UltiProject - Documentation - Module Setup v2.0





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1. General information

This chapter describes the constraints and limitations of the application UltiProject.

1.1. Length of fields shared by the 2 systems

Before setting your data in order to settle the interface, you have to consider the constraints on the length of Objects. If you need to implement prefix in the interface, the length of objects may be also affected.

Objects ID	Length in D365	Length in Pegase
Material	60	20
Equipment		255
Customers		255
Locations		255
Intervention		To be tested
Intervention Type	10	

1.2. Constraints

An intervention in Pegase is related to a unique equipment. For that reason a new object, called intervention, has been implemented in D365 based on the standard service order.

Pegase allow only one intervention duration; in D365 for intervention, you will be authorized to create only.one line with hours

1.3. Master data referential

The master data referential in Pegase is composed of Customers, Sites and Equipment.

This referential is not mandatory in Pegase, you can choose to let it inactive.

When the referential is not activated in Pegase, all the information necessary for an intervention is sent by D365 in the intervention itself.



2. Overview of the module setting

The following diagram shows the necessary setting to enable the interface between D365 ULTIPROJECT and the mobile solution Pegase





3. Settings in Pegase – Administration Data

3.1. Interface User Account

3.1.1 Profile

A profile dedicated to interface: this profile allow to do all the operations except manage users and technicians

AD ULTIMA GROUP		Q New			
Synthesis Work order 🔹	Schedule • Cartograph	y Customer •			
Search a profile	Add a profile				
O Search		* Name	Webservice		
New		Comments	Profile for webservice		
	* Compulsory fields				
	Rights				
	> Work order				
	> Customer referential				
	> Parameters				
	~ Administration				
		Name		Comments	
	✓	Technician reading		Read and list technicians	
	✓	Team reading		Read and list teams	
		Technician writing		Read, list, create, modify and	delete technicians
		Teamss writing		Read, list, create, edit, delete t	teams.
		Filter by team		Filter data by team.	
		Technician modifing		Modify technicians	
		Profile reading		Read and list profiles	
		Profile writing		Read, list, create, modify and	delete profiles
	✓	User reading		Read and list users	
	✓	Web service user		Administration of right of use	of web services.
		User writing		Read, list, create, modify and	delete users
	~	Consultation pays		Consulter et lister les pays	
		Ecriture pays		Consulter, lister, créer, modifie	er et supprimer des pays
	> Activity report				
	> Localisation				
	> Techniciens				



3.1.2 Interface user account

In Pegase, you have to define a special user for the webservice interface between D365 and Pegase.

AD ULTIMA GROUP	QNew
Synthesis Work order 🔹	Schedule • Cartography Customer •
Excel export	Add a user
Export	* Last name Interface AX-PBMS
Search a user	First name
	* Login axpraxedo@adultimagroi
	* E-mail axpraxedo@adultimagrol
Q Search	Country France V
New	Language French V
	* Profile Webservice 🗸
	Team PBMS GROUP
	Web service user 🔽
	* Compulsory fields
	Save Cancel

Field Login: Define a login for the user

Field E-mail: Put the mail address of the interface administrator: he will receive the link by mail to initialize the password of the user.

Field Profile: In this field, indicate the user profile for the Webservices : This profile should be limited to the operations related to an intervention; avoid to grant administrative task in that profile.

Web service user: This checkbox indicates that this user can only login through webservice in Pegase: it should be always ticked off for the interface users.

Remark: this user/password will be set on the D365 side in the interface global parameters

After the interface user definition, go back in the user in read mode and click the button "Reset Password":

AD ULTIMA GROUP	Q Ne	w
Synthesis Work order 🔹	Schedule • Cartography Customer •	
Excel export	Users	
Export	Last name	Interface AX-PBMS
	First name	
Search a user	Login	axpraxedo@adultimagroup.com
	E-mail	axpraxedo@adultimagroup.com
O Occurt	Profile	Webservice
Q Search	Team	PBMS GROUP
	Country	France
New	Language	French
	Web service user	Yes
	Edit Delete Reset password	





3.2. Agencies (Teams)

List of agencies created in Pegase:

AD ULTIMA GROUP	Q New
Synthesis Work order 🔻	Schedule • Cartography Customer •
Création	Team list
New	Name
	PBMS GROUP
	PBMS Belgium
	Team Beneluxpark
	Team De Kien
	PBMS France
	Team Lyon
	Team Paris
	Team Toulouse
	Test Team 001

Codes:

Agency Code	Code	Parent
PBMS Group	GLCO	-
PBMS Belgium	DEMF	GLCO
Team Beneluxpark	092	DEMF
Team De Kien	093	DEMF
PBMS France	USMF	GLCO
Team Paris	094	USMF
Team Toulouse	095	USMF
Team Lyon	096	USMF



Setting of Pegase: Parameters Activity types

Add an activity type							
Name	Administration	Break	Holiday	Maintenance	Meal	Repair	Transport
Code	ADMIN	PAUSE	Holiday	MAINT_PREV	Meal	Repair	Transport
Color	•	•		•	•	•	•
Length	Hours, minutes	Hours, minutes	Days	Hours, minutes	Hours, minutes	Hours, minutes	Hours, minutes
Start	System date and time	Manual typing	System date and time	System date and time	Manual typing	System date and time	Manual typing
End	Next activity	Next activity	Next activity	Next activity	Next activity	Next activity	Next activity
Working time	Yes	No	No	Yes	No	Yes	Yes
Imputable to a work order	No	No	No	Yes	No	Yes	No
Work order start	No	No	No	No	No	No	No
~ Advanced parameters							
Linked section							
Real time	Yes	Yes	No	Yes	Yes	Yes	Yes
Initial activity	Yes	No	No	No	No	No	Yes
Form access	No	No	No	All work orders	No	Imputable work order	No
Complete access	No	No	No	Yes	No	Yes	No
End on complete	No	No	No	Yes	No	Yes	No
Usable	Web and Mobile	Web and Mobile	Web	Web and Mobile	Web and Mobile	Web and Mobile	Web and Mobile
Modify on	Web and Mobile	Web and Mobile	Web	Web and Mobile	Web and Mobile	Web and Mobile	Web and Mobile
GPS record	Never	Never	Never	Never	Never	Never	Never
Next activities	 Break Maintenance Meal Repair Return (no input) Transport 	 Maintenance Meal Repair Transport 		 Administration Break Maintenance Meal Repair Return (no input) Transport 	Maintenance Meal Repair Transport	 Administration Break Maintenance Meal Repair Return (no input) Transport 	 Break Maintenance Meal Repair
Edit Delete							

< Return to the list

Remarks on Maintenance and Repair activities:

These activities are "Special" because their corresponding time is registered in the interventions. For a proper operation of the interface between D365 and Pegase, these activities must be ended as soon as the intervention is completed by the technician. The setting of these activities should be as follow in the red boxes:





4.2. Product Categories (Charge Categories)

The charge categories help the technician to find material on the mobile application

AD ULTIMA GROUF	Q New
Synthesis Work order 🔹	Schedule • Cartography Customer •
Création	Charge category list
New	Name
	EX - Expenses
	EX01 - Travel
	Electrical Component
	Contactors
	Motors
	Sensors
	Hydraulics
	Mechanical components
	Belt
	Carters
	Link Rod
	PP - Pedestrian Products
	PP01 - Security Entrance Lanes
	PP02 - Swing Gates
	PP03 - Tripod Turnstiles



4.3. Skills

Creation of 2 types of skill:

Liste des compétences	
	A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Tout
Nom	Code
Electricity	ELEC
Mechanic	MECA

Skills have no link with D365. They are assigned to the technicians and are used to select the correct technicians for a given intervention. When the service planner has to assign an intervention to a technician, Pegase will propose only the technicians who have the correct profile (skill) to realize the intervention

4.4. Forms

General Form (<u>Tout</u>)	
■ Intervention	
Problem Type	~
Mechanical Problem	-
Electrical Problem	T
Equipment Barcode	188
Equipment Photo	
■ Customer Section	
Signature	ø
Customer Name	
• III Information	
Project Nr	
Customer Order	
Modifier Supprimer Ajout d'une section Ajou	t d'un champ Dupliquer

4.5. Intervention types

3 types of intervention are created in Pegase: these intervention types must have code identical to those created in D365. Note also that you can select a unique skill and a unique form to an intervention type.

AD ULTIMA GROUP	Q New			Payen Domi	inique 🔻
Synthesis Work order 🔹	Schedule • Cartography Customer •			Parameters • Admi	inistration 🔹
Search a work order type	Work order type list				
		ABCDEFGHI	JKLMNOPQRSTUVWXYZAII		
Q Search	Name	Code	Skill	Form	
	Annual Maintenance	AMaint	Dépannage barrières BL	Dépannage type 1	
New	Dépannage Barrières Industrie	DEP_BL_IND	Dépannage barrières BL	Dépannage type 1	
	Installation	Installati	Installation	Dépannage type 1	
	Monthly Maintenance	MAINT_MENS	Electrical	Dépannage type 1	
	Order approval	APPROB_CDE	Appro_Cde	Order Approval	
	Quarterly Maintenance	QMaint	Dépannage barrières BL	Dépannage type 1	
	Repair	Repair	Electrical	Dépannage type 1	
					< >



5. Settings in D365

5.1. Basis Data in D365

5.1.1 Product categories

Product category in D365 will be used to assign a material to a product family in Pegase

The product category hierarchy that need to be customized is "Service" in our case. The name of the category created here will have to be indicated later in the setup of the interface (cf 5.2.4)





5.1.2 Organization administration – Operating Units

Create all the operating units corresponding to the teams of Pegase:

- 1: Click on New
- 2: Select "Business Unit"
- 3: Enter the description of the operating unit

4: Check that the number correspond to the code created in Pegase (cf 3.2). If it's not the case, you have to adapt one of the two systems to have the same codes on both.

4	Dynamics A	X = Organization administration > Organizations > Operating units
🖪 s	ave 💼 Delete	New - View in hierarchy - RELATED FORMS OPTIONS
T	₽ Filter Name Team Beneluxnar	OMInternalOrganizationSelector select operating unit type Department vypark 092 Team Beneluxpark
	xxx	Value stream
	Bangalore Mumbai	Business unit
	Delhi store	Rental location Click to follow link
	Call Center Moscow	Region Retail channel
	Osaka Tokyo	OK
	Fabrikam call cen	er 080 :
	Fashion	078 Manager
	Fabrikam online s	tore 077 🗸
	Paris	076 Addresses
14	Dvnamics A	$\chi \equiv$ Organization administration \rightarrow Organizations \rightarrow Operating units



₽ Filter		Business unit		
Name	Operating unit	Name	Business unit number	Search name
Team Beneluxpark	092	Team Beneluxpark	3 092	Team Beneluxpark
ххх	091	General	•	
Bangalore	090	Memo		
Mumbai	089			
Delhi store	087			
Call Center	086			
Moscow	085	In biogenelay		
Osaka	082	No		
Tokyo	081	DUNS number		
Fabrikam call center	080			
Fashion	078	Manager		
Fabrikam online store	077		~	
Paris	076	Addresses		
Nice	075	Contact information		
Bordeaux	074	contact mornation		
DD Financias 0. Adm. / . indiana	070			

After the creation, you should have several business units with corresponding to teams of Pegase.

4	Dynamics AX 🛛 🚍	Organization ad	Iministration > Organizations > Operating units
Go to	o dashboard elete New ~	View in hierarchy \checkmark	Related forms options Q
•		Operating unit	Name Business unit number Search name PBMS Team Paris 096 PBMS Team Paris
	PBMS Team Lyon PBMS Team Lille	095 094	General Memo
	PBMS Team De Kien PBMS Team Beneluxpark	093 092	PBMS Team Paris
	xxx Bangalore	091	In hierarchy
	Mumbai Delhi store	089 087	No DUNS number
	Call Center Moscow	086	Manager
	Osaka Tokyo	082	Addresses
	Fabrikam call center	080	Contact information



5.1.3 Organization Hierarchies

1: Create an organization hierarchy for service operation:

2: Enter its name, for example "PBMS Service Organization"

// Dynamics AX	tion administration > Organizations > Organization hierarchies					
R Save + New Delete View OPTI	ons 🔉					
▼ P Filter Auto - Business Unit	Organization hierarchies Name PBMS Service Organization					
Budgeting - Departments	Purposes Assign purpose					
Centralized Payments	V Purpose					
Contoso Consulting	Allowed organization types					
Contoso Holdings						

Department 3: Assign "Project Management" to the purposes of the organization hierarchy



One the purpose is assigned, you can start the definition of the hierarchy \rightarrow 4 : click on view

4	Dynamics AX = Organization	administration > Organizations > Organization hierarchies						
🖪 Sa	ave 🕂 New 🖻 Delete View OPTIONS	Q						
T	P Filter Auto - Business Unit	Organization hierarchies Name PBMS Service Organization Purposes Assign purpose						
	Budgeting - Departments							
	Centralized Payments	Purpose Project management						
	Contoso Consulting	Allowed organization types						
	Contoso Holdings							

Create the same hierarchy as in Pegase

🏄 Dynamics AX	∣≡	Organization a	dministration > Orga	nizations >	Organization hierarchies			
R Save + New	Delete	Hierarchy details	Organization details	Purposes	Hide or show preview pane	OPTIONS	Q	

Hierarchy designer - PBMS Service Organization

Publis	h 🗸	Insert 🗸	Ō	Remove	Cut	Paste	Undo	
							PBMS Group	
	PBI	MS Fran	ice				PBMS Belgium	
• 	PB	MS Tea		PBN	<mark>νι</mark> ς τε	••• ea	PBMS Tea PBMS Tea	
								••
	PB	MS Tea						

5.1.4 HRM settings : Data for Pegase Technician in D365

Employees who are Technicians in Pegase have a code in their profile. These employees must have also the code in D365 corresponding to the code in Pegase

Go to dash	board CS	AX	≡	Human re	sources >	Workers > Employ	ees							
🖪 Save	+ New	🛅 De	lete	As of date 🗸	WORKER	COMPENSATION	TIME	PROJECT	EXPENSE	RETAIL	GENERAL	OPTIONS	Q	
▼ ≣	 MPLOYEES Dominique Payen: 000648 PROFILE EMPLOYMENT COMPENSATION COMPETENCIES AND DEVELOPMENT RETAIL 													
	Employment details													
	Time r	registra	tion											
_	Financ	cial dim	ensio	ns										
	Servic	e regist	tratior	۱										
	PEGASE Technicia DPY	in code in I	Pegase]											

Don't forget to assign the employee to the user.

A D	ynamics AX 🛛 🔳	System administration > Users >	Users			Search for a page	P USMF	۰
🖪 Save	+ New	Import users Haintain versions	User options OPT	tions Q				
Ŧ	dominique. :	DPY Dominique Pay	/en					
≣	User details							
	User ID dominique.	User name DPY Dominique Pay	en	Domain https://sts.windows.net/	Alias dominique.payen@adultimagro	Company USMF ~ Dominique Payen Enabled Yes	~	
	User's roles							
	+ Assign roles 📋 Remove	e role Assign organizations						
	 Roles 							
	System administra	tor						
	System user							



5.1.5 Intervention types

3 Types of interventions created in D365: they must have the same code as in Pegase (See § 4.5).



▼ Intervention types

₽ Filter	
Intervention ty ↑	Description
AMaint	Annual Maintenance
QMaint	Quarterly Maintenance
Repair	Repair



5.1.6 Service Stage

It is necessary to create the following stages in order to follow the intervention in both systems

🏄 Dy	namics AX									Search for a page 🛛 🔎	USMF 🔎	ø	?	۲	DP
🖪 Save	+ New 💼	Delete OPTIONS Q												٥	0
Ŧ	Service s	stages													
	Service stage 🕇	Description	Delete	Modify	Cancel	Post	Reason	Stop time record	Parent	Phase	Synchronization	S	Symbol font	glyph	
	01-New	New intervention	 ✓ 	✓	✓	✓						++	AddMultip	le	
	02-InQual	In Qualification	✓	✓	✓	✓			01-New			ß	Document		
	03-Qual	Qualified	✓	✓	✓	~			02-InQual			Г,	Generate		
	04-Planned	Planned	✓	~	✓	~			03-Qual			Ē.	ProjectMa	nagei	
	05-InProc	In Process	✓	~	✓	~			04-Planned			۶	Tools		
	06-Compl	Completed	✓	~	✓	~		✓	05-InProc			~	Accept		
	07-Valid	Validated	~	~	✓	~			06-Compl			-	Checkbox\	NithB	
	08-Closed	Closed	 ✓ 	~	 ✓ 	~			07-Valid			Ê	Checklist		
	09-Invoic	Invoiced	~	-	✓	~			08-Closed			-	PayTender		
	10-Waiting	Waiting			 Image: A start of the start of				02-InQual v	~			Warning	~	

Remarks:

Stop time recording is set at the invoice stage, this is mandatory for a proper integration in D365 of intervention result coming from Pegase: in the next version, it will be possible to set the "Stop Time Recording" on every stage

5.1.7 Document types

The documents defined with this type and attached to an intervention will be transmitted to Pegase and on the technician mobile.

/ le h	📔 https://bpm.lcs.dynai 🗴 🚺 PBMS-CTP8 Micro 💉 💆 Document types D 🗴 🦲												
$\in \exists$	C 🔒 https://pbms-ctp8devaos.cloud	dynamics.cor	m/?cmp=USMF&mi=D	ocuType									
🔛 App	os 🙆 LCS												
<u>///</u> [4 Dynamics AX												
🖪 Sa	ve 🕂 New 🛅 Delete OPTIONS												
•	P Filter PBMS_services Document for PBMS Service	Docu Type PBMS_se Gener	ument types ervices Doc	e cument for F	PBMS Service								
	File	Class Attach	file	~	Category None		SharePoint Address	/	DOCUMENT REMOVAL OPTIONS Remove Document only				
	Image	Group File	~		Location Archive directory	~			Ask for confirmation	Ť			
	Note												
	URL												



5.1.8 Automatic Stage for interventions

A D	ynamics AX	=	Service man	agement > Setup	> Servic	e management par	ameters						Sear	ch for a page 🛛 🔎	USN	IF		.	?	9
🖪 Save	e OPTIONS Q																			٥
	Service ma	anag	ement	paramete	ers															
	General			Set up optic	ns for in	terventions														
				AUTOMATIC STA	GES	Qualified		In process		Validated		Closed		DOCUMENT TYPE		MISCE	LLANEOU	JS		
	Journals			In qualification		03-Qual	~	05-InProc	~	07-Valid	~	08-Closed	~	Type to synchronize to	Pegase	Auto SL	A stop re	ason	_	
				02-InQual	~	Planned		Completed				Invoiced		PBMS_services	~	Cance	elCust		~	
	Activities					04-Planned	~	06-Compl	~			09-Invoic	~							
	Interventions																			
	Number sequence	es.																		



5.1.9 Equipment Groups

Equipment Groups have to be created manually with a code corresponding to that of Pegase.



This equipment Group is mandatory in Pegase and thus have to be entered in the equipment of D365.

5.1.10 Pegase Item Group

This table allow to define default parameters required by Pegase: The parameters are defined in groups and the groups are assigned to the released product in D365: this avoid to enter these parameters on each item in D365.

A Dy	/namics Αλ	< ≡	Service	management	> Setup > P	egase >	Pegase item gro	up		
🖪 Save	+ New	Delete	OPTIONS	Q						
Ŧ	Pegase	item o	group							
	P Filter									
	Pegase group 🕇	Description				Tax rate	Fixed-price	Billable	Dimensions (0/1/	Flags
	VAT20 B NV	VAT 20%	Billable No	n visible PDA		20.00000		✓	1	4
	VAT20 N V	VAT 20%	Non billabl	e Visible PDA		20.00000			1	6

The Flags available are:

- 1: Not applicable for web services. Always leave this flag to zero.
- 2: the item's price is displayed on the terminals. Otherwise the price is hidden and agents cannot be aware.
- 4: Listing price is displayed to all users of the web interface. Otherwise the price is visible only for users who have the rights to see the prices.
- 16: unlabeled generic item. The wording of item must be input by the user for each item billed. The generic item used to charge items that are not in the catalog.
- 32: Not applicable to Web services. Always leave this flag to zero.
- 64: unavailable item on terminal agents. This item can be charged only via the web interface.

To create an item with multiple properties at once, sum the values of the related properties. Example: to create a contractual item and generic, the value of the flags attribute should be 17.

5.1.11 Barcode

A barcode type can be defined for product used in the interface with Pegase.

If a barcode is defined for a product, it will be transmitted to Pegase in the product interface

4	Dynamics AX 🛛 🚍	Product inf	formation managem	nent > Products >	Released produc	ts			Search for a page	ρ	USMF	▲0	ø	?	•
🖪 s	ave 🕂 New 🖻 Delete	OPTIONS Q													٥
Ŧ	P Filter Pegase Barcode For technician Pegase		Bar cod Barcode setup Pegase	Description Barcode For techr	ician Pegase										
	EAN-13 EAN-13		General Bar code type Code 39	~	Mask ID	~	Font BC C39 3 to 1 HD Wide	v	Size 0			Min	imum leng	th	
	GS1-128 GS1-128											Max	imum leng	20	
	Internal Internal														
	SFC Shop Floor Control														



5.2. Pegase interface parameters

5.2.1 Path of interface Parameters

🏄 Dynamics AX 🛛 ≡	Service management > Customers > All customers	Pegase parameters
Call center Cash and bank management Common Consolidations Cost management	Customers Service management parameters Service orders Subscription parameters Interventions Service tasks Equipment Dispatch teams Contracts Service tasks	Pegase parameters 🖈 🛧 Pegase item group
Credit and collections Expense management Fixed assets Fleet management General ledger Human resources Inventory management Master planning Organization administration Payroll Procurement and sourcing Product information management	Pegase > Service agreements > Service subscriptions > Inquiries and reports > Perform periodic tasks > Setup > Variantly types > Interventions >	er
Production control Project management and accounting Questionnaire Retail Sales and marketing Service management	> > > > >	

5.2.2 Connectivity parameters

The flag active indicates that the interface between D365 and Pegase is active The username and password will be used for authentication in Pegase:

User: Login of the user defined in Pegase

Password: password of the user defined in Pegase

Connection String Parameter: « | » (Pipe)

	Dynamics AX	≡	Service manag	ement > Setup > Peg	jase > Pega	se parameters			
🔒 Sar	ve OPTIONS 💡								
	Pegase pai	rame	eters						
	Connectivity			Connection setup					
	Message Setup			Active Yes		Operator name axpraxedo@ac	Password	Connection string separator	
	General setup								

Don't forget to activate the interface !!!



5.2.3 Message parameters

μ Dynamics AX \equiv Servic	æ management → Setup → Pegase	> Pegase para	ameters	
R Save OPTIONS ♀				
Pegase parameters				
Connectivity	Message setup			
	Indicate which messages sh	nould be activate	ed for processing Prefix	
Message Setup	✓ Message type	Active	Internet address	Number
	Customer		https://ww2.praxedo.com/eTech/services/2008_07_01/CustomerManagerDL	X7-
General setup	Item	-	https://ww2.praxedo.com/eTech/services/2008_07_01/ItemManager	
	Item category	-	https://ww2.praxedo.com/eTech/services/2008_07_01/ItemCategoryManager	
	Business event	-	https://ww2.praxedo.com/eTech/services/2008_07_01/BusinessEventManagerDL	
	Site	-	https://ww2.praxedo.com/eTech/services/2008_07_01/LocationManagerDL	X7-
	Activity	-	https://ww2.praxedo.com/eTech/services/2008_07_01/ActivityManagerDL	
	Equipment	-	https://ww2.praxedo.com/eTech/services/2008_07_01/EquipmentManagerDL	
	Attachment	1	https://ww2.praxedo.com/eTech/services/2008_07_01/BusinessEventAttachmentManagerDL	

For each kind of object (Customer, Items...), we define the http address of the webservice (This can be found in the documentation of Pegase)

The field 'Active' indicate if the interface is active or not.

The prefix will allow to distinguish data coming from different legal entities in a unique Pegase instance.

Important remarks:

The prefix are relevant only for basis data: Customers - sites -Material (Articles) - Equipment.

For other "Process data" (intervention, activities....), the best solution consist in managing a number sequence with a scope depending on company:

94	Number sec	quences 1) - Number sequence code: Serv_71Adu, Serv_71_Adu
File 👻 Num	iber sequence	
🧷 🗡 Delete	<u>†</u> 23. 🐹	🎇 Status list
F.104	Alexandra Consents	📥 Manual cleanup 🔻
Ealt	sequence	🕀 History
Maintain	New	Administration
Serv_71Adu : Se	erv_71_Adu	
⊿ Identification		
Number sequen	ce code: Serv_71Adu	Name: Serv_71_Adu
Scope parame	ters	
Scope:	Company	
Company:	USMF	
b. Commente		

Prefix Changes

When an object is transmitted to Pegase for the first time, its key in Pegase is stored in D365. If the prefix is changed afterward in the interface Parameters of D365, this will have no effect on the object previously created in Pegase.



5.2.4 General Setup

Go to di	ashboard cs AX	management > Setup > Pegase > I	Pegase parameters			Search for a page	D USMF	2	?	۲	DPY Dom
🖪 Sav	e OPTIONS 💡										0 C
	Pegase parameters										
	Connectivity	General setup									
	Message Setup	Category hierarchy Service	Transfer full address info for each int	Max timeframe for activity search (hours)	Organizational unit BusinessUnit	Empty s	service level agreem	ent Barcode	setup e	~]
	General setup										

Category Hierarchy: is the category corresponding to the Team Hierarchy in Pegase

Transfer full address for each intervention. When an intervention is created in D365, there are 2 possibilities to transfer the address where the technician will intervene:

- Either we transmit the Site Number
- Either we transmit the full address with the geolocation: This option should be chosen if the equipment have a particular GPS position and are not located at the customer Site.

Organizational Unit: The kind or organizational unit in D365 that correspond to a Team in Pegase

Barcode Setup: The type of barcode that is used to identify the product when they are used for the service (Note that if the product barcode is existing in D365, the technician will be able to scan it with his smartphone during the intervention)

5.3. Parameters in D365

Service Management \rightarrow Setup \rightarrow Service Management parameters

5.3.1	General						
🥢 Dy	namics AX 🗧 Service mana	agement > Setup > Servic	e management parameters			Search for a page	ρ
Ħ Save	OPTIONS Q						
	Service management	parameters					
	General	Set up calendar and	group agreement opti	ons for service orders			
		CALENDAR	Project group	SERVICE ORDERS	REASON CODES BASED ON SERVICE LEVEL	AGREEMENTS	
	Journals	Calendar	~	Allow without service agreement	Reason code on canceling		
		24hr v	Service agreement activity type	Yes	No		
	Activities		Initial phone call \sim	ORIECTS	Reason code on exceeding time		
		Service agreement group		Allow one item on multiple service o	No		
	Interventions	Silver v		No			
	Number sequences						



5.3.2 Activities

We don't generate activities because the interface with Pegase generate automatically an Activity with the type appointment when an intervention is scheduled.

inevertneless, you may choose to create automatically an activity: you will have then to manage it manually.
--

Go to dash	iboard CS AX 🗧 Service mana	igement > Setup > Service management parameters	Searc
🖪 Save	OPTIONS Q		
(Service management	parameters	
	General	Set up service order activities	
	Journals	Create activity for service order Initial phone call Appointment Activity generation stage Yes Service order purpose 02-InQual V	
	Activities		
	Interventions		
	Number sequences		

5.3.3 Number sequences

Compared to the standard version of D365 (without ULTIPROJECT), you will have to define a number sequence for contracts

🛺 Dynamics AX 🛛 ≡	Service management > Setup > Service ma	anagement parameters
Save OPTIONS Q		
Service manage	ement parameters	
General	Set up number sequenc	es for services documents
	Reference	Number sequence code
Journals	Service agreement	Serv_71
	Service order	Serv_72
Activities	Pre-service order line ID	Serv_73
	Template BOM	Serv_74
Interventions	BOM history line number	Serv_75
	Equipment	Serv_76
Number sequences	Equipment relation	Serv_77
	Contract	Serv_78 ~



6. Advanced Project

6.1. General setting

Dy	namics A	٩X	Project manager	nent and	accounting >	Setup >	Project man	agement and accountin	g parameters			
≡	日 Save	OPTIONS	م									
	Proje	ect ma	anagemei	nt ar	id accour	nting p	barame	ters				
	Invoice	e		•	Set up advar costing sheet	nced proj	ject inform PURCHASE	nation	TRANSFER W	/BS ITEM ESTIMATES	PROJECT DIMENSION	
	Foreca	ast			Costing version PBMS	~	Disable proje Yes	ect id propagation to pur	Scheduled a Start	ctivity date used as receipt .	Automatic creation of the inventor	ory p
	Estima	ate									Project dimension creation type Only header projects	\sim
	Hour u	utilization									Only header projects All project levels	
	Projec	t statemen	ts	I.								
	Cost c	ontrol		L								
	Foreca	ast reductio	n	L								
	Invent	ory dimens	sions	L								
	Produ	ction		L								
	Projec	t stage		L								
	Vendo	or contract l	anguage	I.								
	Numb	er sequenc	es	1								
	Advan	iced projec	t	Ŧ								

In "Project management and accounting > Setup > Project management an accounting parameters a new tab "Advanced project" has been added and contain 5 fields:

• **Costing sheet version**: This field define the costing sheet that allows you to recalculate the BOM price of a finish or semi-finished product transfer it from stock to project or project A to project B. This "costing version setup" needs to be activate and the 3 fields in red have to be setting like illustrate. All others are independent to ULTIPROJECT functionalities.

Costing version setup

₽ Filter						
OVERVIEW GENERAL RECO	RDING CALCULATION					
BOM CALCULATION	Purchase order Yes	Restrict calculation	Cost price model Calculation group	Purchase price model Item purchase price V	Fallback principle Costing version	Fallback costing version
res L						Profit-setting Standard
						Explosion mode

• Disable project ID propagation to purchase: always at "Yes".

Multilevel



- Schedule activity date used as receipt date for item requirement: This field can be setup at Start or End.
 - o If Start, item requirements related to activities will be scheduled to be available at the start date of the activity
 - o If End, item requirements related to activities will be scheduled to be available at the end date of the activity
- Automatic creation of the inventory project dimension.
 - If yes, the tracking dimension "Project" will automatically be created with the same value as the ID project and pushed in the dedicated field "Project dimension" in Project.
 - If no, the tracking dimension "Project" needs to be create manually and pushed also manually in the dedicated field "Project dimension" in Project.
- Project dimension creation type
 - Only header project: this choice means that only the header project ID will be considered in the sub-project to track costs and logistics. This choice often implies that only one budget is creating for project and subprojects...
 - All project levels: this choice means that each sub-project has its own project dimension and its own tracking process for costs and logistics. Each subproject has its own budget in this case.

6.2. Project categories

Project management and accounting $\,\,
ightarrow\,$ Setup $\,\,
ightarrow\,$ Categories $\,\,
ightarrow\,$ Shared categories

In ______, all the shared categories that will be related to transaction type "Hour" <u>and</u> used in production need to be configured with Project and Production at YES

	Shared categories			
▲ Drilling	Category ID Catego	ategory name Drilling		
Acc. Loss Accrued Losses (FP +Invest)	Usage Can be used in Project Yes	Can be used in Expense No	Can be used in Production Yes	Expense type
Project categories Category ID Category Drilling V	iory name			
Usage Use in Expense No	Use in Production Yes			
Project _{Category} Drilling	Category name Drilling	Item sales tax group		
Category group	Transaction type Hour	Worker Mandatory		

Warning:

- If these type of category is used in a project journal, the price will come from "Category setup".
- If these type of category is used in a production journal, the price will come from "Price"

For both case see below



CATEGORY SETUP							
Setup V ransactions V							
Cost price (hour)							
Cost price (expense)							
Sales price (hour)							
Sales price (expense)							
Sales price (fee)							
Sales price (subscription)							
Service subscriptions	CATEGORY SET	JP Transactions	✓ Project control ✓				
Project/group line properties	Validation V	Committed (osts Price				
Ledger posting setup	Tunction +	Torecust +					
Cost category price							
𝒫 Filter							
✓ Status	Version	Nan	e	Site	Price	From date	Blocked
V Pending	PBMS	\sim		~	40,00	04-10-16	

6.3. Project tracking dimension

The main goal of Advanced Project in ULTIPROJECT is to be able to track all transactions in term of cost and logistics for all items, even if these will be consumed in production orders later on. This is absolutely impossible in standard D365. According to this all item that we want to track in project need to be setting with aa active project dimension.

This dimension "Project" has been added to both "Serial number" and "Batch number". Of course these ones can be activated with "Project".

In any case if project is active, the setup needs to be done as shown below and only like that.

Tracking dimension groups

Name Description Project Project												
Tracking dimensions												
Name	Active	Active in sales p	Primary stocking	Blank receipt all	Blank issue allo	Physical inventory	Financial invent	Coverage plan	For purchase pri	For sales prices	Transfer	
Batch number												
Serial number												
Project	✓			✓	✓	✓		✓				

Project dimension is propagated to all sub-level (Raw material and semi-finished product) during the MRP calculation for all item that use Project Dimension. The final goal is to track and trace all items related to 1 project in terms of logistics and cost.

Project logistics: detailed view for 1 finished product

CTRI De	Tetails logistique Projet											
₽ Filtre												
~	Niveau	Numéro d'article	Nom du produit	Site	Entrepôt	Projet	Quantité des be	Date de besoin	Date demandée Ré	i Di I	Référence	Numéro
	0	CTR000	Finished Product 000	1	11		1,00	17-03-16		(Ordres de fabrication prévisionn	003932
	1	CTR100	Semi finished Product 100	1	11		1,00	17-03-16		(Ordres de fabrication prévisionn	003956
	2	CTR120	Semi finished Product 120	1	11		1,00	17-03-16		(Ordres de fabrication prévisionn	004005
	3	CTR121	Raw Material 121	1	11		1,00	17-03-16		(Commandes fournisseur prévisio	004031
	3	CTR122	Raw Material 122	1	11		1,00	17-03-16		(Commandes fournisseur prévisio	004034
	2	CTR110	Raw Material 110	1	11		1,00	17-03-16		0	Commandes fournisseur prévisio	004002
	1	CTR200	Semi finished Product 200	1	11		1,00	17-03-16			Ordres de fabrication prévisionn	003959
	2	CTR210	Raw Material 210	1	11		1,00	17-03-16			Commandes fournisseur prévisio	004008
	2	CTR220	Raw Material 220	1	11		1,00	17-03-16			Commandes fournisseur prévisio	004010

Project logistics: global view for all finished products related to the same project

Tous les détails de logistique Projet

Vu	/ue d'ensemble											
\checkmark	ID WBS 1	Niveau	Numéro d'article	Nom du produit	Quantité des be	Date de besoin	Ré	Di	Référence	Numéro		
\checkmark	2	3	CTR122	Raw Material 122	1,00	17-03-16			Commandes fournisseur prévisio	004036		
	3.1	1	CTR100	Semi finished Product 100	1,00	17-03-16			Ordres de fabrication prévisionn	003957		
	3.1	2	CTR120	Semi finished Product 120	1,00	17-03-16			Ordres de fabrication prévisionn	004006		
	3.1	3	CTR121	Raw Material 121	1,00	17-03-16			Commandes fournisseur prévisio	004032		
	3.1	3	CTR122	Raw Material 122	1,00	17-03-16			Commandes fournisseur prévisio	004035		
	3.1 2 CTR110		Raw Material 110	1,00	1,00 17-03-16			Commandes fournisseur prévisio	004003			

Cost control in real time for all items related to 1 project

Contrôle des coûts

Grou	uper par Modèle de coût												
M	odèle de (:oût ~	PBMS1										
С	osts												
D	éveloppe	ijusqu'à 🗸											
\checkmark		ProjBudgetBalancesCost	ProjBudgetBalancesCo										
	~	Coût total	2.113,00	0,00	2.113,00	0,00	0,00	121,00	122,00	122,00	243,00	0,00	0,00
	~	Expense	1.000,00	0,00	1.000,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		Travel	1.000,00	0,00	1.000,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
	~	Item	783,00	0,00	783,00	0,00	0,00	121,00	122,00	122,00	243,00	0,00	0,00
		C01-01	110,00	0,00	110,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		C01-02	243,00	0,00	243,00	0,00	0,00	121,00	122,00	122,00	243,00	0,00	0,00
		C02-01	210,00	0,00	210,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		C02-02	220,00	0,00	220,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
	~	Prod_H	180,00	0,00	180,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		Assembly_P	60,00	0,00	60,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		Cutting_P	30,00	0,00	30,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		Drilling_P	40,00	0,00	40,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		Polishing_P	50,00	0,00	50,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
	~	Proj_H	150,00	0,00	150,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		Journeyman	150,00	0,00	150,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00