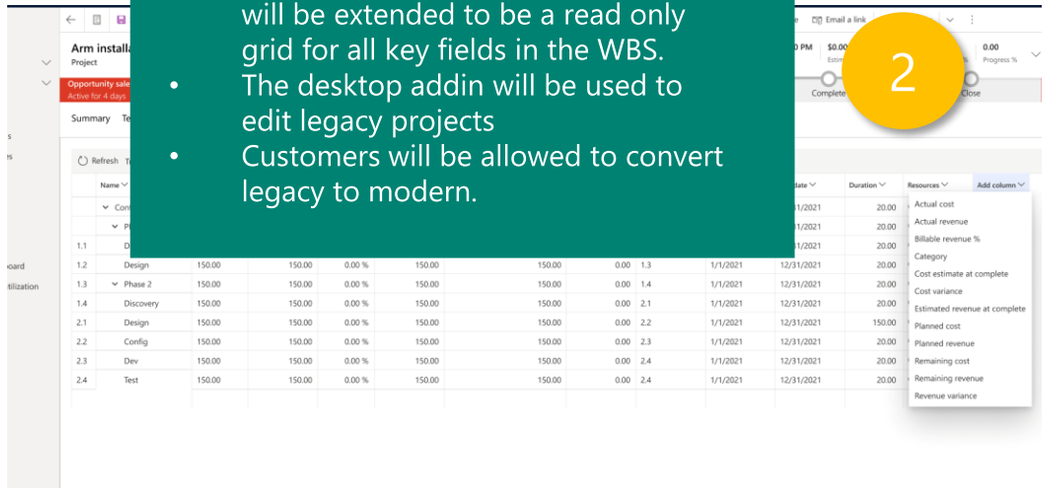
Upgrade Process overview

1

- New Pre-validation checks
- New error logging for admins
- Upgrade meta data to handle new data model and new 4.x features



- For legacy projects, the tracking grid will be extended to be a read only grid for all key fields in the WBS.
- The desktop addin will be used to edit legacy projects
- Customers will be allowed to convert legacy to modern.



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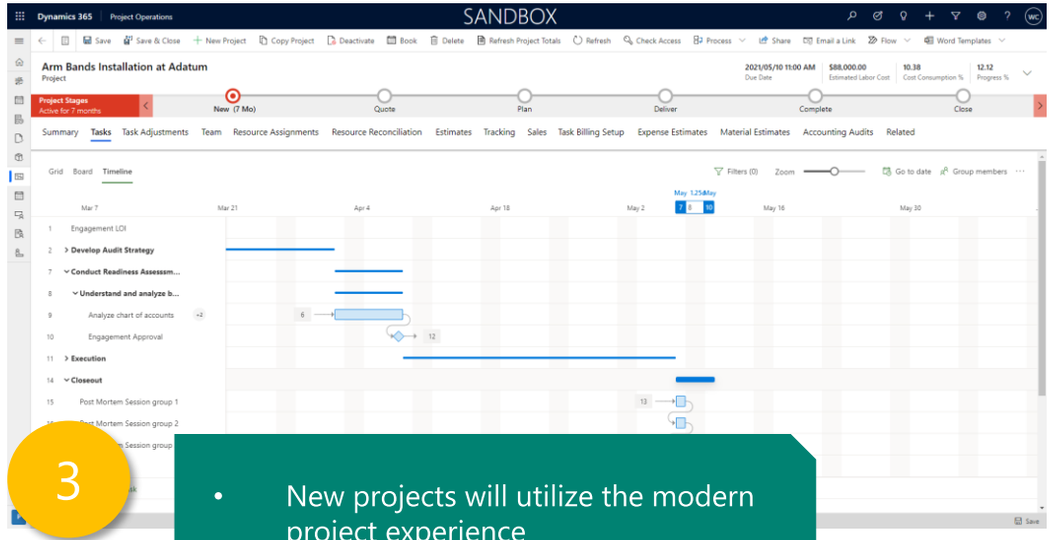

3

- New projects will utilize the modern project experience

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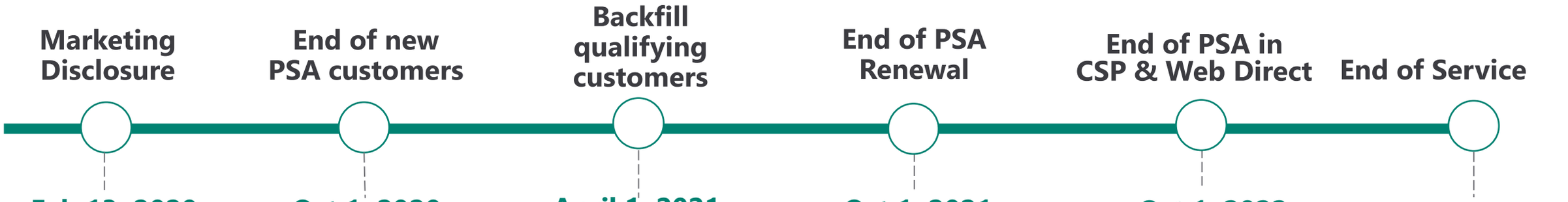
License Transition Timeline



Feb 13, 2020

- Disclosure blog of Project Operations and EoS of PSA
- Removal of PSA from website
- Turn off PSA marketing
- Generate Project Operations marketing momentum

Oct 1, 2020

- PSA removed from price list and new customers must purchase Project Operations

April 1, 2021

- All existing D365 PSA customers and qualifying D365 CE and Plan 2 customers with MAU provided Project Ops.

Oct 1, 2021

- Ability to renew D365 PSA will be removed and auto-renew turned off in CSP and web direct

Oct 1, 2022

- End of PSA licenses in CSP and web direct contracts

- End of PSA licenses in EA contracts

1 year to renew PSA licenses

2 years until the end of PSA licenses in CSP & web direct

until end of PSA licenses in EA

* Existing eligible PSA customers were backfilled with Project Operation License in 2020.

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Licensing Planning

- Licensed PSA customers have been backfilled with Project Operations
- Project Operations is a different product to PSA, being licensed for Project Operations does not give one access to PSA. When a customer's PSA license expires, they will no longer have access to PSA
- Customer needs more time on PSA? http://aka.ms/ineedpsa
- Project Operations does not include entitlement to Project Desktop Client

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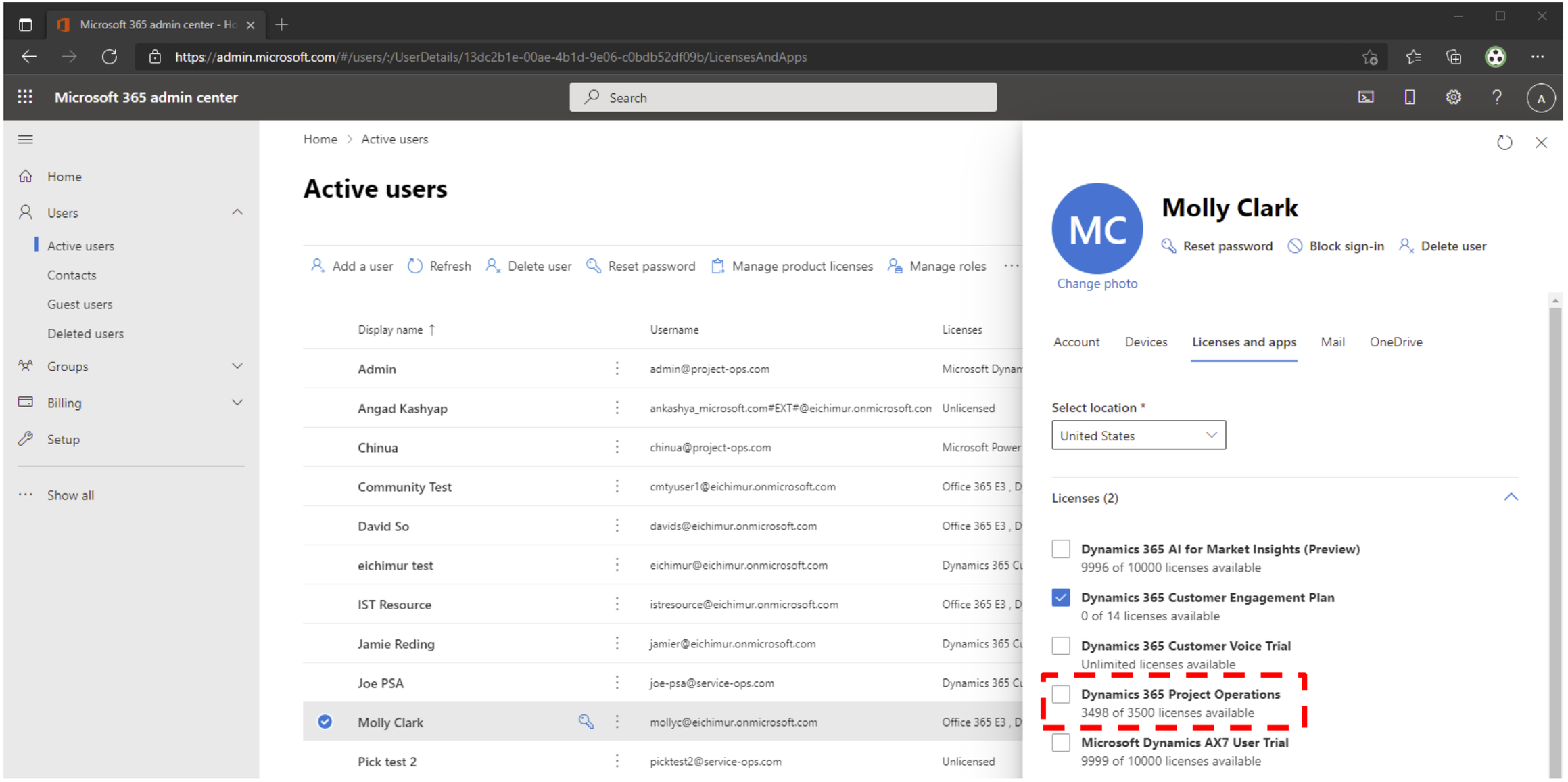
Project Operations License (full)



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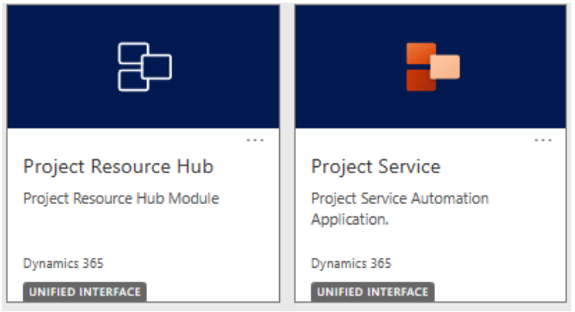
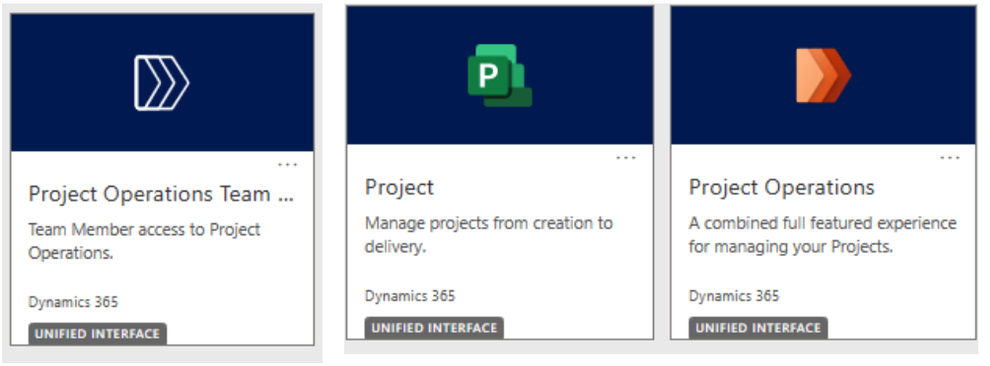
Project Operations Licenses and Apps

Name of app entitlement
Common Data Service for Dynamics 365 Project Operations
Dynamics 365 for Finance and Operations, Enterprise edition - Regulatory Service
Dynamics 365 Project Operations
(or Dynamics 365 Project Operations Attach)
Dynamics 365 Project Operations CDS
(or Dynamics 365 Project Operations CDS Attach)
Exchange Foundation?
Power Apps for Dynamics 365
Power Automate for Dynamics 365
Power Pages Internal User
Project for Project Operations
(or Project for Project Operations Attach)
SharePoint (Plan 1)

PSA



Project Operations



Make sure at least the highlighted apps are enabled (full license)

Team Members license does not include Project, but rights are across Dynamics 365 products. Access is via designated Team Member apps. See Licensing Guide.

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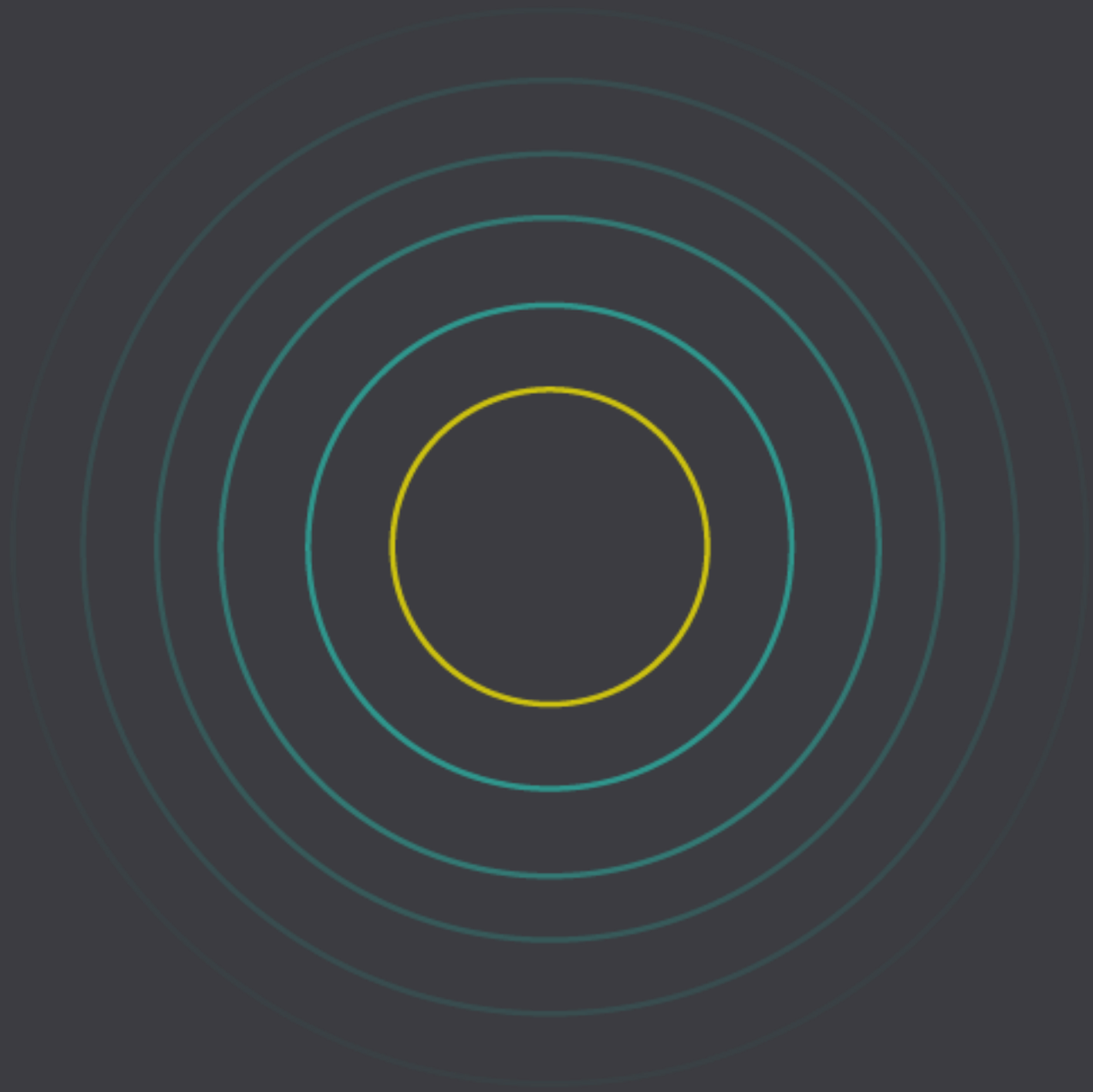
Chapter 2: Features



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What is Project Operations Lite?

Project Operations empowers project-centric organizations with the right capabilities to drive success– from prospect to payment to profit.

Project Operations builds upon the strengths in Project Service Automation while providing rich new experiences in project Features along with exciting tools to provide more flexibility in quoting and contracting to support both service and non-stocked materials scenarios. New features include:

Project Features with Project for the Web

- Schedule with new robust tools for both agile and waterfall project delivery.

Recording material usage on projects and project tasks

- Estimate and track consumption of non-stocked materials.

Subcontract management

- Contract, invoice and staff project with external resources.

Advances and retainer-based contracts

- Create retainer-based billing schedules

Contract not-to-exceed status and validations

- Provides robust contract control at the customer, contract or contract line level.

Task based & Split billing

- Quote and contract lines can be mapped to specific tasks in the work breakdown structure.
- Add contract line to one or many paying customers

Project Budget Management (Preview)

- A project budget represents a point-in-time snapshot of the estimated spend across the project phases and its associated tasks.

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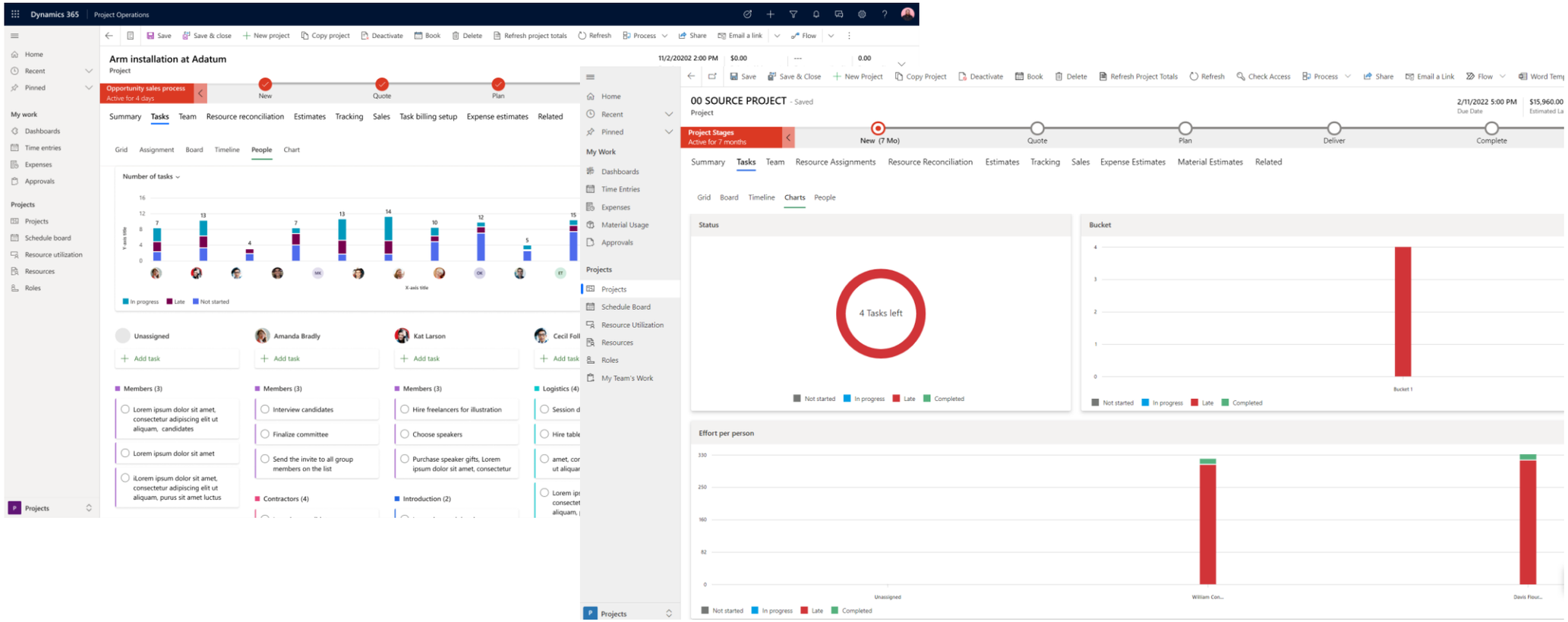
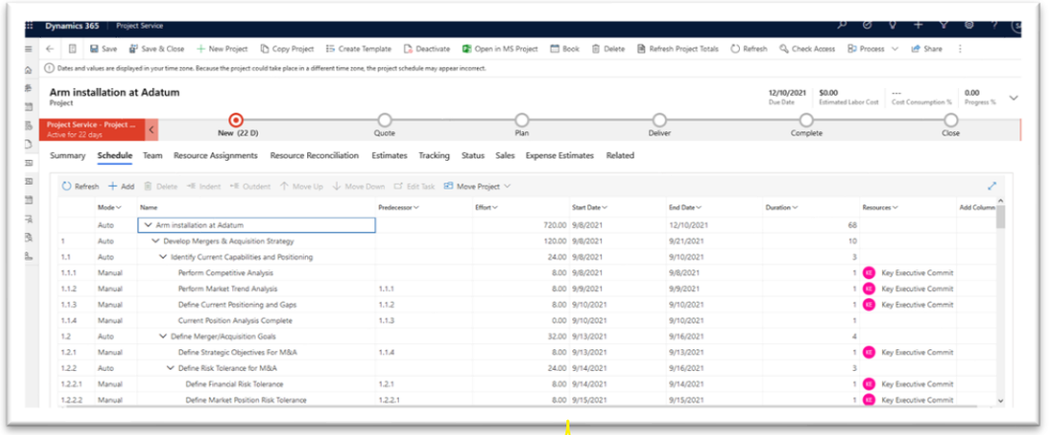
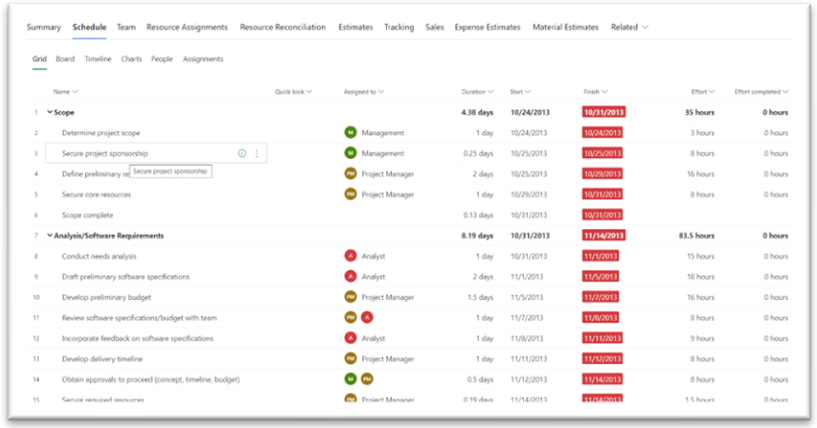
Project Features with Project for the Web

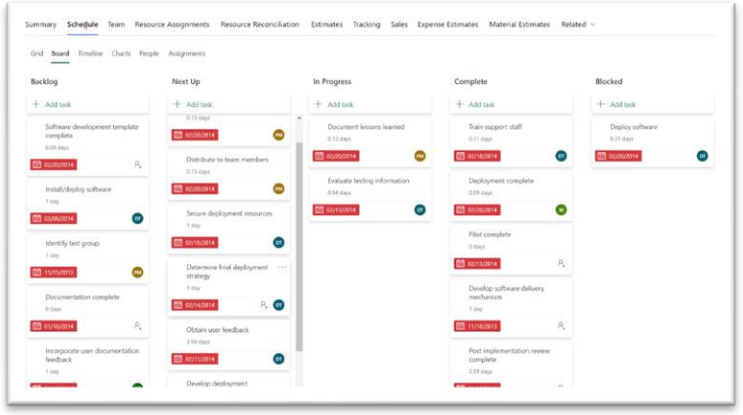
- People view and Charts view quantify the number of tasks assigned to a resource in a task and aggregate task status by task or resource.

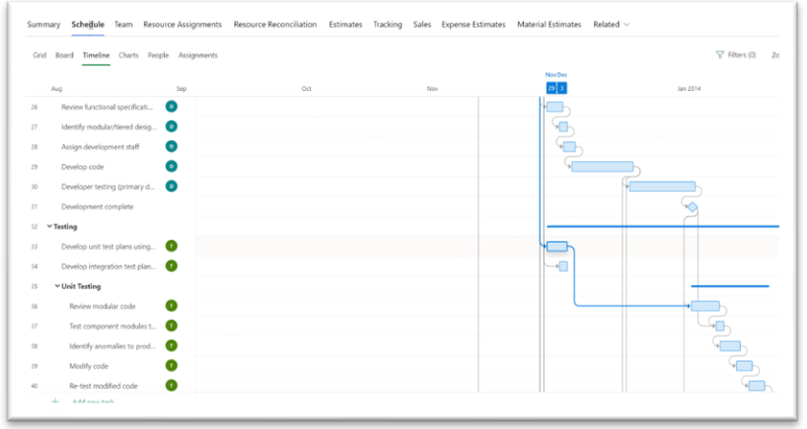


Project Features with Project for the Web









1. advanced grid view with drag and drop, cut and paste, multi-select etc.
2. The board view can be used for agile project delivery
3. The timeline view allows customers to edit and view the tasks in a gantt

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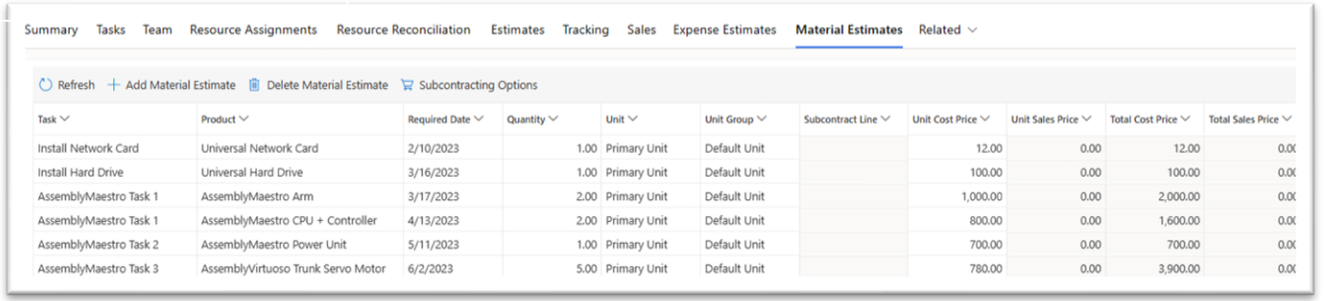
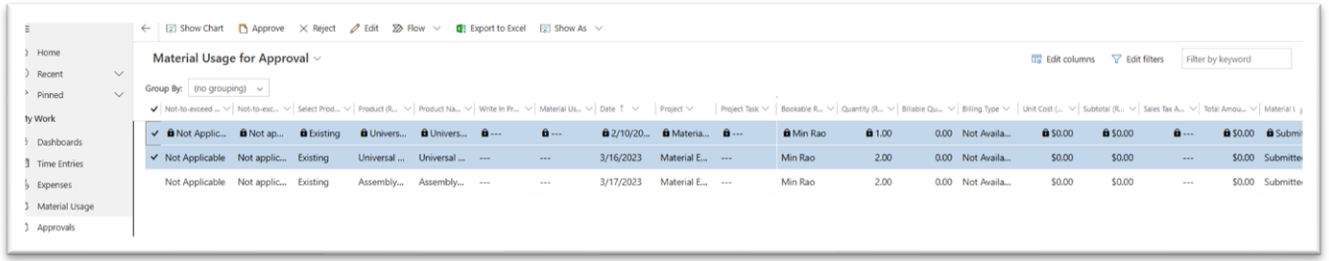
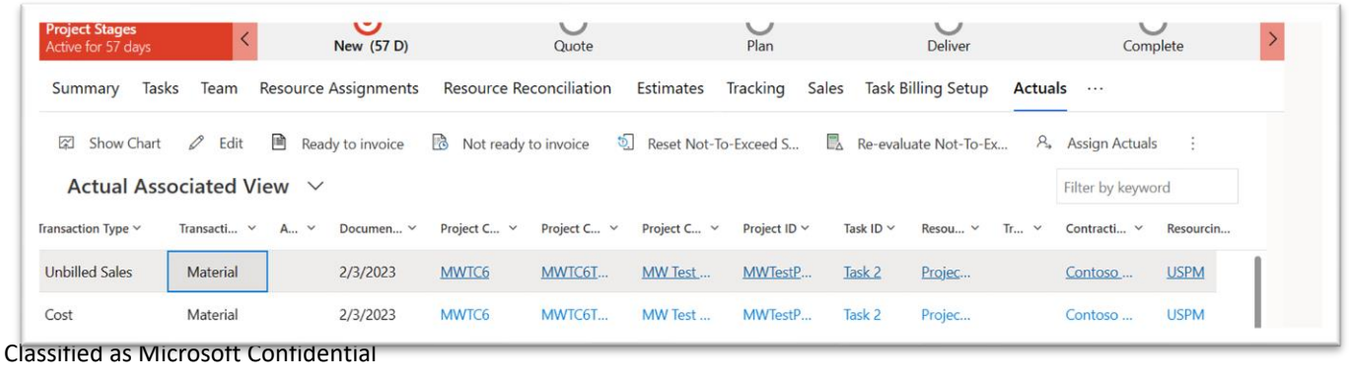
Recording material usage on projects and project tasks

Estimate



Approve





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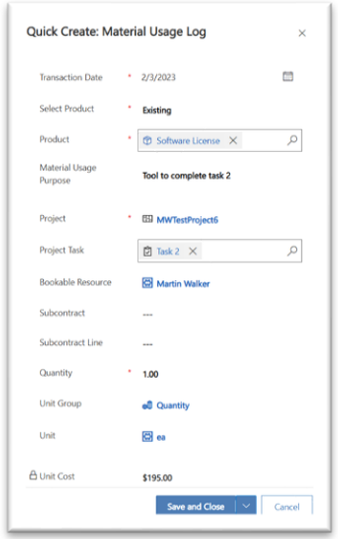

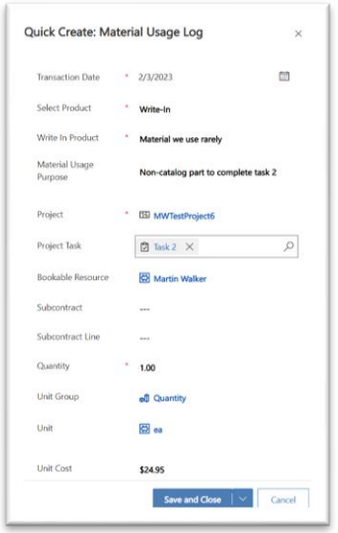

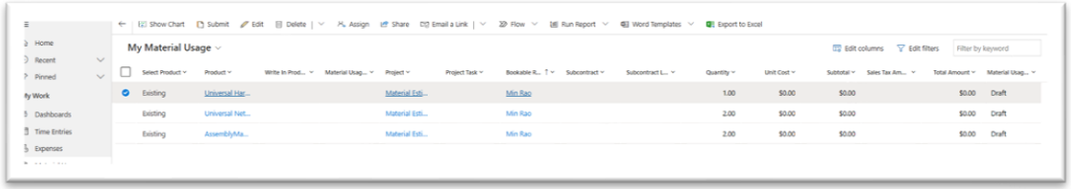

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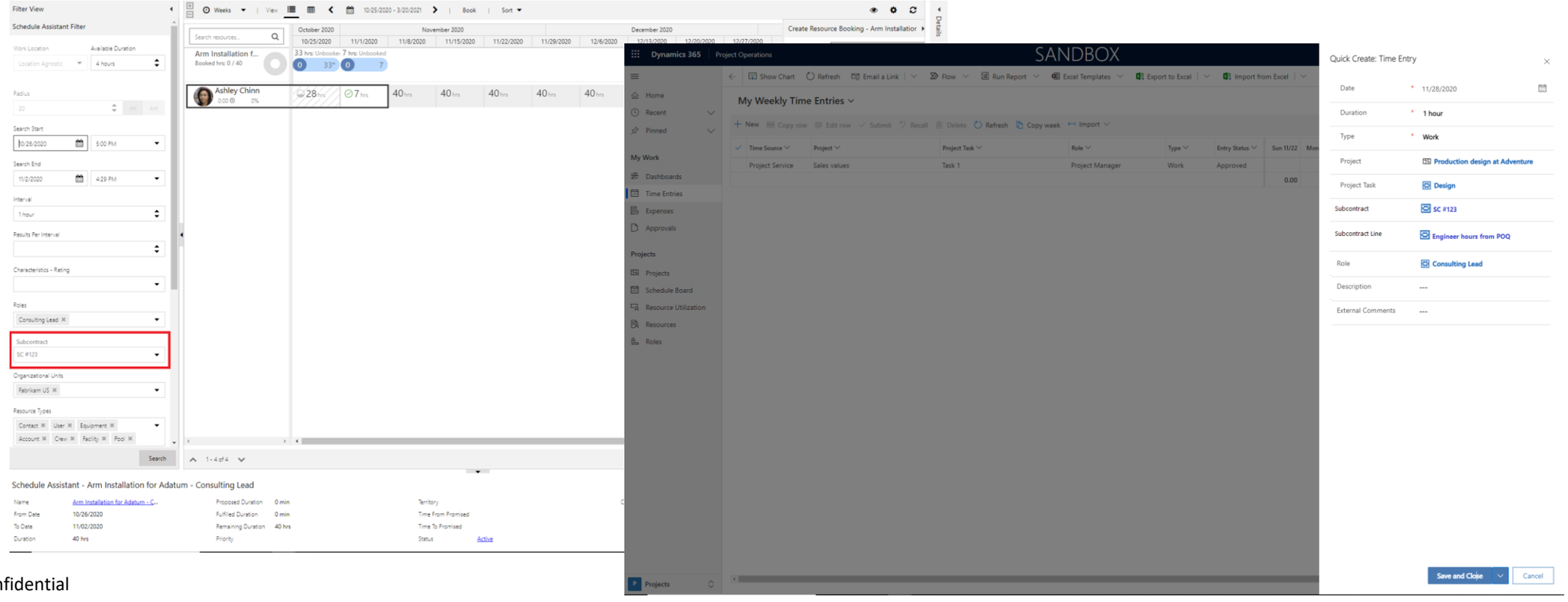
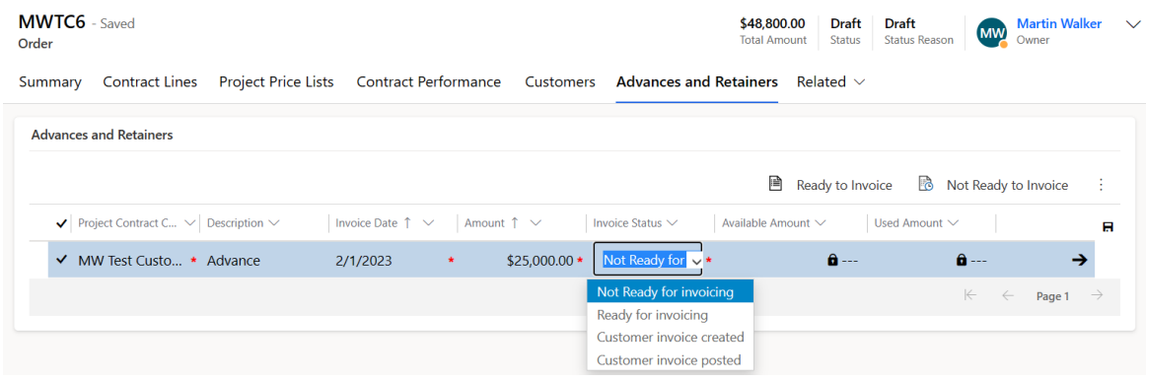
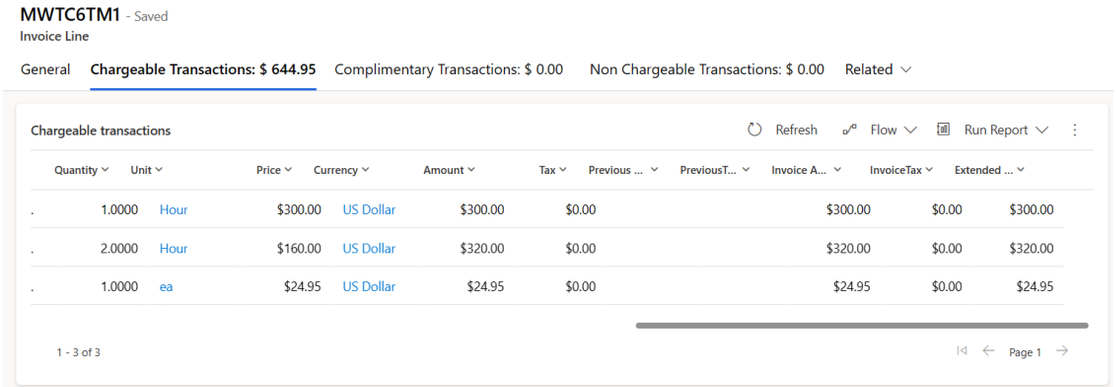
Subcontract management

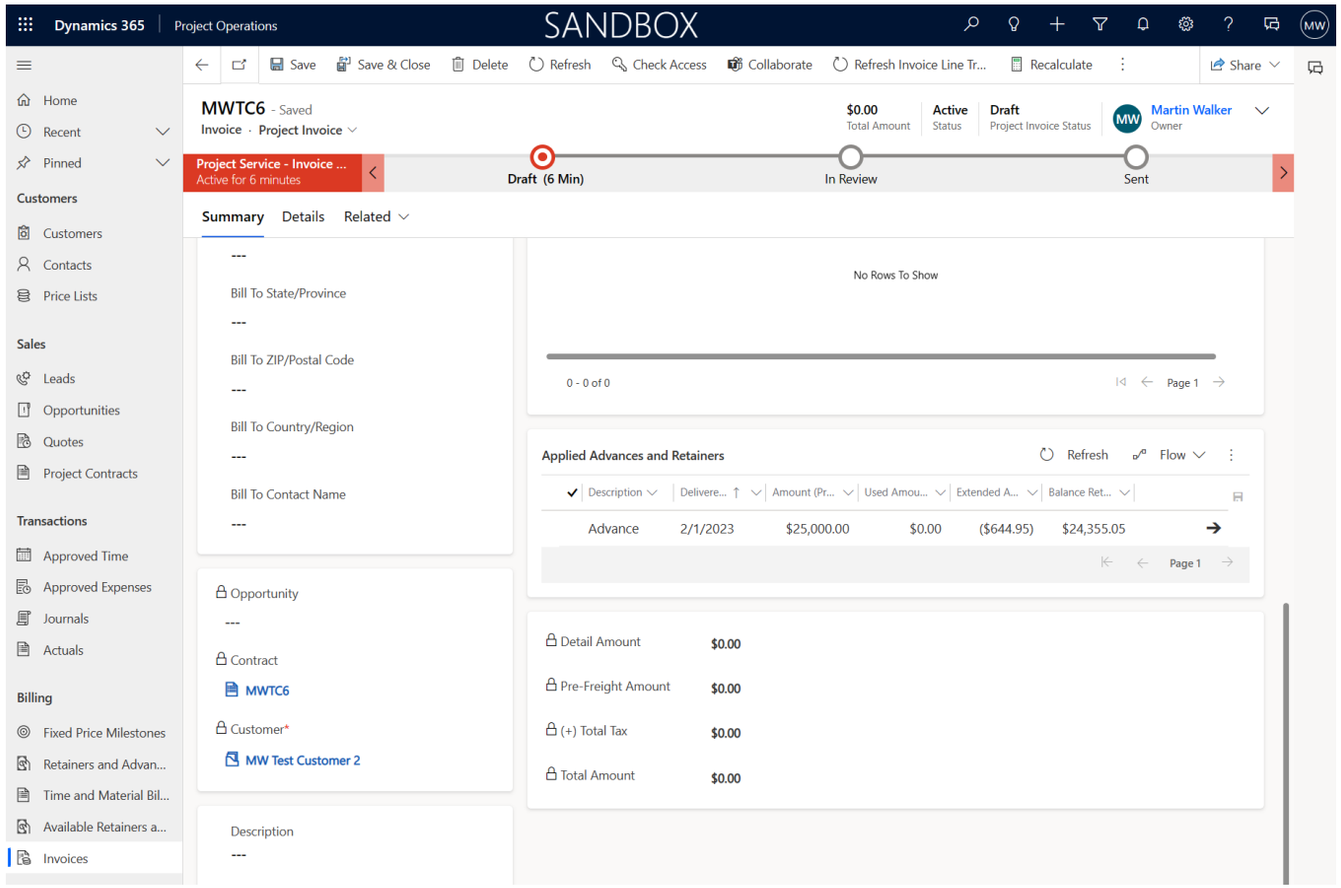
- When a book experience is initiated from Project, the Schedule Board can filtered to show Contract Workers from specific subcontracts
- Contract Workers recording time entries will be prompted with a subcontract and subcontract line when entering time so that the time is costed based on what was agreed on with the vendor contractually.



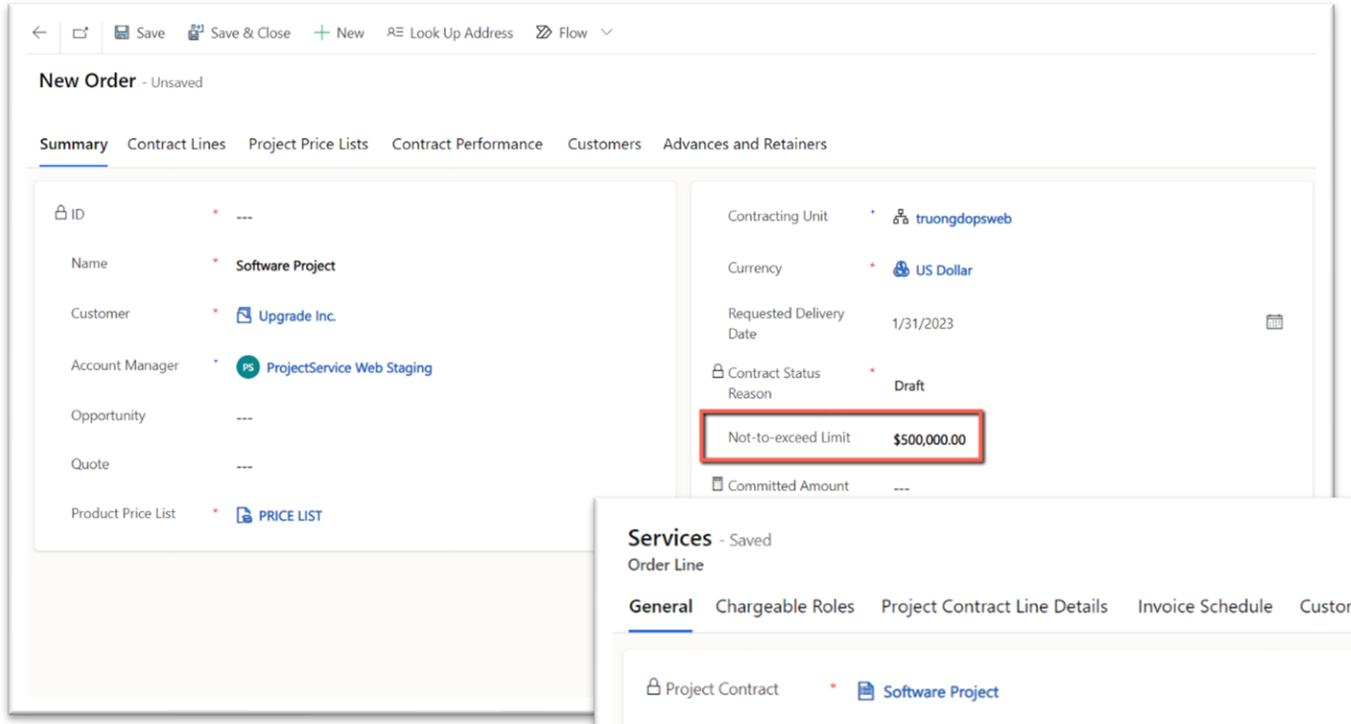
Advances and retainer-based contracts

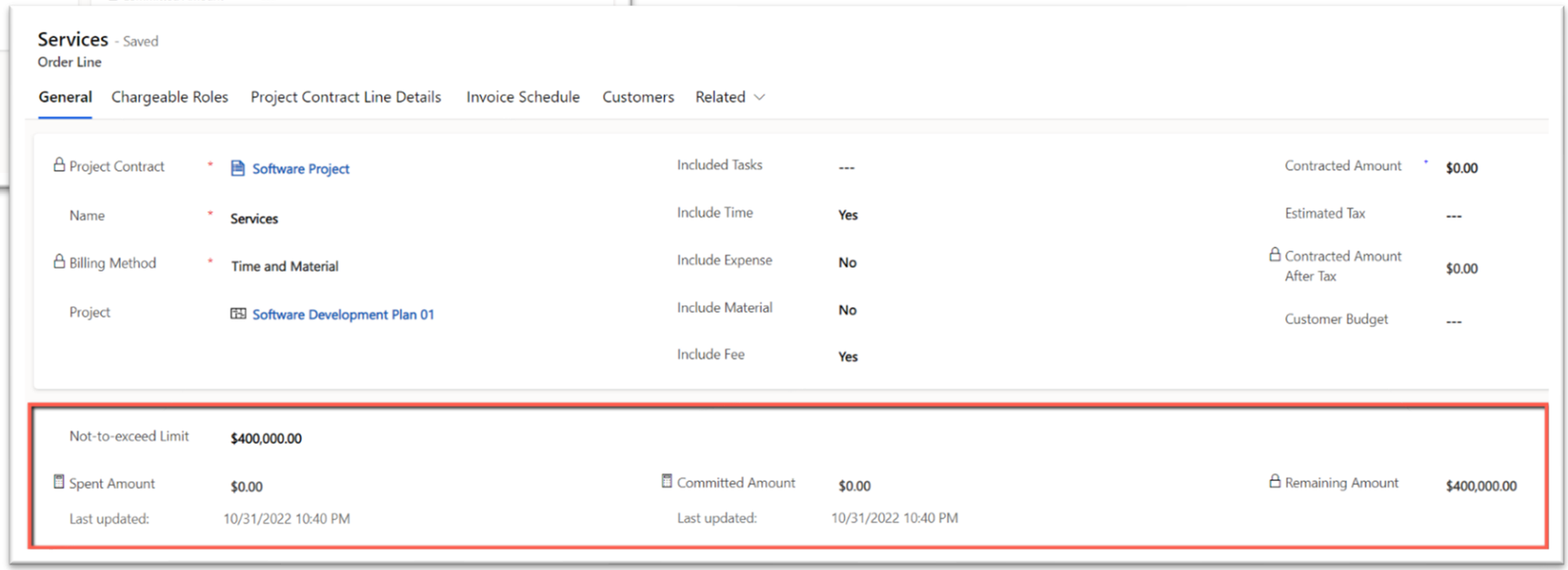






Contract not-to-exceed status and validations





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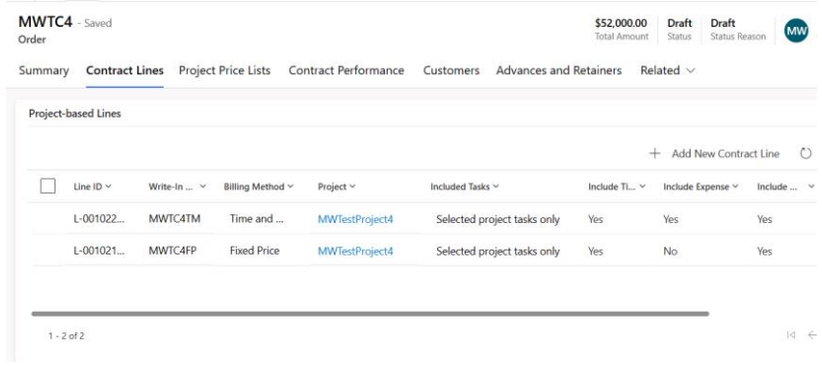
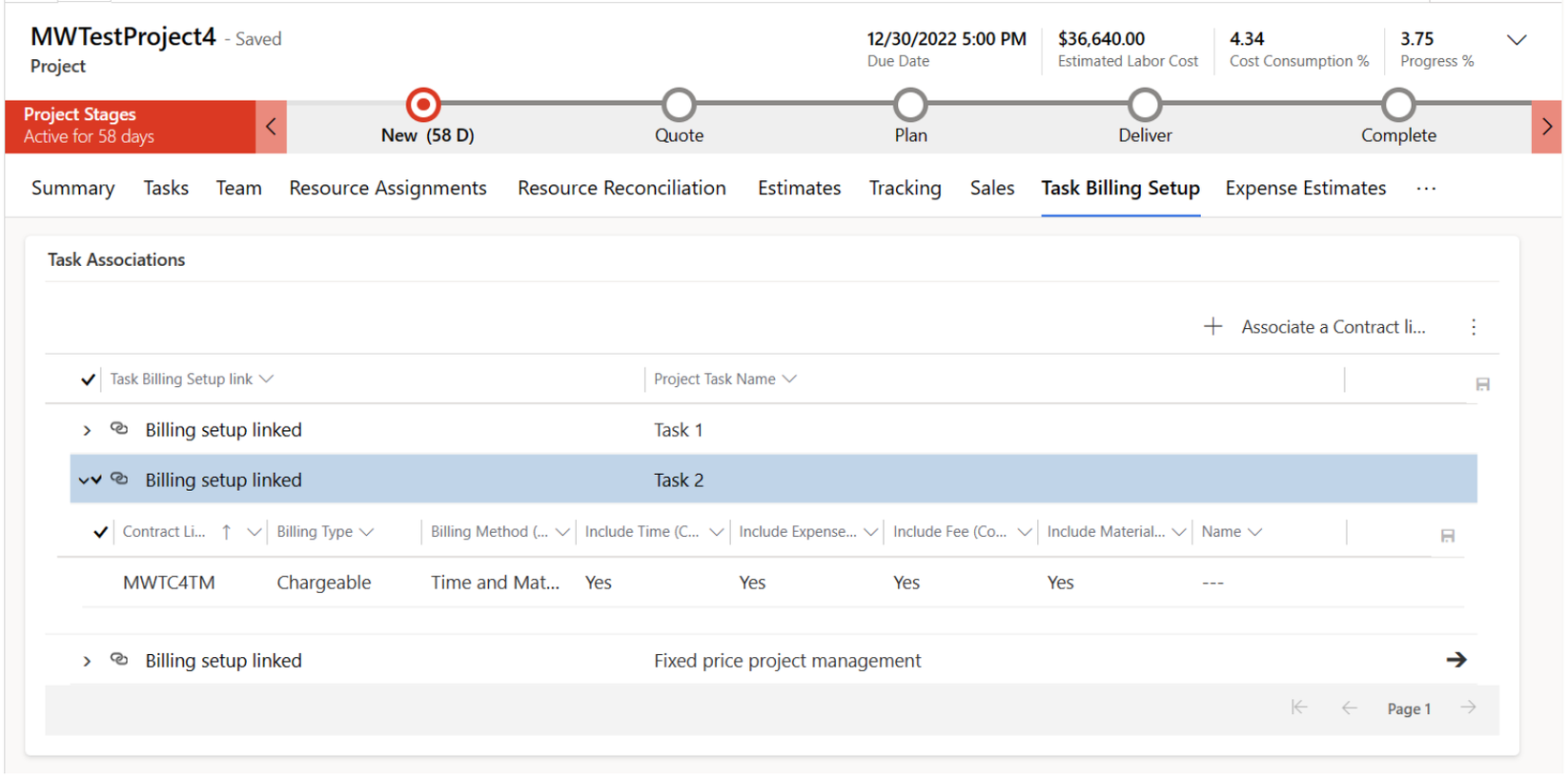
Task-based billing

- Provides ability to associate tasks in a project with different contract lines





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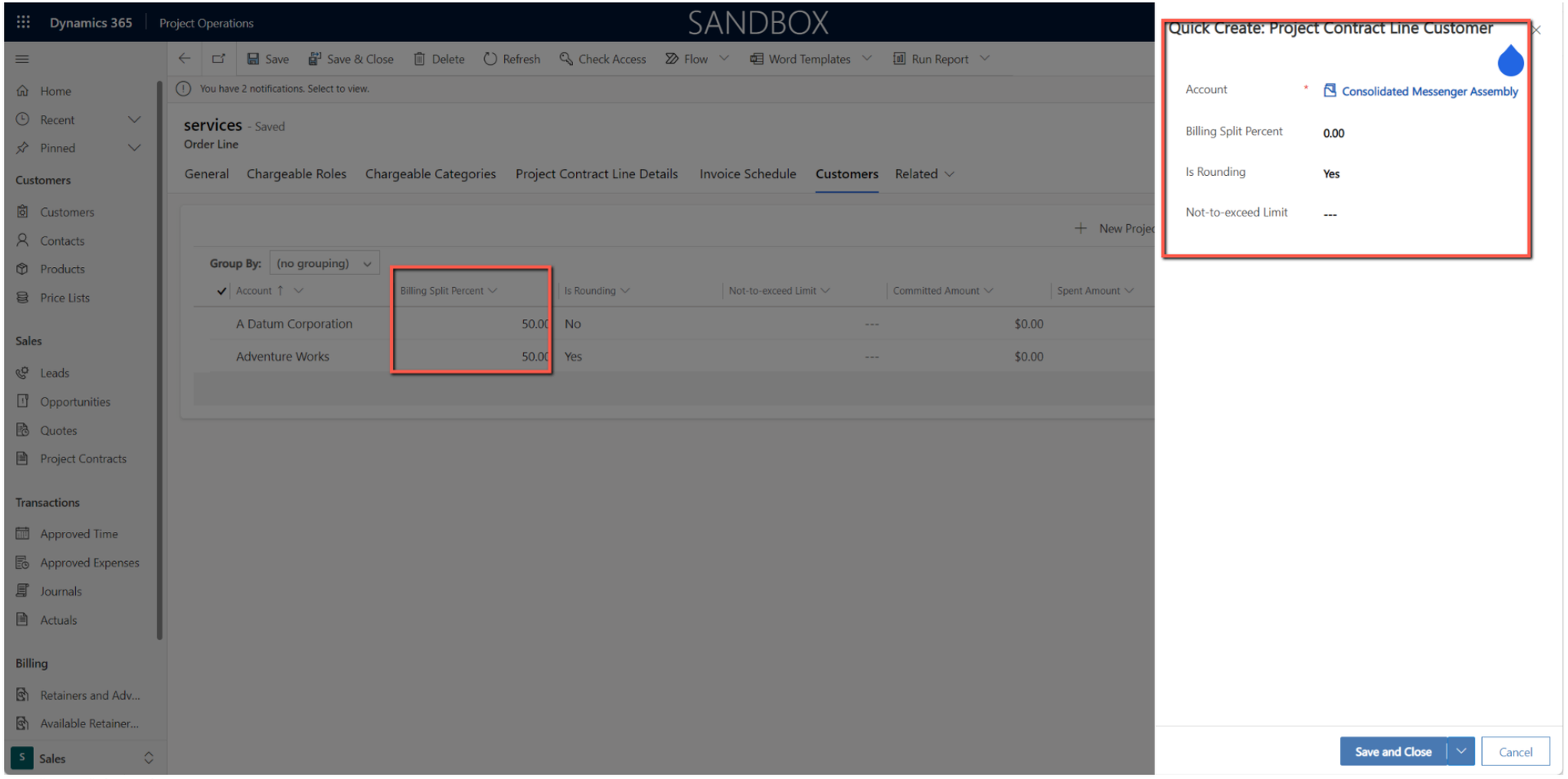
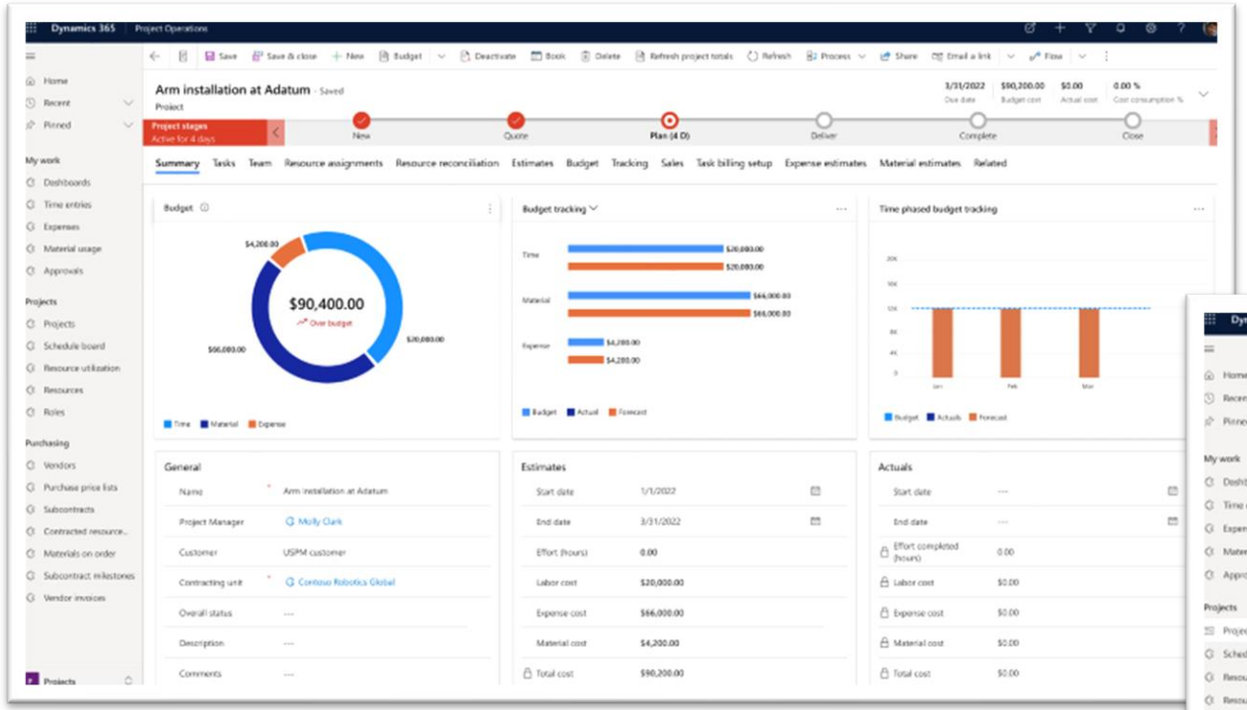
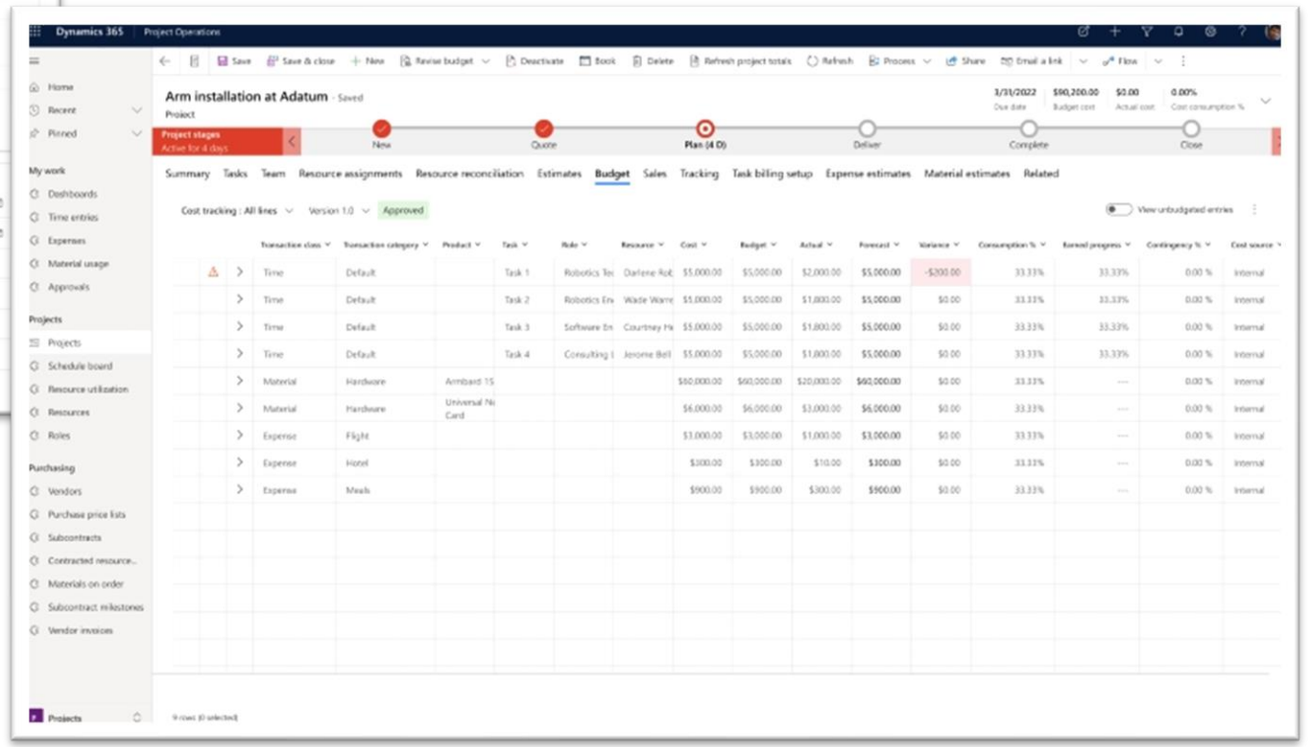
Split billing

Provides ability to define % of a contract line to be billed to each of multiple customers.



Project budget management