# Microsoft Dynamics SL 2015 Cumulative Update 1 Web Services/Web Apps Release Notes

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# Audience

This document provides important information about changes and new features that are available in Microsoft Dynamics SL 2015 CU1 Web Apps. The document is of particular interest to those who install Microsoft Dynamics SL 2015 CU1 Web Apps or develop applications for it. All users can benefit from reviewing the content to determine where they may benefit from the changes in this release.

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 or Microsoft Dynamics SL 2015 CU1 installed before you install Microsoft Dynamics SL 2015 CU1 Web Apps.

The deployment guide lists the prerequisites for the new reports, for the web services, and for the web apps. To install Microsoft Dynamics SL 2015 CU1 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 Services

## Project Suite

### Project Budget Web Methods

The Project web service now contains the ability to manage both direct budgets, direct budget schedules, and budget revisions. It also contains the ability to view budget revision schedules.

### Project Timecard Web Service changed

The Project Timecard web service is changed to handle project timecards without rates and amounts and project timecard with rates and amounts. Previously, the web service did not support the entry of rates and amounts.

### Project Employee Web Service

The Project Employee web service is added and contains the ability to create, edit, and delete project employees and resources, in addition to the related project notes and system notes/attachments.

### Project Employee Position/Rate Service

The Project Employee Position/Rate web service is added and contains the ability to create, edit, and delete the employees' default labor class and hourly rate or salary, in addition to the related system notes/attachments.

## Resource Management Suite

### Inquiry-related web methods

The Resource Management module contains several Inquiry web apps and related web methods. These methods provide the following:

- compare direct and indirect hours worked to goal hours, by utilization period, employee, supervisor, manager, and subaccount
- compare direct and indirect hours planned to goal hours, by utilization period, employee, supervisor, manager, and subaccount
- compare the amount of revenue generated by employees to goal revenue, by utilization period, employee, supervisor, manager, and subaccount
- compare project and task remaining budget hours to resource planned hours for a manager overview
- view all direct or indirect projects worked on by an employee for the specified period grouped by project
- view labor-related cost and revenue transactions by project and employee

### Resource Assignment Web Service

The Resource Assignment web service is added and contains the ability to manage the assignment of resources to projects and the ability to inquire about the projects and tasks assigned to resources.

### Project Utilization Goal Web Service

The Project Utilization Goal web service is added and contains the ability to create, edit, update, and delete project employee utilization goals. This information is then used for planning in Resource Management.

### Project Utilization Type Web Service

The Project Utilization Type web service is added and contains the ability to create, edit, update, and delete project utilization types. This information is then used for planning in Resource Management.

### Project Utilization Period Web Service

The Project Utilization Period web service is added and contains the ability to create, edit, update, and delete project utilization periods. This information is then used for planning in Resource Management.

## Inventory Suite

### Inventory Web Methods

Two web methods related to inventory ID are added and contain the ability to find attribute definitions and look up inventory items.

## Requisitions Suite

### Inventory Order History Web Service Method

The Inventory Order History Web Service method is added and contains the ability to read the list of requisitions created for a specific inventory ID.

### Item Request Web Service

The Item Request web service is added and contains the ability to create, edit, update, approve, and reject item requests. This web service includes the ability to manage the approval comments, system notes, and system attachments related to item requests.

## Payroll Suite

### Advanced Timecard Web Service

The Advanced Timecard web service is added and contains the ability to create, edit, and delete payroll timecards and advanced payroll timecards.

## Shared Suite

### ROI Service Web Service

The ROI Service web service is added and contains the ability to submit, view, and delete report requests and manage the report queue in Web Apps.

## Administration Suite

### Web App Custom Web Service / Administration

The Web App Custom web service is added and contains the ability to create, edit, and delete access rights and manage custom properties of certain fields. This includes whether the fields are visible, enabled, required, or have default values.

# Web Apps

## Miscellaneous

### iOS-Specific Button Tap Issue Resolved

On Apple devices running certain versions of iOS, you may find that you need to tap a button more than one time to produce the intended result. This problem has been resolved in iOS 8.3 and later versions.

## Project Suite

### Ability to Maintain Budgets added to Project Maintenance

Project Maintenance now lets users access both direct budgets and budget revisions for projects from many devices, such as tablets and smartphones, as well as an internet browser on their computer. This includes viewing budget revision schedules and editing direct budget schedules. Project employees that are members of a project can view the project budget information. Project Managers can also do this, as well as editing the budget for those projects for which they are the Project Manager. Project Executives can edit the budget for any project.

### Ability Added to enter Rates and Amounts in Project Timecard Entry

*Project Timecard with Rate\Amt Entry* now lets project users enter rates and amounts in their timecards. This provides the functionality from *Timecard with Rate/Amt Entry* (TM.TEA.00). *Project Timecard with Rate\Amt Entry* resembles *Project Timecard Entry* with the added feature of enabling the override of labor rates and the entry of flat amounts to handle bonuses, retroactive pay, adjustments, and so on.

### Time Detail Entry now available in Timecard Entry (PFT)

*Timecard Entry*, when Project Flex Time is enabled, now contains the ability to enter time by inputting start times and end times. Use *Time and Expense Setup* (TM.SET.00) to enable this feature. Users must have permissions to both *Project Timecard Entry Web App* (MD.TMT.CE) and to *Project Timecard Detail Web App* (MD.TMD.LY) to use this functionality.

### Ability to Maintain Employees and Resources in Project

*Employee and Resource Maintenance* is added and now provides the ability to manage employees and resources in project. Use *Employee and Resource Maintenance* to set up and maintain the Resource Master table (PJEMPLOY). Resources include people such as employees and subcontractors. You can also have non-person resources, such as conference rooms.

### Ability to Maintain Employee Positions and Rates in Project

*Employee Position/Rate Maintenance* is added and now provides the ability to view and maintain the employees' default labor class and hourly rate or salary.

### Grid Entry now available in Timecard Entry (PFT)

*Timecard Entry*, when Project Flex Time is enabled, now contains the ability to enter time in a grid. This also adds the flexibility to have multiple detail lines for the same employee/project/task/date, so that the hours worked can be itemized and contain specific notes or comments.

### Grid Entry now available in Expense Entry

*Expense Entry*, now contains the ability to enter expense report detail lines in a grid. This adds the flexibility to have multiple detail lines for the same employee/project/task/date, so that the expenses can be itemized and contain specific notes or comments.

## Resource Management Suite

### Ability to perform Resource Assignment and Inquiry

Resource Planning is added and now lets users manage and inquire about resource assignments from many devices, such as tablets and smartphones, as well as an internet browser on their computer. Project employees that are members of a project can view their own assignments. Project Managers can also view and manage the assignments for those project employees for which they are the Project Manager. Project Executives can follow these steps for all resources and all projects and tasks. If the user has permissions to the *Employee Position/Rate Maintenance* (TM.EPJ.00) screen, they can also see estimated costs, actual costs, and net revenue calculations. If the user has permissions to view or edit budgets, they will be able to view or edit the estimated at completion (EAC) budget based on the current resource assignment values. Additionally, specific users can manage the assignment of resources to project/task or the assignment of project/tasks to resources, while matching a resource's available utilization goal hours to a project/task's budgeted hours by utilization period.

### Ability to compare project utilization Goal Hours to Actual Hours

*Goal vs. Actual Hours Inquiry* now lets users compare direct and indirect hours worked to goal hours. You can select data for display by using criteria as precise as for a single employee or as global as for all employees of the company to which you logged on. Beginning and ending utilization periods let you view data for any time interval regardless of fiscal period-end or year-end. This web app facilitates analysis of employee productivity by displaying the Variance % as the Direct % (Direct Hours divided by Available Hours) minus the Goal % entered in Employee Goal Maintenance. The number of indirect hours worked also appears.

### Ability to compare project utilization Goal Hours to Planned Hours

*Goal vs. Planned Hours Inquiry* now lets users compare direct and indirect hours planned to goal hours. This page is the counterpart to the *Goal vs. Actual Hours Inquiry* page. Where *Goal vs. Actual Hours Inquiry* compares goal hours to actual hours recorded in the past, *Goal vs. Planned Hours Inquiry* compares goal hours to planned hours in the present and future. These planned hours can still be adjusted so that work that is performed according to the plan will meet Utilization Goals. You can select data for display by using criteria as precise as for a single employee or as global as for all employees of the company to which you logged on. Beginning and ending utilization periods let you view data for any time interval regardless of fiscal period-end or year-end. This web app facilitates analysis of employee productivity by displaying the Goal – Plan Var % as the Plan Dir % (Planned Direct Hours divided by Planned Hours) minus the Goal % entered in *Employee Goal Maintenance*. The number of indirect hours planned also appears.

Use *Goal vs. Planned Hours Detail Inquiry* to compare direct and indirect hours planned to goal hours, by employee and utilization period. This gives managers a high-level view of where hour assignments can be changed to improve utilization. You can open this page from the Resource Management menu, from *Goal vs. Planned Hours Inquiry*, from *Resource Planning by Project*, or from *Resource Planning by Resource*.

## Ability to compare project utilization Goal Revenue to Actual Revenue

*Goal vs. Actual Revenue Inquiry* now lets users compare the amount of revenue generated by employees to goal revenue. You can select data for display by using criteria as precise as for a single employee or as global as for all employees of the company to which you logged on. Beginning and ending utilization periods let you view data for any time interval regardless of fiscal period-end or year-end. This web app facilitates analysis of employee productivity by displaying the Revenue Variance as Revenue generated less Goal Revenue entered in Employee Goal Maintenance. Hours variance and rate variance also appear.

## Ability to compare remaining budget hours to resource planned hours

*Budget vs. Planned Hours Inquiry* now lets users compare project and task remaining budget hours to resource planned hours for a manager overview. This helps you identify where planned hours exceed the remaining EAC budget hours and where additional planning is needed to assign available resource hours to tasks that have unscheduled time remaining.

Use *Budget vs. Planned Hours Detail Inquiry* to compare budgeted hours to planned hours by project, task, and account category. This lets project managers and resource planners identify projects and tasks that have budgeted hours remaining to be assigned to resources. This also lets project manager and resource planners identify projects where planned hours exceed the number of hours left in the EAC budget. You can open this page from the Resource Management menu and from *Budget vs. Planned Hours Inquiry*.

## Ability to view employee activity by project and by transaction

*Employee Revenue and Expense Inquiry* now lets users view all direct or indirect projects worked on by an employee for the specified period grouped by project. The data comes from the Project Transactions table (PJTRAN) for transactions posted to account categories that have a transaction class of Labor. When you access it from *Goal vs. Actual Revenue Inquiry* by tapping **Details**, the grid loads the data for the employee ID and utilization period interval selected on that screen. Clicking the **Details** button opens *Employee Project Revenue and Expense Inquiry*.

Use *Employee Project Revenue and Expense Detail Inquiry* to view labor-related cost and revenue transactions by project and employee. The data consists of those qualified transactions from the Project Transaction table (PJTRAN) posted to account categories having certain transaction classes. When you access it from *Employee Revenue and Expense Inquiry* by tapping **Details**, the grid loads the data for Employee ID, Project ID, and utilization period interval selected on the previous screen.

## Ability to manage Project Employee Utilization Goals

*Employee Goal Maintenance* lets you set up available hours and utilization percentages per utilization period for each employee. The information entered in this screen is used to calculate employee available hours and utilization throughout the Resource Management module.

## Ability to manage Utilization Types

*Utilization Type Maintenance* lets you set up valid utilization types for an organization. Examples of utilization types include Billable Time, Marketing/Sales, Bids and Proposals, Training, General Admin/Overhead, Vacation/Holiday/Sick/Jury, and so on. Because consulting organizations generate most of their revenue by billing clients on an hourly basis for the work that is performed by individual employees, it is very important that they be able to track the time their employees spend on various activities. In order to provide this kind of information, the system must be able to classify projects into the various activity categories. The information entered in this screen is used throughout the Resource Management module.

### Ability to manage Utilization Periods

*Utilization Period Maintenance* lets you set up the valid utilization periods for an organization. Companies frequently use weekly, monthly, or quarterly utilization periods when they define employee goals. The information entered in this screen is used throughout the Resource Management module.

## Inventory Suite

### Ability to look up Inventory Items

*Inventory Item Lookup* is added and contains the ability to find inventory IDs by various attributes about the inventory item. Users can also view the availability information for the inventory item.

## Requisitions Suite

### Ability to create and submit Item Requests

*Item Request Entry* is added and contains the ability to create, edit, and submit for approval requests for goods or services to be purchased.

### Ability to approve or reject Item Requests

*Item Request Approvals* is added and contains the ability for approvers view item requests and approve them, reject them, or take no action. These approvals can be at the line item level or at the header level.

### Ability to view a Requisition Budget

*Requisition Budget* is added and contains the ability to display the amount of budget remaining for the general ledger account and subaccount budget created in General Ledger Budget Maintenance (01.250.00) and the project and task budget created in Project Controller Budget Maintenance (PA.BSM.00).

### Ability to inquire Inventory Order History

*Inventory Order History* is added and contains the ability to display the list of requisitions created for the inventory ID identified.

## Payroll Suite

### Payroll Time Entry and Advanced Payroll Timecard Entry

*Payroll Time Entry* is added and now lets employees enter basic timecard information. This includes the date and hours worked, earnings type, work location, and comments. The timecards can then be reviewed in *Time and Dollar* (02.020.00), and released there or from *Release PR Batches* (02.400.00). The employees can also edit timecards that are not yet released, to correct errors. Or, they can delete unreleased timecards and re-enter the timecard.

Also, Advanced Payroll Timecard is added and now lets payroll and project managers enter employee time information for advanced payrolls. This might include default information for labor class, union code, shift differential, pay rate, project, service, and more. After a manager creates an advanced timecard batch, the information can be released in *Release Adv PR Batches* (58.400.00).

## Shared Suite

### Reorganized Menu

The menu in *Microsoft Dynamics SL Web Apps* is reorganized and now groups related web apps together in a suite. For example, Timecard Entry, Expense Entry, and Project Maintenance are now grouped on a Project menu.

### Ability to submit, edit, and delete Report Requests

*Reports* in the Shared Suite now lets users submit report requests, view existing report requests, and delete old report requests. It enables SYSADMIN and members of the ADMINISTRATORS group in Microsoft Dynamics SL to manage all report requests. Users can produce the report in the same file formats available in the Microsoft Dynamics SL rich-client. Additionally, users can decide to upload the resulting report to a SharePoint document library. The Microsoft Dynamics SL Reporting Service windows service handles the processing of the reports.

Copy all custom reports from the Usr_Rpts folder on the server where you have Microsoft Dynamics SL installed to the Usr_Rpts folder on the server where you have the Microsoft Dynamics SL Web Services deployed. The default locations are as follows:

- Dynamics SL:   \Program Files (x86)\Microsoft Dynamics\SL\Applications\Usr_Rpts
- Web Services:  \WebServicesSite\Reports\Usr_Rpts

**Note:** Custom formats of standard reports will automatically appear in Web Apps. Custom reports added per the instructions in the *Microsoft Dynamics SL Reporting Guide* must also be added to the web_rptcontrol table in the Microsoft Dynamics SL system database if you want them to appear in Web Apps.

## Administration Suite

### Ability to maintain Access Rights and Customize Field Properties

*Administration – Access Rights* now lets administrator users manage the permissions assigned to other users, for released Web Apps, similar to *Access Rights Maintenance* (95.270.00). This screen also lets administrator users customize the properties for certain fields in Web Apps, setting the fields to be visible/invisible, enabled/disabled, required/option, and also setting the default value for the field. This resembles functionality previously available in Business Portal Administration.