WESTCOAST CLOUD

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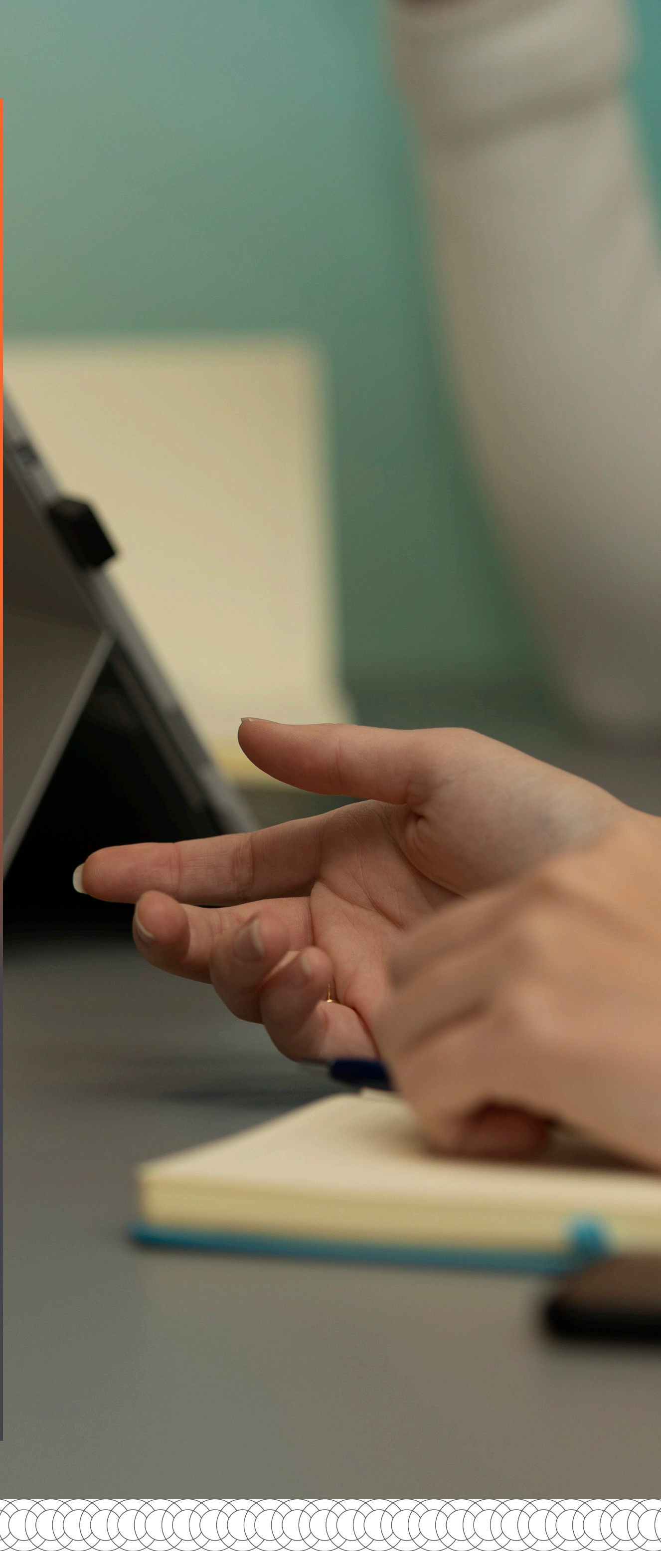

DYNAMICS 365 PROJECT OPERATIONS LICENSING

Dynamics 365 Project Operations turns siloed, unorganised businesses into connected, collaborative, project-centric organisations.

Use this centralised platform to help your customers optimise resources, accelerate delivery, maximise profitability, win more bids and ensure every project goes off without a hitch.

Project Operations is licensed per user. And your customer must purchase at least 20 licences in order to use it.

Account managers, project managers, project assistants, and project accountants are typically licensed as full users.

Users who create and approve project timesheets, such as those with a Project Timesheet security role, only need a Team Members license.

Project Operations licenses aren't used at the Operations Activity level. But full users do have rights to Operations Activity roles for other Dynamics 365 products, such as Finance and Supply Chain Management.

PROJECT OPERATIONS SECURITY ROLES

ROLE	SECURITY ROLE DESCRIPTION	TEAM MEMBERS	PROJECT OPERATIONS
Project Management			
Project Resource	Works on the project as a team member, usually fulfilling a specialised role. Records time and expense entries as they make progress on the project.	●	●
Project Timesheet Delegate	Enables creation and approval of project timesheets	●	●
Project Timesheet User	Enables creation and approval of project timesheets	●	●
Project Approver	Approves time, expenses, and materials within a project	●	●
Project Manager	Creates and plans projects and tasks. Plan resources and estimate the cost and revenue for the project. Reviews and approves all consultant activity on the project and tracks the progress and spend. Reviews draft invoices.		●
Project Accountability & Administration			
Project Billing Administrator	Creates project invoices. Manages and maintains invoice layouts. Reviews invoices for accuracy of sales tax codes and exchange rates. Sends invoices to customers and posts invoices to general ledger.		●
Expense Administrator	Configures expense management solution		●
Project Assistant	Documents project accounting process events and responds to project accounting process enquiries		●
Project Accountant	Maintains project accounting policies		●
Project Supervisor	Enables and reviews the project accounting process		●
Project Sales			
Account Manager	Manages sales and relationship for customer-facing projects. Creates and manages new project opportunities, builds proposals, and wins quotes to create project contracts.		●
Practice Management			
Practice Manager	Owns the practice in the project organisation. Creates reports and dashboards for deals in the pipeline. Understands resource demand and utilisation.		●
Resource Management			
Resource Manager	Maintains project resource tasks. Staffs project demand and manages resource utilisation to ensure resources are appropriately utilised.		●

PROJECT OPERATIONS USE RIGHTS

USE RIGHTS	TEAM MEMBERS	PROJECT OPERATIONS
Access		
Dynamics 365 for Outlook and Dynamics 365 App for Outlook	●	●
Dynamics 365 Mobile Client Application	●	●
Microsoft Dynamics 365 for iPad & Windows	●	●
Microsoft Dynamics 365 Web application	●	●
Read		
All Dynamics 365 application data	●	●
Custom table data	●	●
Approve		
Time, expense, materials, and invoices	●	●
Access via Customer Service App for Team Members, Portal2 or API: Create, Read, Update, Delete		
Employee self-serve: cases	●	●
Non-employees only: work orders		●
Non-employees only: opportunities		●
Tables: Create, Update, Delete		
Accounts		●
Activities	●	●
Announcements	●	●
Calendar: Share	●	●
Contacts	●	●
Custom Tables	15 max	●
Notes	●	●
Organisational Units		●
Personal Views	●	●
Price Lists		●
Product		●
Product Bundles		●
Product Families/Hierarchies		●
Product Relationships		●
Project Billing Backing Views		●
Project Contracts		●
Project Estimates		●
Project Invoice Schedules		●
Project Invoices		●
Project Management		●
Project Opportunities		●
Project Price Lists		●
Project Pricing Dimensions		●
Project Quotes		●
Project Resource Requests		●
Project Time and Expense Entries	●	●
Project Transaction Approvals		●
Quick Campaigns		●
Resource Availability View		●
Resource Schedule Management		●
Saved Views	●	●
Transaction and Expense Categories		●
Tables: Actions		
Activity feeds: post and follow activity feeds	●	●
Add or remove a connection (stakeholder, sales team) for an account or contact	●	●
Business units: define and configure		●
Chat with support team (as chat client for self-service, requires; third-party solution)	●	●
Copy project quotes and project contracts		●
Create and confirm corrective invoices for projects		●
Create and confirm project invoices along a recurring schedule		●
Create custom and configurable project pricing	●	●
Dialog: start dialog		●
Knowledge base: create, update, publish, configure		●
Lead: qualify and convert to an opportunity		●
Mail merge: perform mail merge	●	●
Manage services, resources, work hours, and competencies		●
Marketing list: associate a marketing list with an account or contact	●	●
Project contract confirmation		●
Project tasks: update project task status for Project Operations	●	●
Project transactions: approve		●
Queue: use a queue item	●	●
Resource competencies: update own resource competencies for Project Operations	●	●
Resources (facilities, equipment, people): manage		●
Resources: define and configure		●
Schedule and dispatch capabilities: use scheduling assistant, drag and drop assignment, update resource bookings		●
Schedule board: configure and view		●
Services: define and configure		●
Setup cost and bill rates for project resources from same division and resource transfer prices for resources from other divisions		●
Teams: define and configure		●
Territories: manage		●
Time and expense: submit time and expenses for Project Operations	●	●
Use resource availability view and resource schedule management		●
Winning a project quote		●
Work hours: manage		●
Yammer: use Yammer collaboration (requires the appropriate license, acquired; separately)	●	●
General System Use: Actions		
Auditing: configure		●
Business processes: customise		●
Dialogs: define and configure		●
Duplicate detection: configure rules		●
Dynamics 365 forms, tables, and fields: create		●
Email: create, update, and delete templates	●	●
Forms and views: customise		●
Import data in bulk		●
Microsoft Excel: export data to Excel	●	●
Queue: define and configure		●
Records: use relationships and connections between records	●	●
Search and advanced find: use	●	●
System reports, charts, and dashboards: create and update		●
System reports, charts, and dashboards: customise		●
Tables: define connections and relationships between tables		●
Word: create, update, and delete templates	●	●
Workflows: define and configure		●
Additional Services and Software		
Project for the Web		●
Project Operations Team Members App	●	●

If you have any questions around licensing, please contact:

The Dynamics Team
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