Microsoft Dynamics SL 2015 Web Services/Web Apps Release Notes

Updated December 2016

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December 2016

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Contents

Audience

This document provides important information about changes and new features that are available in Microsoft Dynamics SL 2015 Web Apps. All users can review the content to determine where they may benefit from the changes in this release. The document is of particular interest to those who install Microsoft Dynamics SL 2015 Web Apps or develop applications for it.

The .pdf documents included in this release are located in the root of the release and are installed to the directory where you deploy the Web Apps. Additionally, these documents, and earlier versions, are available for download on CustomerSource mbs.microsoft.com/customersource/northamerica/SL/learning/documentation.

Before You Begin

You *must* have Microsoft Dynamics SL 2015, Microsoft Dynamics SL 2015 CU1, or Microsoft Dynamics SL 2015 CU2 installed before you install Microsoft Dynamics SL 2015 Web Apps. The deployment guide lists the prerequisites for the reports, for the web services, and for the Web Apps. To install Microsoft Dynamics SL 2015 Web Apps, pay additional attention to the prerequisites in each of those sections.

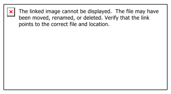
The deployment guide also contains detailed configuration and access rights information for each Web App. This information will be useful to you after you complete the deployment.

Web Apps

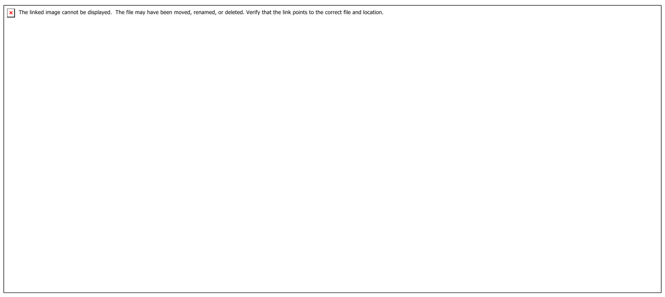
Timecard Entry Enhancements

Timecard Entry – Reduce the number of clicks needed to enter time

a. Removed the New row button

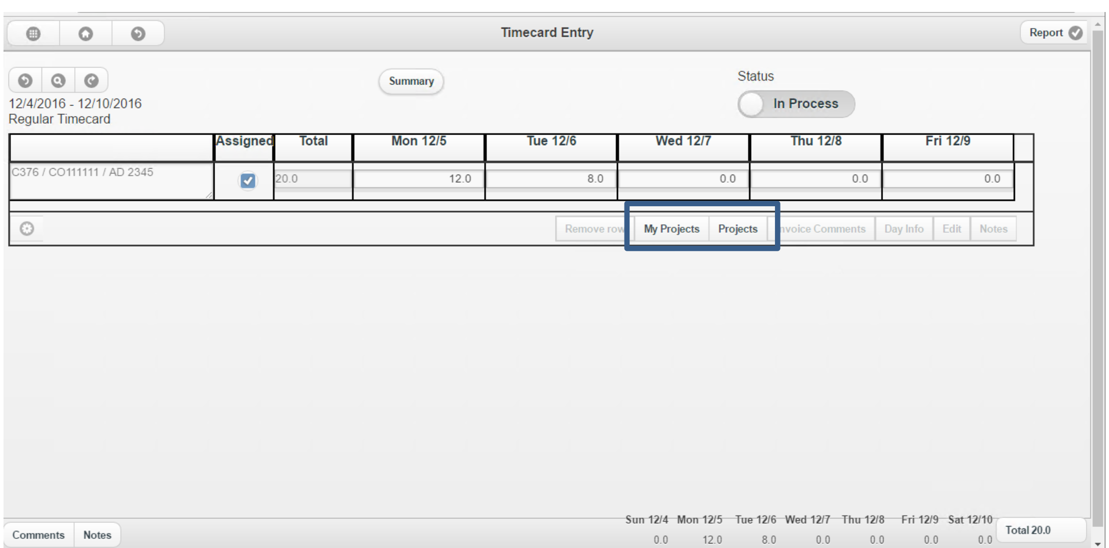


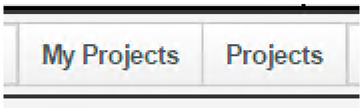
b. Removed the New row submenu



The submenu allowed the selection of adding Assigned or Unassigned projects.

c. Replaced the New button and the submenu with two buttons on the main Timecard Entry screen: My Projects & Projects button





Buttons

a. My Projects Clicking the button opens the list of Projects that have been assigned to a user.
This is the same screen accessed by the previous Assigned button.

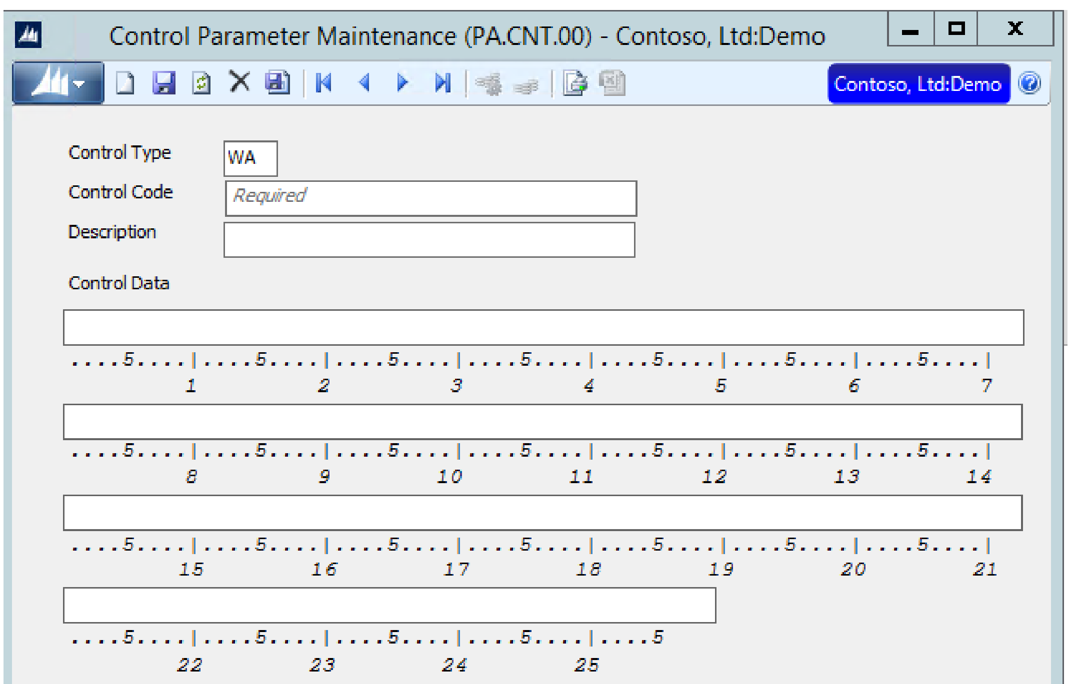
b. Projects Clicking the button opens the interface to search for a Project and Task.
This is the same screen accessed by the previous Unassigned button.

Timecard Entry – Hide My Projects button

If the My Projects button's project assignment feature is not used then the My Projects button can be hidden.

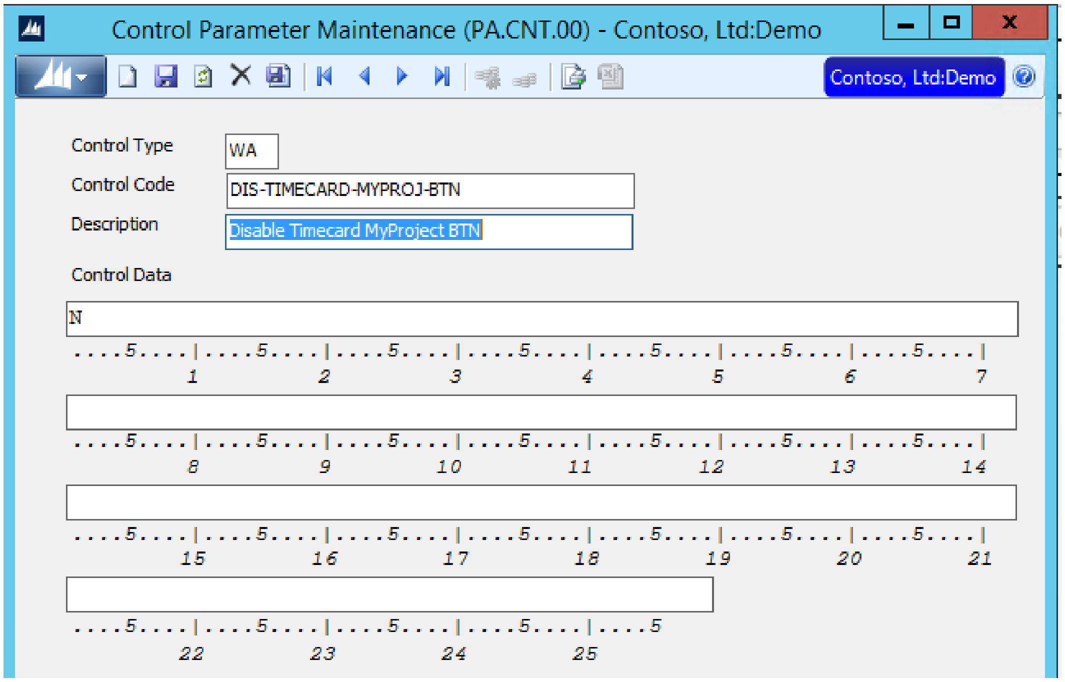
How to hide the My Projects button:

a. Open the Control Parameter Maintenance (PA.CNT.00) screen



b. Control Type field: Enter the value WA (for Web Apps)

c. Control Code field: Enter in the value DIS-TIMECARD-MYPROJ-BTN (Disable the Timecard My Project button)



d. Control Data field values:

N (default) No, don't disable the My Project button on the Timecard Entry screen.
Display the My Project button on the Timecard Entry screen.

Y Yes, disable the My Project button the Timecard Entry screen.
Do not display the My Project button on the Timecard Entry screen.

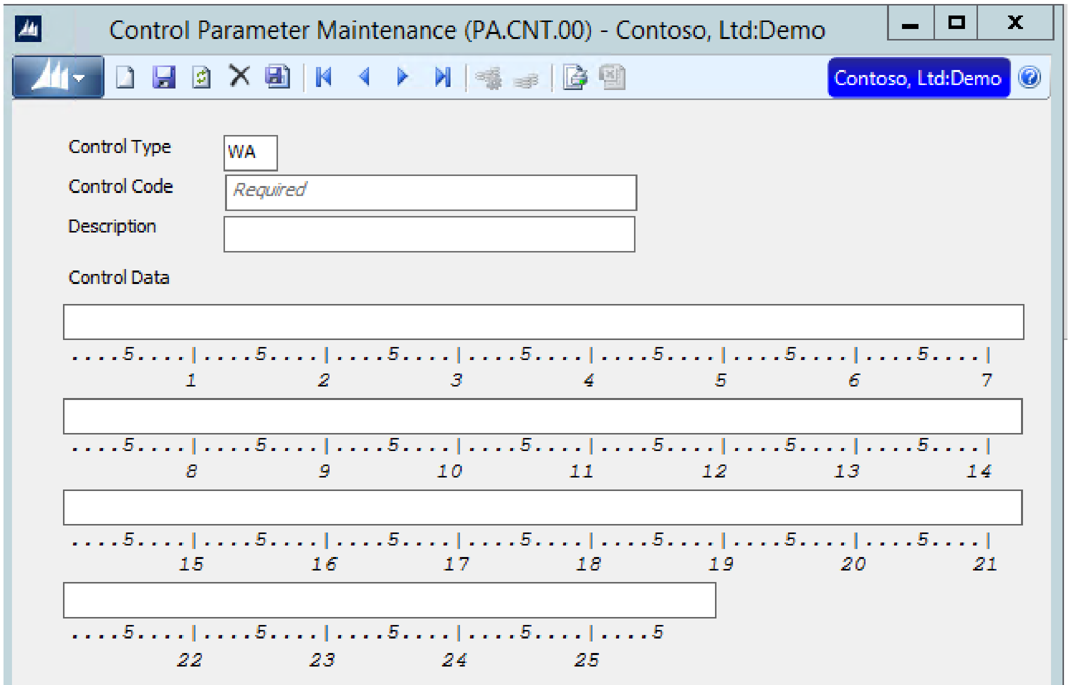
Note: This is a global setting and will be used by all users entering time.

Timecard Entry – Hide the Projects buttons

If your company does not want users to be able to search and enter projects they are not assigned to them, then hide the Project button.

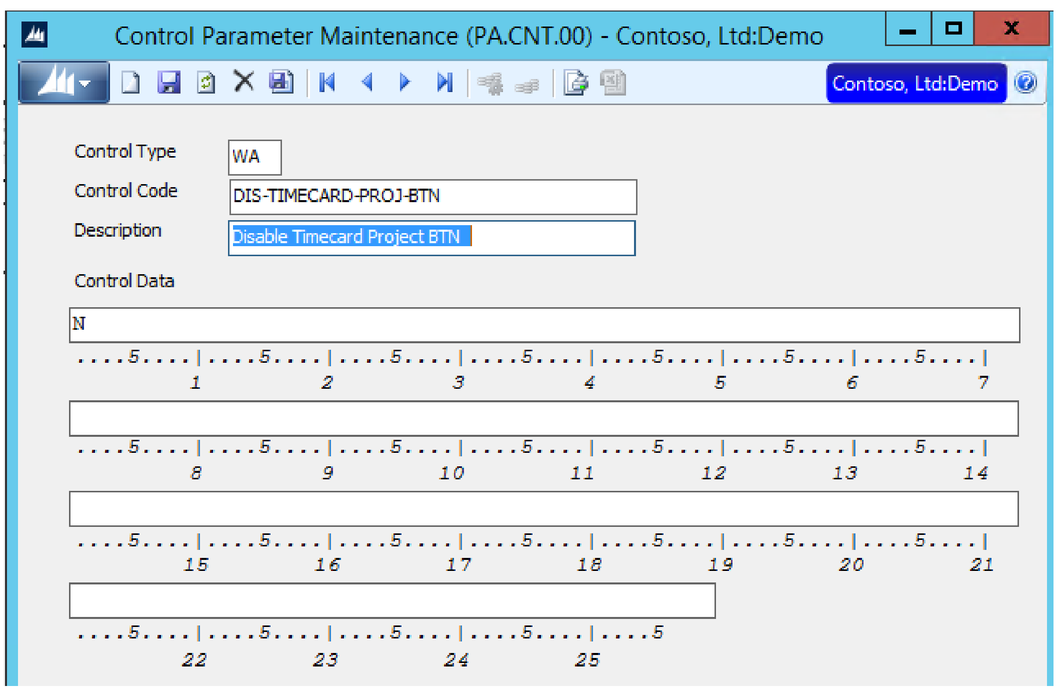
How to hide the Projects button:

a. Open the Control Parameter Maintenance (PA.CNT.00) screen



b. Control Type field: Enter the value WA (for Web Apps)

c. Control Code field: Enter in the value DIS-TIMECARD-PROJ-BTN (Disable Timecard Project Button)



d. Control Data field values:

a. N (default) No, don't disable the Project button on the Timecard Entry screen.

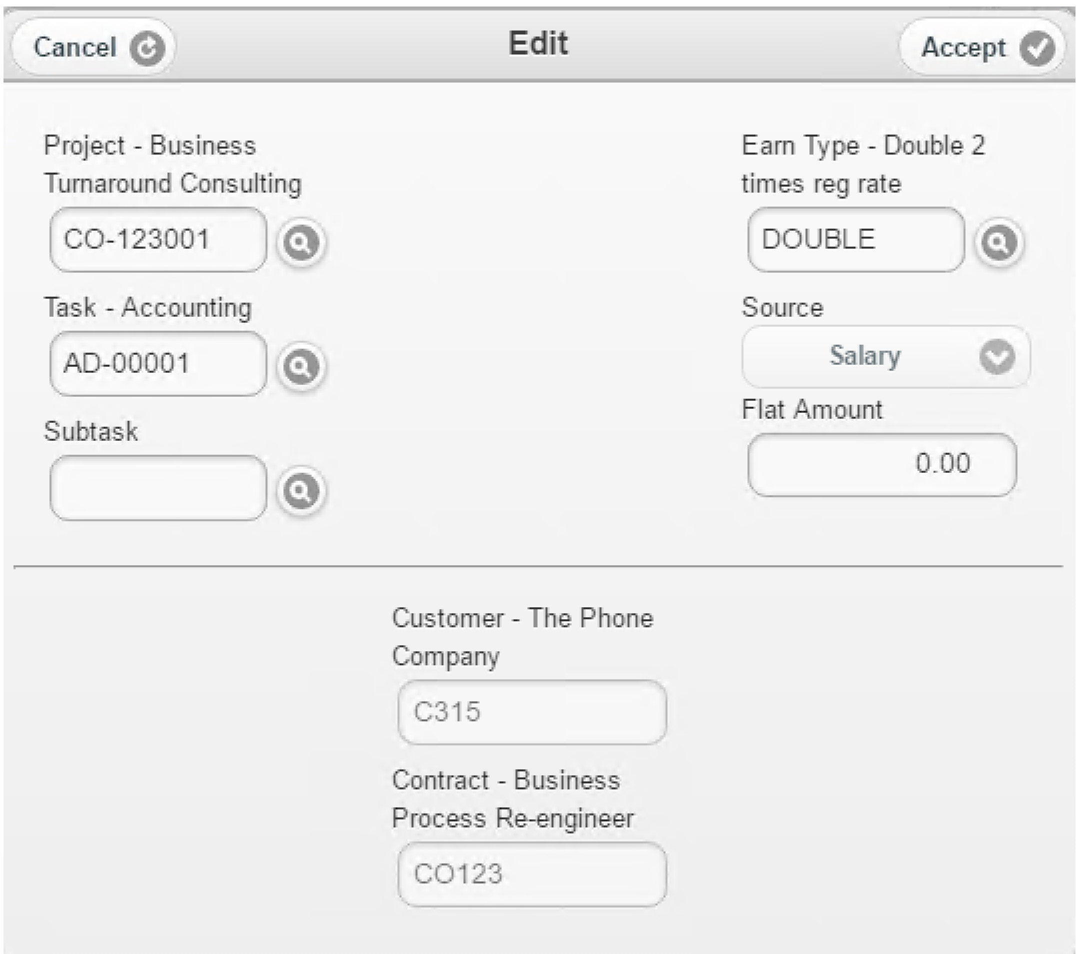
Display the Project button on the Timecard Entry screen.

b. Y — Yes, disable the Project button the Timecard Entry screen. Do not display the Project button on the Timecard Entry screen.

Note: This is a global setting and will be used by all users entering time.

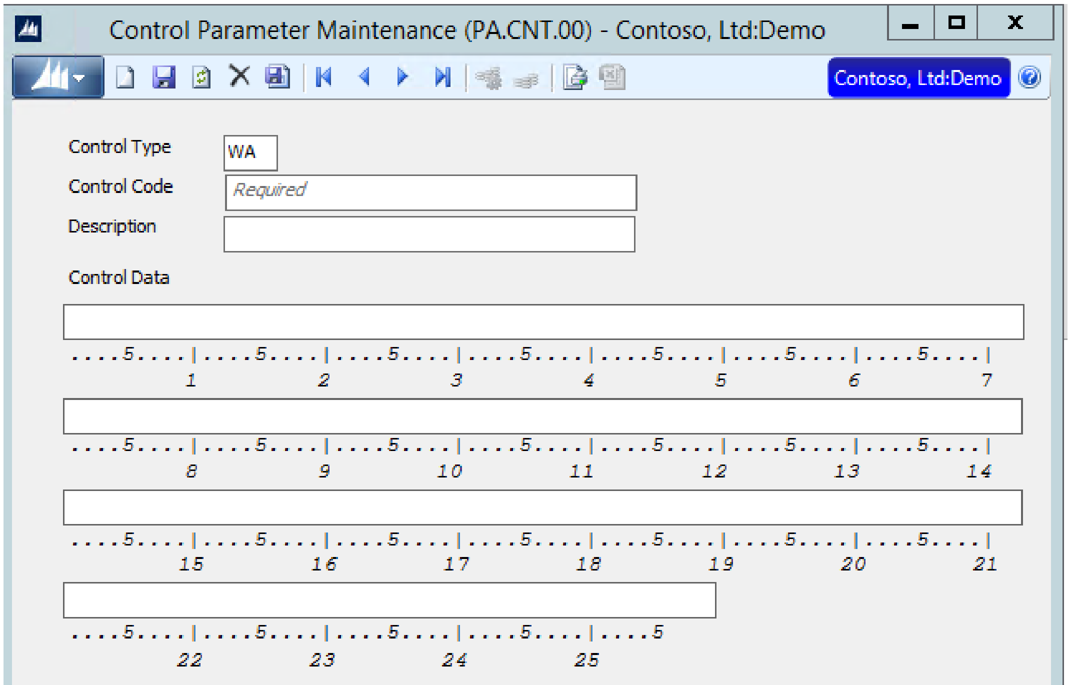
Timecard Entry – Selecting/Editing Projects – Viewing Contracts

During the selecting of a Project and Task, it is possible to view the Contract ID and Contract name if one is associated to the Project. This field is view only and not editable. The field can be turned on and off for Web Apps.



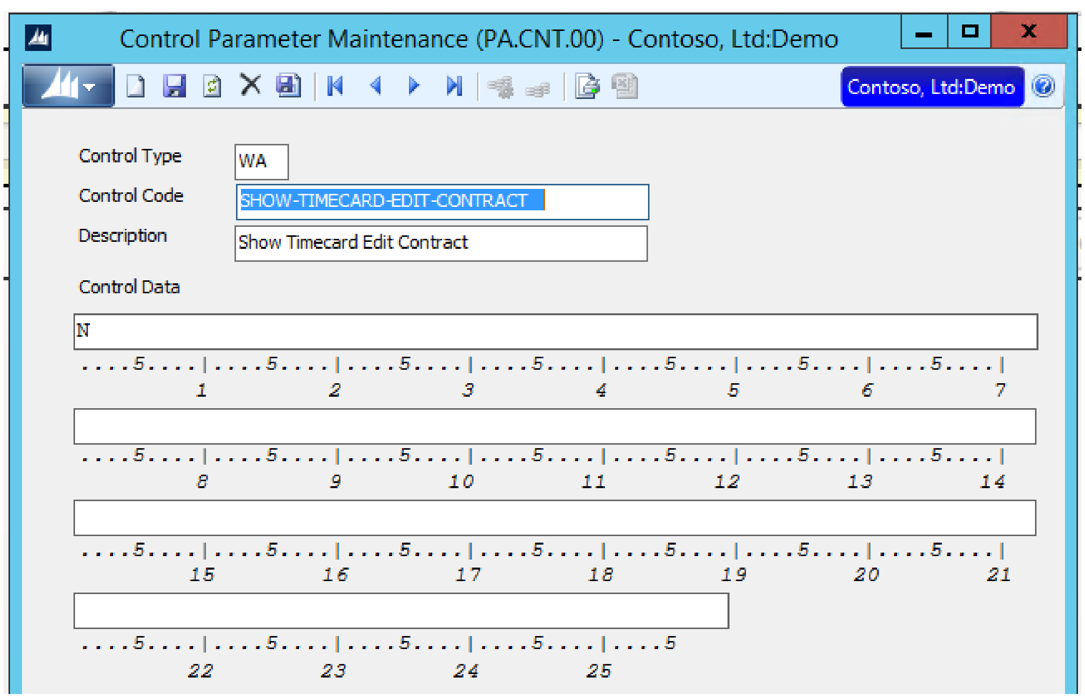
How to turn on or off the Contract field:

a. Open the Control Parameter Maintenance (PA.CNT.00) screen



b.	Control Type field:	Enter the value WA (for Web Apps)

c.	Control Code field:	Enter the value SHOW-TIMECARD-EDIT-CONTRACT (Show the Timecard Edit Contract field)



d.	Control Data field values:

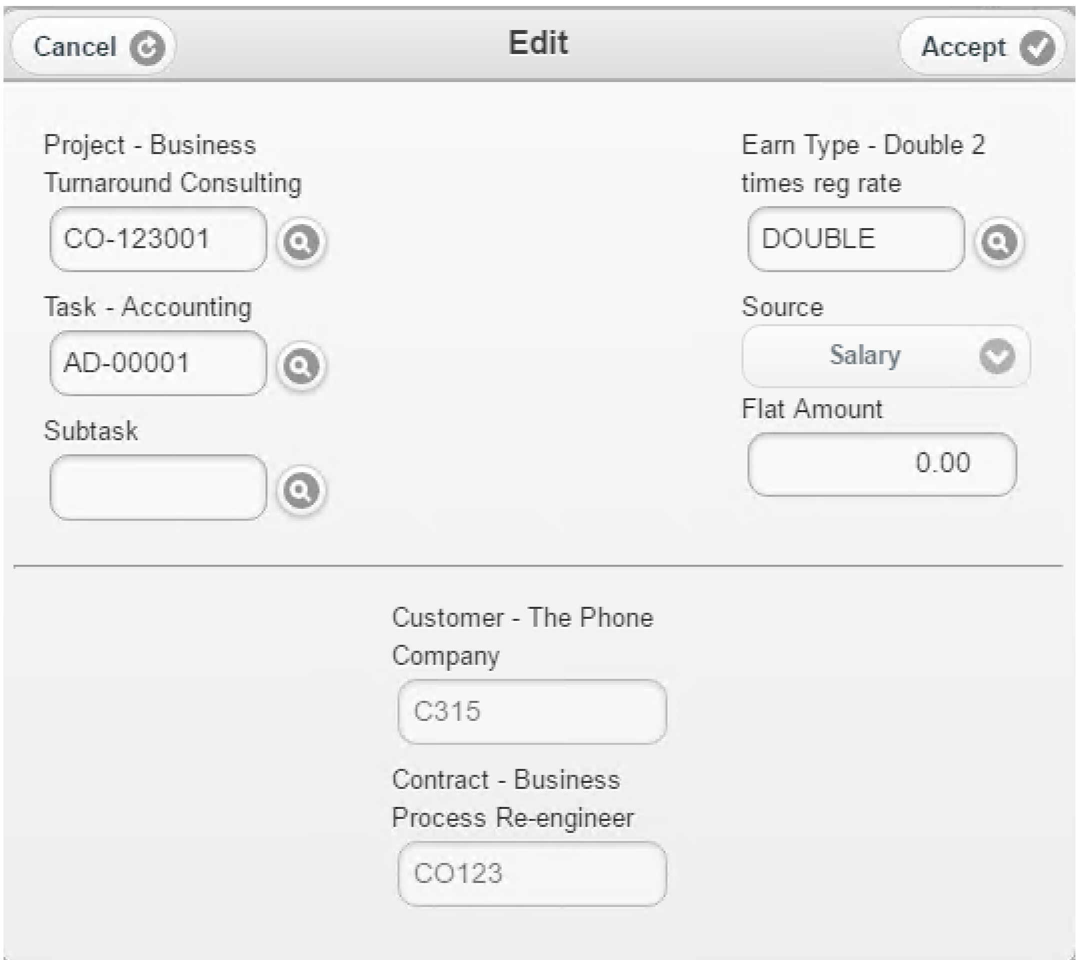
N (default)	No, do not display the Contract field in the Edit Project screen.

Y Yes, display the Contract field in the Edit Project screen.

Note: This is a global setting and will be used by all users entering time.

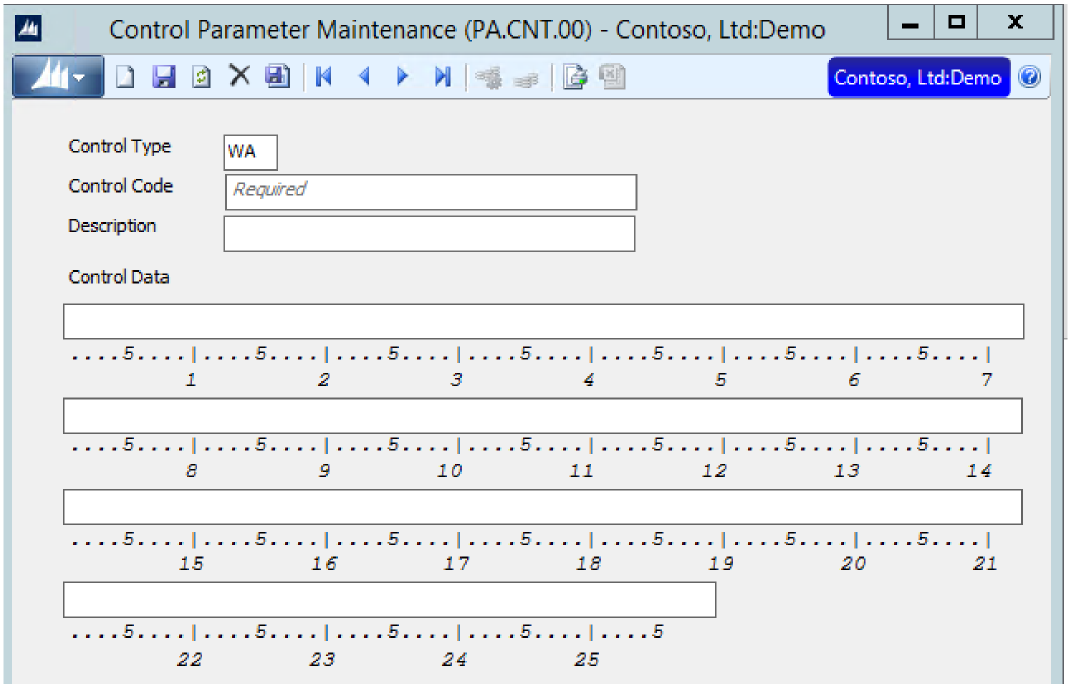
Timecard Entry – Selecting/Editing Projects – Viewing Customers

During the selecting of a Project and Task, it is possible to view the Customer ID and Customer name. This field is not editable and is view only. The field can be turned on and off for a company.



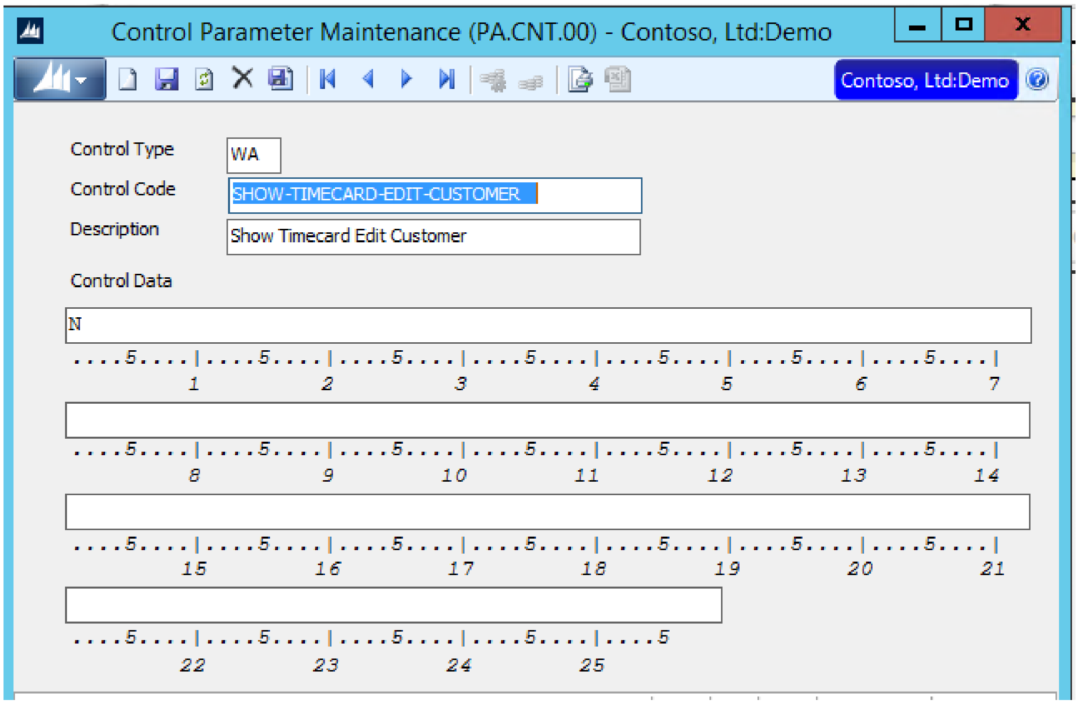
How to turn on or off the Customer field:

a. Open the Control Parameter Maintenance (PA.CNT.00) screen



b. Control Type field: Enter the value WA (for Web Apps)

c. Control Code field: Enter in the value SHOW-TIMECARD-EDIT-CUSTOMER (Show the Timecard Edit Customer field)



d. Control Data values:

N (default) No, do not display the Customer field in the Edit Project screen.

Y Yes, display the Customer field in the Edit Project screen

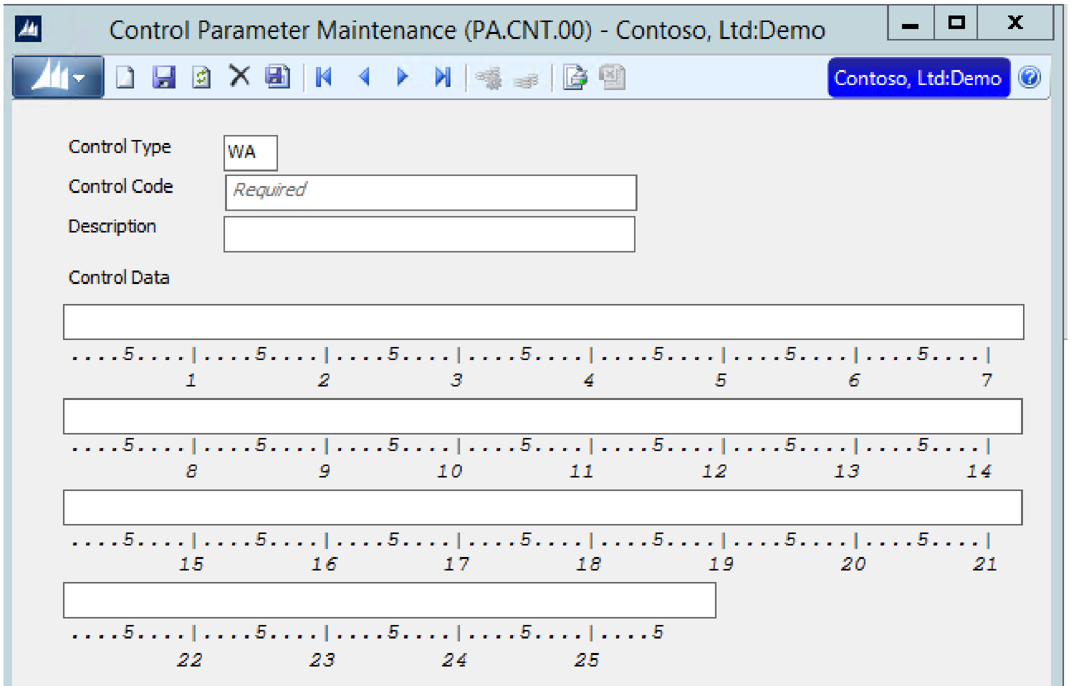
Note: This is a global setting and will be used by all users entering time.

Timecard Entry – Line items displayed

Set the number of detail lines to display when loading an existing timecard.

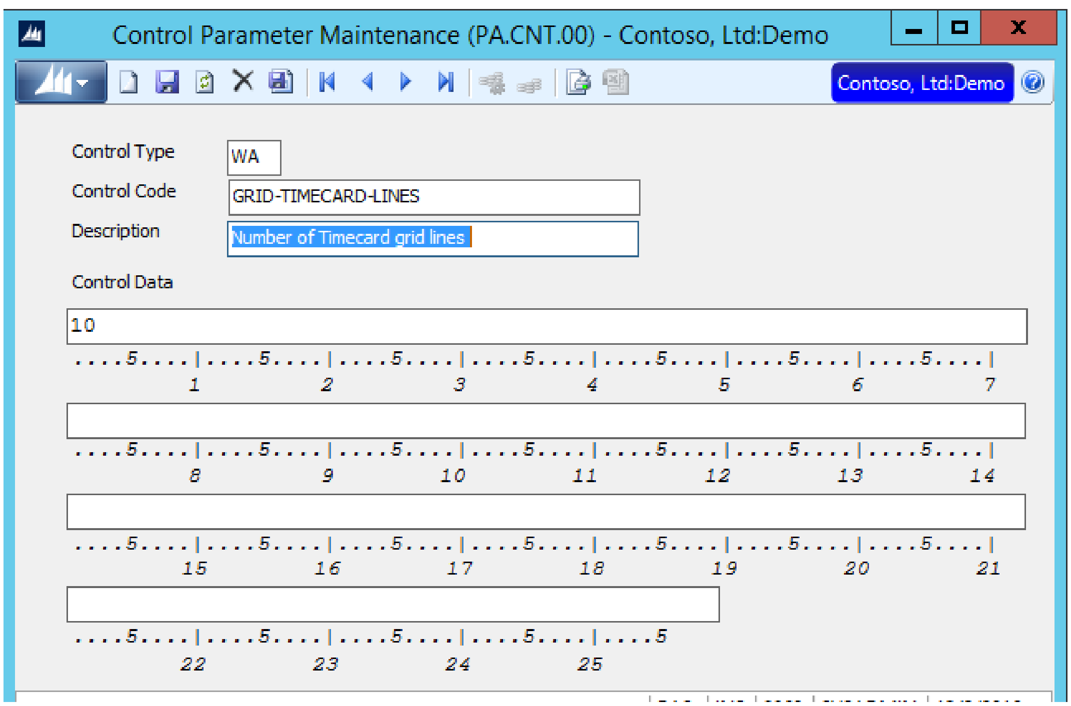
How to set the number of line items to display:

a. Open the Control Parameter Maintenance (PA.CNT.00) screen



b. Control Type field: Enter the value WA (for Web Apps)

c. Control Code field: Enter in the value GRID-TIMECARD-LINES (The number of Grid Timecard Lines to Load)



d. Control Data: Enter in a value from 1 – 20

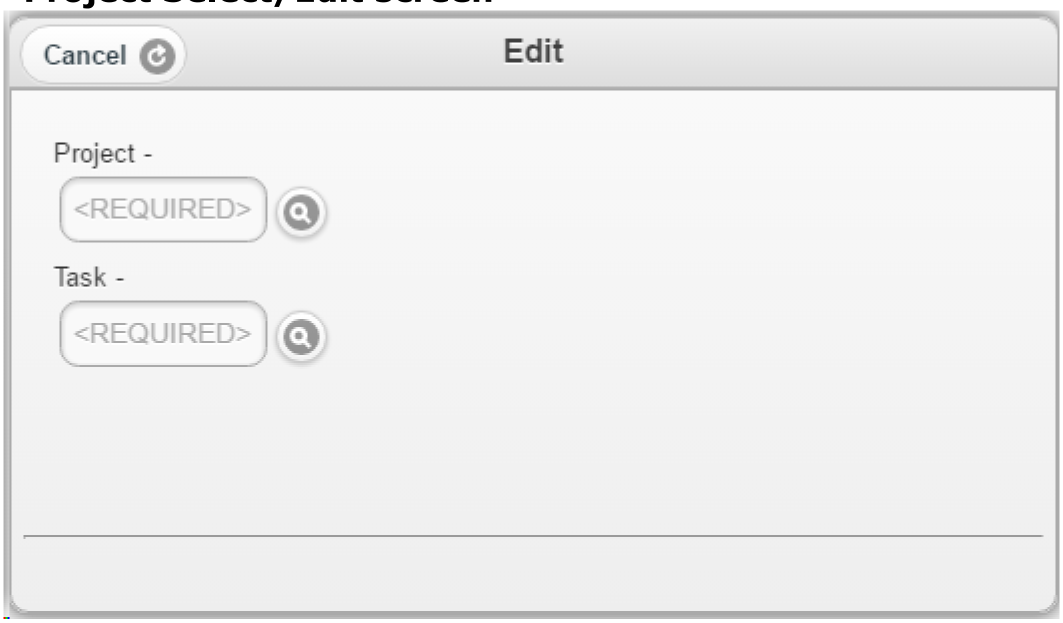
1 means that only one line item will display in the grid at a time.
If there is more than one line, then a paging system will display.
Numbers will display that can be used to navigate between pages.

20 means that twenty line items will display in the grid at a time.
If there are more than twenty lines, then a paging system will display.
Numbers will display that can be used to navigate between pages.

The default value that is loaded during installation is 10.

Note: This is a global setting and will be used by all users entering time.

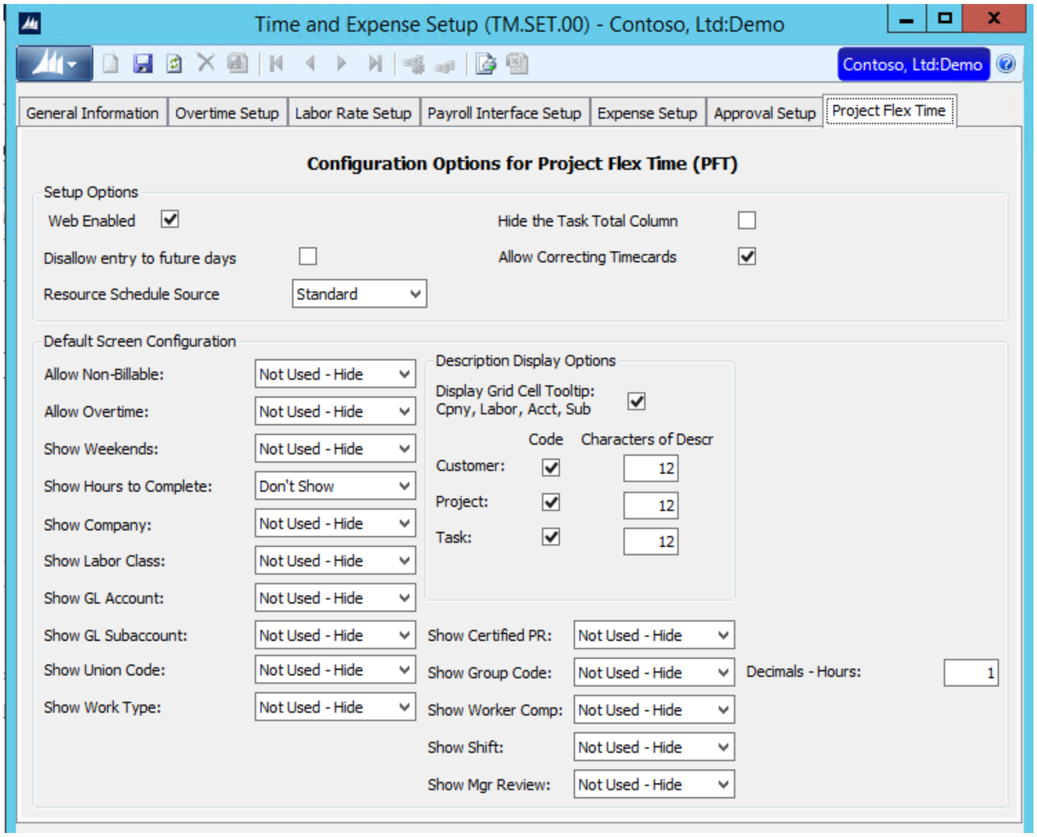
Timecard – Project Select/Edit screen



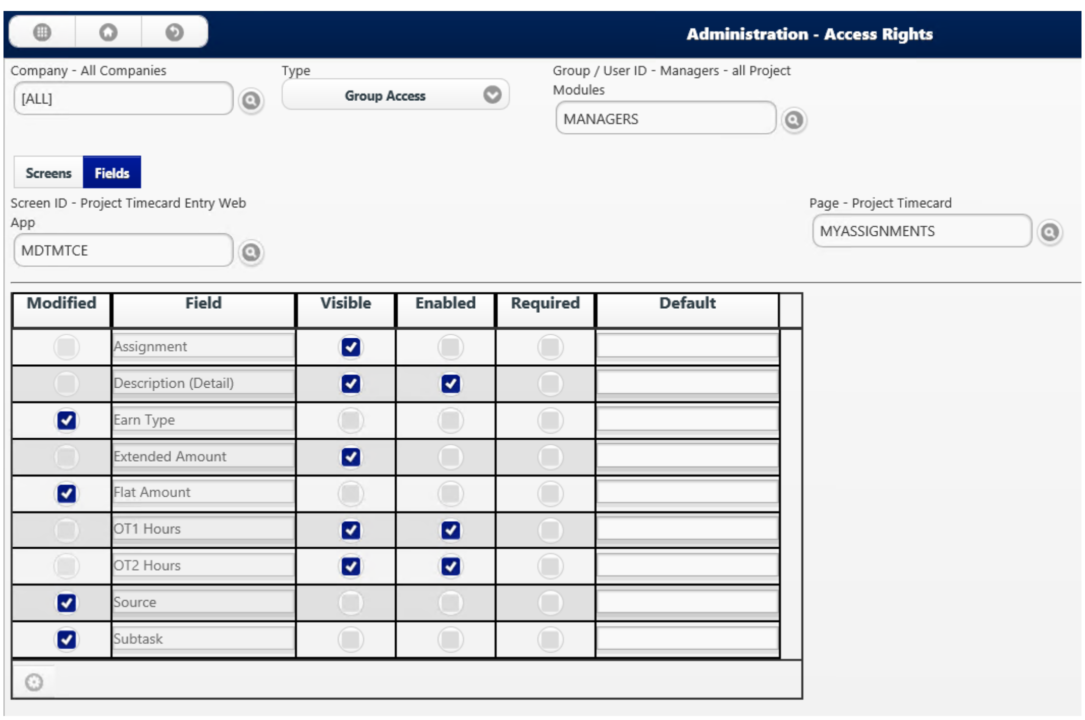
The subscreen now supports turning off all fields, except the required fields (Project and Task).

How to turn off fields on the Project Select/Edit screen through two setup screens:

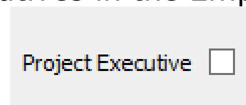
a. Time and Expense Setup (TM.SET.00)



b. Web Apps – Administration – Access Rights – Fields – App: MDTMTCE – Page: MYASSIGNMENTS



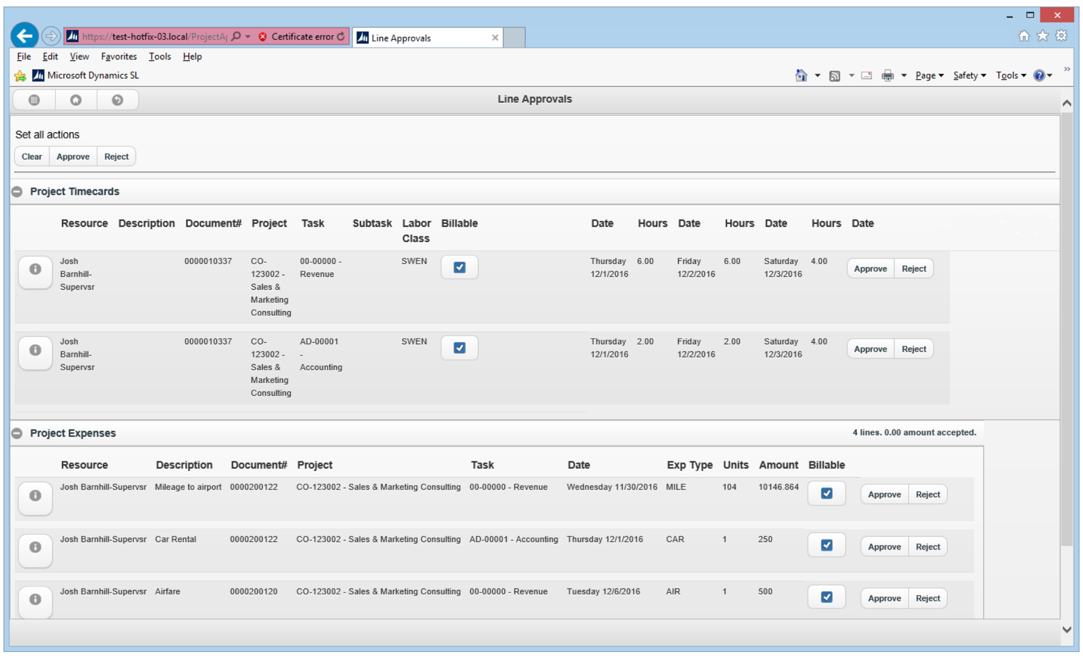
Timecard – Line Item Approval – View Details

Project Managers who are not setup as Project Executives in the Employee and Resource and Maintenance screen (PA.EMP.00) 

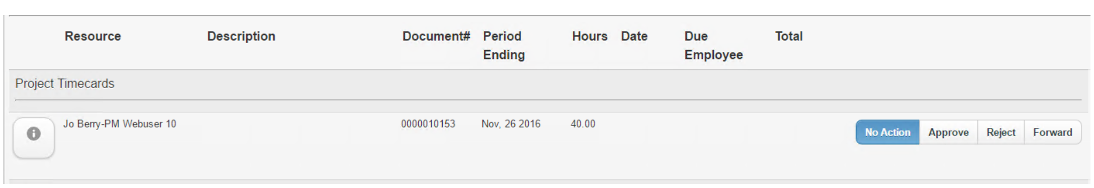
, can now view the detailed information in the Line Item Approval screen for Timecard and Expense entry line items.

Timecard - Document Approval and Line Item Approval

The Document Approval and Line Item approval screens have been altered to provide a similar layout.



Line Item Approval screenshot - Feature needs to be fixed & new screenshot



Document Approval screenshot

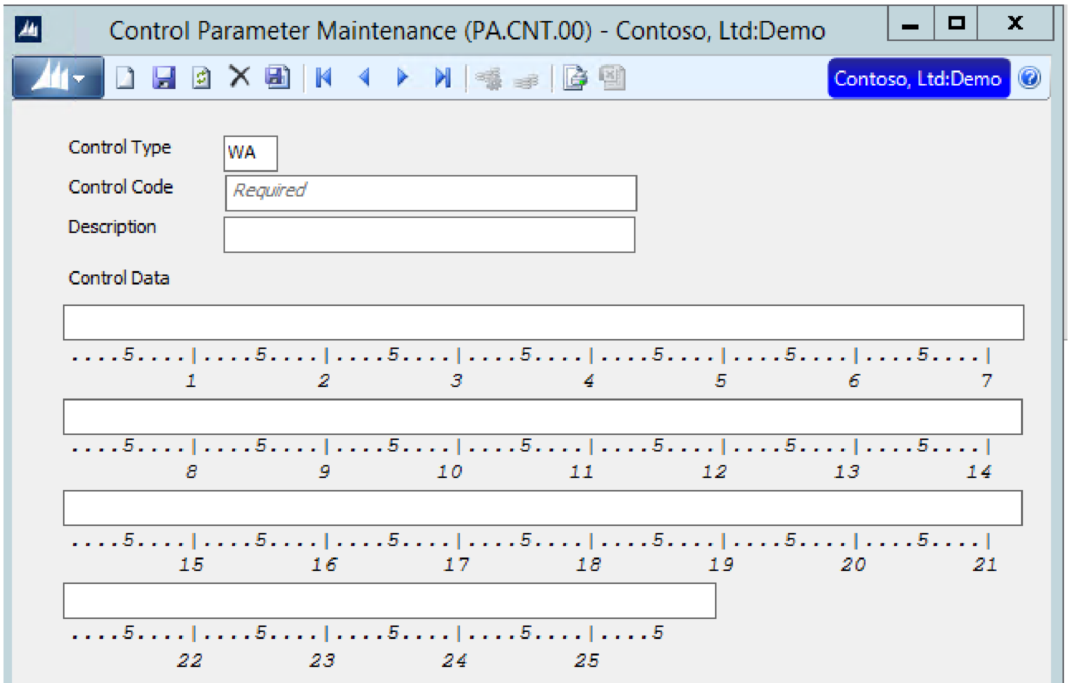
Expense Entry Enhancements

Expense Entry – Line items displayed

Set the number of detail lines to display when loading an existing expense report.

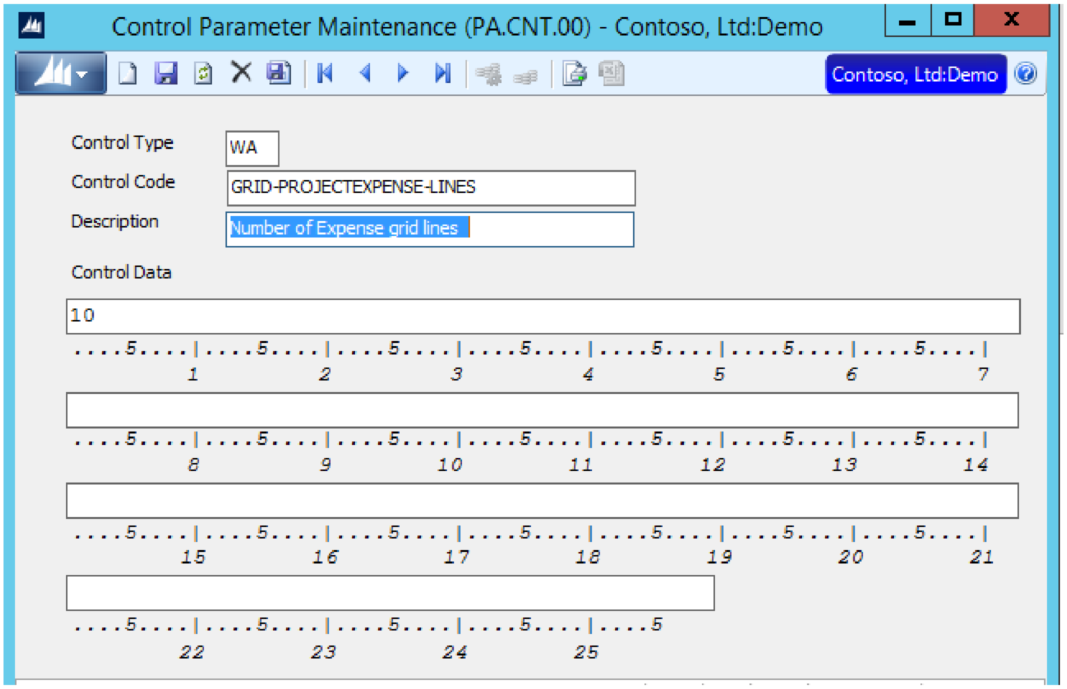
How to set the number of line items to display:

a. Open the Control Parameter Maintenance (PA.CNT.00) screen



b. Control Type field: Enter the value WA (for Web Apps)

c. Control Code field: Enter in the value GRID-PROJECTEXPENSE-LINES (Enter the number of Grid Timecard Lines to load)



d. Control Data: Enter in a value from 1 – 20

1 means that only 1 line item will display in the grid at a time.
If there is more than 1 line, then a paging system will display.
Numbers will display that can be used to navigate between pages.

20 means that 20 line items will display in the grid at a time.
If there are more than 20 lines, then a paging system will display.
Numbers will display that can be used to navigate between pages.

The default value that is loaded during installation is 10.

Note: This is a global setting and will be used by all users entering time.

Expense – Lookup field includes Expense Report Date

The lookup list for the Expense reports entered into the system now includes the Expense Report Date. The date can be selected to allow searching for an expense document entered on a specific date.

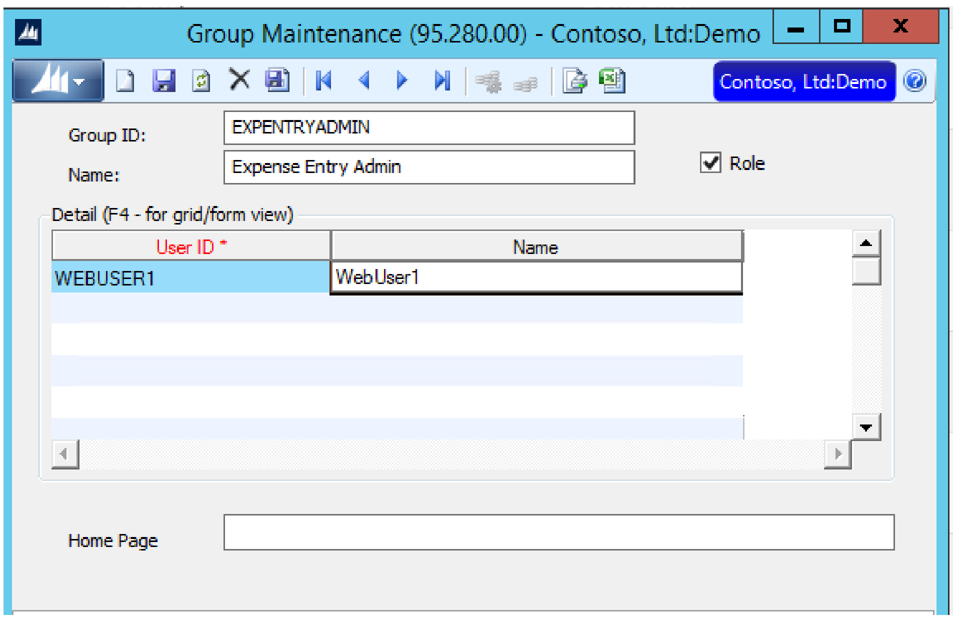
Expense – Impersonate User

It is now possible for a user, such as an administrative assistant or department head, to enter expenses for other users.

How to setup the impersonate user feature:

a. Setup a SL Group called: ExpEntryAdmin

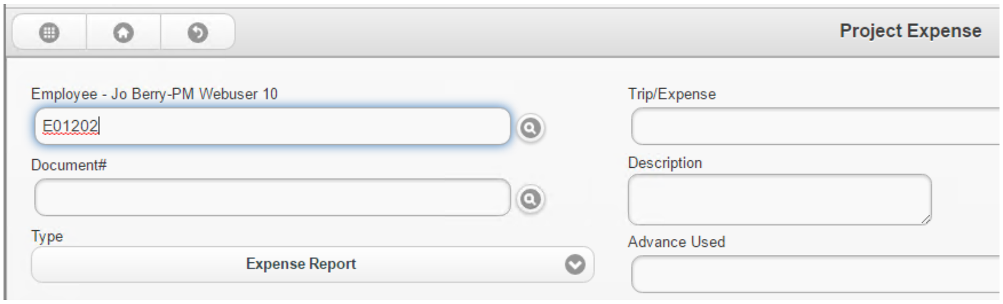
a. Open the Group Maintenance (95.280.00) screen



b. Group ID field: Enter the value EXPENTRYADMIN
c. Name field: Defaults to Expense Entry Admin
d. User ID: Enter the ID of the person that should have access to enter expenses for other users.

Here is how you use the impersonate user feature:

a. Log into the Web Apps Project Expense Entry screen



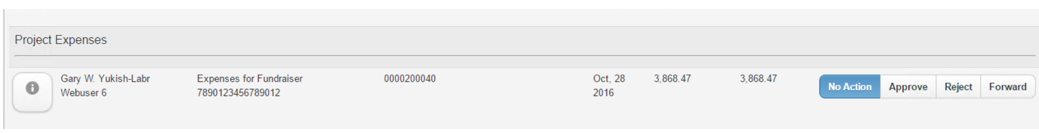
b. Place your cursor on the Employee field. The field is only enabled for users that are a part of the ExpEntryAdmin group.

c. Type in an Employee ID or use the lookup button to search and select an Employee

Expense - Document Approval and Line Item Approval

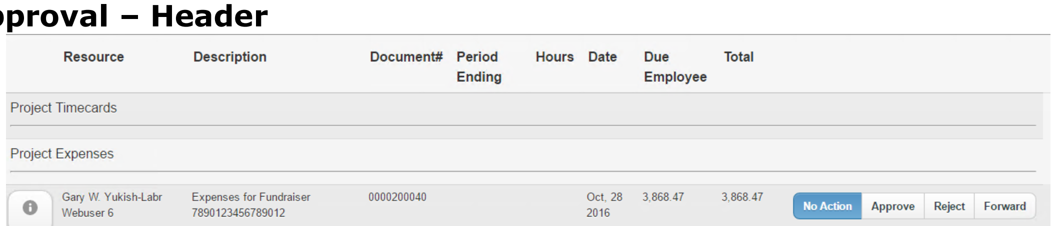
The Document Approval and Line Item approval screens have been altered to look similar in layout.

Line Item Approval screenshot



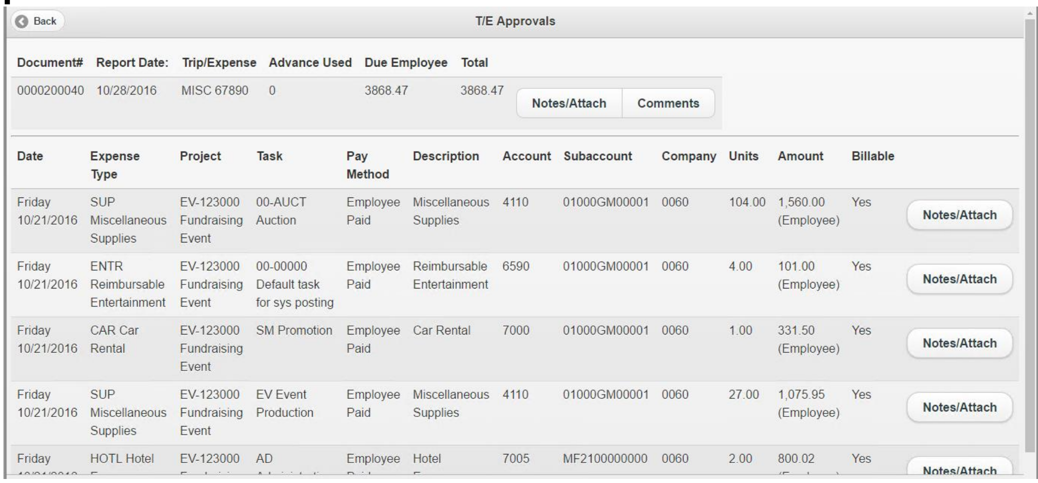
Document Approval screenshot

Expense Approval – Header



The Due Employee total amount field was added to the Expense Approval screen to the right of the expense report date and to the right of the Total field.

Expense Approval – Detail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T/E Approvals

Document#	Report Date:	Trip/Expense	Advance Used	Due Employee	Total
0000200040	10/28/2016	MISC 67890	0	3868.47	3868.47

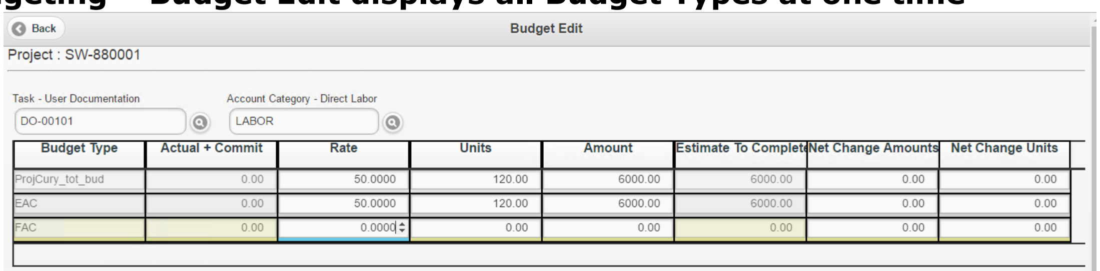
Notes/Attach Comments

Date	Expense Type	Project	Task	Pay Method	Description	Account	Subaccount	Company	Units	Amount	Billable	
Friday 10/21/2016	SUP Miscellaneous Supplies	EV-123000 Fundraising Event	00-AUCT Auction	Employee Paid	Miscellaneous Supplies	4110	01000GM00001	0060	104.00	1,560.00 (Employee)	Yes	Notes/Attach
Friday 10/21/2016	ENTR Reimbursable Entertainment	EV-123000 Fundraising Event	00-00000 Default task for sys posting	Employee Paid	Reimbursable Entertainment	6590	01000GM00001	0060	4.00	101.00 (Employee)	Yes	Notes/Attach
Friday 10/21/2016	CAR Car Rental	EV-123000 Fundraising Event	SM Promotion	Employee Paid	Car Rental	7000	01000GM00001	0060	1.00	331.50 (Employee)	Yes	Notes/Attach
Friday 10/21/2016	SUP Miscellaneous Supplies	EV-123000 Fundraising Event	EV Event Production	Employee Paid	Miscellaneous Supplies	4110	01000GM00001	0060	27.00	1,075.95 (Employee)	Yes	Notes/Attach
Friday	HOTL Hotel	EV-123000	AD	Employee	Hotel	7005	MF2100000000	0060	2.00	800.02	Yes	Notes/Attach

The Due Employee total amount field was added to the Expense TE Approvals (details) screen. The field was added between the Advanced Used and the Total fields.

Project Miscellaneous Enhancements

Project Budgeting – Budget Edit displays all Budget Types at one time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Budget Edit

Project : SW-880001

Task - User Documentation: DO-00101

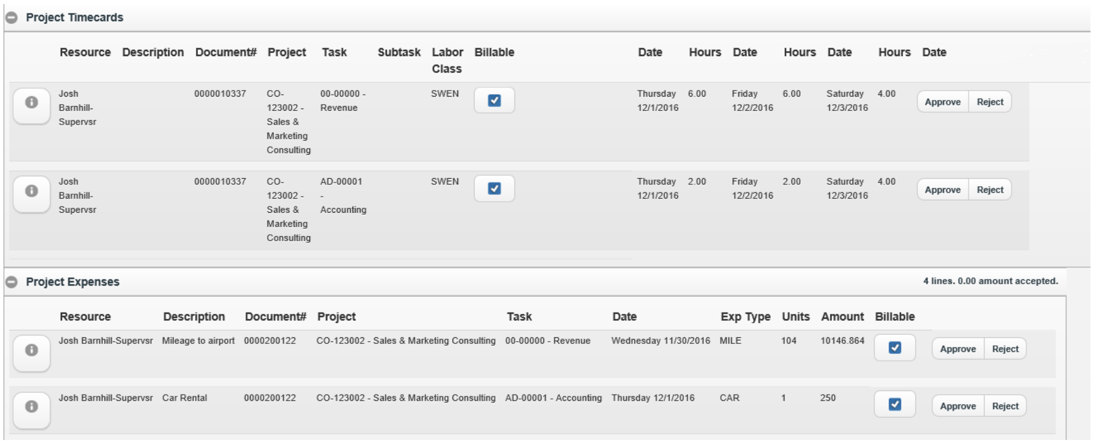
Account Category - Direct Labor: LABOR

Budget Type	Actual + Commit	Rate	Units	Amount	Estimate To Complet	Net Change Amounts	Net Change Units
ProjCury_tot_bud	0.00	50.0000	120.00	6000.00	6000.00	0.00	0.00
EAC	0.00	50.0000	120.00	6000.00	6000.00	0.00	0.00
FAC	0.00	0.0000	0.00	0.00	0.00	0.00	0.00

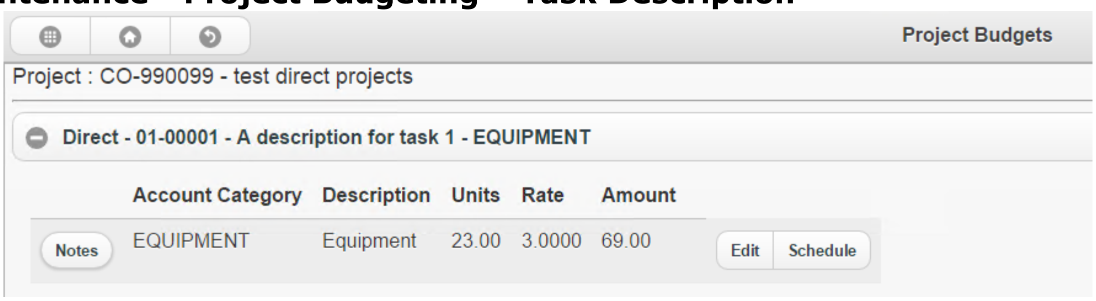
The Original + CO (change order), EAC (estimate at complete) and Original budgets are now displayed in a grid on the screen, opposed to having to select and view one at a time. The same data that was displayed before is now available for viewing and updating in the grid.

Line Item Approval – Non-Executives

Non-Executives can now view the detail lines of a line item approval entry and not receive an error message.



Project Maintenance - Project Budgeting – Task Description

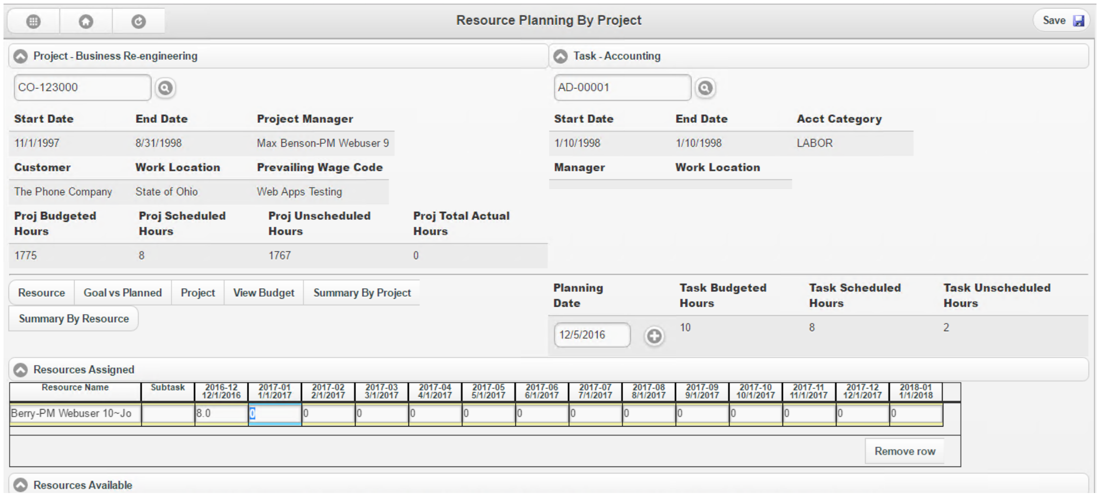


Added the Task description, along with the existing Task ID. The Task description is now visible in the Project Budgeting screen for direct budgeting.

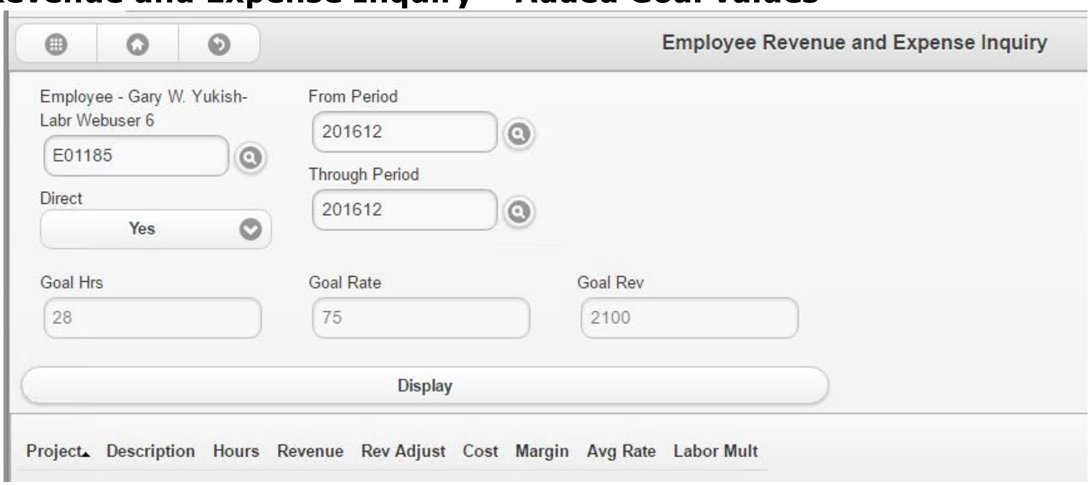
Resource Assignment Enhancements

Resource Planning by Project

Added the viewing of the Project Total Actual Hours to the header section of the screen.

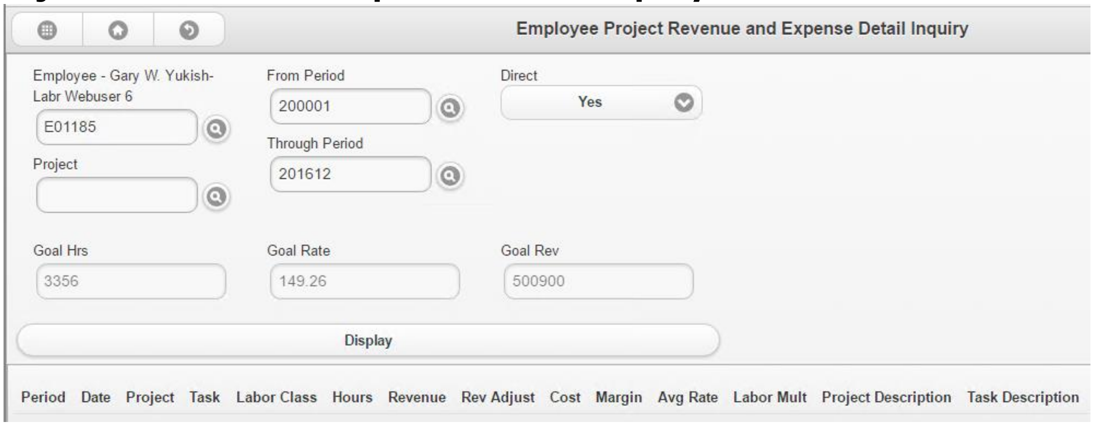


Employee Revenue and Expense Inquiry – Added Goal values



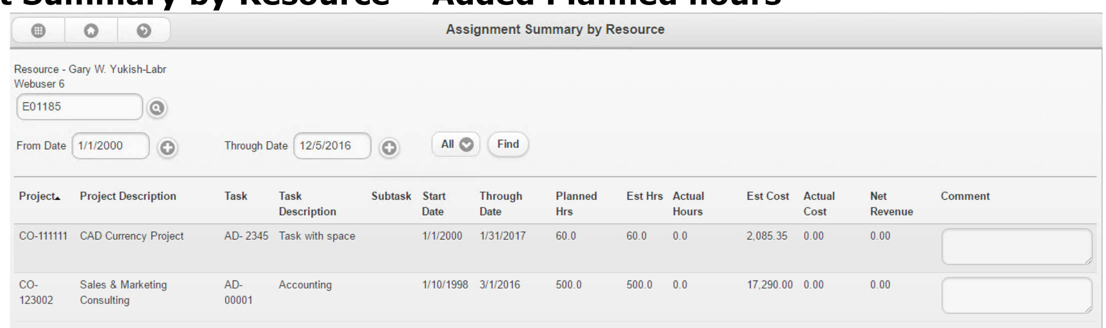
Added the Goal Hours, Goal Rate and Goal Revenue fields to the header of the Employee Revenue and Expense Inquiry screen for the employee loaded on the screen. The values loaded are based on the Employee, From Period and Through Period.

Employee Project Revenue and Expense Detail Inquiry – Added Goal fields



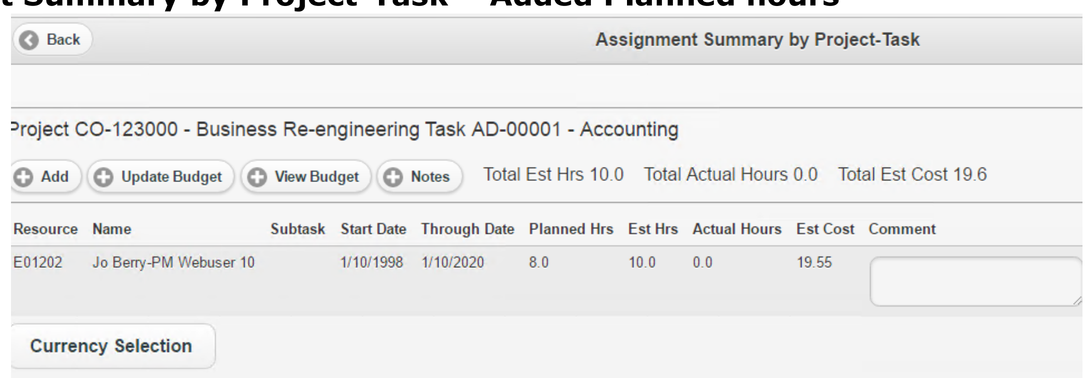
Added the Goal Hours, Goal Rate and Goal Revenue fields to the header of the Employee Revenue and Expense Inquiry screen for the employee loaded on the screen. The values loaded are based on the Employee, From Period and Through Period

Assignment Summary by Resource – Added Planned hours



Added the Planned Hours field to the grid of the screen, located between the Through Date and Estimated Hours (Est Hrs) fields.

Assignment Summary by Project-Task – Added Planned hours



Added the Planned Hours field to the grid of the screen, located the Through Date and Estimated Hours (Est Hrs) fields.

Messaging and Reporting Enhancements

Communicator – Message sort order

Delete All

	Msg Status	Sender	Created	Subject	Message	
	New		10/26/2016	Expense reports awaiting approval.		Approve
	New		10/16/2014	Project Activated	A project has been Activated in Dynamics SL, ID = CO999999. Transactions can now be recorded against it.	Project Maint
	New		10/22/1998	Timecards awaiting approval.		Approve

The communicator messages now sort by Created date, showing the most recent message at the top of the Communicator screen.

Project Analyst – AR Aging - Invoice Inquiry - End Date field

The field now displays just the date, not the date and time.

Project Analyst – Unbilled Summary - Billing Detail Inquiry – Status

Billing Detail Inquiry

Project: EN123000: Earthquake Retrofit Bldg 350 **Currency:** BAS

Status	Trans Date	Project	Task	Account Category	Type	Units
Unbilled	1/23/1998	EN123000	TS00502	MATERIALS	Item	
Unbilled	1/20/1998	EN123000	TS00503	LAB TESTS	Item	
Selected	11/23/1997	EN123000	AD00003	TRAVEL	Item	

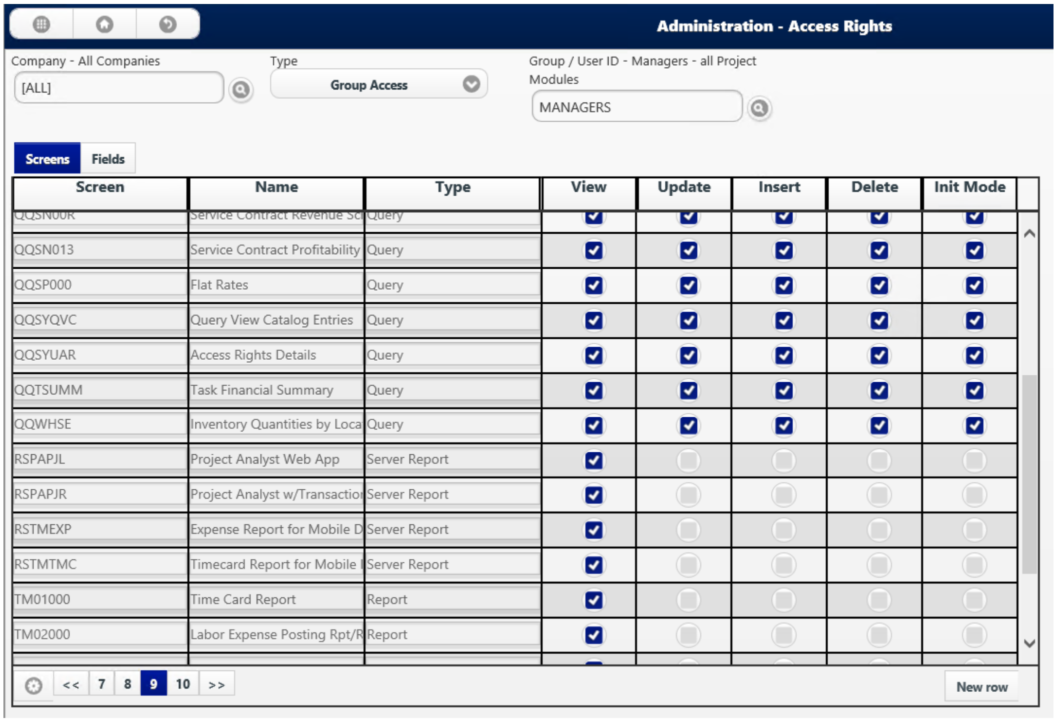
The status field now displays the full status value, not just a single letter. Examples: Unbilled, Selected

Project Analyst – Transaction Detail report – Hide Labor lines

a. Labor lines do not display the amount or Base Amount for users who don't have access to screen: Project Analyst w/Transaction Labor Rates RSPAPJR.

How to turn on or off this feature

b. Open the Web Apps Administration screen



c. Type: Select either Group Access or User Access

d. Group/UserID: Enter the appropriate value based on the type

e. Select the Screens button

f. Use the paging button to get to approximately the 9th tab

g. Select the screen: RSPAPJR – Project Analyst w/Transaction Labor Rates Web App

h. View: Checked — Can view Labor Rates transactions
Unchecked — Cannot view Labor Rates transactions

Project Analyst - Project Net Profit – Account Category Sort order

The report now sorts the Account Category based on the Sort Number value defined in the Acct Category Maintenance (PA.ACC.00) screen. In goes in ascending order (smallest to largest), displaying the lowest value first and the largest value last on the report.

Project Net Profit

Project:	CO123002: Sales & Marketing Consulting

Account Category	Month to Date	Project to Date
REVENUE	0.00	203,504.23
REV-EXP RECOVERY	0.00	0.00
LABOR	0.00	0.00
TRAVEL	0.00	0.00
ODCS	0.00	0.00
Total Revenue	**0.00**	**203,504.23**
Total Expenses	**0.00**	**0.00**
Total Net	**0.00**	**203,504.23**

In this example, Revenue = 10 and ODCS = 50

Project Analyst – Project Net Profit – New Remaining field

Task Net Profit

Project:	CO123002: Sales & Marketing Consulting	Billing Currency:	BAS	Project Currency:	BAS

Task	Account Category	Month to Date	Project to Date	Commitment	Project to Date + Commitment (PTDC)	ETC (EAC-PTDC)	EAC	Original Budget (OB)	Variance (EAC-OB)	Remaining (OB-PTDC)

The existing Variance value shows the EAC minus the Original Budget. The new Remaining field displays the Original Budget minus the Project to Date + Commitment.

Quick Query - General Ledger – Journal transaction quick query

Back | Journal Transactions | Actions

Journal Type	Batch Number	Transaction Type	Original Company ID	Account	Account Description	Subaccount	Subaccount Description	Reference Number	Transaction Date	Transaction Description	Debit Amount	Credit Amount	Period to Post
AP	000001	VO	0060	2050	A/P Trade-USD	01100AA00001	Administration-Controller		10/1/1999	Summary By Account	0.00	26.95	199910
AP	000001	VO	0060	4030	Merchandise Purchases	01100AA00001	Administration-Controller		10/1/1999	Summary By Account	25.25	0.00	199910

The Journal Transaction Quick query has been updated and now displays the Period to Post and the Period Entered field has been removed from the report. The Period Entered field is still available to add if needed, using the Column chooser.

Miscellaneous Enhancements

Telephone field formatting

Added a common method for telephone formatting across all Web Apps screens.

Decimal Places

The decimal places fields in Web Apps look to the Rich Client to get the decimal place settings.

Paging consistency across all screens

The paging process happens when more lines items are loaded into a screen than that can be displayed. The interface for the paging process is now consistent across all screens that use paging.

Web Apps Menu

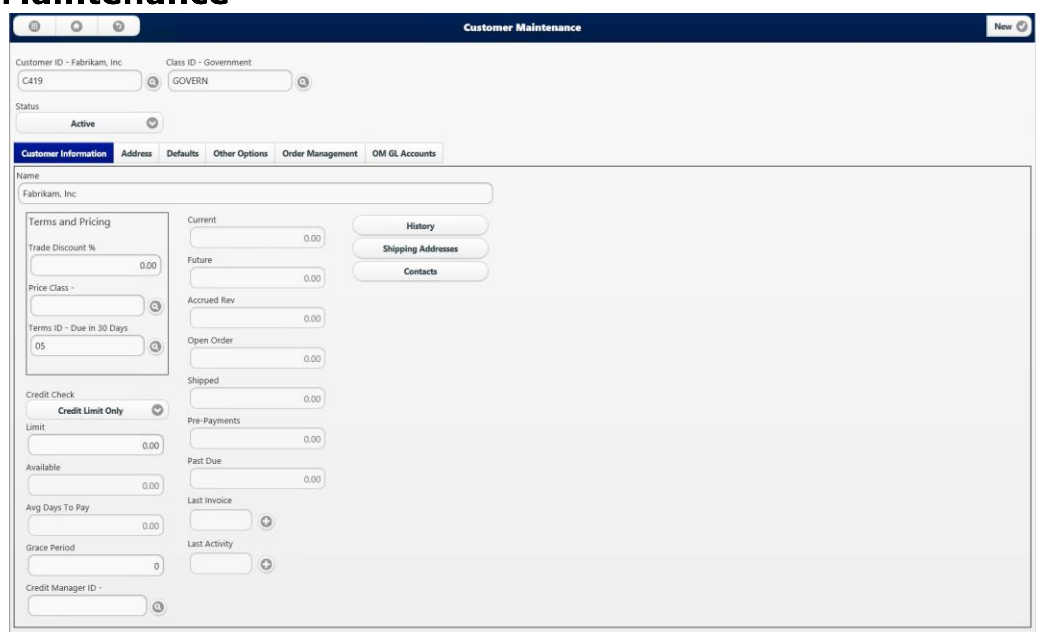
The Web Apps menu has been enhanced to help speed up the loading of the menu.

New Payroll Menu

A new Payroll menu has been added to Web Apps. This menu holds the new payroll Employee Maintenance screen along with the existing payroll screens Time Entry and Advanced Timecard.

New Financial Web Apps

Customer Maintenance

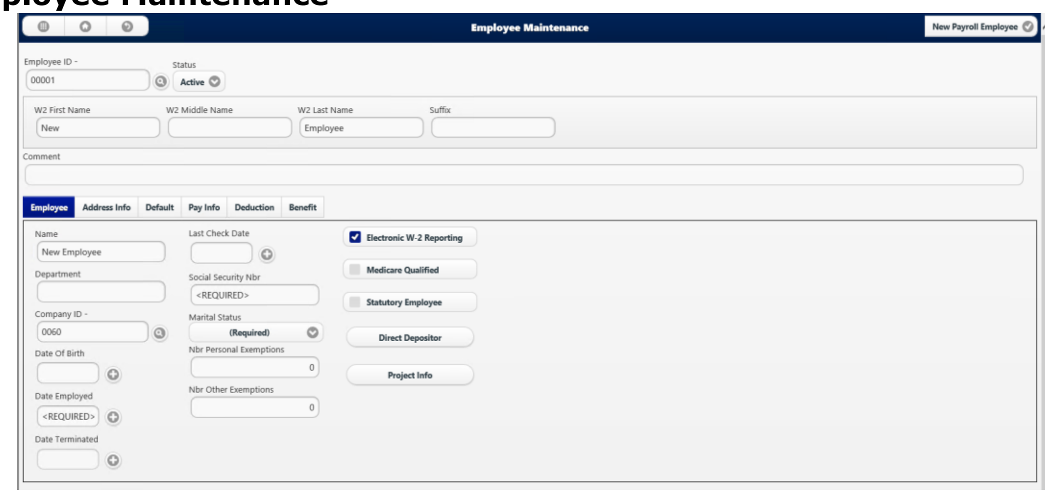


The Customer Maintenance screen has been added to Web Apps. This screen allows the setting up and editing of customers in Microsoft Dynamics SL. The screen is located under the new Accounts Receivable menu in Web Apps. Details on the features and functionality can be found in the MicrosoftDynamicsSLWebApps document and the help files.

Vendor Maintenance

The Vendor Maintenance screen has been added to Web Apps. This screen allows the setting up and editing of vendors in Microsoft Dynamics SL. The screen is located under the new Accounts Payable menu in Web Apps. Details on the features and functionality can be found in the MicrosoftDynamicsSLWebApps document and the help files.

Payroll Employee Maintenance



The Payroll Employee Maintenance screen has been added to Web Apps. This allows the setting up and editing of employees in Microsoft Dynamics SL. The screen is located under the new Payroll menu in Web Apps. Details on the features and functionality can be found in the MicrosoftDynamicsSLWebApps document and the help files.