

Functional Tips for ScanWorkX



This month's tip for getting more from your ScanWorkX implementation!

ScanWorkX for D365: Project Hours Application -By Harrison Brazelton harrison.brazelton@nextw.com

In this month's edition of the ScanWorkX newsletter we will be discussing our Project Hours application which integrates with the Project management and accounting (PMA) module within D365. If you are currently using this module to create project hour journals, you might consider using the Project Hours ScanWorkX application to allow users to input their own time against projects from a mobile device. If you are not currently using the PMA module, but do have ongoing internal projects, this application may make you reconsider tracking internal project hours within D365, as the application will make it easier for workers without immediate D365 access to log their time against specific project activities.

Project Hours Setup & Overview

To use this application, you will first need to get the application DLL 'ScanWorkXDSIProjectHoursJournal.dll' and take the newest version of the ScanWorkX D365 model (7.161.1.1). If you are interested in this application, please reach out to us and we will provide you with the DLL and a new ScanWorkX model.

\leftarrow 2 Edit + New Delete Clone Application \sim Options ρ								
ScanWorkX Applications								
Standard view * $\scriptstyle{\sim}$	Standard view * ~							
✓ Application Name								
Application Name	♡↑ DLL Name	Auto-Save	Default Icon	Default Prompt	Description			
O Project Hours	ScanWorkXDSIProjectHoursJournal		DSI_SWX_Logo	Project Hours	Project Hours			

Once you have the DLL, you will need to add a record to the 'Licensed Applications' form located at DSI ScanWorkX – Application Setup – Licensed Applications. Assign the new record a name and point it to the 'ScanWorkXDSIProjectHoursJournal.dll' which you will need to put in the folder containing your other ScanWorkX application DLLs on the server hosting ScanWorkX (default location: C:/Program Files/DSI/ScanWorkX).

Once you have confirmed the DLL is in your ScanWorkX folder on the machine hosting ScanWorkX and a record has been made in the 'License Applications' form, Assign the application to a menu at DSI ScanWorkX – Common – Menus and Navigation.



The next step in activating this application is to link the journal name in the ScanWorkX module to a journal name you have set up and activated in the Project management and accounting module.

\leftarrow \swarrow Edit $+$ New \square Delete Options \checkmark							
Journal Types	Journal Types						
Standard view * \sim							
○ Application Name	↑ Journal Name	Description					
O Project Hours	Hour	ScanWorkX project hours journal					

Navigate to DSI ScanWorkX – Application Setup – Journal Types and create a record for the Project Hours application, then assign it a valid journal name. I will show you where to find a journal name to use below.

← 😑 🖉 Edit 🕂 New 볩 Delete	Options $ \rho $				⊗ 0
✓ Filter Fee Fee journal	Standard view V Journal names Name Description Sales tax book section Hour Hour journal				
Hour Hour journal	General				
	IDENTIFICATION Journal type Hour VOUCHER Voucher series	Selection by Entry New voucher by Change voucher date VOUCHER DATE	POSTING Detail level Details BLOCKING Private for user group	APPROVAL Approve TIMESHEET Show start/end times	
		Set voucher date to Project period end date			

Navigate to *Project management and accounting – Setup – Journals – Journal names* and find or create the journal name you want to associate with the ScanWorkX application. Make sure it matches up with the journal name you specified on the ScanWorkX Journal Types record.



	Command	XScanWorkX.
Journalid:		
Project:		
Category:		
Activity:		
Trans. Text:		
Line Prop.:		
Hours:		

Once you have started up the application, the cursor will start on the 'Journalld' field. This field by default will be optional, as the related parameter value for the 'Create Journals' parameter comes defaulted as 'Y', this means that if the field is left blank ScanWorkX will create a new journal for the transaction upon hitting the 'Save' button.

The journal that is created will have the journal name tied to the ScanWorkX Journal Types record you created. This journal name is also used in the list of values (LOV) query. When using the LOV, you will only see unposted project hour journals that share the same journal name that is tied to the application.

		Command	× ScanWorkX	
Journalld:	PJJ-0	0474		
Project:	00018	37		
Category:	JOUR	RNEYMAN		
Activity:]	
Trans. Text:]	
Line Prop.:	Billab	le]	
Hours:]	



If you select an already existing journal, the 'Project' and 'Category' fields will be automatically populated based on the values on the journal that was selected. Once the 'Category' field is validated, the 'Line Prop' field will also be automatically populated, in this example the default property is 'Billable'.

Save	Command		XScanWorkX.
Journalld:	PJJ-0	0474	
Project:	00018	7	
Category:	JOUR	NEYMAN	
Activity:	00367		
Trans. Text:	TEST		
Line Prop.:	BILLA	BLE	
Hours:	10		

Use the LOV or manually scan/enter values for the project activity, transaction text, and the hours fields, at which point the 'Save' menu option will become available. Click 'Save' to create the journal line.

Once the transaction has been processed by ScanWorkX you can verify in D365 that a journal line has been added, and the journal header's total hours have been updated to reflect the addition of the new line.



	Command	XScanWorkX.
Journalld:	LOV	
Project:	Post	
Category:		
Activity:	End	
Trans. Text:		I
Line Prop.:		
Hours:		

After you have hit 'Save' and created at least one journal line associated with a journal, depending on the value of your application parameter 'Post Method', you will be able to post the journal from the command menu button 'Post'. We will discuss the parameters in more detail below.

Project Hours - Parameters

Navigate to DSI ScanWorkX – Application Setup – Application Parameters and filter on the 'Project Hours' application.

Application Parameter Standard vie	rs ₩ ∽			
	Application Name Filter Project Hours			
Application Nam	e 🖓 Name	↑ Value	Site ID	
O Project Hours	Create Journals	Y	All	
Project Hours	Hours Maximum	12	All	
Project Hours	Line Property	Y	All	
Project Hours	Post Method	Command Menu	All	

I will list the parameters with descriptions below for easier readability:

• **Create Journals** – Decides if ScanWorkX will be able to create journals automatically from the application if the 'Journalld' field is left blank. ('Y' or 'N', default value is 'Y')



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- Hours Maximum Dictates the highest number of hours a user is allowed to enter in the application, in the example screenshot above no user can create a journal line if the hours field is greater than 12. (custom integer value, default value is '12')
- Line Property This parameter will decide if a user is allowed to manually select a different line property other than the default auto-populated value based on the project category. ('Y' or 'N', default value is 'Y')
- Post Method Decides if the application will be able to post journals automatically (whenever the 'Save' button is pressed), through a command menu button push, or not at all. ('Command Menu', 'Auto' or 'None', default value is 'Command Menu')

Thank you for reading along and I hope this brief article can help you add more value to your ScanWorkX implementation! If you would like to know more about the ScanWorkX Project Hours application, have any questions/issues, or if you have an idea you think would be a beneficial addition to ScanWorkX, please do not hesitate to reach out to us at <u>harrison.brazelton@nextw.com</u>.