I'm not a robot

The Expense management workspace for the Dynamics 365 Finance & Operations mobile app is a convenient way for remote or travelling workers to capture receipts, enter expenses, and create and approve expense reports. In this article, I'll explain how to deploy the Expense management workspace on the mobile app, and show you briefly what you can do with it. Note: Even though most customers, commentators, and consultants still call it Dynamics 365 Finance & Operations or D365FO, Microsoft now technically licenses it as Dynamics 365 Finance and Supply Chain Management. What Is the Expense Management Module for D365FO? Within Dynamics 365 Finance & Operations, the Expense management module is often used together with Project management and accounting to handle expenses related to projects. For instance, if you have an employee who travels to work on a project at a customer site, this module could be used to connect their airfare or hotel expenses with the project. Technically, the Expense management module can also be used alongside the Production control module to track expenses in production (for instance, if you are building an engine, and you use a local supplier to make up a shortage of a certain part). However, that's less common than expenses in projects. Configuration of the Expense management module itself is outside the scope of this article. Some companies may be using a 3rd-party solution for expense management and receipt capture. The solution described here is completely integrated into your D365FO environment, and it doesn't cost anything beyond the D365FO licenses for users. Ask your Dynamics partner if you have any licensing questions, or want to determine whether this approach is best for you. What Is the D365FO Mobile App? The mobile app for Dynamics 365 F&O extends your ERP from desktop to mobile device. It's included with your licensing, and you can download it for your Android or iOS device. That mobile app allows your workers to access workspaces that have been published by your sysadmin. Those workspaces are published as Power Apps "mobile apps," but they are accessed from within the general D365FO mobile app. Pretty much anything you can do in the Expense management module on desktop, you can also do from the mobile app. When you enter info on the mobile app, it pushes that data back to the D365FO expense reports. Watch a demo here to see the mobile app in action: inline-block; width: 0px; overflow: hidden; line-height: 0;" class="mce_SELRES_start"> How to Deploy the Expense Management Workspace for the D365FO Mobile App As an administrator, log into the environment/company that you are deploying for. Click on the gear icon in the top right and select Mobile app. Select the Mobile app for Expense management from the list. When selected, click on Publish at the top.The application side is now ready to go. Deployment on the Mobile Device From the mobile device, navigate to the app store for your operating system. Search for Finance and Operations (Dynamics 365). Select and download the free app. Launch the Finance and Operations app once it's installed. You will be prompted for connection information. Enter the URL for the company that you deployed for above and click Connect. After accepting the connection agreement, click Connect. You will be prompted to enter your network credentials. Once authenticated, your organization's published apps should appear. You are now ready to work within the Dynamics 365 F&O Expense management Workspace from the Finance and Operations mobile app. Note that, if you have other custom Power Apps (for instance, for managing vendors), your sysadmin can push those as workspaces into the D365FO mobile app too. Using Expense Management in the D365FO Mobile App Click on Expense management within the D365FO mobile app's list of workspaces. You will now see the actions that you can take. You can capture a receipt in the D35FO mobile app with a photograph like so. You'll then choose the category for the receipt. Then choose the payment method. If you're the project manager, once your team members have submitted expenses, you can drill in via the expense reports to see them. Note: One limitation of the mobile app is that, while it's convenient for capturing receipts, you may need the greater real estate of the desktop interface to process the receipt details. If you'd like to learn more about Dynamics 365 Finance & Operations, Power Apps, and how to empower your workers with both, please contact us. Dynamics 365 for finance and operations mobile app is one of a kind configurable user friendly mobile app. By using this app an end user can easily reuse existing user interfaces, business logic and design a mobile work space in the Dynamics 365 for Finance and Operations. Every Page, Action and Control metadata recordings made is saved and cached in the app as static metadata. This metadata recording contains details of all the objects used along with their dependencies, relationships, business logic and filters as XML in the Dynamics 365 for Finance and Operations database. This also enables users to import and export a mobile app work space easily from one environment to another. For e.g. A standard mobile app work space can be customized by exporting and importing it into another new work space, since the standard work spaces cannot be modified. Now the pages, actions and fields can be modified or customized. Download and modify business logic and re-apply it. For developers, this mobile app offers support for advanced business logic using JavaScript. Using custom logic, a developer can enhance existing capabilities or implement custom design layouts and controls. Business logic execution flow is controlled by the mobile app framework. Any such modifications are executed at run time for that specific work space and overrides the static metadata from the server hence they do not directly affect the work space design or configurations set in the server. The Dynamics 365 for finance and operations Mobile app currently supports iOS and Android devices. Creating a Purchase order work space This tutorial video shows the creation of a simple Purchase order work space without having to add any business logic. End users or non-technical users can easily follow this method to create a basic operational work space for specific tasks. After Publishing the new work space (I forgot to record the Publishing part). The simple work space looks like this To make the "All Purchase orders" grid look better, We can do some changes to the grid property in the work space. And now, after this small change in the grid property, The "All Purchase orders" grid looks much better. Each Purchase order is listed as a tile. Coming up in this series - A developer can use JavaScript to override the behavior of web pages at run time by using some of the framework service methods. e.g logic to hide unnecessary pages in a work space. Advanced design concepts using CSS Flex Deep dive into the advanced business logic topic and using CSS Flex property to design much cooler looking designs like the one below Ever considered configuring your mobile/device with latest Microsoft Dynamics 365 Finance and Operations warehouse app. Sharing in brief how to get your ap working in no time with simple 4 steps: Download app from Windows store or Android Play store Configure AAD with a new app registration Configure Azure Web app authentication in D365 Provide Azure Web app details in mobile app Well it would become too simple so let us go a deeper: 1) Understand system requirements for App in terms of OS, architecture and beyond. 2) For windows platform, if it's a client OS like Windows 10 then download from marketplace/MS store If it's for a Virtual Machine with Windows Server 2016 Datacenter edition then get the app from Business Store, using your O365 credential. *Ensure following services are running before installing app on windows platform otherwise it may run into error. Microsoft Store install service Update orchestration service Windows update service 3) The app is also available on Android/Play store (version 4.4, 5.0, 6.0, 7.0, 8.0) Note the app is not available on Apple platform/App store Also note since July 2017 update, there is no WMDp portal only Warehouse app on Windows store and Android/Google play store 4) Create a web app in Azure portal using app registration in Azure Active Directory (AAD) 5) Make a note of the application ID as this would be used later as client ID. 6) Next we need to create a client secret using keys on web app settings. 7) Provide a name to the key and duration and save which would reveal the key/client secret in the value column. 8) Give permission to an API - Microsoft Dynamics ERP 9) You may create a dedicated user to be able to use the mobile app. 10) Register this web app in D365FO using path System administration > Setup > Azure Active Directory applications 11) You may choose to keep the AAD application with a single user and use this to connect with individual app connections. 12) Next we go the app in your device and go to connections and disable demo mode which would open up connection settings 13) This is key to successfully getting connected Azure Active directory client ID as Application ID of the AAD web app. Azure Active directory client secret as value of key from the AAD settings. Azure Active directory resource as the Dynamics Finance and Operations root URL Azure Active directory tenant as authentication authority of the O365 as >.onmicrosoft.com 14) Setup your warehouse app user from path Warehouse management > setup > worker If using demo data then could reset your password or create one for new setup. Good references to leverage Lachlan OrganicAX AXPS_SF836_WMSAppConfigure This section contains the basic configuration required in Dynamics 365 for Finance and Operations > Mobility to let users connect to and work with the Mobile Client. Prerequisites You have completed mobile backend installation, as described in the section above. Audience Sysadmin, Partner Consultant You must set up security roles in Dynamics 365 for Finance and Operations for administrators or managers to work with setup in the Mobility module, and for workers to be able to access the Mobile Client. Role Related tasks CAL level in Microsoft Dynamics 365 for Finance and Operations Mobility administrator This role has access to the Mobility module in Dynamics 365 for Finance and Operations. Here, the user can set up and change the configuration of the Mobile Clients. This includes setting up the functionality available on the Mobile Client as well as setting up the users who should be able to log in on the Mobile Client. Team Members Mobility data manager Load setup data from data entities for data migration. None Mobility user This role is required to log in and make registrations on the Mobile Client. None Change tracking is a feature on the database that is used to track entity changes. Change tracking determines which changes should be sent to the mobile clients during synchronization. To verify setup for change tracking (screenshot 01), Go to Mobility > Setup > Mobile parameters. On the Mobile parameters page, select Change tracking. In the Database section, if DB change tracking enabled is selected, it implies that change tracking is enabled on the database. If not, it must be set up on physical database. The Change tracking retention field determines how long the system retains change tracking data in the database before it is automatically purged. This change tracking retention period is set up on physical database and is provided by Microsoft. To update the change tracking retention period, click on the Update retention period button. This functionality will update the change tracking retention period in physical database to 5 days. You will see a message prompt for you to confirm this action (see screenshot 02). Click on Yes to confirm and update the change tracking retention period. On successful update you can see a confirmation message (see screenshot 03). The Entity tables section shows if the change tracking has been enabled for tables used in synchronization. If not, select the Enable/disable button. Change tracking must be enabled for entity tables used in synchronization to have synchronization working properly. Refer to the article "Entity initialization" in the Data entities section for information regarding Synchronization paging and Synchronization status. Handlers are methods that are visible to the Mobile Client. You must set up handlers to allow the Mobile Client to make external calls to Dynamics 365 for Finance and Operations. Select Mobility > Setup > Handler setup and open the form to initialize handlers for the Mobile Client. Check that handlers are listed. Handlers are now set up, and you can close the form. Users must be created in Dynamics 365 for Finance and Operations and be associated with a person. The setup is made in System administration > Users > Users. The next step is to add persons to mobile users. Mobile users (workers) must be set up in three forms in Dynamics 365 for Finance and Operations to be able to make registrations on the Mobile Client: General setup in the User form, in which you select the Dynamics 365 for Finance and Operations security roles that define which registrations a user (worker) can make on a Mobile Client. Select System Administration> Users > Users to open the form. Ensure your user account has selected Person and the default company is set. To create a Person, go to Module Human Resources > Workers > Workers and create a new Worker. Select Save. In order to schedule maintenance workers, a calendar must be set up for each maintenance worker. Maintenance workers are related to a resource, and working time calendars are set up for resources. Select Organization administration > Resources > Resources and create a HR resource and assign a working time calendar to it. Add worker to Enterprise Asset Management > Setup > Workers > Workers. This form adds a worker from the Human resources module as an Enterprise Asset Management worker. Save. Select Mobility > Setup > Users to open the form. If required, you can also create user groups for convenient module configuration. Add user (person/worker) Select "Enable" and Save changes. Add Person (worker) to Dynamics 365 F&O User. Go to System Administration> Users > Users, find your account and add the Person. In System Administration> Users > Users, three Dynamics 365 for Finance and Operations security roles are required for each mobile user to make registrations on a Mobile Client: The System user is a general Dynamics 365 for Finance and Operations user, which is always required. The EAM Maintenance worker and Maintenance mobile user role is required to log in and make registrations on the Mobile Client. To make registrations in Asset Management, one of the following roles is required, depending on the worker's primary work area: Maintenance manager Maintenance clerk Maintenance requester Maintenance worker Go to Mobility -> Setup -> Module configuration 1. Application locations a) add direct URL to Planning Board App, for example, b) add direct URL to Planning Board App, for example, 2. Set access to Planning Board Planning Board -> Enabled a) You can give access to all users (Scope = All) b) Access to a single user (Scope = User) c) Access to User Group (Scope = User Group) and change the parameter value to "true", then "Save" your changes. All data (the entities) for the Mobile Clients are kept in a single table that must be initialized before use. If entities are changed (code changes), the table must be reinitialized. In Dynamics 365 for Finance and Operations, select Mobility > Periodic > Initialize synchronization data, use Batch processing, and click OK, to carry out data initialization. Entity initialization should be set as a recurring batch job every week. For more information about data initialization, refer to the section Data entities. With every release of Dynamics 365 for Finance and Operations Microsoft launches a bit more of mobile experience. According to the message Mobile first, Cloud first this approach has now also attained Microsoft ERP flagship. Here i will give a short overview of the available mobile apps and how to start to work with the mobile workspaces. With the new brand name "Dynamics 365 for Finance and Operations" are now ten mobile workspaces available for being used with and to support your business processes. To Start with Finance and Operations mobile apps you have first to publish the mobile workspaces you need. Entry point is the Mobile app in the Setting menu inside the main navigation. Be Default the mobile apps are not published. After publishing the mobile workspaces are immediately available inside the Microsoft Dynamics for Finance and Operation mobile app. The app is available for Android and iOS. After installation and short setup the mobile app offers the user the mobile workspaces which have been deployed from inside the Dynamics 365 for Finance and Operations environment. Mobile Workspaces are the entry point to business infromations within the Microsoft Dynamivcs 365 mobile app. The mobile Workspaces we see here are predefined out of the box workspaces mostly for information purpose for users staying out of the office. In addition to the predefined mobile workspaces shown here, user can create their own workspaces containg more information from other business areas and entities. For creating your own worksapces a mobile app designer is available which allows user to access data from all data entities. No code needs to be created while available business logic from list pages, menü items and froms is used to design the custom mobile workspaces A mobile Workspace generally can contains: Workspace page for a list to further workspcae List Pages and Views List page for overview Detail page for deatils and related infromations Actions for starting transactions Task page for entering, editing and execute business logic Available mobile Workspaces Humans Resources and Organisation Company Directory (rel. 06/2017) My Team (rel. 06/2017) This workspaces are using Human Resources, jobs and positions information as well as position hierarchy to bring this information to supervisors and managers. With Compoany directory you can find contact details of employees e.g. to make a call from outside the office. Just for information and to remember who is assigned to my department as well as to find current information about defined mile stones, position, salary details and declared goals regarding an individual employee. My Team als well as the Company Directory have no integrated business logic, so the business value of this workspaces are reduced just to informational purpose. Purchase Operations Much more sense is given at the purchase sides mobil workspaces. Vendor Collaboration (rel. 01/2017) Purchase order approval (rel. 04/2017) Invoice approvals (rel. 06/2017) Within vendor collaboration workspace vendor and contact details are avialable for vendors participating via the vendor collarboration portal. Furthermore your vendor can look for users requests and status of new purchase orders. Depending of vendors configuration vendors prices, quantities are availabe as well as requested and confirmed deliverey dates. The purachse order approval workspace has additional business logic for approve or reject purchase orders as configured in approval workflow. So decision makers for purachse order can view the purchse orders and do their actions inside the configured workflow (approve, reject, requets change, delegate) outside the offce. Furthermore the invoice approval mobile workspace enables the buyers team to make mobile use of the vendor invoice header workflow, which has to be configured before the mobile process can be applied. If you are participant of the workflow and an invoice is assigned to you, you can view invoice header and line details including financial dimension information, review including accounting and distribution of the costs and see document attachments. Finally approve or reject the invoice to proceed with the workflow. Finance Insight Cost Control (rel. 01/2017) For Cost center manager the Cost controlling Workspace summarizes information from Cost accountig module. Generally you can view actual cost vs budget cost or revised budget for current period, previous period and Year to Date. For each cost element of cost center the budget variance, budget variance in percent, revised budget, revised budget variance and revised budget variance in percent is shown. Inventory Insight Inventory on-hand (rel. 01/2017) The inventory on-hand can list details for a single specific item. You can search for item with item number or product name and select from an item list. The product page shows a minimum basic information about the item and if available the product image. Inventory on-hand informatio can be viewed per site, per warehouse, per location, per batch odr per inventory status. Then the on-hand details lists physical on stock, physical reserved and physical available. For more compact overview of on-hand inventory you may be intersted on creating your own mobile app using PowerApp servcies which is described on InventoryOnHand – a first PowerApp for Dynamics 365 for Operations (Part 2). Sales Orders Overview Sales orders (rel. 01/2017) You can call it Sales Order Browser. With this workspace you can find and view basic information of all sales orders. Search engine supports search by customer with customer account or customer name as well as to search orders by sales order ID, customer account, customer name, sales order status, status realeased and createdDateTime. Entering search criteria works as full text search. If you serach for sales order you can also filter by sales order status which has to be entered as an ineteger number (e.g. 3 for invoiced). For each order you can display some order header details (dates, address, contact at customer, contact of sales) as well as the order lines, packing slips and packing slip lines. Order List Order Header Order Lines For sales people it looks like an easy and fast way to provide information (e.g. status, delivery dates, …) of individual sales orders on a mobile device. Expense Management Expense Management (rel.04/2017) The Expense Mangament workspace was also in AX 2012 available as a mobile app and the integration of this small app is much more useful as on the previous seen workspaces. With expense Management Workspace you can take pictures od receipts upload files to capturerd receipts create expense reports enter expense lines to expense reports, inluding adding a guest list submit expense report for approval and reimbursment approve or reject expens reports if you are an assigned approver For the setup of Expense Management before you can use the Expense Management Workspace we will a add extra post here. Projekt Management Projekt time entry (rel.03/2017) Especially this wokspace is for travlleing users designed to post their times to prevoius created projects. Whether the time enrty is billable or not the entry can be posted to project categories activities or billing codes. Internal and external comments can be captured to the project time entry journal Out of the box Workspaces Out of the box the ten mobile Workspaces for Dynamics 365 for Finance and Operations mobile App are more or less of sweeping force. Some are only informative, some are supporting workflow and two are more integrated using casual transactions. The apps may find some users who can apply the workspace effective. Mainly the Expense and Projekt Managemenat are my favourite because of saving time for travelling business users. Mobile App Designer Also out of the box users (Developers oder Administrators) can create their own mobile workspaces. Therefore the mobile app designer is available to create custom mobile app using mobile workspaces. But which business case could be applied? Which business case can be fulfiled on a 12 square inch display? Workflows are suitable for this to decide with less information with yes or no. While Dynamics mobile app Framework and mobile workspaces support offline actions, may be there pop up some more business scenarios we cant bring to mobile devices in the Dynamics ERP environment. As we are present at our customer we will look forward with open eyes which business scenarios will make sense to built a mobile workspace. We will describe usage of the mobile app Designer building a senseful Dynamics Workspace in later post. The Expense management workspace for the Dynamics 365 Finance & Operations mobile app is a convenient way for remote or travelling workers to capture receipts, enter expenses, and create and approve expense reports. 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That mobile app allows your workers to access workspaces that have been published by your sysadmin. Those workspaces are published as Power Apps "mobile apps," but they are accessed from within the general D365FO mobile app. Pretty much anything you can do in the Expense management module on desktop, you can also do from the mobile app. When you enter info on the mobile app, it pushes that data back to the D365FO expense reports. Watch a demo here to see the mobile app in action: inline-block; width: 0px; overflow: hidden; line-height: 0;" class="mce_SELRES_start"> How to Deploy the Expense Management Workspace for the D365FO Mobile App As an administrator, log into the environment/company that you are deploying for. Click on the gear icon in the top right and select Mobile app. Select the Mobile app for Expense management from the list. When selected, click on Publish at the top.The application side is now ready to go. Deployment on the Mobile Device From the mobile device, navigate to the app store for your operating system. Search for Finance and Operations (Dynamics 365). Select and download the free app. Launch the Finance and Operations app once it's installed. You will be prompted for connection information. Enter the URL for the company that you deployed for above and click Connect. After accepting the connection agreement, click Connect. You will be prompted to enter your network credentials. Once authenticated, your organization's published apps should appear. You are now ready to work within the Dynamics 365 F&O Expense management Workspace from the Finance and Operations mobile app. Note that, if you have other custom Power Apps (for instance, for managing vendors), your sysadmin can push those as workspaces into the D365FO mobile app too. Using Expense Management in the D365FO Mobile App Click on Expense management within the D365FO mobile app's list of workspaces. 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Create your own workspace Firstly, to access the mobile app editor within Finance & Operations, click on the cog at the top right of your screen and select mobile app. If this doesn't appear, add "&form=mobile" to the end of your URL. This will now make the mobile app editor appear at the right of your screen. This gives you a list of default workspaces. To create your own, click on the ellipsis at the top right and click Create. This will open your new workspace. You must select a Name and can also select a Description, App colour and Workspace icon. Add pages to your workspace There are two types of pages you can create on Dynamics 365 for Unified Operations; list pages and details pages. A list page would be some sort of list of records for one entity for example, the All suppliers (or under the US nomenclature: All vendors). Whereas a details page is the page for a particular record for an entity ie the page for a particular supplier. To add a list page, click Add page. Provide a title and description for the page and click OK. You will now be able to start editing this page. Navigate to the page you want to add then click Select fields. Plus signs should appear underneath the titles of the list, select the plus signs underneath the fields you want to be displayed in the mobile app. Once you have finished adding fields, click Done. Please note, the order with which you select these fields is the order in which they'll be displayed on the mobile workspace in the app. To add a details page, add fields in a similar manner. Then connect the details page to the list page. Save and publish a workspace To save your newly created workspace, exit out of the page you're editing by clicking Back then click Done then Save. To be able to access it on the mobile app, you need to publish it. To publish it, from the view of all workspaces, select your workspace and click Publish. When you first download the mobile app, paste a link to your environment and then log in using your details. You should now be able to see your workspace appear at the bottom. Click on it to access the pages you have created. Add actions to your workspace Now that you can view data on your phone, you can now add actions to perform tasks on this data e.g. creating, editing, processing and deleting records. To add an action, click the Actions tab within the Mobile app then click Create new action. As with adding pages, you add an action by navigating to the relevant page then click Select fields. This will record the tasks you perform until you click Done. It records the business logic behind the processes you perform and the fields you enter information in as part of the process. Please note that only the fields you add in the action are displayed even though it records other processes. In this example below where we try to create an action for adding a new supplier. It only shows the fields which we add information in or click the plus sign by. It does not show us clicking New at the start and Save at the end even though this is added into the action. Click Done to conclude the action. In today's current climate, there is an increasing need to be able to carry out simple business processes via our phones, increasing efficiency and saving considerable time. This point is particularly true when it comes to procurement. To keep up with other competitors, managers can save considerable time and paperwork by reviewing purchase requisitions and purchase orders on their phone. Fortunately, Microsoft provides a default purchase order confirmation workspace however this functionality does not exist by default for purchase requisitions. At Snowden Consulting, we've developed a mobile workspace that allows for approving, rejecting, delegating or recalling purchase requisitions, allowing you to fully streamline your procurement process. Access purchase requisitions requiring your approval Drill-down to see the further details and lines of a purchase requisition Enact a decision on the purchase requisition