

# CHAPTER 4: CREATING CUSTOM MICROSOFT DYNAMICS SURE STEP PROJECTS

## Objectives

The objectives are:

- Describe reasons for creating Custom Microsoft Dynamics® Sure Step Projects.
- Describe Microsoft Dynamics Sure Step Projects.
- Describe how to make Microsoft Dynamics Sure Step Projects available to other users.
- Describe how to manage Microsoft Dynamics Sure Step Projects.
- Describe how to manage Microsoft Dynamics Sure Step Projects within Microsoft SharePoint.
- Describe how to incorporate customizations from Microsoft Dynamics Sure Step v1 into the current version of Microsoft Dynamics Sure Step.

## Introduction

This chapter explains how to create customized Microsoft Dynamics Sure Step Projects to meet the requirements of your business, to support your industry vertical focus, and to meet the needs of clients. The chapter also discusses how Microsoft Dynamics Sure Step projects are stored, shared, and archived.

## Why Create Custom Microsoft Dynamics Sure Step Projects?

Microsoft Dynamics partner consulting organizations generally have developed unique internal processes and strategies for implementing the Microsoft Dynamics products that they market. Consulting organizations use these methodologies to differentiate themselves in the marketplace to create a competitive advantage. To support this diversity in partner methodologies, Microsoft Dynamics Sure Step provides the facility to create and customize projects to suit each environment.

Partner organizations might decide to create custom projects to enhance the fit to their own implementation strategies. The default content can be modified to support selling and implementing into the specific vertical markets that an organization might focus on. In addition, customizing projects to fit the partner organization's unique internal processes for implementing Microsoft Dynamics solutions can help increase productivity and implementation success rates. Productivity and implementation success rates are realized by allowing project teams to follow consistent, repeatable processes throughout the implementation life cycle.

## What is a Microsoft Dynamics Sure Step Project?

A Microsoft Dynamics Sure Step project is a collection of Microsoft Dynamics Sure Step documents that you can edit. The design of the Sure Step Projects tab and Project sub tabs is used to retain all the resources and project specific details together in an organized structure which is easily accessible and easily managed.

Each project is created using a specific Project Type and a specific Microsoft Dynamics Product. For example, you can create an Upgrade Project for a Microsoft Dynamics CRM implementation.

New projects contain writable copies of all the Microsoft Dynamics Sure Step documents relevant for that combination of Project Type and Microsoft Dynamics product. A project can be customized to meet the requirements of a particular implementation by adding, editing or removing documents.

In Microsoft Dynamics Sure Step a project is managed through the Projects tab. This tab has three sub tabs

- Project List

- Project Properties
- Project Documents

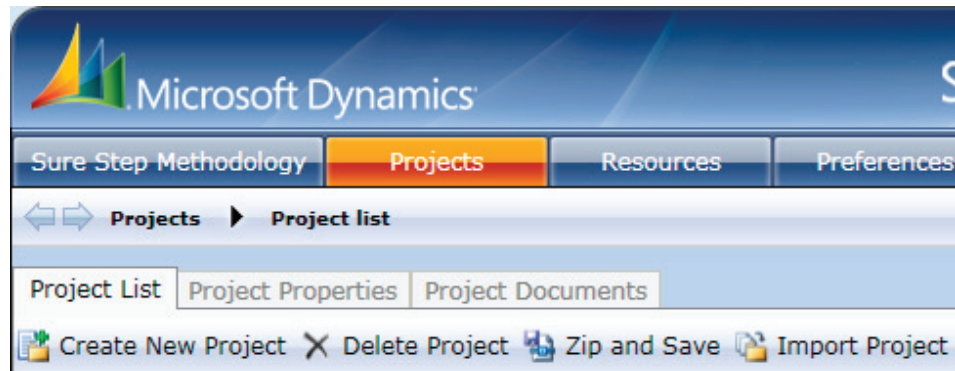


FIGURE 4.1 PROJECT TABS

### Project List

Within the Microsoft Dynamics Sure Step tool, project documents are accessed through the Project List, which is a Documents view similar to that used in the Reference view.

Projects are stored in directories known as repositories. Project repositories are configured on the preferences tab of Microsoft Dynamics Sure Sep. The Project List provides a list view of Sure Step projects in a given repository.

The project list is used to:

- Sort projects by Name, Project Type, Date Modified, Person Responsible, Customer, Product, or Project Mode.
- Filter projects by status.
- Create new projects.
- Delete projects.
- Zip and Save projects.
- Import projects.

## Project Properties

The Project Properties tab is used to specify the various properties of a project. The fields required to create a project are listed in the following table:

Property	Description
Solution	Specify the Solution: <ul style="list-style-type: none"> <li>• General</li> <li>• Process Industry</li> <li>• Public Sector</li> <li>• XRM</li> </ul>
Product	Specify the Microsoft Dynamics product: <ul style="list-style-type: none"> <li>• Microsoft Dynamics® AX</li> <li>• Microsoft Dynamics® GP</li> <li>• Microsoft Dynamics® NAV</li> <li>• Microsoft Dynamics® SL</li> <li>• Microsoft Dynamics® CRM</li> <li>• Microsoft Dynamics® CRM Online</li> </ul>
Engagement Type	Specify the Engagement Type: <ul style="list-style-type: none"> <li>• Diagnostic Phase Offering</li> <li>• Implementation</li> <li>• Optimization Offering</li> </ul>
Project name	Specify a name for the project.
Project Mode	Specify the Project Mode: <ul style="list-style-type: none"> <li>• Local Project</li> <li>• SharePoint-based project</li> </ul>

Project type is an additional required field to create a project. Depending upon the Engagement type selected the corresponding **Project type** fields will be displayed for selection.

Diagnostic Phase Offering	Implementation	Optimization Offering
Requirements and Process Review	Enterprise	Architecture Review
Upgrade Assessment	Standard	Code Review
Fit Gap and Solution Blueprint	Rapid	Design Review
Architecture Assessment	Upgrade	Performance Review
Scoping Assessment	Agile	Health Check

Diagnostic Phase Offering	Implementation	Optimization Offering
Proof of Concept		Upgrade Review
Business Case		Advisory Services

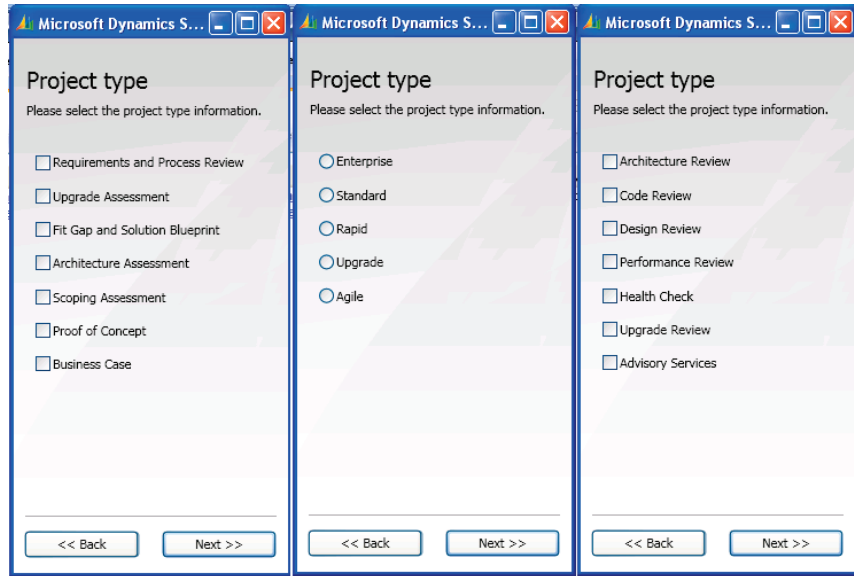


FIGURE 4.2 PROJECT TYPES

The Solution, Product, Engagement Type, Project Name, Project Type and Project Mode must be specified when the project is created. After creating and saving the project, you can modify the Project Name and the properties listed in the following table.

Property	Description
Use as project template	Specify that you will only use the project as a basis for creating other custom projects.
Customer	Specify the customer name.
Customer's e-mail	Specify the primary customer contact.
Customer notes	Create brief notes about the customer, extend these if necessary.
Company logo	Specify a custom logo for the project, or use the default logo.
Project owner's e-mail	Specify the primary project contact.
Project notes	Create brief notes about the project, extend these if necessary.

The project properties tab is also used to create new projects, clone projects, and delete projects.

### **Project Documents View**

The Project Documents view is used to display all the documents in the project, or to display the documents by phase.

The Project Documents view is similar to the Documents view, with one essential difference: these documents can be edited.

Key features include:

- Edit document. Double-click a document to open and edit it in Microsoft Office.
- Locate Content in Sure Step. Right-click a document and select the Locate Content in the Sure Step menu option to view the Microsoft Dynamics Sure Step activity related to the document.
- Add or Delete File to Phase Design. Add other documents to your projects, such as Word documents, Excel spreadsheets or PowerPoint presentations, Microsoft® Visio drawings, or graphics files such as Portable Network Graphics (PNG) for inclusion in project documents.

## **Sharing Microsoft Dynamics Sure Step Projects**

To work efficiently with Microsoft Dynamics Sure Step, all members of the project team will require access to at least some of the project files so that they can make updates as the project progresses. Make the relevant projects available by sharing the project repository.

### **Specify the Project Repository Location**

A project repository is a location for storing all the files related to a particular project. It is possible to have as many project repositories as required. For example, a repository can be defined for a set of related projects for the same customer, since it can be used in a phased implementation. Alternatively, a repository can be defined on a shared location, such as a network drive or SharePoint, so that members of project teams can access the project documents.

A location for a project repository can be specified on the Preferences tab.

### **Shared Repository**

To make a Sure Step Project Repository available to members of the project team, locate the repository on a network share. Ensure that the members of the project team who require access to the project repository have the appropriate access permissions.

For your team to work from a shared project repository, perform the following steps:

1. Create a folder on a network share that is accessible to team members.
2. On the Microsoft Dynamics Sure Step Preferences tab, in the Project Repository box, type the path to the shared folder. Alternatively, you can browse to the network share.
3. Save the shared location.

## Managing Microsoft Dynamics Sure Step Projects

The Microsoft Dynamics Sure Step client-based tool is used to create new projects and manage existing projects easily. A project can be cloned to create a project for a similar implementation, and a project can be sorted by various attributes and compressed and saved for archiving or distribution. Additionally, a customized logo can be added to the documents in each project.

### Create a Project

Microsoft Dynamics Sure Step projects are designed to reflect each individual customer engagement. There is no limit to the number of projects you can create, although with each project requiring approximately 100Mb of disk space, you must carefully manage storage space.

There are two ways to create a new project. You can create a new project from scratch, and customize it as required.

To create a new project:

1. On the Microsoft Dynamics Sure Step **Projects** tab, on the **Project list** tab, click **Create New Project**.
2. The **Sure Step Collaboration Tool Wizard** will open. Click **next** to begin.
3. In the **Add New Project Data** window, specify a **solution, product and engagement type**.
4. In the **Project Name** box, type a name for the new project.
5. Other project properties can be added at this time.
6. Click **next** to proceed.
7. Within the **Project Type** window, select the **project type** information. Click **next** to proceed.
8. On the **Project Mode** window, select the project mode. Click **next** to proceed. If **SharePoint-based project** is selected, the location of the **Site Collection URL** will be needed. You must have appropriate site collection security for SharePoint creation.
9. Confirmation of project creation will be displayed. Click **next** to proceed. The project is automatically saved upon completion.

### Clone a Project

If there is an existing project with similar requirements, the project can be cloned. Cloning an existing project can be very efficient, saving the time and effort involved in customizing a new project. Alternatively, a customized project can be created to act as a template, and then the template can be cloned for each phase of a phased implementation project.

To clone an existing project:

1. On the Microsoft Dynamics Sure Step **Projects** tab, on the **Project List** tab, click the project to clone.
2. Click **Clone Project**.
3. In the **Need Confirmation** dialog box, click **Yes** to confirm the update.
4. In the **Success Confirmation** dialog box, click **OK** to confirm and begin working in the cloned project.

### Sort Projects

When there are a large number of projects in the project repository, it is useful to be able to sort the project list by name, project type, or customer.

For example, to sort the project list by name, navigate to the Microsoft Dynamics Sure Step **Projects** tab, and then click the **Project list** tab. To sort the column into alphabetical order, click the **Name** column heading.

### Custom Logo

Your own company logo or a specific project logo can be added to your Microsoft Dynamics Sure Step deliverables, to customize the documents for a particular customer or engagement.

To specify a default logo for all new Microsoft Dynamics Sure Step projects:

1. On the Microsoft Dynamics Sure Step **Preferences** tab, in the **Company Logo** section, click **Change Logo**.
2. Browse to the graphic to use as the company logo and then click **OK**.
3. On the **Preferences** tab, click **Save**.

For each individual project, there are two options:

- Include the default company logo that is configured on the Preferences tab.
- Specify a different logo for a particular project.

If the default logo changed since the creation of the project, perform the following steps to include the new default logo in your project documents:



- Within the specific project, on the Microsoft Dynamics Sure Step **Projects** tab, on the **Project Properties** tab, in the **Company logo** section, click **Use default (as set in Preferences)**.
- On the **Project Properties** tab, click **Save**.
- On the **Project Properties** tab, click **Update Project Documents**.
- In the **Need Confirmation** dialog box, click **Yes** to confirm the update.
- On the **Project Properties** tab, click **Save**.

To specify a different logo for an individual project and apply the logo to the existing project documents:

1. On the Microsoft Dynamics Sure Step **Projects** tab, on the **Project Properties** tab, in the **Company logo** section, click **Change Logo**.
2. Browse to the graphic to be used as the company logo and then click **Open**.
3. Click **Update Project Documents**.
4. In the **Need Confirmation** dialog box, click **Yes** to confirm the update.
5. Changes are automatically saved upon completion of the update.

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***NOTE:** The recommended size for a logo is 213 x 162 pixels.*

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### **Zip and Save**

Microsoft Dynamics Sure Step provides the facility to archive projects that are no longer in use, or to transfer projects to an alternate storage location.

To archive a Microsoft Sure Step project:

1. On the Microsoft Dynamics Sure Step **Projects** tab, on the **Project list** tab, select the check box for the project to archive.
2. Click **Zip and Save**.
3. Specify the location and filename for the archived project.
4. In the **Sure Step Information** dialog box, click **OK**.

## **Managing Microsoft Dynamics Sure Step Projects Using SharePoint**

Microsoft SharePoint can be used as a document repository to share documents and collaborate on projects within Microsoft Dynamics Sure Step.

Microsoft SharePoint provides document management capabilities to:

- Store, organize, and locate documents
- Ensure the consistency of documents

- Help protect documents from unauthorized use or access
- Ensure consistent business processes (workflows) for how document are handled

## Accessing SharePoint Projects

Upon completion of the creation of the Sure Step project within SharePoint, a URL link to the project site is displayed. You can access the SharePoint site by navigating to the site using the URL or through Sure Step in the Project List.

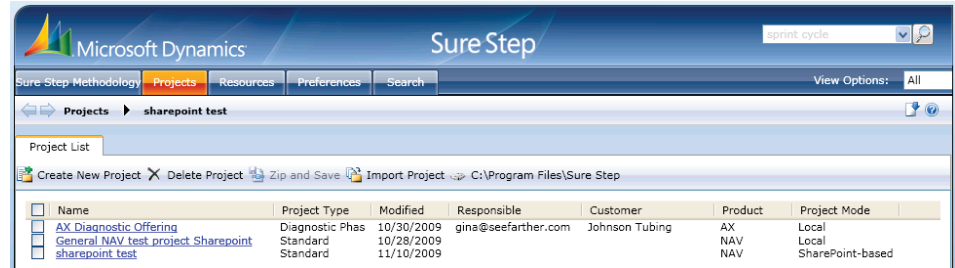


FIGURE 4.3 PROJECT LIST

## Navigating SharePoint Projects

The Sure Step SharePoint project includes various features of the SharePoint Navigation including:

- Documents
  - Shared Documents
  - Document Libraries including Shared Documents and Sure Step Documents
- Project Management
  - Calendar
  - Tasks
  - Project Members
- Discussions
- Recycle Bin

New folders can also be created and individual or multiple documents can be uploaded.

The home page navigation of the project is similar to that within the Sure Step documents view of a project. Each phase column heading can be selected to view the specific documents of that phase.

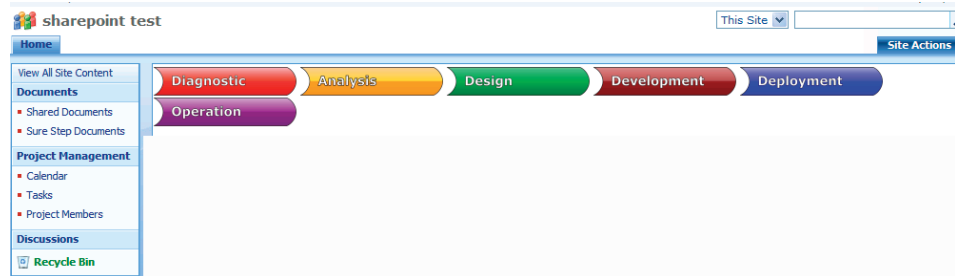


FIGURE 4.4 SURESTEP SHAREPOINT NAVIGATION

Documents can also be viewed by author, completion status, cross phase, or explorer view. A customized view can be created as well as modifying a view.



FIGURE 4.5 SHAREPOINT LIST VIEW

Documents within each view can be filtered by:

- Type
- Title

- Name
- Modified Date
- Modified By
- Deliverable
- Owner
- Status

### Editing Project Properties

Within the project in SharePoint, management and editing of the document properties can be accessed. The down arrow next to each document name allows the user the following options:

- **View Properties** - Displays the main properties of the document as set by the user. It also gives the user the additional editing and managing options available in the initial drop down.
- **Edit Properties** - allows the properties of the document to be edited. The list of properties includes:
  - **Project Name:** The physical name of the document displayed within the project
  - **Title:** The title of the document.
  - **Phase:** Denotes which phase of the project the document will display in. Multiple phases can be selected.
  - **Cross Phase Process:** Selection of the cross phase of the project the document will display in.
  - **Owner:** Selection of which Sure Step Consulting Role is the owner of the document.
  - **Customer Role:** Selection of which Sure Step Customer Role(s) assigned to the document.
  - **Partner Role:** Selection of which Sure Step Partner Role(s) assigned to the document.
  - **Status:** Current status of the document
  - **Deliverable:** The document can be Client Ready or for Internal use only.
  - **Solution:** The document can be for General, Process Industry, Public Sector or XRM.
- **Manage Permissions** - Displays the permissions assigned to the document.
- **Edit** - Allows editing of the document.
- **Delete** - Allows the document to be deleted from the project
- **Send to** - Provides the option of sending the doc to another location, email a link, create a document workspace or download a copy.

- **Check Out** - The document can be checked out for editing and then checked in upon completion of the edits.
- **Alert me** - An alert can be set up for the specified item, document, list or library within the project.

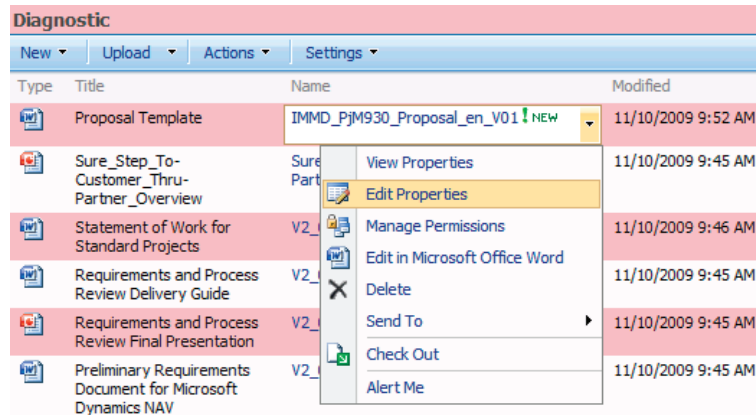


FIGURE 4.6 PROJECT PROPERTIES

## Incorporating Customizations

Microsoft Dynamics Sure Step v1 enabled users to modify the Sure Step methodology, including adding new documents to the project.

To incorporate customizations from Microsoft Dynamics Sure Step v1 into the current version of Microsoft Dynamics Sure Step:

1. In Sure Step v1, save any modified documents into a single directory.
2. If you made significant changes to the methodology itself, copy and paste those changes into one or more Word documents. Save the Word documents and save in the same directory as the documents from Sure Step v1.

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**NOTE:** These customized methodology Word documents are visible from within the project documents view. They are not visible within the Sure Step Reference view.

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3. In the current version of Microsoft Dynamics Sure Step, create a new Project based on the pertinent Microsoft Dynamics Sure Step v1 Dynamics product and project type.
4. On the **Project Documents** tab, add your documents to the appropriate project phases.
5. In when viewing a single phase, you can use the **Move Up** and **Move Down** options to position the documents as needed.

### Summary

This course introduced the creation and customization of Microsoft Dynamics Sure Step projects and discussed the primary reasons why most organizations will opt to create custom projects.

This lesson discussed how to manage Microsoft Dynamics Sure Step projects, including how to specify the storage location, whether on a local drive or on a shared network resource, and how to customize a project by adding a specific logo. This lesson also discussed cloning and archiving projects.

You can incorporate customizations made in Microsoft Sure Step v1 into custom projects in the current version of Microsoft Dynamics Sure Step. This ensures that adaptations made in earlier versions of Microsoft Dynamics are not lost when partners upgrade.

### Test Your Knowledge

Test your knowledge with the following questions.

1. To distribute a customized version of Microsoft Dynamics Sure Step, which steps must be performed? Select all that apply.
  - E-mail all the project documents to the project team.
  - Locate the Project Repository on a shared network resource.
  - Ensure that the project team members have access to the shared network resource.
  - Zip and Save the project to the shared network resource.
  
2. On the Project Properties tab in Microsoft Dynamics Sure Step, which command is used to copy the entire project?
  - Copy Project
  - Add Project
  - Use as project template
  - Clone Project
  
3. When creating a new project, if choosing an Engagement Type of Optimization Offering, which Project Types are displayed for selection?
  - Requirements and Process Review, Upgrade Assessment, Fit Gap and Solution Blueprint, Architecture Assessment, Scoping Assessment, Proof of Concept, and Business Case
  - Architecture Review, Code Review, Design Review, Performance Review, Health Check, Upgrade Review and Advisory Services
  - Enterprise, Standard, Rapid, Upgrade and Agile

## Lab 4.1 - Working with Microsoft Dynamics Sure Step Projects

In this lab, you will complete the following tasks:

- Create a new project template.
- Add new documents to the project template.
- Add a custom logo for the project.
- Clone the template project to create a new project.

### Scenario

From Fabrikam's perspective, it is important to protect sensitive data. Since it applies to this project, you must take specific care with accounting and payroll data. This is also a core tenet of your firm's own implementation methodology. To ensure security requirements are suitably validated when Microsoft Dynamics is deployed, you want to add some important content that your firm uses in its Microsoft Dynamics implementation process.

Your lead Microsoft Dynamics technology consultant has delivered a copy of the document used by your firm for Microsoft Dynamics security planning and you want to include it in a template for future Microsoft Dynamics implementation projects.

You use Microsoft Dynamics Sure Step Editor to add the Microsoft Dynamics Security Planning worksheet. You also use a link to the Microsoft Dynamics Community Web page to help the project team during implementations of Microsoft Dynamics.

### Before You Begin

To prepare for this lab, you will need to copy the Lab files provided to your computer. If you have already copied the Lab files for a previous Lab, it is not necessary to do it again.

To extract the files:

1. Double-click **Labfiles.exe**.
2. Ensure that the files are extracted into C:\Lab files.

### Exercise 1: Challenge Yourself!

In this exercise, you will create a template project to be used for all appropriate customer engagements. Fabrikam is upgrading to the latest version of Microsoft Dynamics AX, and requires some complex customizations to the product.



Create a new template project by using the Projects tab in Microsoft Dynamics Sure Step. Use the following information:

Project Property	Setting Required
Solution	General
Product	AX
Engagement type	Implementation
Project name	Upgrade Template
Project Type	Upgrade
Project Mode	Local Project
Use as a project template	Selected

### Exercise 2: Challenge Yourself!

In this exercise, you will modify the Upgrade template project. You will add extra security configuration information to be used for all appropriate upgrade engagements with Fabrikam.

Complete the following task by using the Projects tab in Microsoft Dynamics Sure Step:

- Add the following files to the Design phase of the template project.
  - Determine Application Security.doc
  - Microsoft Security Setup Final.xls

### Exercise 3: Challenge Yourself!

In this exercise, you will modify the Upgrade template project. You will add Fabrikam's logo.

Add a logo for the template project by using the Projects tab in Microsoft Dynamics Sure Step. The logo filename is Fabrikam.png.

### Exercise 4: Challenge Yourself!

In this exercise, you will create a new project based on the Upgrade template project. Create a new project by cloning the Upgrade template project. Use the following information:

Project Property	Setting Required
Project name	Fabrikam Upgrade
Use as a project template	Cleared
Customer	Fabrikam, Inc.

Project Property	Setting Required
Customer's e-mail	Wilson.Pais@Fabrikam.com
Customer notes	<ul style="list-style-type: none"> <li>Locally owned manufacturer of custom furniture.</li> <li>Employ 200+</li> <li>Established thirty years ago by the current CEO, Wilson Pais.</li> </ul>
Project owner's e-mail	ProjectOwner@contoso.com
Project notes	Rescue project based on failed implementation by A. Datum, Inc.

### Exercise 1: Need a Little Help?

To create a new template project by using the Projects tab in Microsoft Dynamics Sure Step, do the following:

1. On the **Projects** tab, navigate to the **Project List** tab.
2. On the **Projects List** tab, click **Create New Project**.
3. Enter the following information in the appropriate boxes:

Project Property	Setting Required
Solution	General
Product	AX
Engagement type	Implementation
Project name	Upgrade Template
Project Type	Upgrade
Project Mode	Local Project
Use as a project template	Selected

Upon completion of the project creation, on the **Project Properties** tab of the project, select **Use as project template** and save the template project before continuing to the next exercise.

### Exercise 2: Need a Little Help?

To modify the Upgrade template project by adding extra security configuration documents, in Microsoft Dynamics Sure Step:

1. On the **Projects** tab, navigate to the **Project Documents** tab.
2. Set the filter to **All Documents**.
3. Click the **Design** phase column heading.

4. Use **Add Document** to add the following:
  - a. Determine Application Security.doc
  - b. Microsoft Security Setup Final.xls
5. In the list of documents, click each document that is added to verify that it opens.

### Exercise 3: Need a Little Help?

To modify the Upgrade template project by adding Fabrikam's logo, in Microsoft Dynamics Sure Step:

1. On the **Projects** tab, navigate to the **Project Properties** tab.
2. In the **Company Logo** section, click **Change Logo**.
3. Browse to the **Lab 4** folder, and add **Fabrikam.png** as the logo.
4. Replace the logo in the project documents.

### Exercise 4: Need a Little Help?

To create a new project based on the Upgrade template project, clone the Upgrade template project. In Microsoft Dynamics Sure Step:

1. On the **Projects** tab, navigate to the **Project List** tab.
2. On the **Projects List** tab, click **Upgrade Template**.
3. Click the **Project Properties** tab, and then click **Clone Project**.
4. Use the following information to complete the properties of the new project:

Project Property	Setting Required
Project name	Fabrikam Major Upgrade
Use as a project template	Cleared
Customer	Fabrikam, Inc.
Customer's e-mail	Wilson.Pais@Fabrikam.com
Customer notes	<ul style="list-style-type: none"><li>• Locally owned manufacturer of custom furniture.</li><li>• Employ 200+</li><li>• Established thirty years ago by the current CEO, Wilson Pais.</li></ul>
Project owner's e-mail	ProjectOwner@contoso.com
Project notes	Rescue project based on failed implementation by A. Datum, Inc.

Save the new project before continuing to the next exercise.

## Exercise 1: Step by Step

To create a new template project by using the Projects tab in Microsoft Dynamics Sure Step, in

Microsoft Dynamics Sure Step:

1. On the **Projects** tab, click **Project List**.
2. The **Sure Step Collaboration Tool Wizard** will open, click **next**.
3. On the **Projects List** tab, click **Create New Project**.
4. On the **Add New Project Data** tab, in the **Solution** list, select **General**.
5. In the **Product** list, select **AX**.
6. In the **Engagement Type** list, select **Implementation**.
7. In the **Project name** box, type **Upgrade Template**.
8. Click **next**.
9. On the **Project Type** tab, select **Upgrade**.
10. Click **next**.
11. On the **Project Node** tab, select **Local Project**.
12. Click **next**.
13. On the **Ready to create new project** window, click **next**.
14. On the **dialog confirmation**, click **Finish**.
15. On the **Project Properties** tab, select the **Use as Project template** check box.
16. Click **Save**.
17. In the **Sure Step Information** dialog box, click **OK**.

## Exercise 2: Step by Step

To modify the Upgrade template project by adding extra security configuration documents, in

Microsoft Dynamics Sure Step:

1. On the **Projects** tab, double-click the **Upgrade Template** project to open.
2. Click **Project Documents** tab.
3. In the View Options list, select **All Documents**.
4. Click the **Design** phase column heading.
5. Click **Add Document**.
6. In the **Open** dialog box, in the **Filename** box, type **C:\Labfiles\Lab 4\Determine Application Security.doc**, and then click **Open**.
7. Scroll down to verify that the document is added.
8. Click **Add Document**.

9. In the **Open** dialog box, in the **Filename** box, type **C:\Labfiles\Lab 4\Microsoft Security Setup Final.xls**, and then click **Open**.
10. Scroll down to verify that the document is added.
11. Click **Determine Application Security.doc**, and verify that the document opens in Word.
12. Close the document.
13. Click **Microsoft Security Setup Final.xls**, and verify that the spreadsheet opens in Excel.
14. Close the spreadsheet.

### Exercise 3: Step by Step

To modify the Upgrade template project by adding Fabrikam's logo, in Microsoft Dynamics Sure Step:

1. On the **Projects** tab, double-click to open the **Upgrade Template** project.
2. Click the **Project Properties** tab.
3. In the **Company Logo** section, click **Change Logo**.
4. In the **Select New Company Logo Image** dialog box, in the **File name** box, type **C:\Labfiles\Lab 4\Fabrikam.png** and then click **Open**.
5. On the **Project Properties** tab, in the **Company Logo** section, click **Update Project Documents**.
6. In the **Need confirmation** dialog box, click **Yes**.
7. In the **Sure Step Information** dialog box, click **OK**.

### Exercise 4: Step by Step

To create a new project based on the Upgrade template project, clone the Upgrade template project. In Microsoft Dynamics Sure Step:

1. On the **Projects** tab, click **Project List**.
2. On the **Projects List** tab, double-click **Upgrade Template**.
3. Click **Project Properties**, and then click **Clone Project**.
4. In the **Need confirmation** dialog box, click **Yes**.
5. In the **Sure Step Information** dialog box, click **OK**.
6. On the **Project Properties** tab, in the **Project name** box, type **Fabrikam Upgrade**.
7. Click to clear the **Use as project template** check box.
8. In the **Customer** box, type **Fabrikam, Inc**.
9. In the **Customer's e-mail** box, type **Wilson.Pais@Fabrikam.com**.

10. In the **Customer notes** box, type:
  - **Locally owned manufacturer of custom furniture.**
  - **Employ 200+**
  - **Established thirty years ago by the current CEO, Wilson Pais.**
  
11. In the **Project owner's e-mail** box, type  
**ProjectOwner@contoso.com.**
12. In the **Project notes** box, type:
  - **Rescue project based on failed implementation by A. Datum, Inc.**
  
13. Click **Save**.

## Quick Interaction: Lessons Learned

Take a moment and write down three key points you have learned from this chapter

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2.

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3.

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## Solutions

### Test Your Knowledge

1. To distribute a customized version of Microsoft Dynamics Sure Step, which steps must be performed? Select all that apply.
  - E-mail all the project documents to the project team.
  - Locate the Project Repository on a shared network resource.
  - Ensure that the project team members have access to the shared network resource.
  - Zip and Save the project to the shared network resource.
  
2. On the Project Properties tab in Microsoft Dynamics Sure Step, which command is used to copy the entire project?
  - Copy Project
  - Add Project
  - Use as project template
  - Clone Project
  
3. When creating a new project, if choosing an Engagement Type of Optimization Offering, which Project Types are displayed for selection?
  - Requirements and Process Review, Upgrade Assessment, Fit Gap and Solution Blueprint, Architecture Assessment, Scoping Assessment, Proof of Concept, and Business Case
  - Architecture Review, Code Review, Design Review, Performance Review, Health Check, Upgrade Review and Advisory Services
  - Enterprise, Standard, Rapid, Upgrade and Agile