



## CHANGE REQUESTS FOR PROJECT ONLINE

### DOCUMENTATION AND SETUP INSTRUCTIONS

#### CHANGE REQUESTS FOR PROJECT ONLINE SOLUTION OVERVIEW

*Change Requests for Project Online* solution is a Canvas app that provides a capability to create and manage change requests for Project Online PWA projects.

*Change Requests for Project Online* solution can be easily accessed in a browser, mobile phone, tablet and embedded into MS Teams app.

#### PREREQUISITES

The following prerequisites are required for *installing Change Requests for Project Online* solution.

1. Dataverse environment, where the user installing the solution has System Administrator security role.
2. Power Apps License (per app or per user) for using a solution with Dataverse database.
3. Project Web App for Project Online.

The following prerequisites are required for *using Change Requests for Project Online* solution.

1. Power Apps License
2. Project Plan 3 License for working with projects in Project Online PWA.

#### SECURITY

All users who work with Change Requests for Project Online solution must have a standard security role **Basic User** to access any Canvas App in PowerApps.

All users who work with Change Requests for Project Online solution must have permissions assigned in Project Online PWA that would allow to **read projects list**.

## SETUP INSTRUCTIONS

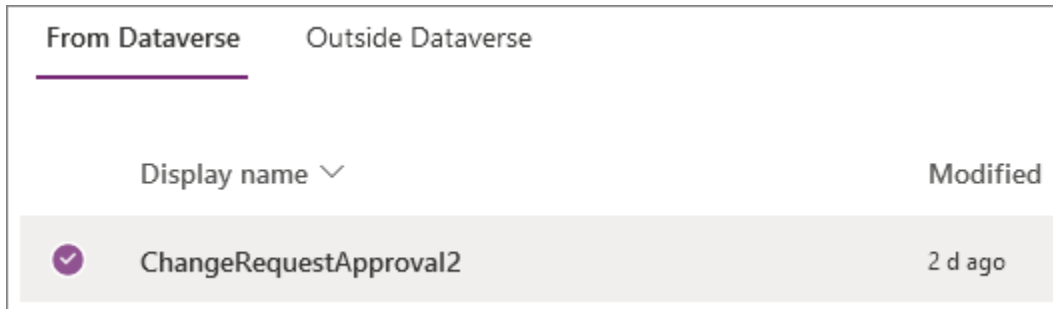
*Change Requests for Project Online* solution contains several components, each will require some configuration to setup.

### STEP 1: IMPORT SOLUTION

1. Open *Change Requests for Project Online* solution page in AppSource and click **GET IT NOW**.
2. Provide contact information required by Microsoft and click **Continue**.
3. In Power Platform Admin Center in Install *Change Requests for Project Online* solution select a **Dataverse environment** where you want to install the app.
4. Check **I agree** checkboxes and click **Install**.  
Wait for the installation process to complete.

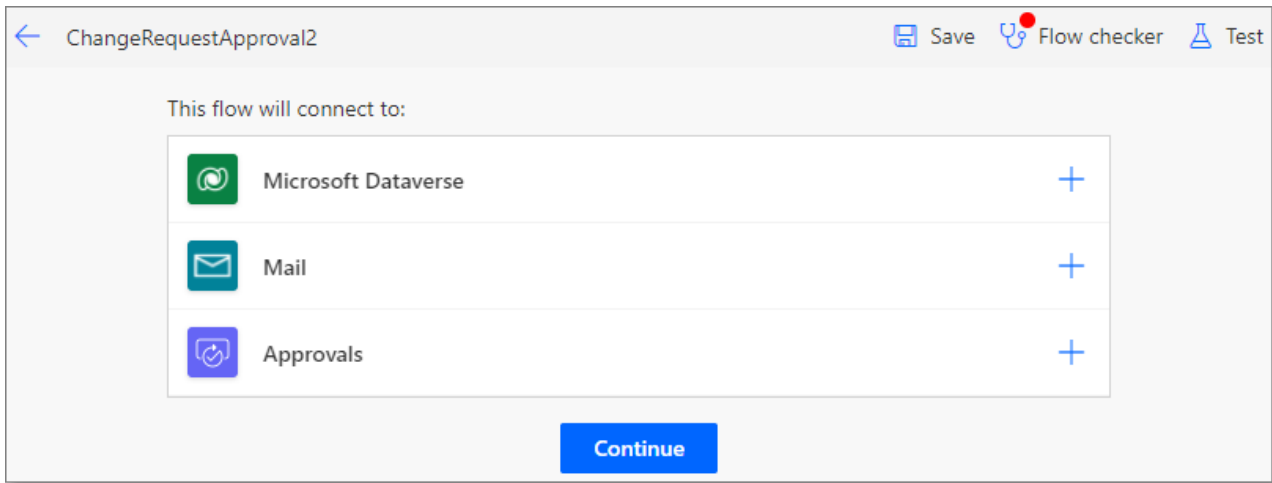
### STEP 2: UPDATE FLOW

1. Sign into <https://make.powerapps.com>.
2. In the top header, open the Environments menu and select the environment into which *Change Requests for Project Online* solution was installed.
3. On the left navigation, click the **Solutions** menu item.
4. In the list of Solutions find **Common Data Services Default Solution** and open it.
5. Click **+ Add existing** on the toolbar, select **Automation -> Cloud flow** in the list.
6. Select the following flow in the **From Dataverse** tab and click **Add**:



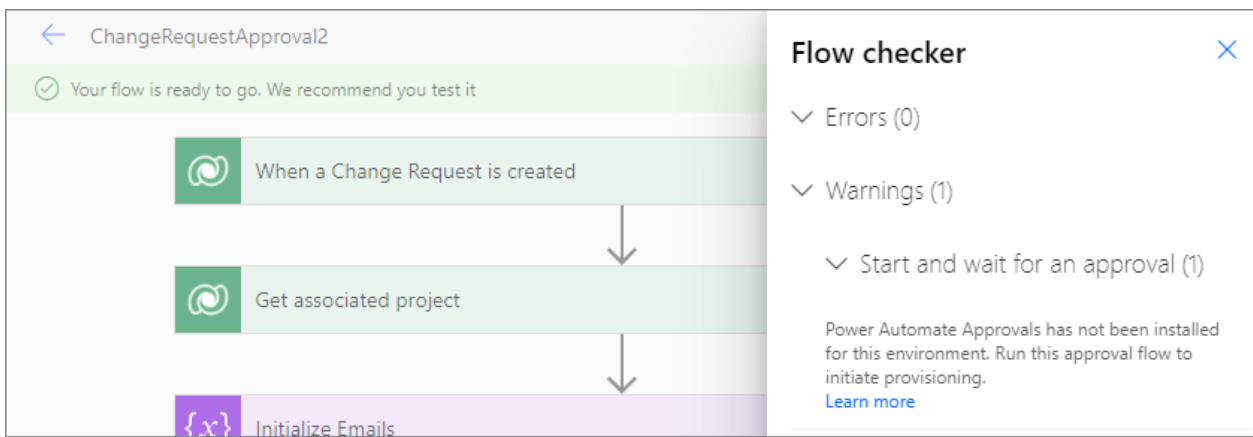
From Dataverse	Outside Dataverse
Display name <input type="text"/>	Modified
<input checked="" type="checkbox"/> ChangeRequestApproval2	2 d ago

7. After the flow is added, select it in the list and click **Edit** on the toolbar.
8. Click **Continue** on the step **This flow will connect to:**

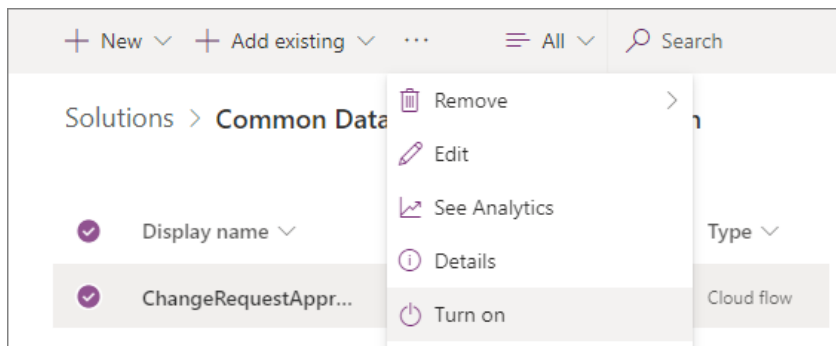


9. Click **Save**, wait for the save process to complete and close the tab with the flow.

**NOTE:** You will get the following warning from the Flow checker, that is expected, it will be taken care of further during the setup.



10. Select the flow in the Common Data Services Default Solution and turn it **ON** using the toolbar option:



## STEP 3: UPDATE ENVIRONMENT VARIABLE

1. Go back to the **Common Data Services Default Solution** and open it.
2. Click **+ Add existing** on the toolbar, select **Environment variable** in the list.
3. Select the following environment variable in the Add existing environment variables and click **Next**:

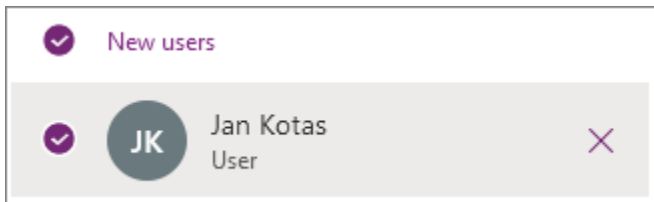
Display name	Name	Owner	Data type	Default v...
<input checked="" type="checkbox"/> PWA_URL	new_PWA_URL	System Service	Text	-

4. Click **Add** to add the environment variable to your project.
5. Select **PWA\_URL** environment variable in the Common Data Services Default Solution and click Edit on the toolbar.
6. Add PWA URL to the **Current Value** field and click **Save**.

**NOTE:** PWA URL needs to be specified in the following format – <https://contoso.sharepoint.com/sites/PWANAME>

## STEP 4: SHARE CANVAS APP

1. Go back to the **Solutions** list.
2. Open **Change Requests for Project Online** solution from the list and select **Apps** from the sub-menu.
3. Select Change Requests for Project Online Canvas app by checking a check box next to the app name, and then click **Share** on the toolbar.
4. Add all people who will be using the app as Users and click **Share**.



5. Close Share Change Requests for Project Online app window.

**NOTE:** A good practice would be to use a **Security Group** for sharing Canvas apps. Using a Security Group, instead of adding each user individually will help to reduce manual work.

## STEP 5: GRANT CRUD PERMISSIONS TO BASIC USER ROLE FOR CUSTOM ENTITIES

1. In <https://make.powerapps.com> open the environment into which Change Requests for Project Online solution was installed.
2. Click Gear button -> Advanced settings.
3. After redirected to Dynamics 365 click Settings -> Security on the toolbar.

4. Click Security Roles, locate **Basic User** role in the list and click on it to open the role for editing.
5. In the Security Role: Basic User window open **Custom Entities** tab and grant **Create, Read, Write, Delete, Append** and **Append To** permissions with **Organization** key to the following custom entities:
  - Associated Project
  - Change Requests
  - Change Requests Approvers
6. **Save and Close** Security Role: Basic User window.

## STEP 6: INITIATE POWER AUTOMATE APPROVALS

1. Go back to <https://make.powerapps.com>
2. Open the environment into which **Change Requests for Project Online** solution was installed.
3. On the left navigation, click the **Apps** menu item.
4. Launch **Change Requests for Project Online** app by clicking its name.
5. In the app create a sample change request to initiate provisioning of **Power Automate Approvals**.
6. Allow Power Automate some time to complete Approvals provisioning.
7. Once Approvals provisioning is successfully completed, user specified as an Approver in the sample change request will receive a **New Change Request** email.
8. Remove sample change request if necessary.

**Congrats! Change Requests for Project Online app is ready for use now.**

**User Guide** section below provides information on how to create and manage change requests in the Change Requests for Project Online app.

**Change Requests for Project Online** solution is a Canvas app that provides a capability to create and manage change requests for Project Online PWA projects.

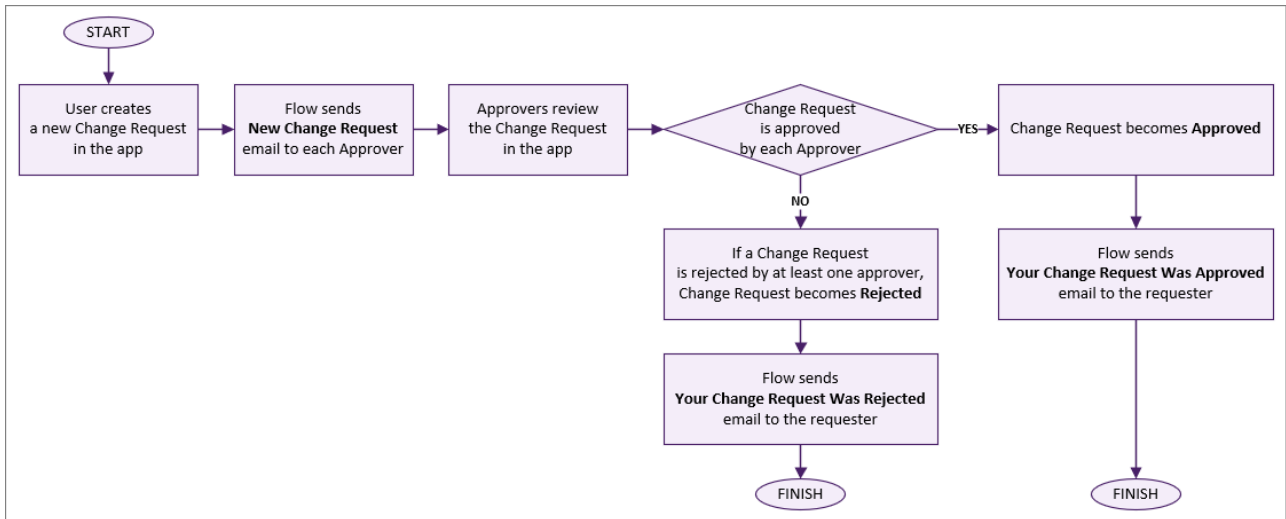
The change management process starts with the creation of a new change request, in which the requester selects the project for which the change is being requested, describes the proposed change, its background and benefit, and selects the approvers who will review and discuss the change and decide whether to approve or decline this change.

Once a change request is created it goes through the approval process, where each of the designated approvers have a chance to review the request and provide their decision. If all members of the change review board approve the request, the request receives Approved status and can be added to the project scope.

**Change Requests for Project Online** solution can be easily accessed in a browser, mobile phone, tablet and embedded into MS Teams app.

### CHANGE REQUESTS FOR PROJECT ONLINE – WORKFLOW

The following workflow represents the process of working with the Change Requests for Project Online solution – from change request creation to its approval or rejection.



## CHANGE REQUESTS – HOME

Change Requests – Home screen lists all change requests that exist in the app.

From this screen user create a new change request, search for an existing change request by its title, open a change request details by clicking this change request title.

CR ID	Change Request Title	CR Status	Project Name	Project Manager
CR-1000	<a href="#">Additional analysis of marketing st...</a>	Approved	Biothermal Ear Warming System	Alyona Gonchar
CR-1002	<a href="#">Obtain certificate of occupancy</a>	Approval Pending	Fourth Coffee Shop Build	Alyona Gonchar
CR-1001	<a href="#">Perform competitor analysis</a>	Approval Pending	Bountiful Agriculture Monitoring ...	Kirill Gonchar

## NEW CHANGE REQUEST

To create a new change request, perform the following steps:

1. On the Change Requests – Home screen click + on the toolbar.
2. Provide all necessary information about the change you are requesting:
  - Change Request Title
  - Project Name – select a project from the drop-down (this drop-down lists all projects available in the PWA)
  - Project Manager
  - Due Date
  - Change Background
  - Change Benefit
  - Approvers – specify one or multiple approvers, who will review the proposed change and make a decision whether to approve a reject this change.
3. Click **V** to complete the creation process.

NOTE: Change Request Status field will be populated automatically based on the current status of the request.

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## NEW CHANGE REQUEST

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\* Change Request Title

\* Project Name

Change Request Status

\* Project Manager

\* Due Date

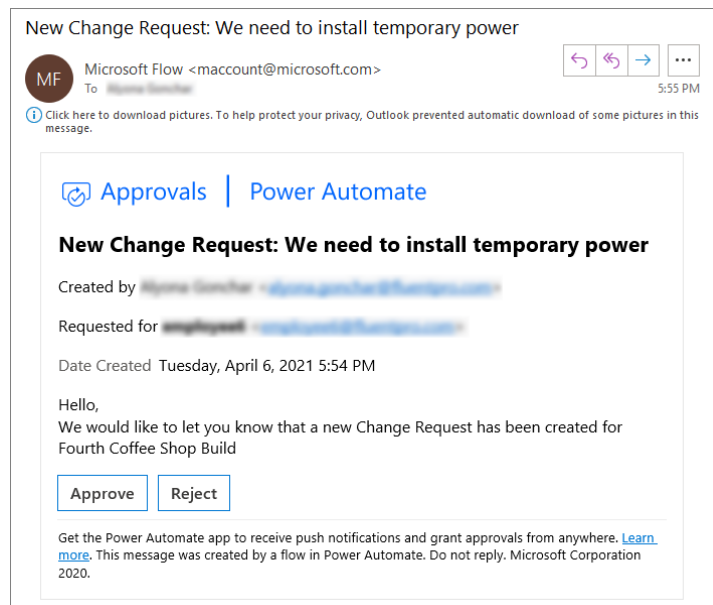
Change Background

Change Benefit

\* Approvers

APPROVE/REJECT CHANGE REQUEST

Once a new change request is created, each of the Approvers will receive an email about this new request:



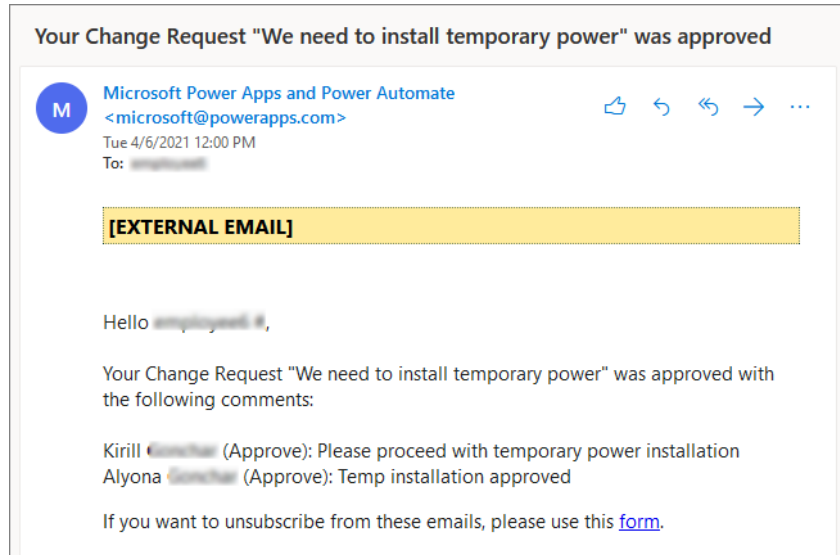
**NOTE:**

- **Created by** - a user who installed the application and initiated the approval flow.
- **Requested for** – a user who created a change request itself.



As an Approver, review change request details in the **Change Requests for Project Online** app and click either Approve or Reject option in the email.

Provide your comments as necessary – requestor will receive each of the approvers' comments in the final email notification.



## EDIT CHANGE REQUEST

To edit an existing change request, perform the following steps:

1. On the Change Requests – Home screen click on the title of a change request that needs editing.
2. Make changes to the change request as necessary and save the changes clicking **V** button.

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## EDIT CHANGE REQUEST

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\* Change Request Title

\* Project Name  ▼

Change Request Status

\* Project Manager  ▼

\* Due Date

Change Background

Change Benefit

\* Approvers [User] Kirill Gonchar"/> ▼

## DELETE CHANGE REQUEST

To delete an existing change request, perform the following steps:

1. On the Change Requests – Home screen click on the title of a change request that needs to be deleted.
2. On the Edit Change Request screen click “Delete this change request” option at the very bottom of the screen.
3. Confirm the deletion clicking Delete button.

Delete

Are you sure you want to delete Change Request?



Cancel

Change Request ID	CR-1003
Change Request Title	Submit bond and insurance documents
Project Name	Cactus Traffic Sensor
Change Request Status	Rejected
Project Manager	Alyona Gonchar

## SHARE YOUR FEEDBACK

To **share your feedback** about Change Requests for Project Online app, perform the following steps:

1. On the Change Requests – Home screen click Feedback option.
2. On the Share Your Feedback screen rate the app from 1 to 10 and leave your comment if you wish to.
3. You can also provide your email address and indicate if you want to be contacted about your feedback.
4. Review FluentPro Privacy Policy by clicking “Privacy Policy” link.
5. Confirm the feedback by clicking **V** button.

 **SHARE YOUR FEEDBACK** 

How likely are you to recommend Change Requests for Project Online app to a friend or colleague?

1    2    3    4    5    6    7    8    9    10

NOT AT ALL LIKELY EXTREMELY LIKELY

Your feedback will help us to improve Change Requests for Project Online app.  
You can leave us a comment if you wish to.

Please do not include any confidential or personal information in your comment

You can contact me about this feedback

Email (optional)

[Privacy Policy](#)

***Your feedback will help us to improve Change Requests for Project Online app!***

## EMAILS

***Change Requests for Project Online*** solution send 3 types of email notifications:

- New Change Request: <Change Request Title>.
- Your Change Request <Change Request Title> was approved.
- Your Change Request <Change Request Title> was rejected.