Microsoft Dynamics SL

Communicator

Release 2015

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Introduction

Communicator Overview

Communicator provides a sophisticated means of identifying pending problems before they arise and alerting designated individuals within your organization of them. In a project environment, a variety of potential problem situations looms. When such situations arise, the appropriate people must be notified so they can interpret, act, or cause some action to be taken. Reacting timely to many of these events is crucial to effective project management.

Whether you are working in a large organization, a company with many projects, or a branch office with a few complex projects consisting of many tasks, keeping on top of potential problem areas is very challenging. Reliance on people who have many other responsibilities can result in problems being overlooked. Communicator arms your computer system with the power and authority to perform an analysis of these problems and generate notifications.

Communicator includes the following screens:

- *Alert Manager* (CO.ALM.00)
- *View Messages* (CO.CMD.00)
- *Communicator to Mail* (CO.MAL.00)
- *Send Messages* (CO.MMT.00)

Alert Manager

Alert Manager (CO.ALM.00) fills two essential roles. First, it allows you to define the situations to monitor, the criteria to apply, and the people to notify. In this regard, it serves as a setup screen to permit definition of the criteria users want considered for the analysis of project information. This establishes the notifications. See “Setting up Automated Notifications” on page 8 for more information.

The second role for the *Alert Manager* is to perform the analysis and issue the notifications. The analysis process uses the power of the computer to evaluate specific criteria, notifying designated individuals immediately when these criteria are met. The notifications can be simple (project or task over budget), more involved (margin below an acceptable minimum), or quite complex (trends where margin is eroding over some period). Notifications can be triggered by a lack of action as well. The failure to bill in a timely fashion or the failure of the customer to pay invoices can create messages. Any of these can escalate up a management hierarchy if the situation becomes more urgent. See “Alert Manager (CO.ALM.00)” on page 15 for more information.

View Messages

An employee views notifications using *View Messages* (CO.CMD.00), which displays all messages for the selected user. These messages might be notifications generated by the system, notices of action required as a result of other users’ activities, or direct communications from other users. These messages are more than just email, however. Each message can carry one or two potential actions, with labeled buttons to provide direct access to the appropriate functionality within Project Management and Accounting. Clicking one of the buttons causes *View Messages* to pass control and key data, such as the problem project number, to the activated function. Furthermore, it restricts the individual’s use of the activated function to the key value passed. See “View Messages (CO.CMD.00)” on page 18 for more information.

Send Messages

Communicator also provides for the manual creation of messages to support an electronic mail facility. *Send Messages* (CO.MMT.00) allows anyone with access to Communicator to format, maintain, and send messages to other employees. See “Send Messages (CO.MMT.00)” on page 22 for more information.

Communicator to Mail

In addition to the power and flexibility of the Communicator functions, interfacing Communicator with the site’s email system allows users to process notification messages using a tool with which they are familiar and comfortable. You can accomplish this using *Communicator to Mail* (CO.MAL.00), which delivers Communicator messages by using Microsoft Visual Studio Tools for Office (VSTO). VSTO allows Microsoft Dynamics SL screens to communicate with Microsoft Office Outlook through an add-in. This add-in is named Microsoft.Dynamics.SL.OutlookAddin and is installed with the Microsoft Dynamics SL client. It uses a timer to automatically “wake up” at user-defined intervals and check for unsent mail. You can also choose to process notifications manually by clicking **Mail Messages**. See “Communicator to Mail (CO.MAL.00)” on page 21 for more information.

Other Functions

A number of other Project Management and Accounting screens can transfer information through Communicator. Communicator messages automatically notify supervisors when one of their employees completes a timecard. If the supervisor rejects the timecard, the employee automatically receives notification of this via another Communicator message. If either person highlights the timecard message, the button to approve or correct a timecard appears. By clicking the button, the person has direct access to the appropriate function and data without leaving *View Messages* (CO.CMD.00).

User Guide Overview

This user guide provides administrators with task-oriented and reference information for the Communicator module. Reviewing the user guide helps in making informed decisions regarding the implementation of the Communicator module in your business.

What is Covered in the User Guide?

This user guide is organized into the following major sections:

- The “Introduction” gives an overview of the Communicator module.
- The “Concepts” section describes the major concepts you need to know to fully take advantage of the Communicator module.
- The “Tasks” section shows how to perform various tasks within Communicator.
- The “Reference” section defines all the data provided on Communicator screens.
- The “Index” section provides an easy reference tool.

Who Should Use the User Guide?

The user guide is designed for users and system administrators who are new to the Communicator module. The guide provides the information necessary to set up and operate a successful communication system.

How to Use the User Guide

To assist you in locating information, the user guide contains:

- A Table of Contents of logically organized activities and tasks
- A section describing how to set up the Communicator module
- A Reference section that contains a description of each field on all Communicator screens
- An alphabetized Index of the information provided in the user guide

Operating Tips

The following section contains some hints and tips for operating efficiently when entering data in Microsoft Dynamics SL screens. For more detailed operating information, see the System Manager online help or user guide.

Using Password Protection

Take full advantage of the security features included in Microsoft Dynamics SL. Assign access rights to initially protect entry into Communicator itself. Then, limit the screens users are able to view and control the functions users can perform to update, insert, and delete information in those screens. With Customization Manager, you can also limit user access to individual fields on each screen. Finally, you can use *Password Maintenance* (PA.PWD.00) in the Project Controller module to password-protect employee IDs used for sending and receiving Communicator messages.

For more detailed operating information, see the System Manager online help or user guide.

Concepts

This section describes concepts and definitions relevant to the Communicator module.

Alert Groups

An alert group, identified by a user-assigned code, defines a set of related event analyses. When event analyses run, they always run as a group.

Alert groups are often associated with a time frequency. For example, you might identify a group of notifications that should run daily, another set weekly, and a third group monthly. See “Alert Manager (CO.ALM.00)” on page 15 for more information.

Events

An event is a specific test or circumstance that the system can evaluate as being either true or false. If an event is true, Communicator creates and sends a message. If an event is false, Communicator does not take any action. The event ID is also the executable name of the program that processes the event. The event description appears at the bottom of the screen. See “Alert Manager (CO.ALM.00)” on page 15 for more information.

Events that Communicator evaluates include the following:

Event ID	Event Description
COAR100	Open Invoice > *x* days old and balance > *y$*
COCN100	Pending Project Change Orders where the current system date is greater than the change order date by at least *x* days
COCN200	Expiration date of any insurance stored in the Subcontractor Vendor table (PJSUBVEN) is expired or will expire within *x* days
COFB100	Invoices in process >= *x* days old; in this context, in process means a status other than printed (PR) or posted (PO)
COFB200	Unbilled (and unselected) invoice items >= *x* days old. These items have not yet been selected onto an invoice draft and do not contain a hold status of PG (logical purge)
COMB100	Estimated Post Date of milestone billing/revenue recognition <= Current Date + *x* days
COOV100	Project total expense >= *x*% of Estimate at Completion
COOV300	Project-Account category expense >= *x*% of Estimate at Completion
COOV400	Project-Task-Account category expense >= *x*% of Estimate at Completion
COPC100	Entered % complete for project that differs from calculated % complete by *x* or more
COPC200	Entered % complete for task that differs from calculated % complete by *x* or more
COPR100	Project margin below budget margin by at least *x*%
COPR200	Current period margin < previous period margin by at least *x*%
COREV00	Project-Account category revenue (sum) >= *x*% of Estimate at Completion
COREV01	Project-Task-Account category revenue (sum) >= *x*% of Estimate at Completion

Sending Communicator Messages via Email

Following is some important information about Communicator messages. See “Communicator to Mail (CO.MAL.00)” on page 21 for more information.

- *Communicator to Mail* sends only new messages via email. Once *Communicator to Mail* sends a message, it changes the message status to Mailed.
- If you set the sleep interval to zero, *Communicator to Mail* stops after it sends all new mail. Otherwise, the program waits the specified time interval and sends all new mail. This process repeats until you close the screen.
- By default, *Communicator to Mail* runs in minimized state. If an error occurs, the screen reverts to its normal (un-minimized) state.

Tasks

Quick Reference Task List

This section serves as a guide to help you answer common Communicator questions.

How Do I...?

- Set up automated notifications – see “Setting up Automated Notifications” on page 8.
- Set up the mail interface – see “Setting up the Mail Interface” on page 9.
- Send a message – see “Sending Communicator Messages” on page 12.
- View messages I have received – see “Viewing Communicator Messages” on page 11.
- Send a message more than once – see “Resending a Communicator Message” on page 13.

Setting up Automated Notifications

Alert Manager (CO.ALM.00) allows you to define the situations to monitor, the criteria to apply, and the people to notify.

To set up automated notifications:

1. Determine the number and nature of alert groups that you will need. You can create multiple notifications for each alert group. Because the Communicator processes notifications by group, you will need to create groups for each frequency (daily, weekly, monthly, quarterly, etc.) with which you will send notification messages.
2. Open *Alert Manager* and assign an ID for a group in **Alert Group**. Add a description for the group in **Description**.
3. Select the recipient for the notification. If the recipient will be a specific individual, enter or select an employee ID in **Employee**. To send the notification to a group of managers, select one of the manager types that appear in the **Manager** list.
4. Enter or select the notification type in **Event**. See “Events” on page 5 for more information about the types of notifications that you can set up for automated notification. The event description appears at the bottom of the screen.
5. Specify the parameters that you want to apply to the event. The parameters are identified in the event by the letters *x*, *y*, and *z*.

   Example: You selected event COAR100, Open Invoice > *x* days old and balance > *y*$. If you want to notify recipients of open invoices that are more than 30 days old and that have a balance greater than $1,000.00, enter 30 (for *x* number of days) in **Param x** and 1000 (for *y* monetary units) in **Param y**. Since event COAR100 does not use the third parameter, leave **Param z** blank.
6. You can add optional filters from the project master table to the information that the *Alert Manager* analyzes when determining which notifications to send. (If you are familiar with Structured Query Language (SQL), these fields specify the “where” clauses applied to the query.)

   Example: You want to create a notification to notify project managers of overdue billings only for projects in a specific organizational unit. Select GL Subacct from the **Select Item 1** list and enter or select the subaccount in the **Select Value 1** field.

   If you have configured the flexible ID field PJPROJ.pm_id01 to store a Project Type (using Project Controller’s *ID Maintenance* (PA.IDM.00)) and you want to filter projects on both subaccount and project type, select Project Type from the **Select Item 2** list and enter or select the project type in the **Select Value 2** field. Only projects that have a subaccount matching the value in **Select Value 1** AND that have a project type matching the value in **Select Value 2** will have their eligibility for sending a notification evaluated. *Alert Manager* will disregard all other projects. You can apply up to three filters.
7. When you have finished configuring all notifications for the current alert group, click **Save**.
8. To process all notifications for the current alert group, click **Begin Processing**.

Setting up the Mail Interface

You can use Microsoft® Office Outlook for sending Communicator messages via email. Microsoft Dynamics SL screens work with email through Microsoft Visual Studio Tools for Office (VSTO). VSTO allows Microsoft Dynamics SL screens to communicate with Microsoft Office Outlook through an add-in. This add-in is named Microsoft.Dynamics.SL.OutlookAddin and is installed with the Microsoft Dynamics SL client. A typical installation of Microsoft Office does not include this feature by default. For more information about installing VSTO, see the Installation Guide.

The control parameter PA MAIL is used for storing mail delivery parameters. Positions 1 through 10 contain the sleep interval. For example, to "wake up" the process every two minutes, enter the number 2 in Position 1. The maximum interval is 24 hours. Positions 11 through 30 contain the mail interface standard. The default interface standard is VSTO. See "Communicator to Mail (CO.MAL.00)" on page 21 for more information.

- In Project Controller's *Employee and Resource Maintenance* (PA.EMP.00), enter the employee's email user name as it appears in the email system's global address list.
- In **Send E-mail To,** select either Mail or Both. If you select Mail, *Communicator to Mail* deletes the message after it sends the message. If you select Both, *Communicator to Mail* changes the message status from New to Mailed.

Note: This information is provided at the request of our customers. **Microsoft does not recommend circumventing security features.** To view an explanation of the warning that appears in Microsoft® Outlook® 2002 and later and how to customize the security feature, click the following links:

- http://support.microsoft.com/kb/290498/EN-US/
- http://support.microsoft.com/kb/290499/EN-US/

An alternative to using the *Communicator to Mail* interface is to use Database Mail. Database Mail is an enterprise solution for sending email messages from the SQL Server Database Engine. Database Mail is not active by default. See the "Database Mail" article at Microsoft TechNet for information about enabling Database Mail, and then return to this page.

The following procedure assumes that you have already enabled and configured Database Mail.

For more help, contact the network administrator or SQL Server Support. Microsoft Dynamics SL support engineers are not trained to help with configuring Database Mail.

To set up Database Mail to send messages from Microsoft Dynamics SL:

1. Change and run the Database Mail script provided in the installation package.
   a) Open SQL Server Management Studio.
   b) On the **File** menu, click **Open**, and then click **File.**
   c) Browse to the \DynamicsSL\DB\scripts\app\ folder in the installation source or the \Program Files\Microsoft Dynamics\SL\Applications\DB\scripts\app\ folder of the installation.
   d) Select the pmg_triggers.sql file and then click **Open**.
   e) On the **Edit** menu, click **Find and Replace**, and then click **Quick Replace**.
   f) In **Find what**, type *PROFILENAME.*
   g) In **Replace with**, type the name of the profile that you specified during the setup of Database Mail.
   h) Click **Replace All**.
2. Run the script against the Microsoft Dynamics SL application database(s).
3. Assign rights for the 07718158D19D4f5f9D23B55DBF5DF1 user to be able to send Database Mail messages. To do this, follow these steps:
   a) Expand **Security**, and then expand **Logins**.
   b) Right-click the 07718158D19D4f5f9D23B55DBF5DF1 user, and then click **Properties**.

c) Click **User Mapping**.

d) In the **Users mapped to this login** area, click to select the **Map** check box on the row for the **msdb** database.

e) Then, in the **Database role membership for:** box, click to select the **DatabaseMailUserRole** check box.

f) Click **OK**.

4. To test the setup, open Microsoft Dynamics SL and use *Send Messages* (CO.MMT.00) to send a test email message to yourself, and then verify that you receive the email message. To do this, follow these steps:

   a) In the navigation pane, click **Foundation**.

   b) In the **Foundation** navigation pane, click **Communicator.**

   c) In the **Communicator** details pane, click **Send Messages.**

   d) In the **From** box, type your project employee ID**.**

   e) In the **To** box, type your project employee ID**.**

   f) In the **Subject** box, type a subject for the email message.

   g) In the **Message** box, type a message, and then click **Save**.

   h) Check your email Inbox for the message.

Viewing Communicator Messages

You can view Communicator messages in one of three ways:

1. If you have access to a computer with the Microsoft Dynamics SL client installed on it (including over Windows Terminal Services), select *View Messages* (CO.CMD.00) from the Communicator menu.

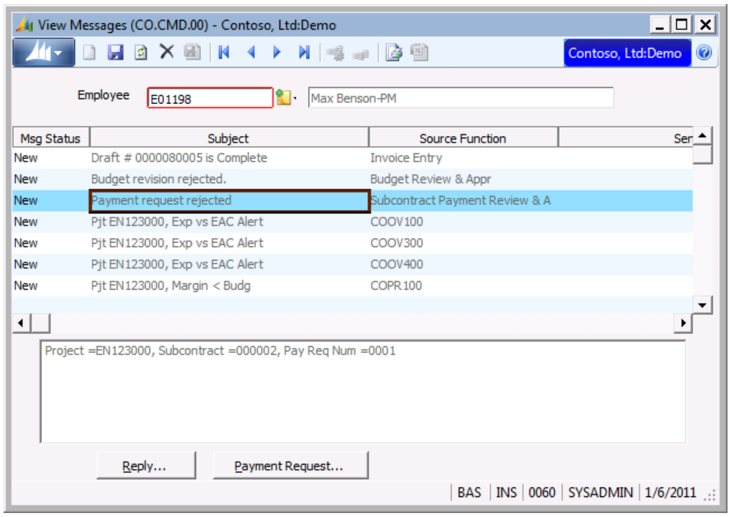

Figure 1: View Messages (CO.CMD.00)

   Enter your employee ID in **Employee**. You can secure your employee ID by setting up employee passwords using Project Controller's *Password Maintenance* (PA.PWD.00).

   All of your messages appear in the grid. Placing the cursor on a message line causes the message to appear in the message box. If navigation to other screens for the selected message is available, the appropriate buttons also appear.

2. If you have access to the Business Portal for Microsoft Dynamics SL Web interface, log on to Business Portal and select **Project | Communicator**.

3. Users who do not have access to Microsoft Dynamics SL or Business Portal can still receive messages using the email interface. Follow the instructions in “Setting up the Mail Interface” on page 9. The email interface allows users to receive their Communicator messages via email, although they will not have access to the screens applicable to the message, nor can they send Communicator messages using email.

Sending Communicator Messages

Communicator sends many notifications automatically. You can also manually compose and send messages using Communicator.

To manually generate and send a Communicator message:

1. Select *Send Messages* (CO.MMT.00) from the Communicator menu.

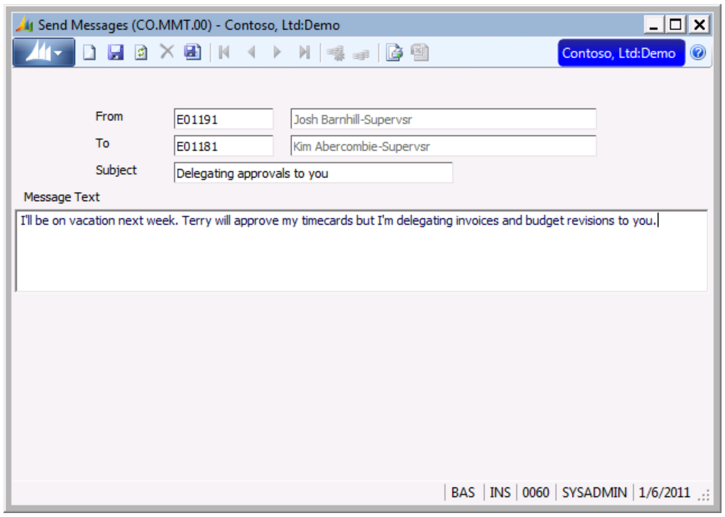

Figure 2: Send Messages (CO.MMT.00)

2. Enter your employee ID in **From**. You can secure your employee ID by setting up employee passwords using Project Controller's *Password Maintenance* (PA.PWD.00).
3. Enter the employee ID of the recipient in **To**. This field is not secured by password protection.

   Note: You can enter an optional subject line that appears in the subject field of *View Messages* (CO.CMD.00) and in the subject field of the email message if notifications to this employee use the Communicator email interface.
4. Enter the text of the message in the **Message Text** area.
5. Click **Save** and **Close** to send the message via the appropriate vehicle (Communicator and/or email).

Resending a Communicator Message

To resend a Communicator message:

1. Open *View Messages* (CO.CMD.00) and display the message that you want to resend.

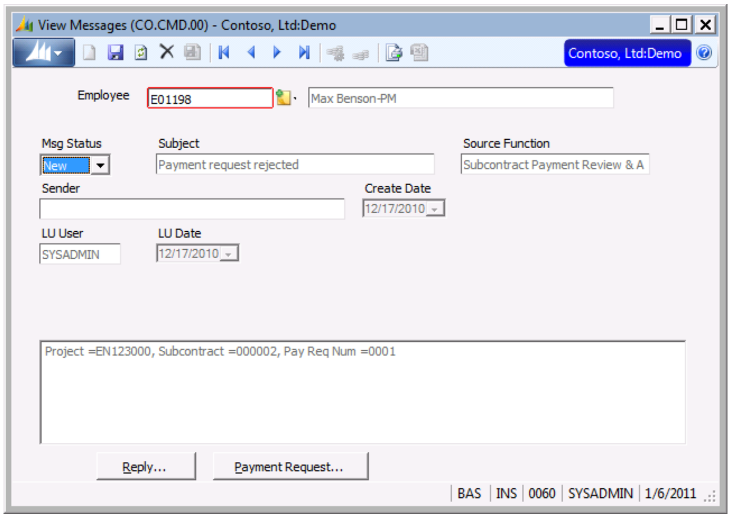

Figure 3: View Messages (CO.CMD.00), form view

2. Change the message status from Mailed or Save back to New. *Communicator to Mail* will resend the message after the specified time interval.

If the Communicator message has been deleted:

Note: This option is available only if you have configured the mailbox to save all sent mail.

1. Run the mail program and open the mailbox for the profile that sent the original message.
2. Go to the Sent Mail folder and locate the specific message.
3. Resend the message using the mail program.

Reference

This section describes the screens in the Communicator module. For each screen, a description of every field and button is included.

Alert Manager (CO.ALM.00)

Use *Alert Manager* (CO.ALM.00) to analyze the events that can generate Communicator messages when it detects an exception condition. You would also use the screen for identifying the exception conditions and maintaining the event conditions.

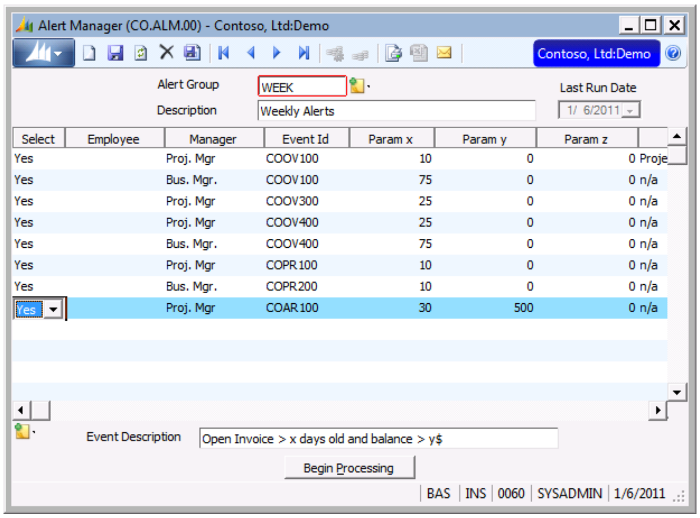

Figure 4: Alert Manager (CO.ALM.00), grid view

You can maintain event conditions as rows of an alert group. When the *Alert Manager* (CO.ALM.00) process runs, it processes the entire alert group. It generates a notification message only if you set **Select** (the first field in the grid) to Yes. Within an event, you can select the recipient(s) of the message, the project(s) to evaluate, the event to analyze, and the parameter values used for the analysis. See "Setting up Automated Notifications" on page 8 for more information.

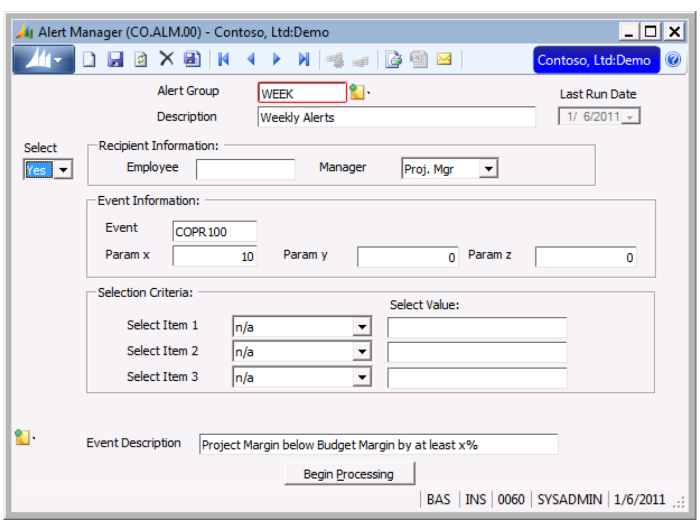

Figure 5: Alert Manager (CO.ALM.00), form view

Following are the field descriptions for *Alert Manager* (CO.ALM.00).

Alert Group

Alert Group is a user-assigned code that identifies a related set of events. When event analyses run, they always run as a group. For example, since alert groups are often associated with a frequency, you might identify a group of notifications to run daily, another group to run weekly, and a third group for monthly notifications. This code and its description are stored in the code file (code type `ALTG`) but you maintain them in *Alert Manager* (CO.ALM.00), not in *Code File Maintenance* (PA.CFM.00).

Description

Description is an optional freeform description of the **Alert Group**.

Last Run Date

Last Run Date displays the last date the alert group was processed. **Last Run Date** is a system-maintained value stored in the Data3 field of the code file (code type `ALTG`).

Select

Select is a yes/no flag that determines whether the event on the selected line will be processed again the next time the alert group runs. You might occasionally need to rerun a particular process or do a special run of only a few notification processes that belong to a larger group.

Employee

Employee is an identification code for the recipient of the Communicator message if the event is true. You can enter **Employee**, **Manager**, or both.

Manager

Manager specifies whether the Project Manager or Business Manager from the project, or the Contract Manager or Contract Accountant from the contract, will receive the Communicator message when the event is true. You can enter **Manager**, **Employee**, or both.

Note: If the event ID is COCN200 (insurance expiration notification), **Manager** is not applicable (since the notification is not based on project).

Event

Event is a specific test or circumstance that the system can evaluate as being either true or false. If an event is true, Communicator creates and sends a message. If an event is false, Communicator does not take any action. The event ID is also the name of the program executable that processes the event. Events that Communicator evaluates include the following:

Event ID	Event Description
COAR100	Open Invoice > *x* days old and balance > *y*$
COCN100	Pending Project Change Orders where the current system date is greater than the change order date by at least *x* days
COCN200	Expiration date of any insurance stored in the Subcontractor Vendor table (PJSUBVEN) is expired or will expire within *x* days
COFB100	Invoices in process >= *x* days old; in this context, in process means a status other than printed (PR) or posted (PO)
COFB200	Unbilled (and unselected) invoice items >= *x* days old. These items have not yet been selected onto an invoice draft and do not contain a hold status of PG (logical purge)
COMB100	Estimated Post Date of milestone billing/revenue recognition <= Current Date + *x* days
COOV100	Project total expense >= *x*% of Estimate at Completion
COOV300	Project-Account category expense >= *x*% of Estimate at Completion
COOV400	Project-Task-Account category expense >= *x*% of Estimate at Completion
COPC100	Entered % complete for project that differs from calculated % complete by *x* or more

Event ID	Event Description
COPC200	Entered % complete for task that differs from calculated % complete by *x* or more
COPR100	Project margin below budget margin by at least *x*%
COPR200	Current period margin < previous period margin by at least *x*%
COREV00	Project-Account category revenue (sum) >= *x*% of Estimate at Completion
COREV01	Project-Task-Account category revenue (sum) >= *x*% of Estimate at Completion

More detailed information about each alert is available in the appendix.

Param x, y, z

Parameters x, y, and **z** are the three parameters available to each event analysis. Use of the parameters varies for each event as described in the text for **Event**.

Select Item 1, 2, 3

Three **Select Item** fields on each notification process line indicate the fields from the Project Master table (PJPROJ) that, in conjunction with the corresponding **Select Value** fields, identify the projects to analyze. You enter the actual values used in the comparison into the corresponding **Select Value** fields. If more than one **Select Item** is indicated (that is, not set to N/A), then the project must meet both (or all three) criteria to be selected.

Example: To configure an event analysis to run against all active projects for Customer 34-500, set **Select Item 1** to Status, **Select Value 1** to A, **Select Item 2** to Customer, and **Select Value 2** to 34-500. Set **Select Item 3** to N/A.

Note: If the event ID is COCN200 (insurance expiration notification) or COFB200 (invoice in process notification), these fields are not applicable.

Select Value 1, 2, 3

Three **Select Value** fields on each notification process line combine with the corresponding **Select Item** fields to identify the projects to analyze. After you select the Project Master field used in the comparison in **Select Item**, enter the comparison value in **Select Value**.

Event Description

Event Description, displayed at the bottom of the screen, contains an explanation of the code listed in **Event. Event Description** is stored in the code file (code type EVNT).

Begin Processing (button)

When you click **Begin Processing**, the alert group currently displayed is processed. The process skips any event line with its **Select** field set to No. Each event is processed by its own executable and the executables are called once for each project processed except for COCN200 (insurance expiration notification) and COFB100 (invoice in process notification). (Since these notifications are not project-specific, they are called only once, before any other notifications are processed.) When the program finishes analyzing all notification processes and projects, it updates the current system date in **Last Run Date**.

Note: If you have made any changes to the screen, click **Save** before you click **Begin Processing**.

View Messages (CO.CMD.00)

Use *View Messages* (CO.CMD.00) to view Communicator messages sent from another employee or from functions such as *Alert Manager* (CO.ALM.00) or *Time Review & Approval* (TM.TRA.00). When you enter your employee ID, all of your messages appear in the grid. When a new message arrives, it sorts to the bottom of those that have a status of New. The oldest message always appears at the top of the list. If you change the message status from New to Save, the message appears below all messages that have a status of New.

When you select a message line, its text appears in the lower part of the screen. Depending on the type of message selected, different program buttons might appear beneath the text message.

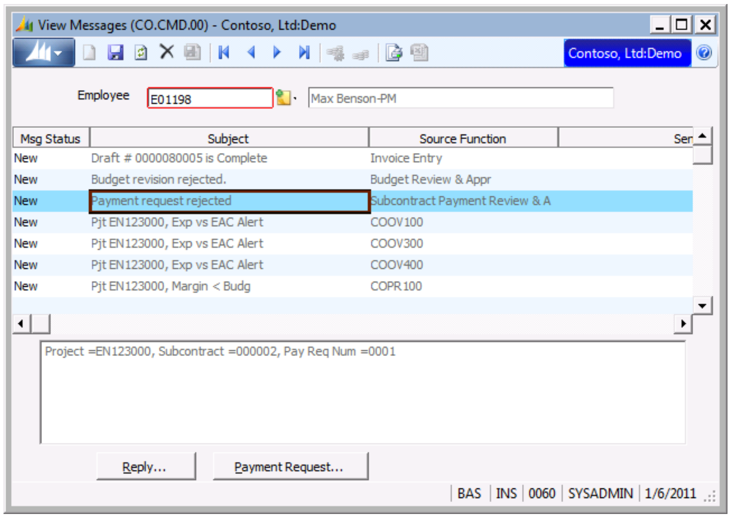

Figure 6: View Messages (CO.CMD.00), grid view

For some message types, the program retains only one instance of each type of message to reduce the number of messages in each user's queue. The date and time of the most recent message always appears. For example, if a manager has ten employees who have completed timecards, there is only one message in the manager's queue notifying the manager that timecards await approval.

Each type of Communicator message can have up to two different go-to screens (buttons) associated with it. When you select a message in the grid, the two buttons appear at the bottom of the screen. The buttons that appear depend on the type of message.

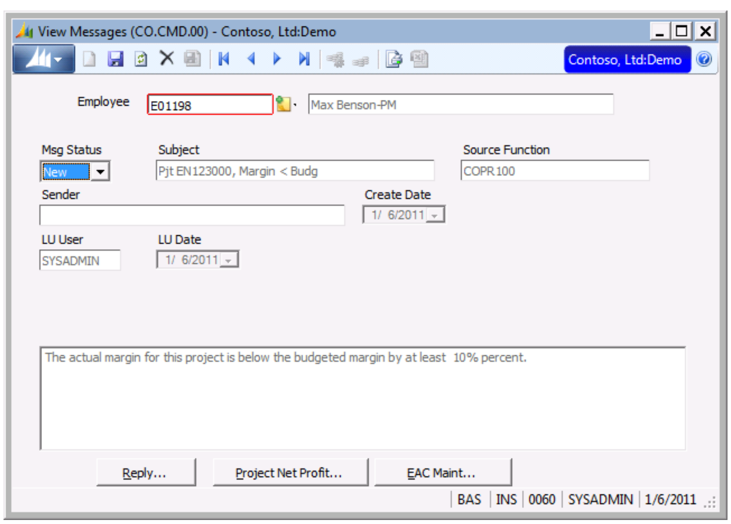

Figure 7: View Messages (CO.CMD.00), form view

Following are the field descriptions for *View Messages* (CO.CMD.00).

Employee

To view your messages, enter your employee ID in **Employee**.

Msg Status

Msg Status is a flag used for sorting messages. When the program creates messages, they always have a status of New. These are the first messages displayed in the *View Messages* grid. After viewing the message, you can leave the status unchanged (New) or change it to Save. A message with a Save status follows the New messages. You can also delete any message by selecting it and clicking **Delete**.

Subject

Subject displays the general subject or title of the communication. It contains the key field description and value (for example, Pjt CO123000, Invoice problem).

Source Function

Source Function displays the name or title of the program that generated the Communicator message.

Sender

Sender displays the name of the employee who sent the message in *Send Messages* (CO.MMT.00).

Create Date

Create Date displays the date the program created the message.

LU User

LU User displays the logon ID of the last person who sent the message or who ran the *Alert Manager* (CO.ALM.00).

LU Date

LU Date displays the date that the *Alert Manager* (CO.ALM.00) last ran. It indicates that the condition generating the message continues to exist. You can use this date for differentiating new messages from ongoing problems.

Buttons

Each type of Communicator message can have up to two different “go to” screens associated with it. This means that when you select a message in the grid, the button(s) appear at the bottom of the screen. The labels for the buttons depend on the type of message you selected. Some examples of buttons that appear and the screens they provide access to follow.

Approve (button)

Approve appears when you select a message from *Timecard Entry* (TM.TCE.00) when an employee has completed and submitted a timecard for approval. Clicking the button opens *Time Review and Approval* (TM.TRA.00).

EAC Maint (button)

EAC Maint appears when you select a message from *Alert Manager* (CO.ALM.00) pertaining to budget information. Clicking the button opens *EAC Maintenance* (IQ.EAC.00).

Invoice (button)

Invoice appears when you select a message from Flexible Billings when an employee has completed and submitted an invoice for approval. Clicking the button opens *Invoice Review and Approval* (BI.IRA.00).

Invoice Inquiry (button)

Invoice Inquiry appears when the program detects an invoice of a user-specified amount becoming overdue by a user-specified number of days. Clicking the button opens *Invoice Inquiry* (BI.INQ.00).

Project Net Profit (button)

Project Net Profit appears when you select a message from *Alert Manager* (CO.ALM.00) pertaining to overall project information. Clicking the button opens *Project Net Profit* (PA.PNR.00).

Reply (button)

Reply is available at any time to send a message back to another employee. Clicking the button opens *Send Messages* (CO.MMT.00).

Task Net Profit (button)

Task Net Profit appears when you select a message from *Alert Manager* (CO.ALM.00) when you included Task in the selection criteria. Clicking the button opens *Task Net Profit* (PA.PND.00).

Timecard (button)

Timecard appears when you select a message about rejecting your timecard in *Time Review & Approval* (TM.TRA.00). Clicking the button opens *Timecard Entry* (TM.TCE.00).

Communicator to Mail (CO.MAL.00)

Use *Communicator to Mail* (CO.MAL.00) to send Communicator messages by using Microsoft Visual Studio Tools for Office (VSTO). VSTO allows Microsoft Dynamics SL screens to communicate with Microsoft Office Outlook through an add-in. This add-in is named Microsoft.Dynamics.SL.OutlookAddin and is installed with the Microsoft Dynamics SL client. A user-defined time interval determines how frequently Communicator checks for new messages to send.

Note: The process sends messages only when *Communicator to Mail* (CO.MAL.00) is running.

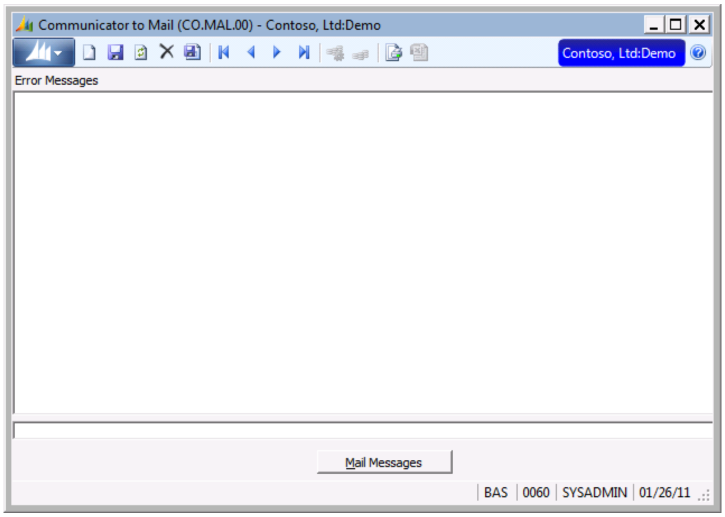

Figure 8: Communicator to Mail (CO.MAL.00)

For more information about setting up the mail interface, see “Setting up the Mail Interface” on page 9. For more information about sending Communicator messages, see “Sending Communicator Messages” on page 12 and “Resending a Communicator Message” on page 13.

Following are the field descriptions for *Communicator to Mail* (CO.MAL.00).

Error Messages

Error Messages displays error messages from the mail system if any occur. **Error Messages** is normally empty.

Mail Messages (button)

Clicking **Mail Messages** sends all new messages to the mail system immediately.

Send Messages (CO.MMT.00)

Use *Send Messages* (CO.MMT.00) to send Communicator messages to an employee. You can access the screen from the Communicator menu, by clicking **Reply** in *View Messages* (CO.CMD.00), or by clicking the **Communicator** icon from a Project Management and Accounting screen.

If accessed from *View Messages* (CO.CMD.00), the program automatically fills in **From** and **To** with the employee IDs and names, if available.

The process sends the message when you click **Save**, **Finish**, or **Close**.

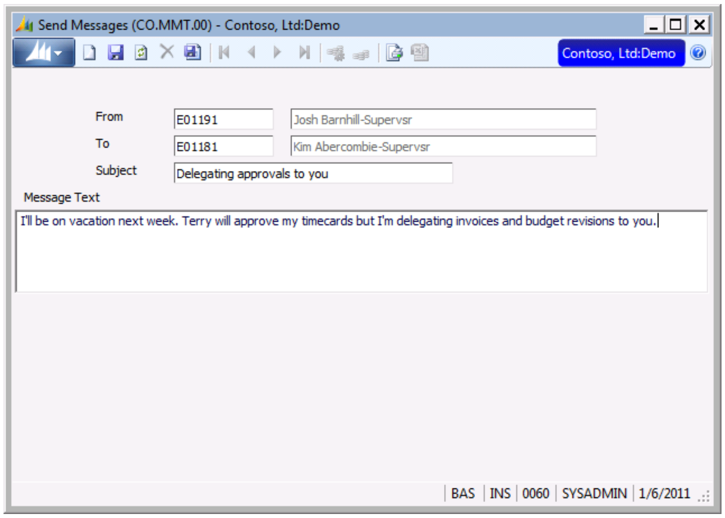

Figure 9: Send Messages (CO.MMT.00)

Following are the field descriptions for *Send Messages* (CO.MMT.00).

From

From is the employee ID of the person sending the message.

To

To is the employee ID of the person to whom you want to send the message.

Subject

Subject is a brief general subject or title of the communication.

Message Text

Message Text is the area where you can enter freeform message text of up to 255 characters.

Appendix: Information on the various messages that can be sent using the Communicator module

The following provides information on the various messages that can automatically be sent by using Project Communicator including what causes the message to be sent, who receives the message, and how to customize the text of the message.

Project Controller Messages

Auto-Started Allocations

- **When**: A message is sent when the Project Allocator (PA.PRO.00) screen automatically allocates a batch of transactions. This can occur when you release a batch from many modules and you have the **Auto-started Allocations** check box selected on the **PC Options and Setup** tab of *Project Controller Setup* (PA.SET.00).
- **Recipient**: Employee specified in the **Auto-Started Communicator Destination** field on the **PC Options and Setup** tab of *Project Controller Setup* (PA.SET.00)
- **How to Customize**: Edit Message Number 0995 and 0991 for the subject, 0996 and 0536 for the body.

Automatic Financial Transaction Transfers

- **When:** A message is sent when the Financial Transaction Transfer process transfers a batch to Project Controller. This can occur when you release a batch from a many modules and you have the **Automatic Financial Transaction Transfer** check box selected on the **PC Options and Setup** tab of *Project Controller Setup* (PA.SET.00).
- **Recipient:** Employee specified in the **Auto-Started Communicator Destination** field on the **PC Options and Setup** tab of *Project Controller Setup* (PA.SET.00)
- **How to Customize**: Edit Message Number 1359 for the subject, 0053 for the body.

Project Activated

- **When:** A message is sent when you set the status of a project to Active in the *Project Maintenance* (PA.PRJ.00) screen or the *Project Maintenance* Web page in Business Portal.
- **Recipient:** Employee specified in the **Project Manager** field in *Project Maintenance*.
- **How to Customize**: Edit Message Number 1570 for the subject, 1571 for the body.

Project with Plan Status

- **When:** A message is sent when you create a new project with the status of Plan in the *Project Maintenance* (PA.PRJ.00) screen or the *Project Maintenance* Web page in Business Portal.
- **Recipient:** Employee specified in the **Business Manager** field in *Project Maintenance*.
- **How to Customize:** Edit Message Number 1572 for the subject, 1573 for the body.

Flexible Billing Messages

Flexible Billing Invoice Waiting For Approval

- **When:** A message is sent when a flexible billing invoice is set to Completed in *Invoice and Adjustment Maintenance* (BI.BAM.00) or when an invoice is created in *Automatic Invoice Creation* (BI.AIC.00) or *Scheduled Billings and Revenue Entry* (BI.SBE.00).
- **Recipient:** Employee specified in the **Approver** field for the project in *Billing Information Maintenance* (BI.BMM.00).
- **How to Customize:** Edit Message Number 0636 for the subject, 0643 and 0637 for the body.

Flexible Billing Invoice Rejected

- **When:** An invoice is rejected in *Invoice Review & Approval* (BI.IRA.00) or in the *Document Approvals* Web page in Business Portal.
- **Recipient:** Employee specified in the **Biller** field for the project in *Billing Information Maintenance* (BI.BMM.00). If this field is blank, then the employee specified in the **Project Manager** field in the *Project Maintenance* (PA.PRJ.00) screen or Web page is used.
- **How to Customize:** Edit Message Number 0660 for the subject, 0643 for the body.

Project Budgeting Messages

Budget Revision Awaiting Approval

- **When:** A budget revision is set to Completed in the *Budget Revision Maintenance* (BU.BRM.00)screen or the *Budget Revision* Web page in Business Portal.
- **Recipient:** Employee specified in the **Approver** field on the Budget Revision.
- **How to Customize:** Edit Message Number 0175 for the subject. There is no text in the body for this message.

Budget Revision Rejected

- **When:** A budget revision is rejected in *Budget Review & Approval* (BU.BRA.00).
- **Recipient:** Employee specified in the **Preparer** field on the Budget Revision
- **How to Customize:** Edit Message Number 0177 for the subject, 1040 and 1004 for the body.

Contract Management Messages

Subcontract Payment Request Awaiting Approval

- **When:** A subcontract payment request is set to Completed in *Subcontract Payment Request Entry* (CN.SPR.00).
- **Recipient:** Employee specified in the **Approver** field on the subcontract payment request.
- **How to Customize:** Edit Message Number 0282 for the subject. The text in the body cannot be customized.

Subcontract Payment Request Rejected

- **When:** A budget revision is rejected in *Budget Review & Approval* (BU.BRA.00).
- **Recipient:** Employee specified in the **Preparer** field on the subcontract payment request.
- **How to Customize:** Edit Message Number 0292 for the subject, 1032 for the body.

Time and Expense for Projects Messages

Expense Report Awaiting Approval

- **When:** An expense report is set to Completed, or after all line items on the expense report are approved if Line Item Review is enabled in the **Approval Setup** tab of *Time and Expense Setup* (TM.SET.00).
- **Recipient:** The approver for the employee submitting the expense report. This might be the employee's Supervisor, Manager, or a specified employee, depending on the setup in the **Approval Setup** tab of *Time and Expense Setup* (TM.SET.00).
- **How to Customize:** Edit Message Number 0227 for the subject. There is no text in the body for this message.

Expense Report Line Item Awaiting Approval

- **When:** An expense report is set to Completed and Line Item Review is enabled in the **Approval Setup** tab of *Time and Expense Setup* (TM.SET.00).
- **Recipient:** The Project Manager for the project specified on the line item on the expense report.
- **How to Customize:** Edit Message Number 1330 for the subject, 1331 for the body.

Expense Report Rejected

- **When:** An expense report is rejected in the *Expense Report Review & Approval* (TM.ERA.00) screen or on the *Document Approvals* Web page in Business Portal.
- **Recipient:** The employee who originally submitted the expense report for approval.
- **How to Customize:** Edit Message Number 0233 for the subject, 0605 for the body.

Expense Report Line Item Rejected

- **When:** An expense report line item is rejected in the *Line Item Approvals* Web page in Business Portal.
- **Recipient:** The employee who originally submitted the expense report for approval.
- **How to Customize:** Cannot be customized.

Timecard Document Awaiting Approval

- **When:** A timecard document is set to Completed, or after all line items on the timecard are approved if Line Item Review is enabled in the **Approval Setup** tab of *Time and Expense Setup* (TM.SET.00).
- **Recipient:** The approver for the employee submitting the timecard. This might be the employee's Supervisor, Manager, or a specified employee, depending on the setup in the **Approval Setup** tab of *Time and Expense Setup* (TM.SET.00).
- **How to Customize:** Edit Message Number 0028 for the subject. There is no text in the body for this message.

Timecard Line Item Awaiting Approval

- **When:** A timecard document is set to Completed and Line Item Review is enabled in the **Approval Setup** tab of *Time and Expense Setup* (TM.SET.00).
- **Recipient:** The Project Manager for the project specified on the line item on the timecard.
- **How to Customize**: Edit Message Number 1330 for the subject, 1331 for the body.

Timecard Document Rejected

- **When:** A timecard document is rejected in the *Time Review & Approval* (TM.TRA.00) screen or on the *Document Approvals* Web page in Business Portal.
- **Recipient:** The employee who originally submitted the timecard for approval.
- **How to Customize:** Edit Message Number 0030 for the subject, 0576 for the body.

Timecard Line Item Rejected

- **When:** A timecard line item is rejected in the *Line Item Approvals* Web page in Business Portal
- **Recipient:** The employee who originally submitted the timecard for approval.
- **How to Customize:** Cannot be customized.

More Information

To edit a message number, follow these steps:

1. On the navigation pane, click **Project**.
2. On the **Project** pane, click **Project Controller**.
3. In the **Project Controller** detail pane, under **Maintenance**, click **Message Text Maintenance**.
4. In the **Message Number** box, type the message number.
5. Do not modify the value in the **Category** box.
6. Change the message in the box, and then click **Save**.

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