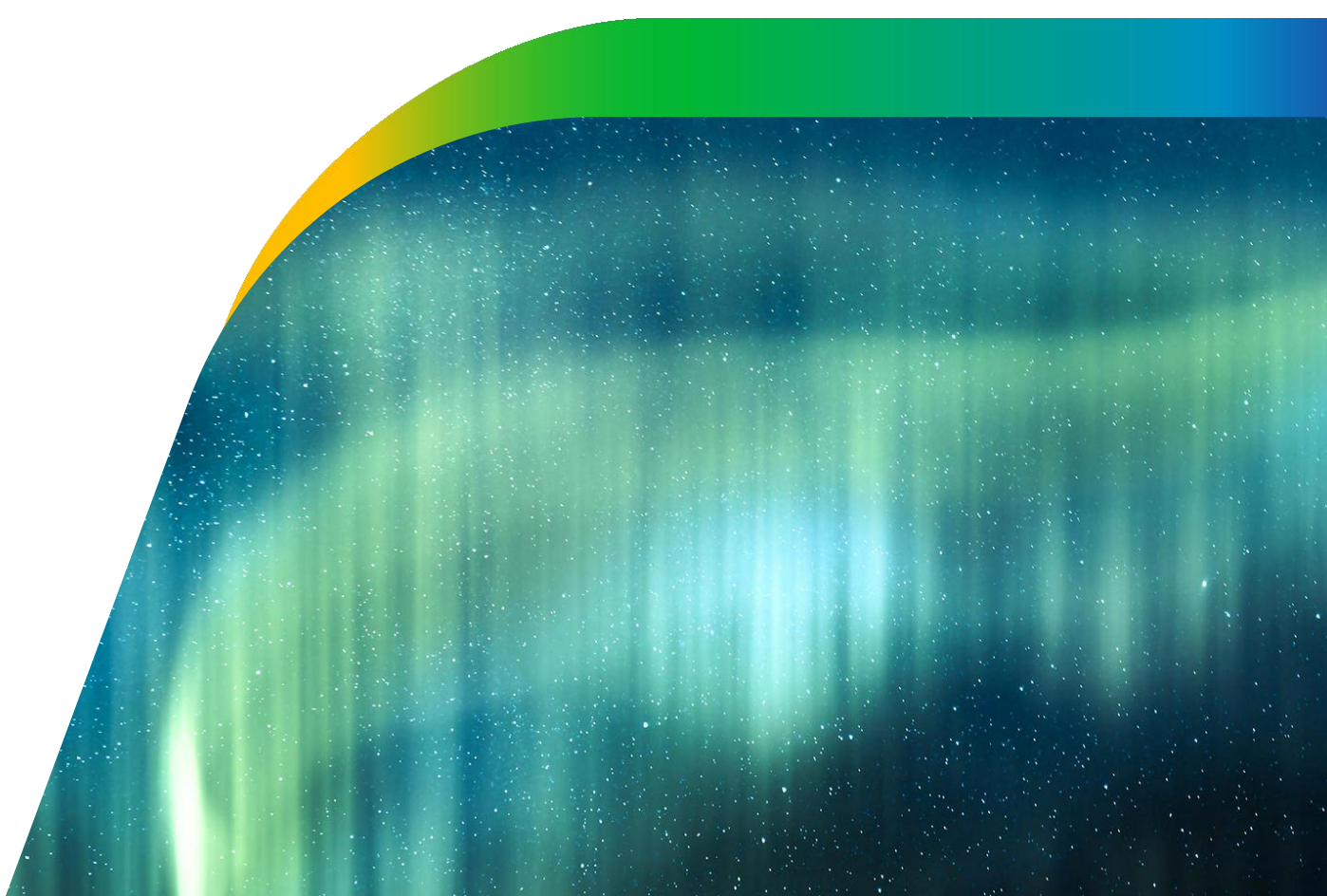




# WHAT'S NEW

EXTENSION PROJECT MANAGEMENT / 2026 H1





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# Axtension® Project Management

## Ability to change the task type

In the Edit activity dialog, a button is available next to the Type field to change an existing task from a task to a milestone, or from a milestone to a task. This is only available and applicable when the task is not assigned to a cost control budget or a posted journal.

For a single copied task, the Paste action includes an option to define a recurrence pattern. When a recurrence pattern is specified, the task is pasted as a recurring task.

A dialog will ask the user to confirm the change and provide warnings

Standard view ▾  
Edit activity

General

Task name: Task 1.1 audio      Type: Task

Current task type is Task, do you want to change this to type Milestone?

Changing task type can lead to loss of resource assignments or estimates and other depending data

OK Cancel

When a task is changed into a milestone the following is affected when publishing the task planning:

- Item requirements linked to a task will have their link removed; the item requirement(s) will remain on the project.
- Resource assignments will be removed.
- Hour and expense estimate lines will be removed from both the task and the project.

In the following scenarios the task type cannot be changed and published:

- There are any transactions posted against the activity (Hour journals, Expense journals, Item journals)
- There is an on-account transaction linked to the activity
- There is a cost control budget line linked to the activity
- The task has child tasks

Please note that a message will be displayed to inform the user that the task type cannot be changed.



## Change WBS ID on a link

When editing a WBS activity from the task planning, it was not possible to change the WBS ID of an existing link (redirect the link to another activity). This behavior has changed, and links can be adjusted directly without having to delete and recreate the link.

Links can be changed to link to another WBS ID without needing to delete and recreate the link. Below a few important notes when changing a link to another WBS ID

- The WBS ID field is editable, which allows you to change the link and link it to another WBS ID
- The dropdown option gives the list of other WBS IDs on the project, an option can be selected on the list
- The user can also enter a number into the field manually
- Validation is done to ensure that the link selected is valid
- Please note that it is not possible to enter and save a WBS ID that is not part of the project

Links Intercompany links

+ New Delete

	Relation	Reference type	Reference ID	WBS ID	Name	Link type	Type
<input checked="" type="checkbox"/>	Successor	Project	000786	2	MANUFACT...	FS	Hard
				WBS ID	↑ Task name		
				1	PLAN		
				2	MANUFACTURE		
				3	INSTALL		
				4	TEST		

## Update the Project reference WBS ID

A link within the task planning also shows the Reference ID. This reference ID refers to the used project. Links can be adjusted directly and linked to another project without having to delete and recreate the link. Below a few important notes when changing a link to another Reference ID

- The Reference ID field is editable
- The dropdown option gives the list of other projects, an option can be selected on the list
- The WBS ID field is cleared and a WBS ID can be selected from the dropdown list for the new project reference
- Validation is done to ensure that the link selected is valid
- Please note that it is not possible to enter and save a Reference ID or WBS ID that doesn't exist



## Sort task planning

In the Axtension Project Management task planning, a new option is available to sort the task planning by a field and define the sorting order.

The sorting is always applied to the project or project quotation (and not to the individual tasks). This means that the ordering of multiple projects or project quotations can be determined when shown in the task planning. The planning of activities within a project or project quotation are still based on the start date of the activities.

The chart preferences dialog has a new section for sorting. In the field dropdown a column can be selected to determine the sorting order. The available fields are the same as those that can be selected in Gantt control table setup. If no field is selected, the default sorting will be applied.

Standard view ▾  
Chart preferences

From <◀◀ 1/1/2026 ▶▶ 1 ▶▶

To <◀◀ 3/31/2026 ▶▶ 14 ▶▶

Show tasks: Active ▾ Show Item tracking:  No

**SORTING**

Field: ▾ Direction: Ascending ▾

1. To sort multiple project or project quotations in the task planning, open the chart preferences
2. Select the field and direction from the dropdown menu to determine the sorting order
3. Click OK to confirm the sorting
4. In the task planning, the sorting is applied based on the selected field.

Field: StartDateTime ▾ Direction: Ascending ▾

Field	Description
Name	Name
Description	Task description
StartDateTime	Start date time
EndDateTime	End date time
CriticalTask	Critical task
Calendar	Calendar

Show resource availability



## View available inventory on product breakdown structure

In the product breakdown structure, there is a new menu item called Available Inventory. This shows a list of available on hand inventory for other programs that could potentially be used for this program.

### View available inventory

In the product breakdown structure, select a line with the program dimension enabled, Click on the Inventory drop down and select the Available inventory.

The screenshot shows the 'Options' menu in the product breakdown structure. The 'VIEW' menu is open, and 'Available inventory' is highlighted. The 'Inventory' dropdown in the main interface is also open, showing 'Available inventory' as the selected option. The main interface displays the 'Standard view' with 'PROJECT IDENTIFICATION' and 'PROGRAM' sections. The 'Inventory' dropdown is set to 'Inventory', and the 'Visible level' is set to 'Inventory'. The table below shows the product breakdown structure with the following data:

Project ID	Program ID	ID
000211	>	1
000211	ABC001	2
000211	ABC001	3

Note: This field is grayed out if the item selected on the line does not have a program tracking dimension enabled.

The screenshot shows the 'Options' menu in the product breakdown structure. The 'VIEW' menu is open, and 'Available inventory' is highlighted. The 'Inventory' dropdown in the main interface is also open, showing 'Available inventory' as the selected option. The main interface displays the 'Standard view' with 'PROJECT IDENTIFICATION' and 'PROGRAM' sections. The 'Inventory' dropdown is set to 'Inventory', and the 'Visible level' is set to 'Inventory'. The table below shows the product breakdown structure with the following data:

Project ID	Program ID	ID	Item number
000211	>	1	D0001
000211	ABC001	2	P030
000211	ABC001	3	P030



## Available inventory form: On hand inventory

The Available inventory form is an on-hand list that displays the following:

- Shows on hand inventory for items of other program IDs, (or blank).
- Dimensions are defaulted to show program ID, Site, Warehouse
- The program from which this is viewed is excluded from the list, based on the assumption that any physically available inventory for the program will be picked up by planning.
- Inventory quantities are the same as the on-hand list inquiry in standard D365 FO

013762 : PBS001

Available inventory

On-hand list

Filter Inventory quantities

Search name	Program ID	Site	Warehouse	Physical invent...	Physical reserv...	Available physiol...	Available physiol...	Ordered in total	On order	Ordered reserv...	Available for r...	Total available	Inventory unit	Uses warehous...	Product identification
PBSitemblank		1	11	6.00		6.00	6.00	1.00			7.00	7.00	ea		PBS001
PBSitemblank		1	13	10.00	1.00	9.00	9.00	1.00			10.00	10.00	ea		PBS001
PBSitemblank		2	21					1.00			1.00	1.00	ea		PBS001
PBSitemblank	ABC001	1	13					1.00	1.00		1.00		ea		PBS001

## Available inventory form: Ordered items

The Available inventory form is an on-hand list that displays the following:

- Shows open purchase order lines and production orders of other program IDs, (or blank).
- Dimensions are defaulted to show program ID, Site, Warehouse
- The program from which this is viewed is excluded from the list
- Production orders with the status Created, Estimated and Scheduled will be displayed
- Purchase orders order lines with an inventory quantity of ordered will be displayed

013759 : PBS001

Available inventory

On-hand list

Filter Inventory quantities

Search name	Program ID	Site	Warehouse	Physical invent...	Physical reserv...	Available physiol...	Available physiol...	Ordered in total	On order	Ordered reserv...	Available for r...	Total available	Inventory unit	Uses warehous...	Produ :
PBSitemblank			11	6.00		6.00	6.00	1.00			7.00	7.00	ea		PBS001
PBSitemblank		1	13	10.00		10.00	10.00	1.00			11.00	11.00	ea		PBS001
PBSitemblank		2	21					1.00			1.00	1.00	ea		PBS001
PBSitemblank	ABC002	1	13					1.00	1.00				ea		PBS001

Ordered items

Request program inventory

Filter

Reference	Number	Party	Program ID	Site	Warehouse	Expected date	Quantity
Purchase order	00000301	Acme Office Supplies		1	13	12/23/2025	1.00
Purchase order	00000301	Acme Office Supplies		2	21	12/23/2025	1.00
Purchase order	00000301	Acme Office Supplies		1	11	12/23/2025	1.00
Purchase order	00000300	Acme Office Supplies	ABC002	1	13	12/24/2025	1.00



## Define authorized users for program inventory requests

Currently, only program managers can create inventory requests for their program. It is now also possible to grant other users permission to create inventory requests.

User ID	Name	Worker name
Brad	Brad Sutton	Brad

## Program ID on orders created from BOM items

On pegged supply orders (production and purchase), the program ID is derived from the parent order or, if the order is related to a project, from the project's program ID.

## Update on-account transactions transDate for time and material projects

When an activity is connected to an on-account transaction of a time and material project, the start date of the activity will automatically update the transDate of the connected on-account transaction when the activity is rescheduled. Similar to how on-account transactions transDate of fixed price projects are updated when a related activity is rescheduled.

## Data entities

Axtension fields are added to standard data entities which are used for master data configuration. For Axtension Project Management new data entities have been created.

Data entities should support read access and allow updates wherever this is supported in the front end. Any rules for setting field values are enforced in the same way when updating fields through a data entity.

More information about the fields and the data entities can be found in the Axtension Production Planning documentation.

