

# PWA Portfolio Mgt Steps

- Determine and Set Business Drivers
- Submit Requests
- Approve Requests
- Build Schedule
- Add Resources to Tasks
- Track Timesheets
- Review Dashboards and Reporting

<https://docs.microsoft.com/en-us/connectors/projectonline/>

# Setting the Project Variable (optional)

- To enable swapping out the Project Online site, I have added a global variable called “Project Site”. You will be able to replace this variable with your own Project Site URL to update the sample app.
  - Screen1 – OnVisible Property  
Set(ProjectSite," <https://m365x773946.sharepoint.com/sites/pwa> ")  
Replace the red text above with the URL of your project site.

# Creating a New Project (from custom form)

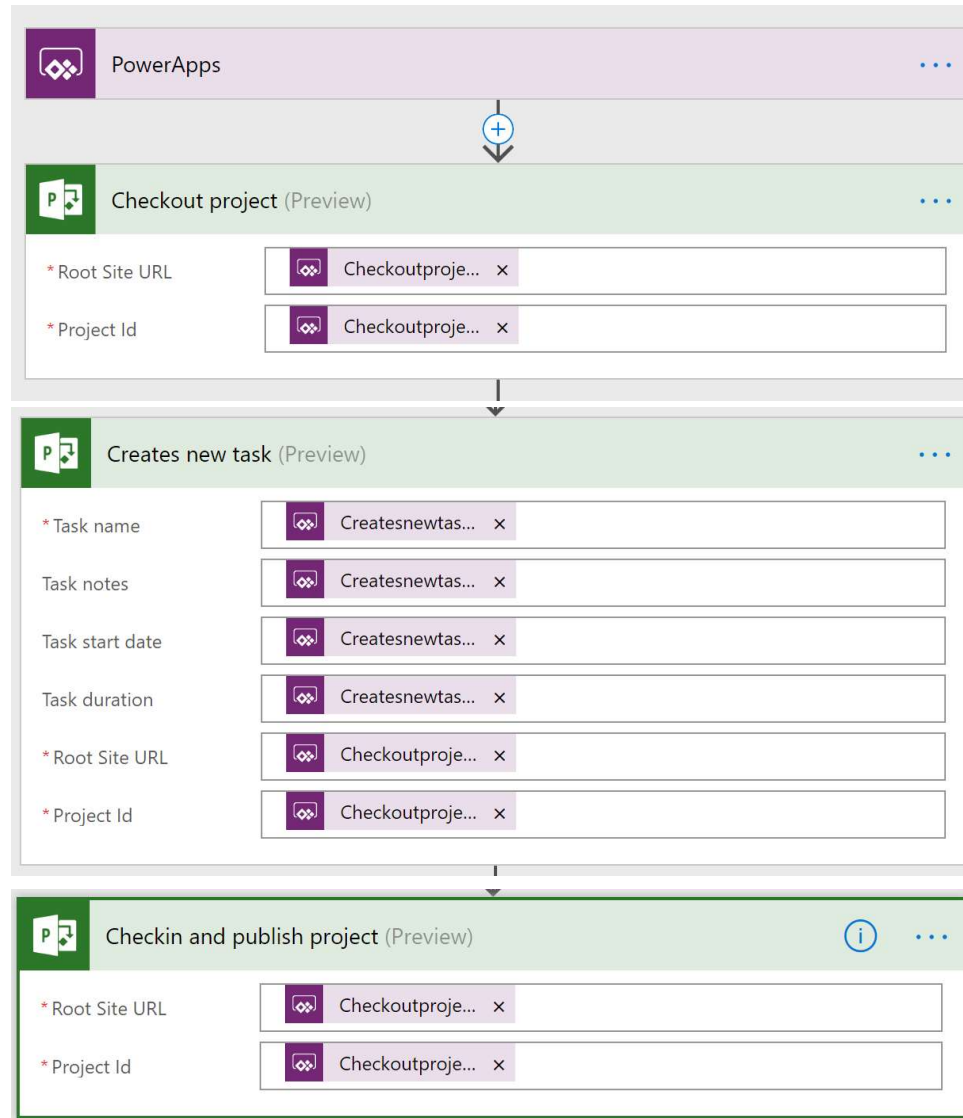
- Create a new project with the following formula:
  - Set(ProjectIDResponse,ProjectOnline.CreateProject(ProjectSite,SharePointIntegration.Selected.Title,{Description:SharePointIntegration.Selected.ProductDescription,Start:SharePointIntegration.Selected.EstStart}))  
Note: Set ProjectIDResponse to capture the body of the response request.
  - When using a standard app where SharePoint Integration is not available (Feel free to use ThisItem, or BrowseGallery1.Selected where possible):  
ProjectOnline.CreateProject(ProjectSite,"Project Name",{Description:"Project Description",Start:StartDate})
- Patch ProjectID to the List
  - Patch('Product Innovation Hub',SharePointIntegration.Selected,{ProjectID:ProjectIDResponse.Id})

# Creating a New Task (Checkout Required)

- Create a new task with the following formula:
  - ProjectOnline.**CheckoutProject**(ProjectIDFResponse.Id,ProjectSite);  
ProjectOnline.**CreateTask**(ProjectIDFResponse.Id,ProjectSite,  
{Name:TaskName.Text,  
Duration:TaskDuration.Text,  
Notes:TaskNotes.Text,  
Start:TaskStart.SelectedDate});  
ProjectOnline.**PublishProject**(ProjectIDFResponse.Id,ProjectSite)

See Flow for this next slide.

## Creating Task using Flow



# Consumption Guidelines

- Get all projects
  - ProjectOnline.**ListProjects**(ProjectSite).value
- Get all tasks for project selected
  - If(IsBlank(galProjects.Selected.Id)=true,  
ProjectOnline.**ListTasks**(galProjects.Selected.Id,ProjectSite).value,  
ProjectOnline.**ListTasks**(galProjects.Selected.Id,ProjectSite).value)
- Calculating Date Differences with the DateDiff Function
  - **DateDiff**(DateValue(ThisItem.Start),DateValue(ThisItem.Finish)) & " days"