Document Type

Online and offline access of Dynamics AX Service orders and time registration

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Document history

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1	Business case description	Georg Braun	4-12-2015

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1 Business case description

One customer wants to implement Micrsoft Dynamics AX2012 R3 (AX) or higher version and plans to use the Service Management module to create service orders for various of tasks for the service technitians. This task could be a repair of one machine or installation, maintanance etc.
To contact the service technitian it is needed to have a mobile application to push the service orders to the technitians with all the needed Information like Customer, Adress, Service order lines, Description etc. To do so, the customer wants to make use of mobile applications which can be deployed / used on smart phones and tablets.
The service technitian should be able to see the service orders which are scheduled for him as a worker but also be able to filter on other Service orders.
This orders must be available on the device online and offline, so that the technitian can still see all the required information of the service order even if he is offline.
The further requirement of the cusotmer is to post the required hours/time to the project id which represents the Service Order in Dynamics AX online and offline. This functionality already exist in the Winows standard App "Timesheets" / "Time and approval" and already works with Dynamics AX online and offline for smart phones.

1.1 Current Status and challenges

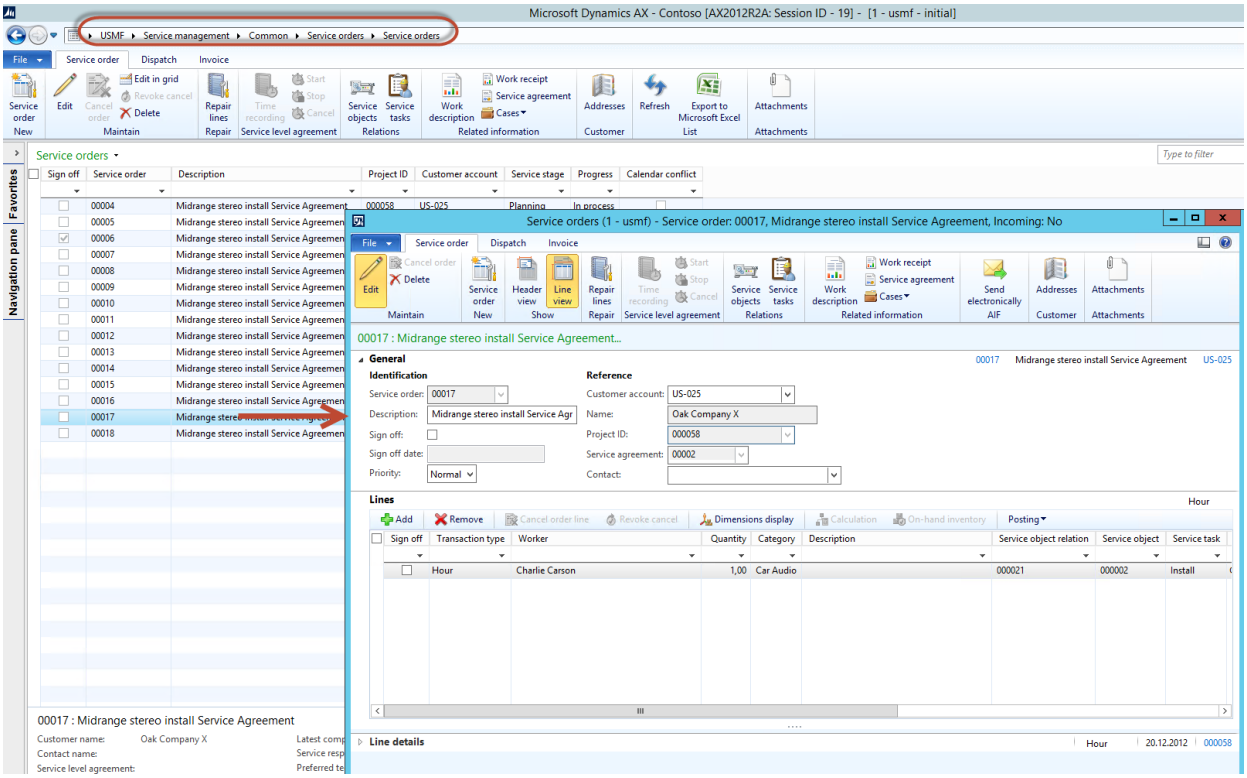
Besides the Enterprise Portal, Microsoft Dynamics AX does not have a mobile application for smart phones and tablets to access the Service Orders from the Service Management module.
The service orders in AX are connected to the project module and always have a project id. This project is important for all postings like hours, items etc. from the service technicians.
There are some apps available (see above chapter) where employees can register and transmit the hours required for a project and could help by understanding how the connection for time registration works.
There is no app available to access the service orders, which are connected to the project in dynamics AX.

1.2 Solution / ToDos

To fit the requirements of the customer, it is needed to design one mobile application to access Dynamics AX Service Management > Service orders
The service technician must be able to filter on the SO assigned to him.
All the required information should be available for him to download this service orders on his mobile application on the smartphone.
Additionally the time registration for the service tasks should be available offline as well, so the technicians can enter hours offline and sync them with the backend Dynamics AX as soon as the device is connected to the internet / wifi.

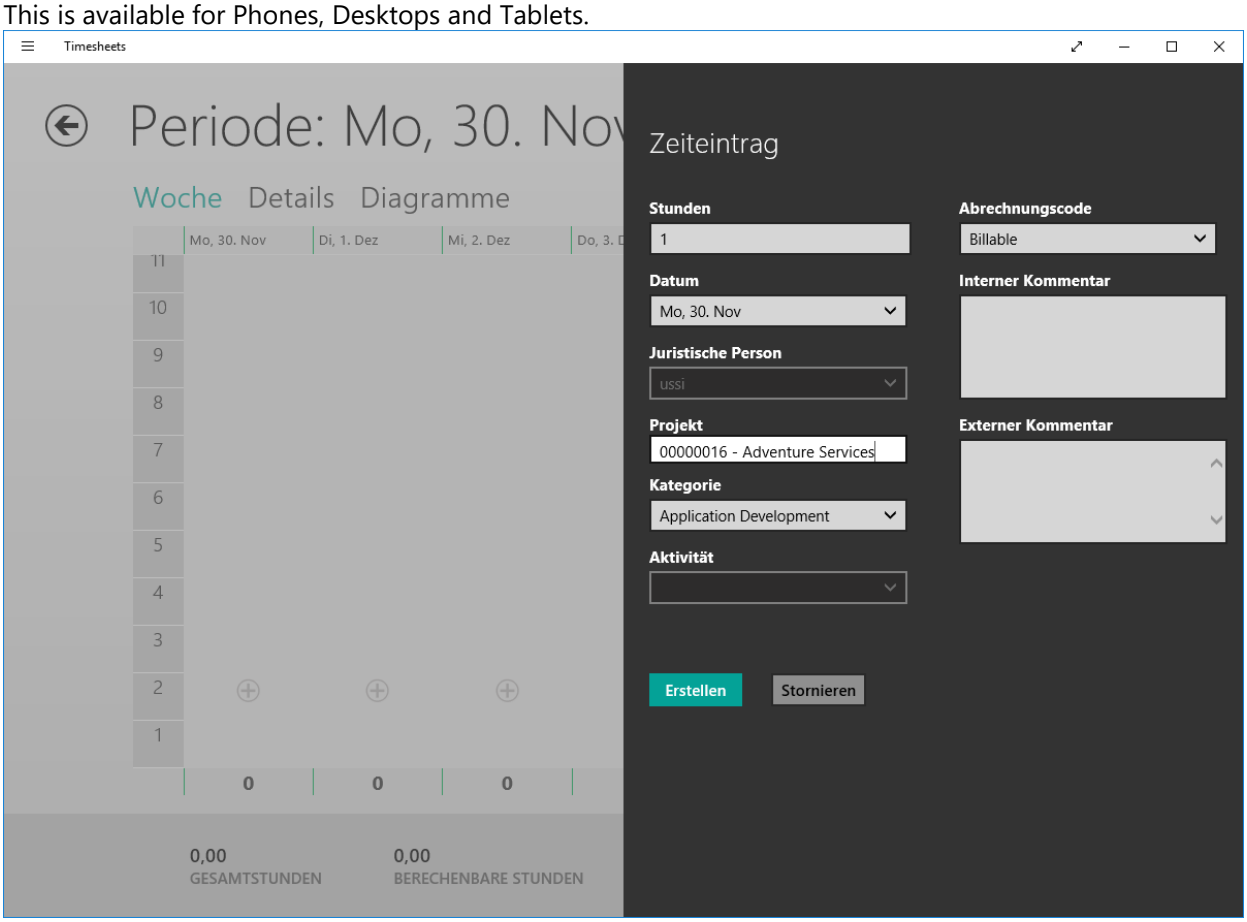
1.1.1 Standard Service Management Module in dynamics AX

Service Orders in Dynamics AX



Standard Windows Timesheet App

This is available for Phones, Desktops and Tablets.



1.1.2 Process Flow of how data has to be accessed by the mobile apps

