

Functional Tips for ScanWorkX



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

ScanWorkX for D365: Project Hours Application

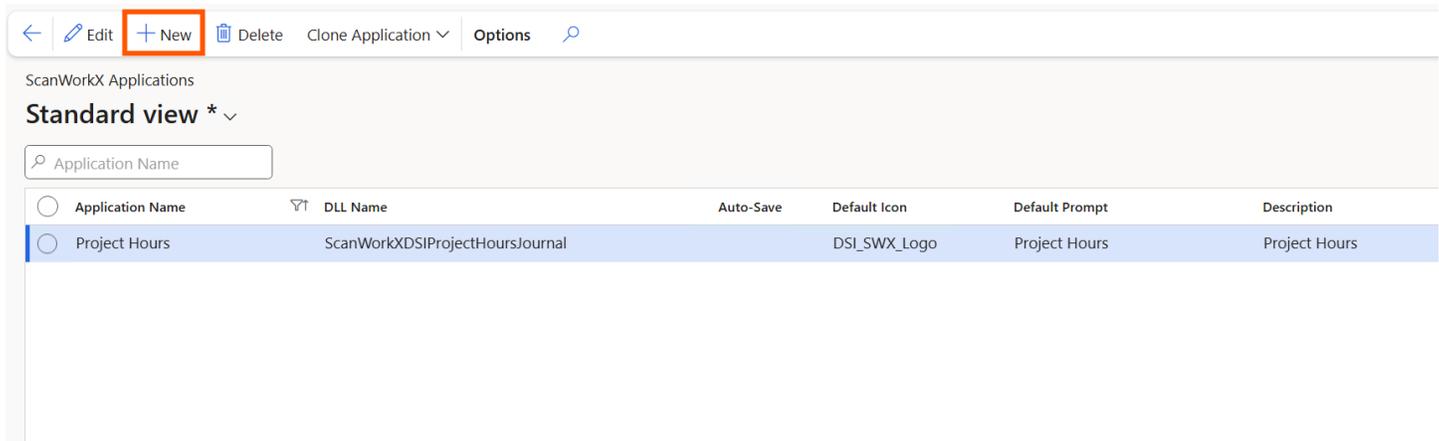
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In this month's edition of the ScanWorkX newsletter we will be discussing our Project Hours application which integrates with the Project management and accounting (PMA) module within D365. If you are currently using this module to create project hour 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

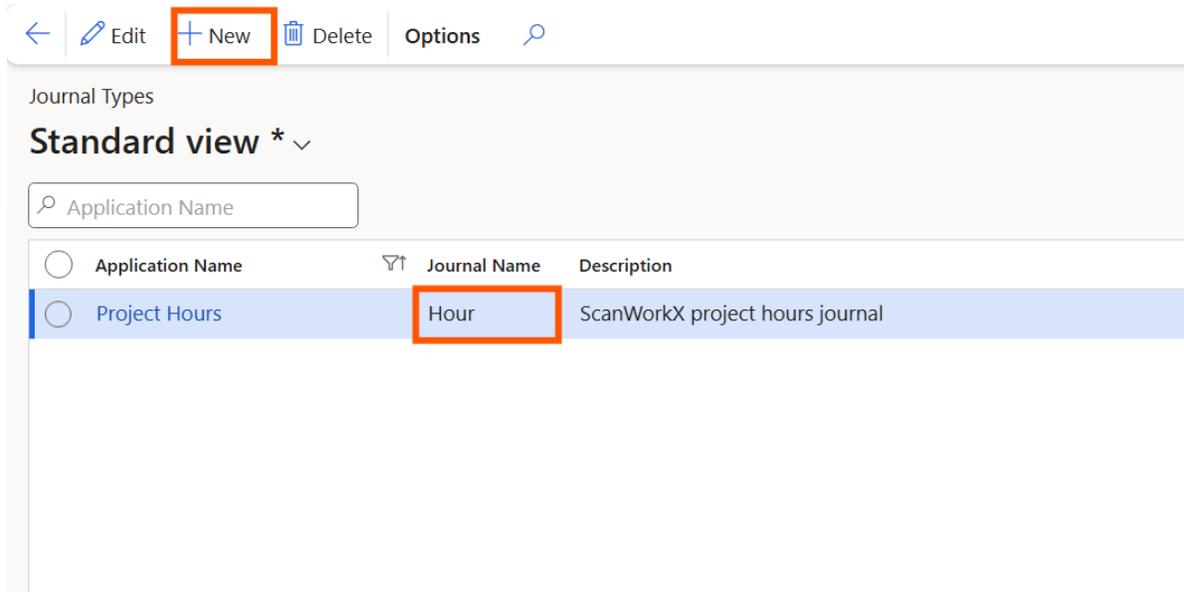
To use this application, you will first need to get the application DLL 'ScanWorkXDSIProjectHoursJournal.dll' and take the newest version of the ScanWorkX D365 model (7.161.1.1). If you are interested in this application, please reach out to us and we will provide you with the DLL and a new ScanWorkX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



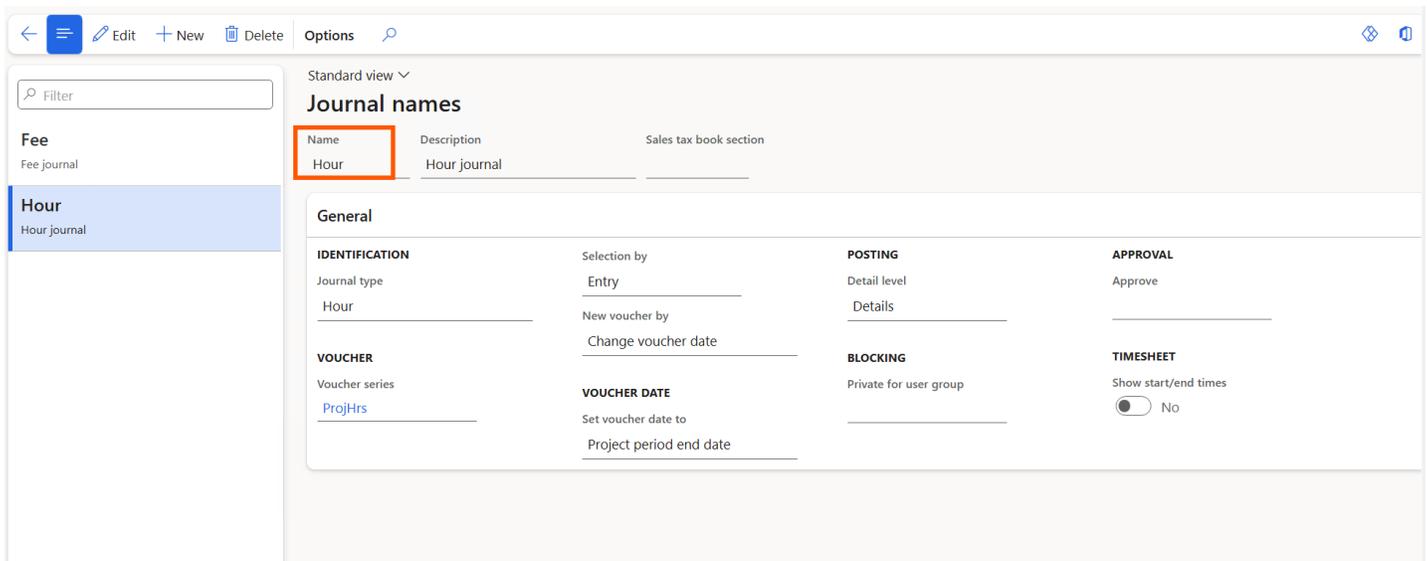
Once you have the DLL, you will need to add a record to the 'Licensed Applications' form located at *DSI ScanWorkX – Application Setup – Licensed Applications*. Assign the new record a name and point it to the 'ScanWorkXDSIProjectHoursJournal.dll' which you will need to put in the folder containing your 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.



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.



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	ScanWorkX
JournalId:	<input type="text" value=""/>	
Project:	<input type="text" value=""/>	
Category:	<input type="text" value=""/>	
Activity:	<input type="text" value=""/>	
Trans. Text:	<input type="text" value=""/>	
Line Prop.:	<input type="text" value=""/>	
Hours:	<input type="text" value=""/>	

Once you have started up the application, the cursor will start on the 'JournalId' 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
JournalId:	<input type="text" value="PJJ-00474"/>	
Project:	<input type="text" value="000187"/>	
Category:	<input type="text" value="JOURNEYMAN"/>	
Activity:	<input type="text" value=""/> ▲	
Trans. Text:	<input type="text" value=""/>	
Line Prop.:	<input type="text" value="Billable"/>	
Hours:	<input type="text" value=""/>	

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'.

The screenshot shows the ScanWorkX interface with a form for creating a journal line. The form has the following fields and values:

Field	Value
JournalId:	PJJ-00474
Project:	000187
Category:	JOURNEYMAN
Activity:	00367
Trans. Text:	TEST
Line Prop.:	BILLABLE
Hours:	10

The 'Save' button is highlighted in blue, and the 'Command' button is highlighted in orange. The ScanWorkX logo is visible in the top right corner of the interface.

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.

- **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 harrison.brazelton@nextw.com.