USER GUIDE

Project Oversight Agent

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1 ABOUT THE APP

The Project Oversight application enhances project management in Microsoft Dynamics 365 Business Central by providing AI-assisted project updates to help stakeholders stay informed throughout active projects. Once a project is completed, users can generate a post-mortem report that summarizes project performance, identifies areas for improvement and lessons learned, and provides recommendations for future projects.

For more information, please go to:

https://www.randgroup.com/apps/microsoft/business-central/Project-Oversight-Agent/

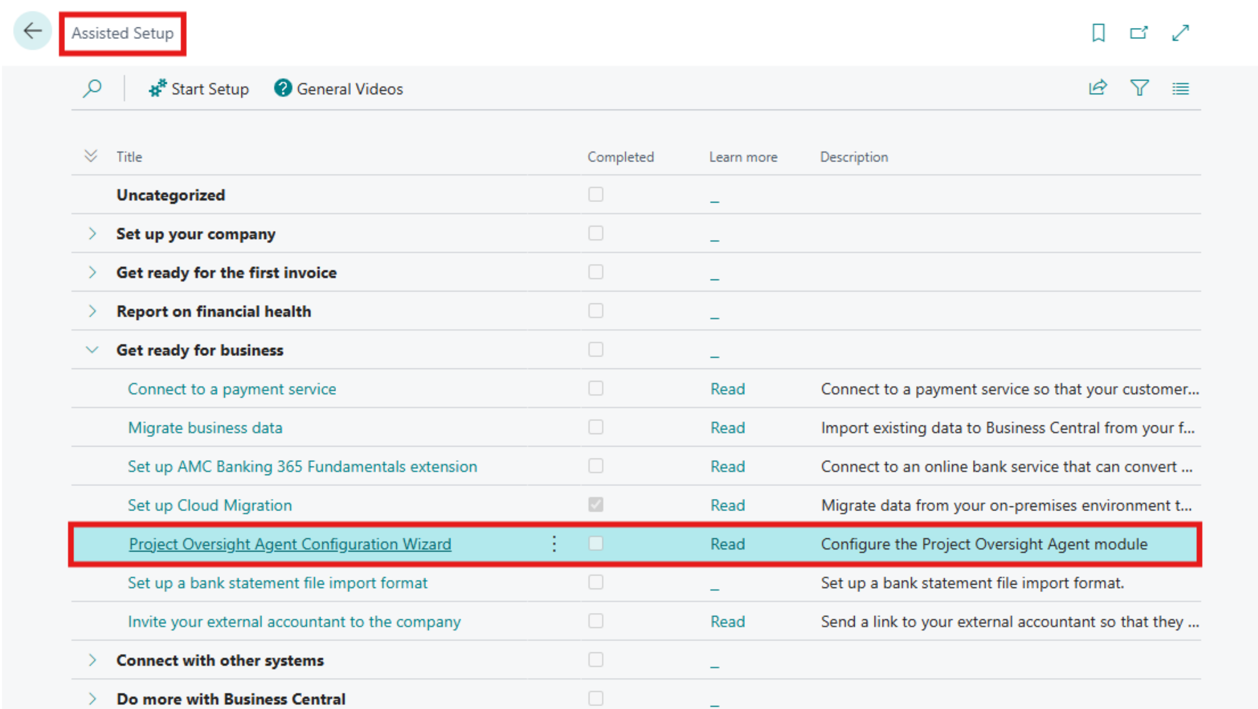
2 BASIC SETUP

This section covers the basic system setup needed to use the Project Oversight Agent application. These steps should be completed prior to using the app.

2.1 Onboarding Wizard

To configure the application using a guided step-by-step wizard:

1. Use the magnifying glass tool to go to the Assisted Setup window.
2. In the Assisted Setup window, go to the section “Get ready for business”, and select the Project Oversight Agent Configuration Wizard.

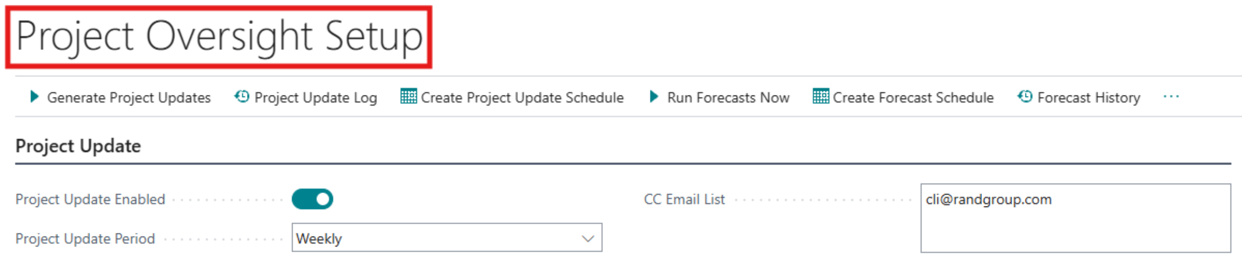


The Project Oversight Agent Configuration wizard will guide you through the installation steps of the application, including:

1. Submitting your client information to Rand Group (go to the Registration section of this document for more details)
2. Verifying that you have a valid license to start using the application (go to the Registration section of this document for more details)
3. Assigning user permissions (go to the Permissions section of this document for more details)

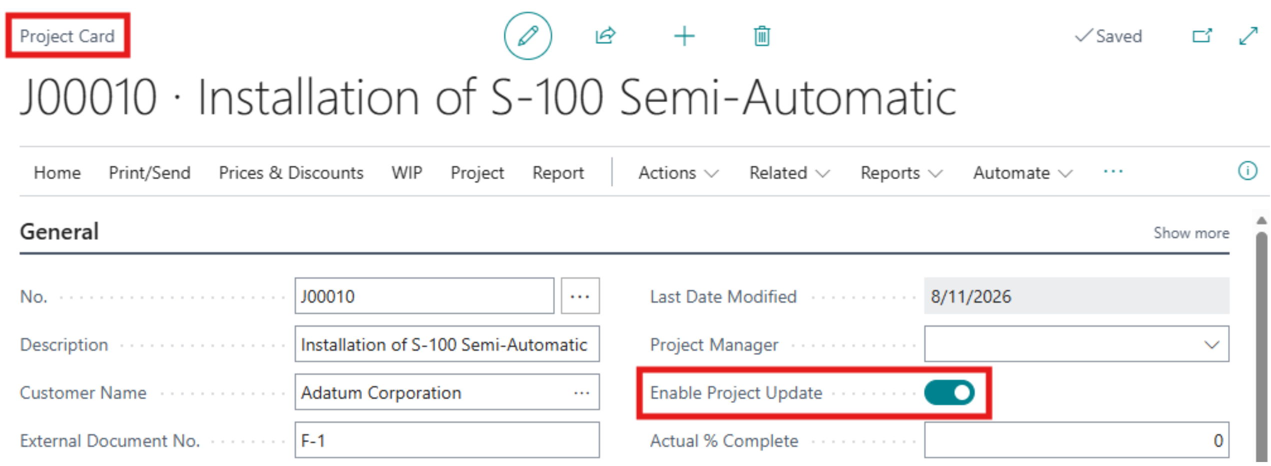
2.2 Project Oversight Setup

The Project Oversight Setup page contains the global settings used to configure project updates across the application.

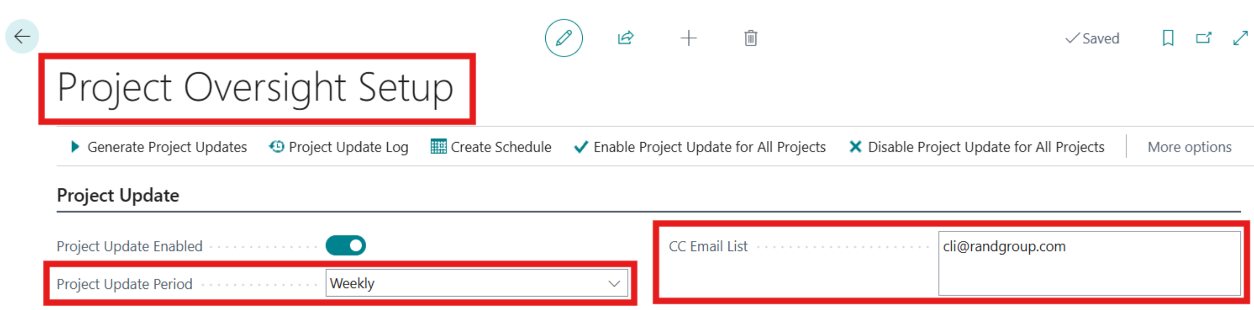


To configure project updates:

1. Enable Project Updates. Turn on Project Update Enabled to enable project update functionality globally. Individual projects can then be included or excluded from project updates from the Project Card.



2. Specify Project Update Period and Notification emails. Specify whether project updates should cover a weekly or monthly period. Enter any additional email addresses that should receive a copy of generated project update emails.



3 FUNCTIONALITY

The Project Oversight Agent provides tools to keep stakeholders informed during active projects and evaluate project performance after completion.

3.1 Project Updates

Project Updates help keep stakeholders informed of activity and progress throughout active projects. For projects enabled for updates, the application collects project information and uses AI to generate an update that can be distributed by email to the appropriate recipients.

Project Update - T7-MIG - Legacy Data Migration and Validation | 10000 - Adatum Corporation

Customer	Status	Reporting Period
10000 - Adatum Corporation	Open	July 21, 2026 to July 28, 2026

Overall Summary

During the reporting period, the team profiled and assessed legacy source data, performed extensive data cleansing, configured and validated mapping logic, executed multiple trial migrations, and reconciled migrated balances. The final migration rehearsal and reconciliation review are planned, with production cutover and business sign-off scheduled after the current project end date. Attention is required for a planned activity outside the project date range and the absence of a designated project owner.

Activity

Source Data Assessment: The team profiled legacy customer and vendor data, reviewed source data completeness and field usage, and documented data quality exceptions for migration.

Data Cleansing: Data cleansing included correcting duplicate customer records, standardizing address and contact information, resolving invalid codes and missing reference values, normalizing naming conventions, and reviewing cleansing exceptions with the project team.

Mapping and Transformation: The team configured source-to-target customer field mappings, developed transformation rules for legacy status codes, updated migration scripts for address conversion, implemented validation for required target fields, tested transformation logic, and resolved mapping defects identified during review.

Trial Migration: Multiple trial migrations were executed in the test environment, migration logs were reviewed and rejected records corrected, trial migrations were repeated after script updates, and record counts were validated across source and target systems.

Reconciliation and Sign-off: Migrated balances and control totals were reconciled, and reconciliation results were documented for business review.

Planned Path Forward

Trial Migration: The final migration rehearsal is planned.

Reconciliation and Sign-off: Final reconciliation review is planned, followed by preparation for production cutover and business sign-off.

Schedule

Project Task	Dates
Source Data Assessment	July 21, 2026 to July 27, 2026
Data Cleansing	July 21, 2026 to July 27, 2026
Mapping and Transformation	July 21, 2026 to July 27, 2026
Trial Migration	July 21, 2026 to July 29, 2026
Reconciliation and Sign-off	July 21, 2026 to July 31, 2026

Items Requiring Attention

Medium - Planning Outside Project Dates

One planned activity falls outside the project's current date range.

- Reconciliation and Sign-off: Prepare production cutover and business sign-off (Resource JANNIK), 4 HOUR, Date: July 31, 2026

Updates can be generated manually or scheduled according to the Project Update Period defined in the Project Oversight Setup page. This allows project stakeholders to receive recurring updates without requiring project information to be manually compiled and summarized.

3.2 Project Post-Mortem Report

The Project Post-Mortem Report provides an AI-generated retrospective analysis of a completed project using project information recorded in Business Central. The report summarizes overall budget and schedule performance and provides task-level details comparing planned and actual project results.

Project Post-Mortem Report

CRONUS USA, Inc.

Project No.: TP9-TIME
Project Description: Post-Mortem Test - Timeline Overage
Customer: 10000 - Adatum Corporation
Project Lead: JAYANN.LASAP
Planned Project Dates: July 9, 2026 to July 27, 2026
Generated: 08/11/26 11:20 AM by OSCAR.CUEVABRAVO

Budget

Total Budget Amount (USD)	Total Actual Amount (USD)	Total Amount Overage (USD)	Recorded Activity Dates	Overall Project Timeline Overage
2,800.00	2,600.00	-200.00	July 9, 2026 to July 30, 2026	3 days

Schedule

Task	Planned Start Date	Planned End Date	Actual Start Date	Actual End Date	Timeline Overage Days	Budget Amount (USD)	Actual Amount (USD)	Amount Overage (USD)
1000 - Preparation	July 9, 2026	July 14, 2026	July 9, 2026	July 14, 2026	0	800.00	800.00	0.00
2000 - Execution	July 15, 2026	July 22, 2026	July 15, 2026	July 25, 2026	3	1,000.00	1,000.00	0.00
3000 - Handoff	July 23, 2026	July 27, 2026	July 23, 2026	July 30, 2026	3	1,000.00	800.00	-200.00

Post-Mortem Analysis

Executive Summary

The project was completed under budget, with a total budget of USD 2,800.00 and an actual cost of USD 2,600.00, resulting in a favourable variance of USD 200.00. The last recorded project activity occurred three days after the planned end date, indicating an overall timeline overage. The most material task-ɪĸ-level exceptions were timeline overruns in the Execution and Handoff tasks, each with their last posted activity three days after their respective planned end daned end dates. No task-level cost overruns were identified.

What Worked Well

- The Preparation task recorded an actual cost equal to its budgeted amount of USD 800.00, and its last posted activity occurred on the planned end date.
- The Execution task recorded an actual cost equal to its budgeted amount of USD 1,000.00.
- The Handoff task recorded an actual cost below its budgeted amount, with a variance of USD 200.00.

Areas for Improvement

- The Execution task's last posted activity occurred three days after the planned end date.
- The Handoff task's last posted activity occurred three days after the planned end date.

Lessons Learned

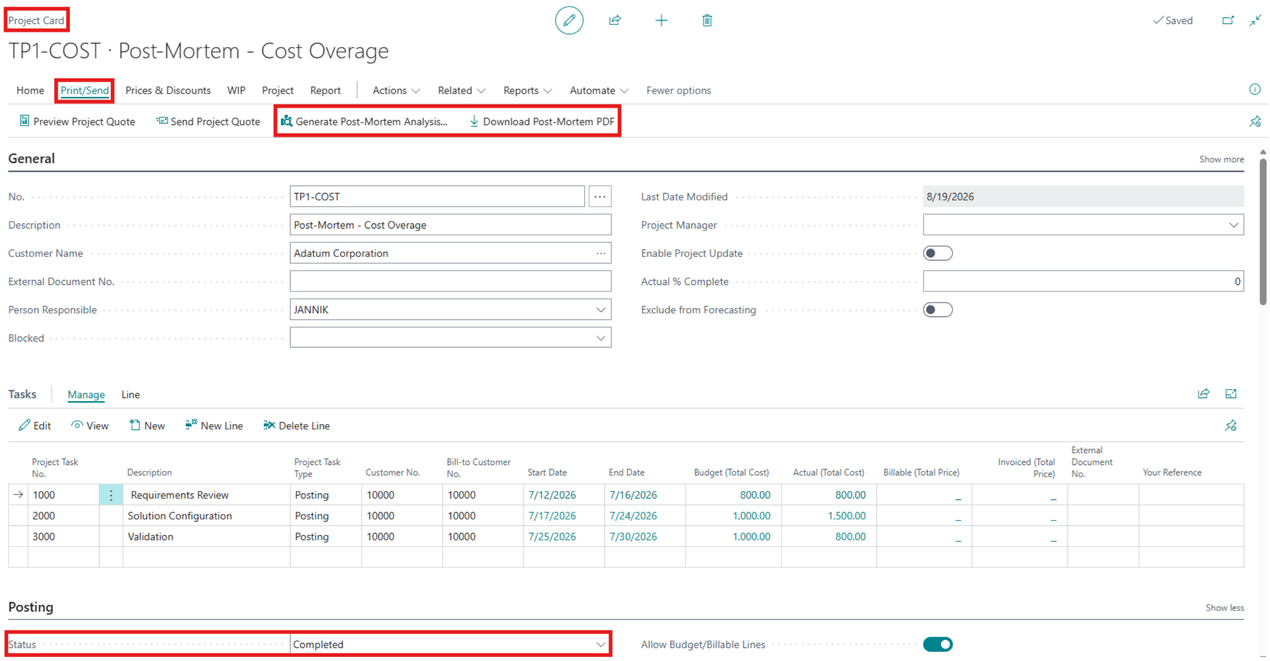
- For both the Execution and Handoff tasks, activity records show that some work was recorded after the planned end date. In future projects, it may be beneficial to review the timing and nature of these follow-up activities to better align them with planned schedules and reduce timeline overruns.

Recommendations

- For future projects, establish clearer guidelines for recording and scheduling follow-up activities to help ensure that all work is completed within the planned timeline.
- Monitor task progress and activity postings more closely as planned end dates approach, so that any necessary adjustments can be made proactively to minimize timeline overruns.

To generate a Project Post-Mortem Report:

1. Open the Project Card for the completed project.
2. From the Print/Send menu, select Generate Post-Mortem Analysis to generate and download an AI-assisted analysis or select Download Post-Mortem PDF to download an existing report.

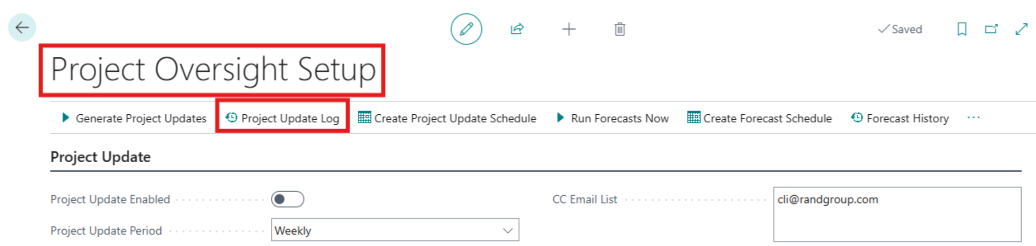


4 REPORTING

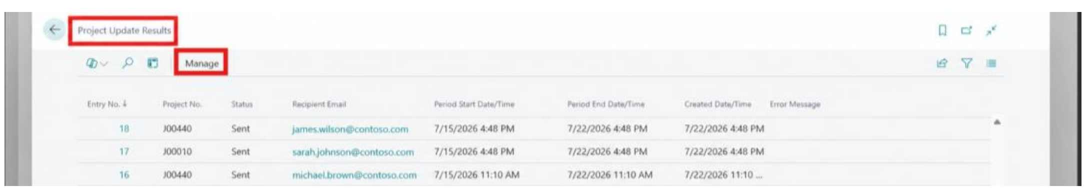
The Project Oversight Agent maintains a history of generated project updates, allowing users to track update activity and confirm whether project update notifications were successfully sent.

4.1 Project Update Log

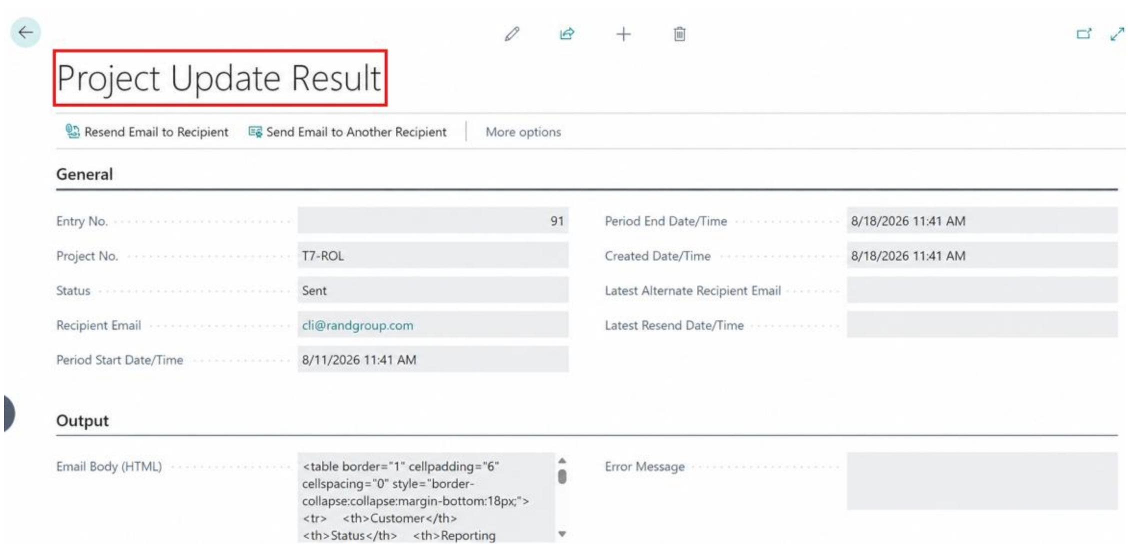
The Project Update Log provides a history of project updates generated by the application. The log allows users to review the project details and its delivery status. To access the log, open the Project Oversight Setup page and select Project Update Log.



To inspect a log entry, click Manage > View.



A detailed view of the log entry is available for user inspection.

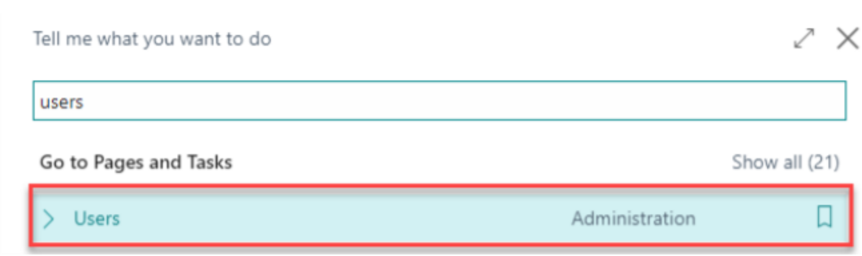


5 SECURITY

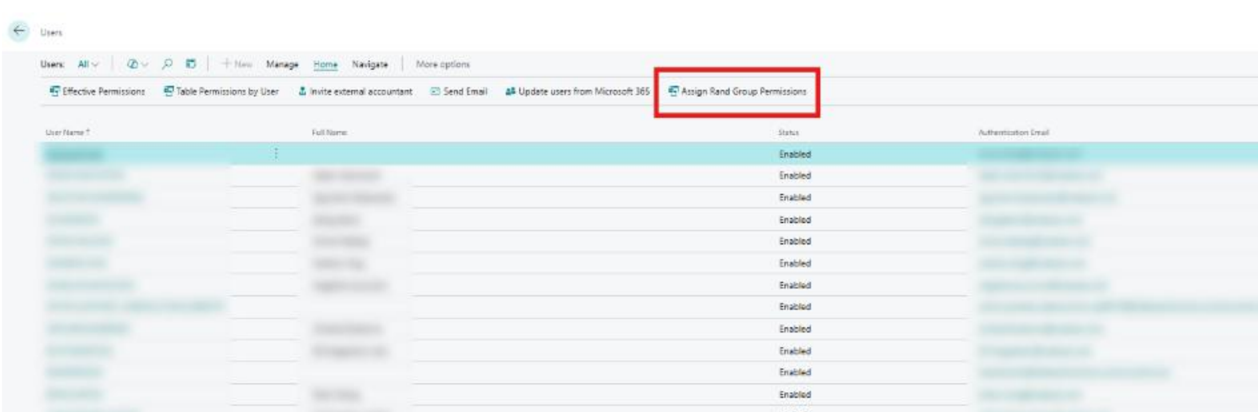
Once a Rand Group application is installed, it is essential to assign user permissions to grant access to pages, data, actions, and additional components integrated with and generated by the Rand Group applications.

The "Assign Rand Group Permissions" feature, accessible under the Home Menu within the Users page of Dynamics 365 Business Central, assigns the necessary permissions for all users to access the complete range of pages, data, actions, etc., provided by all Rand Group applications installed on the tenant.

To assign user permissions to the Rand Group apps, search and go to the User list.



In the Users window, select Assign Rand Group Permissions to assign all users the Rand Group Permission Set.



Note that only a user with the proper permissions (Super is recommended) will be able to Assign Rand Group Permissions.

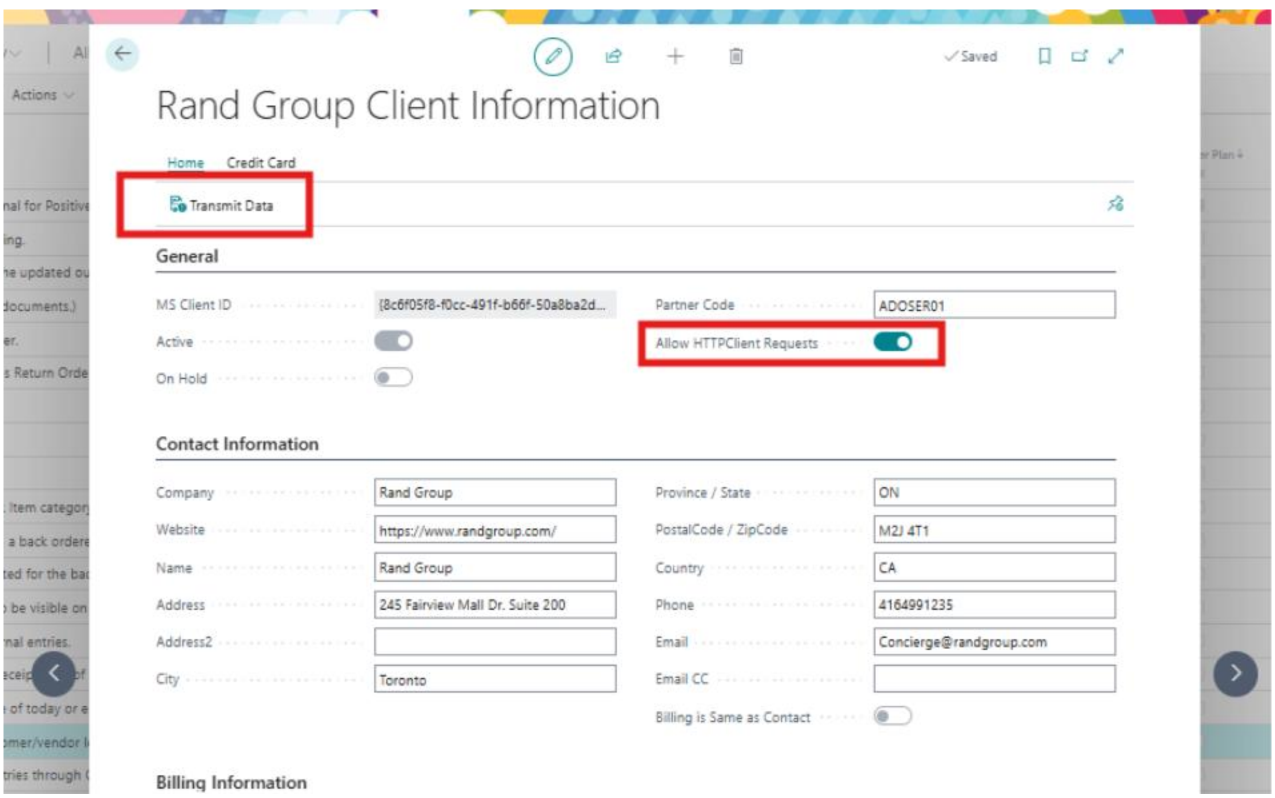
6 REGISTRATION

To use any application developed by Rand Group users must first provide their contact information as part of a registration process. This applies to all applications published by Rand Group.

Note: There is no cost to register an application. Users are only charged if they choose to purchase a license for a Production environment. Production licenses are not required in sandbox environments, allowing users to test Rand Group applications for an unlimited time without cost.

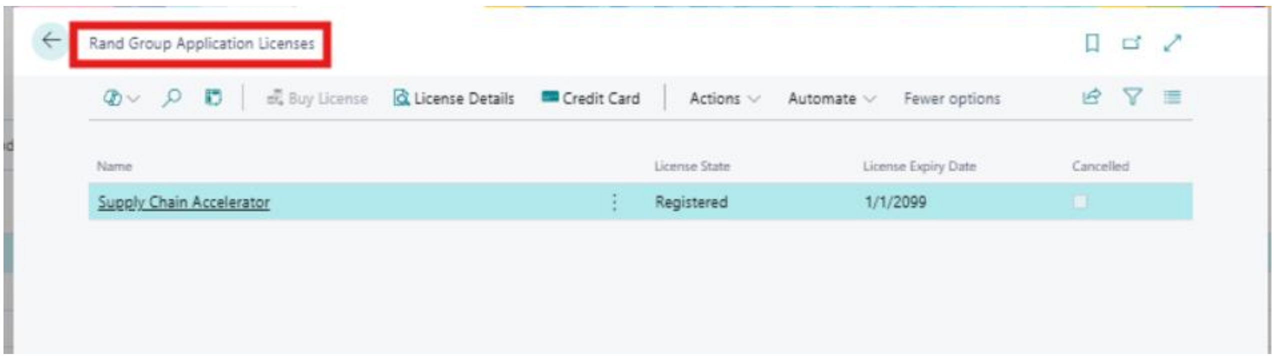
1. **Submitting Rand Group client Information**

To submit client information to Rand Group, in Dynamics 365 Business Central, navigate to the Rand Group Client Information page. Fill all required fields under the Contact Information and Billing Information FastTabs. Before selecting "Transmit Data," ensure that the "Allow HTTPClient Requests" setting is enabled. This is necessary for the data to be successfully transmitted to Rand Group.



2. Verifying License Status

Users can view, purchase, and refresh licenses for applications on the Rand Group Application Licenses page in Dynamics 365 Business Central. This window shows installed Rand Group applications and their license status.



It is important to note that Rand Group applications installed on Dynamics 365 Business Central sandbox environments do not require a production license. Instead, they only need a sandbox license that automatically renews prior to expiration; however, users must register the applications by submitting Client Information to Rand Group before utilizing any Rand Group app.

For more information about licensing and pricing, please visit: https://www.randgroup.com/apps/microsoft/business-central/Project-Oversight-Agent/