Enhanced Notes

For

Microsoft Dynamics™ GP2010, GP2013 and GP2015

User Guide

Elementz

Contents

Introduction

The Enhanced Notes add-on extends the standard Dynamics GP notes functionality by providing the user with the ability to retain many notes instead of a single note. It also allows the user to email the note and create a Dynamics task associated with the note.

The main features are:

- Multiple notes storage– each with author and time and date stamp
- Each note can be emailed to multiple recipients and/or groups
- Dynamics tasks can be associated with a note, assigned to another Dynamics user or User role and given a due date
- Retains all features of current notes including OLE container
- Existing notes are retained
- Notes categorisation for selective viewing
- Any individual note is not editable; changes are entered as a separate note, thus retaining an accurate history
- Each user’s ability to delete Dynamics notes is individually enabled
- A full print of the notes is available
- Enhancement is provided on transaction, record and window notes
- Can be selectively enabled for individual companies
- Notes attached to Quotes are automatically attached to Orders when the Transfer to Order function is used

Section 1: Setup Guide

Client Setup

This operation should be performed on each client installation where Enhanced Notes is to be used. The installation should be carried out by any user that has software installation rights, using the installation media supplied.

1. Double click on **Setup.msi**
2. Where multiple instances of GP are installed on a client, a list is presented and each instance must be installed separately.

Note: If Enhanced Notes has already been installed on an instance, Repair or Remove is offered instead of Install.

3. Follow the on-screen instructions to install, accepting the License agreement when prompted.
4. The first time Dynamics GP is started after installing Enhanced Notes there will be a reminder to include the new code.
5. Once a new version has been installed on the client the server setup steps below must be completed. Until the server setup has been completed Enhanced Notes will not be available on the client.

Server (Application) Setup

This activity is performed from within Dynamics GP, by any user having authority to create tables in the database.

Complete Installation

This step needs to be performed once for each company where Enhanced Notes is to be enabled. Power users will be prompted to complete the setup steps if a new version of enhanced notes is detected, or after an initial install.

1. From the Microsoft Dynamics GP menu, select **Tools** > **Setup** > **Company** > **Enhanced Notes** > **Complete Installation** > **Process** or **Tools** > **Setup** > **Enhanced Notes** > **Complete Installation** on GP2010

Registration

1. This step is completed once for the site and requires valid registration keys to be entered.

2. From the Microsoft Dynamics GP menu, select **Tools** > **Setup** > **Company** > **Enhanced Notes** > **Registration** or **Tools** > **Enhanced Notes** > **Registration** on GP2010**.** Enter the supplied Registration keys.

Note: The Enhanced Notes facility may be trialled using the Fabrikam Company without completing this stage.

Uninstalling Enhanced Notes

1. Double click on **Setup.msi,** select Remove, and follow the on-screen instructions. This action removes Enhanced Notes from all companies in one go.

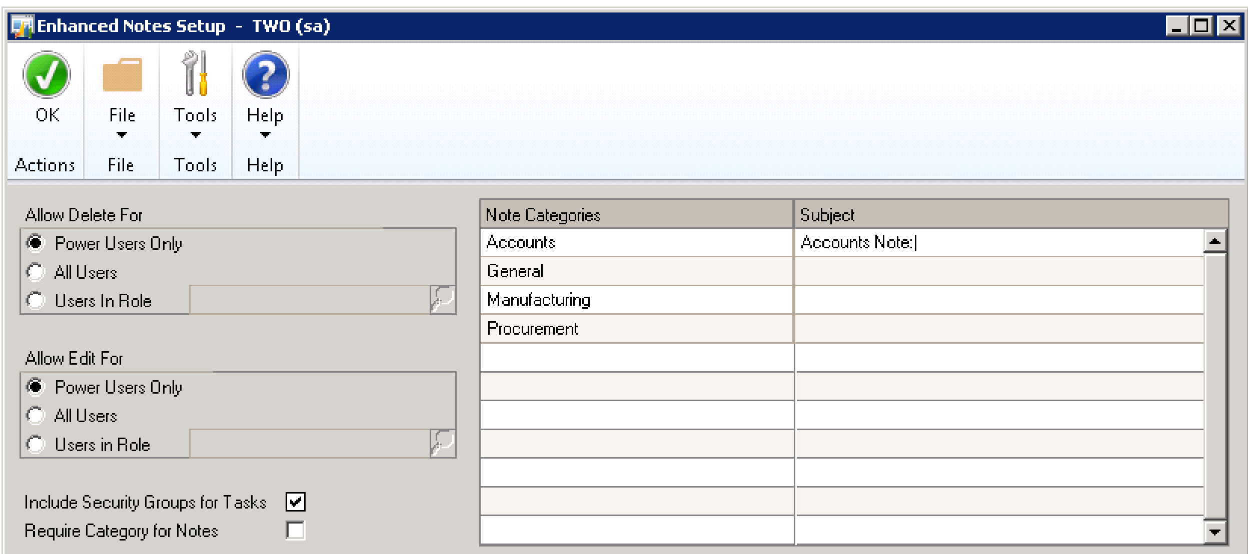
Note: Enhanced Notes can also be uninstalled using standard Windows Add/Remove Programs or Vista Programs and Features.

Section 2: Administrator's Guide

Enhanced Notes Setup

To perform this action the user must be a member of the POWERUSERS or ENHANCED NOTES SETUP security roles.

1. From the Microsoft Dynamics GP menu, click on **Tools** > **Setup** > **Company** > **Enhanced Notes** > **Setup Enhanced Notes** or **Tools** > **Setup** > **Enhanced Notes** > **Setup Enhanced Notes** on GP2010



To save all of your setup changes press the **OK** button on the toolbar. The new settings will be invoked the next time Microsoft Dynamics GP is started. Settings can be controlled as follows:

Delete Notes Permission Control (Allow Delete For)

By default, only members of the Poweruser security role, such as SA, have permission to delete individual note entries in the history panel, or all of the note entries. It is also possible to give delete permission to all users of the system, or a group of users within a security role.

1. Select the **All Users** radio button to allow delete for all users within the system. This will allow users to delete individual note entries, or all of the note entries.

2. Select the **Users in Role** radio button to allow only users within a selected security role permission to delete notes. Enter or lookup the name of the security role that contains users who can delete individual note entries, or all of note entries.

Edit Notes Permission Control (Allow Edit For)

By default, only members of the Poweruser security role, such as SA, have permission to edit individual note entries in the history panel. All users have permission to add new note entries, regardless of the edit permissions. It is also possible to give edit permission to all users of the system, or a group of users within a security role.

1. Select the **All Users** radio button to allow edit for all users within the system. This will allow users to edit individual note entries.

2. Select the **Users in Role** radio button to allow only users within a security role edit permission. Enter or lookup the name of the security role that contains users who will be able to edit individual note entries.

Note Categories Setup

1. **To add a note category** – type the category name in the list area. Optionally you can add a default value for the email subject. Press **Tab** to add another Category

2. **To delete a category** – right click on the entry in the list area, then from the **Edit** menu, select **Delete Row.**

Include Security Groups for Tasks

By default, tasks associated with notes can be assigned to individual users. Checking this option allows any task to be assigned to a selected Security Group.

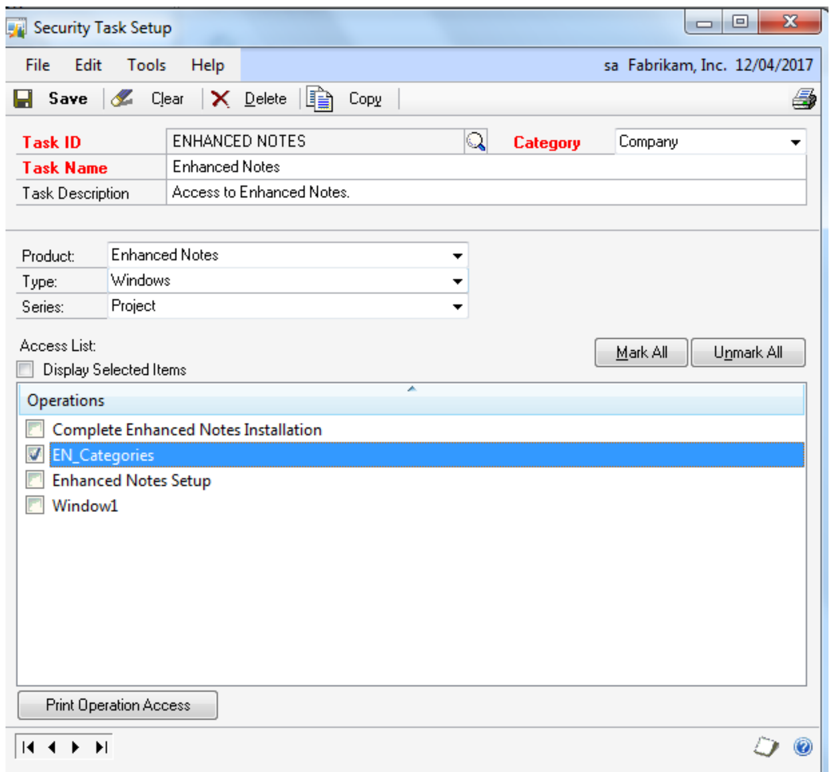
Require Category for Notes

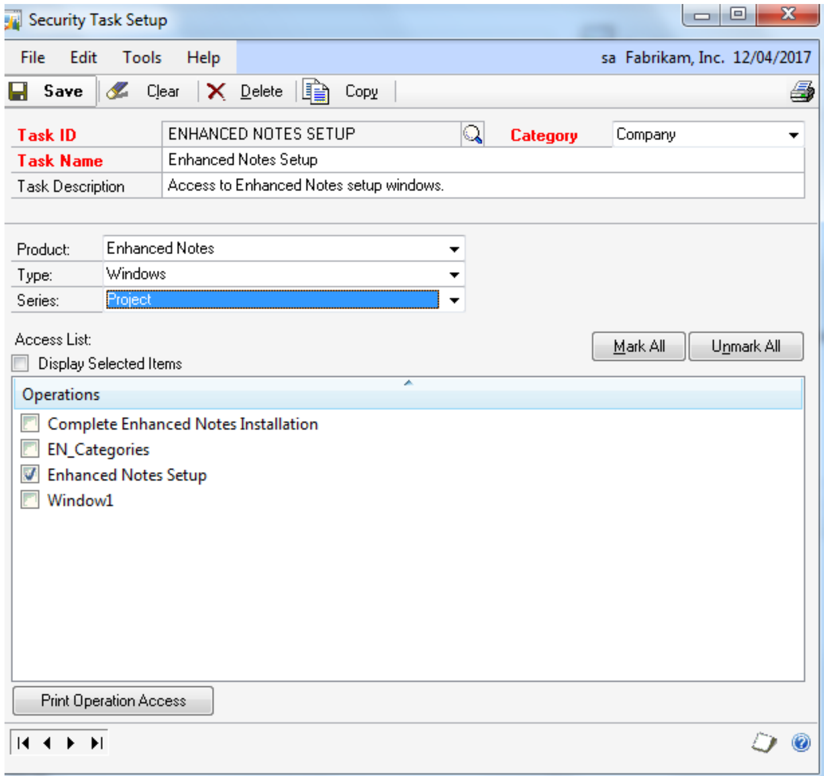
Enhanced Notes does not normally require a user to select a category. Checking this option will force a category to be assigned to all notes before they are saved.

User Administration

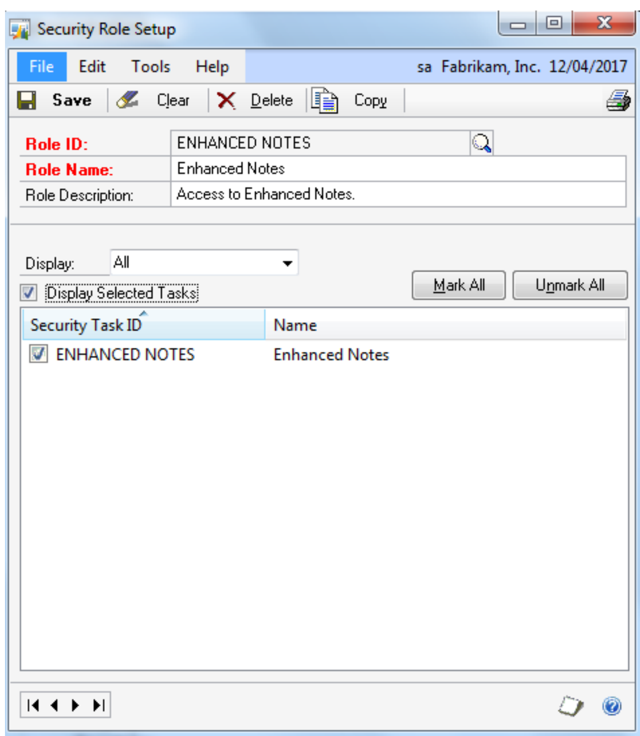
During installation new Tasks and Roles are created to manage Enhanced Notes security. A Security Role called Enhanced Notes is automatically assigned to all users in all companies. Administrators will need to assign the Enhanced Notes Setup Role to Administrators.

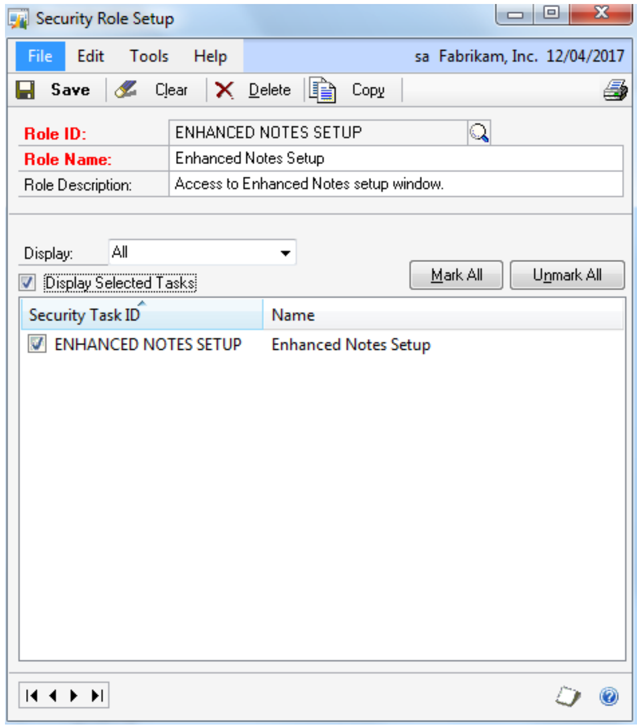
Enhanced Notes Tasks





Enhanced Notes Roles

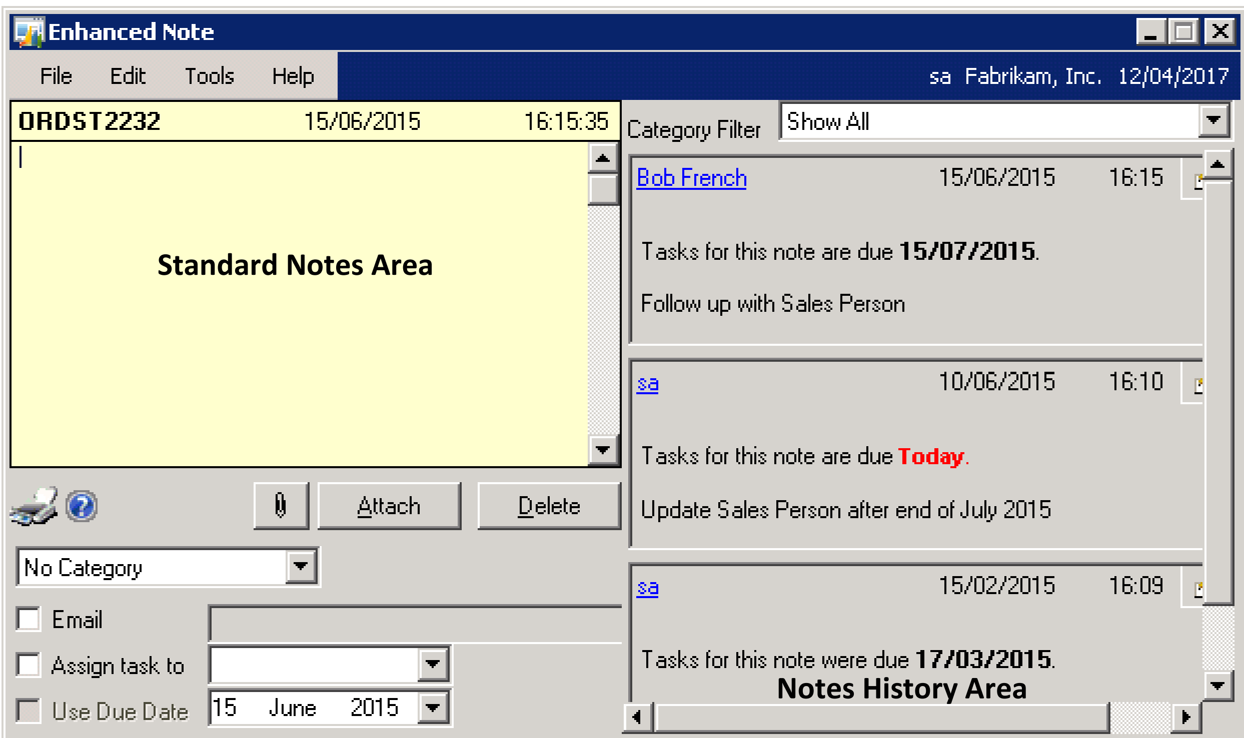



Security Role Setup
File
Edit
Tools
Help
sa Fabrikam, Inc. 12/04/2017
Save
Clear
Delete
Copy
Role ID:
ENHANCED NOTES SETUP
Role Name:
Enhanced Notes Setup
Role Description:
Access to Enhanced Notes setup window.
Display:
All
Display Selected Tasks
Mark All
Unmark All
Security Task ID
Name
ENHANCED NOTES SETUP
Enhanced Notes Setup

Section 3: User's Guide, Desktop Clients

ISC Software Solutions Enhanced Notes is accessed using standard Dynamics GP methods for accessing the Notes feature.

Enhanced Note Window



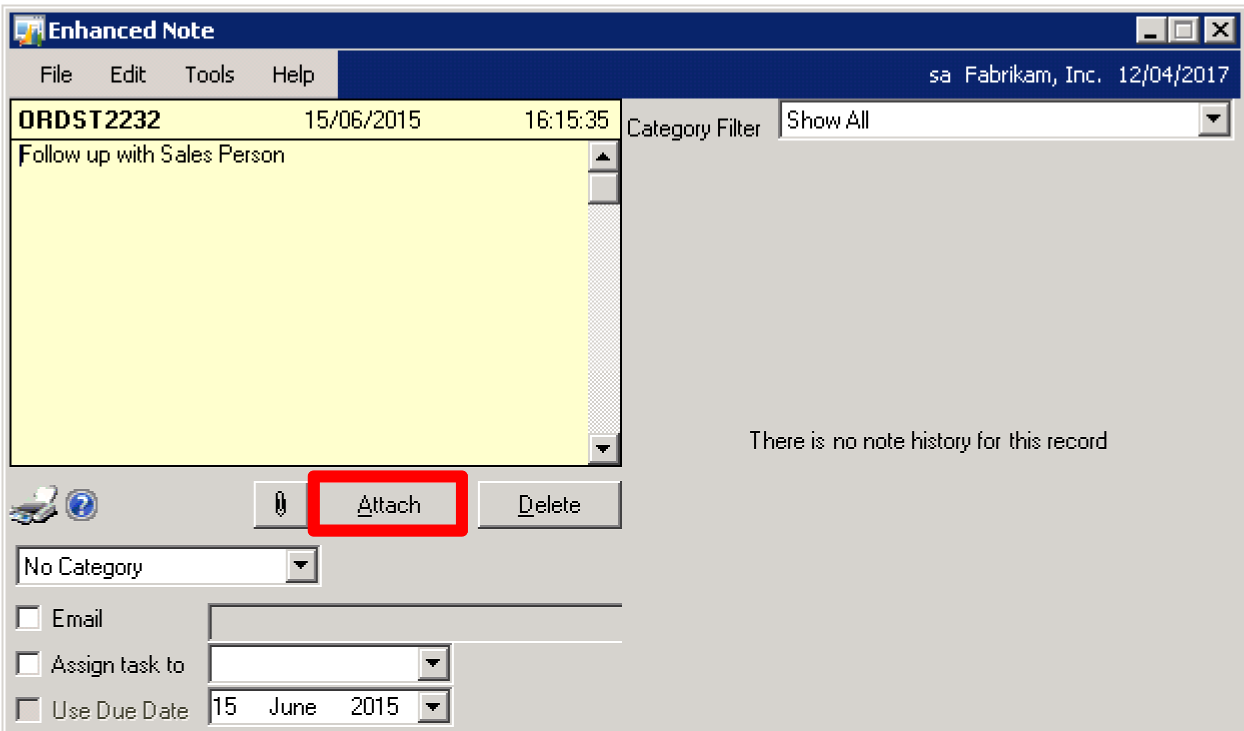
Note: This window shows a user with edit and delete permissions

Transferring an existing note (pre Enhanced Notes installation) to History

Any notes information in the system prior to the Enhanced Notes Package being installed can be retained as the first entry in history by using the **Attach** button and selecting not to process any additional options.

The original note will be transferred to become the first history entry.

Inserting/Adding a Note



Type a new note using the standard method, and then click **Attach.**

Notes:

The most recent Note will appear at the top of the Notes History area.
Each Note can be a maximum of 2kbyte in size
The system capacity is the only limit on the number of Notes that can be stored.
Notes can only be edited by authorized users once they are stored in History

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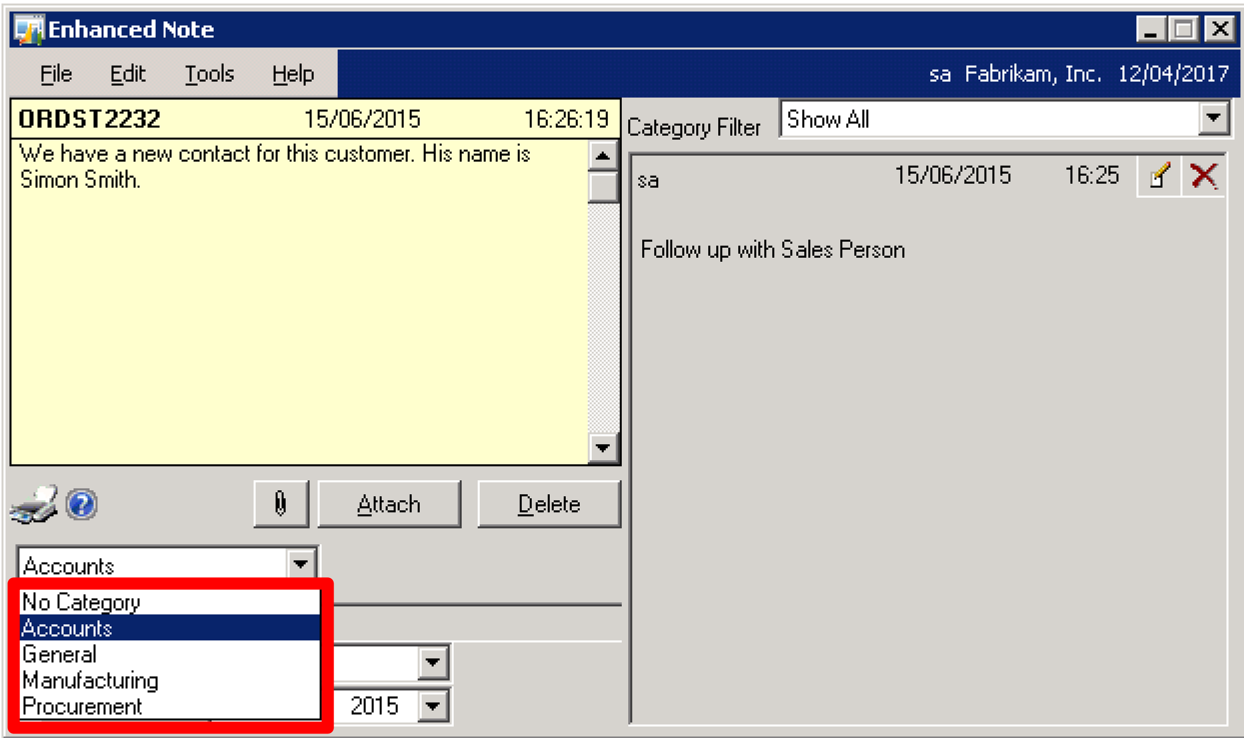
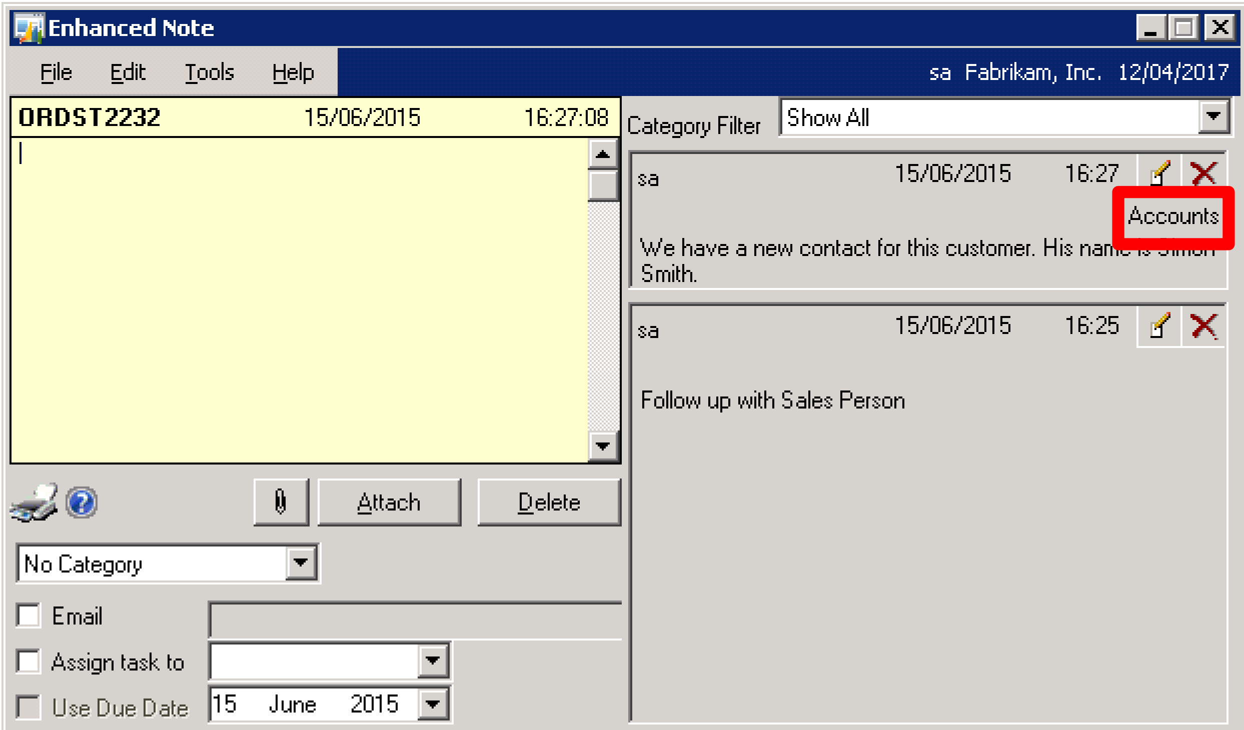
Categorising Notes

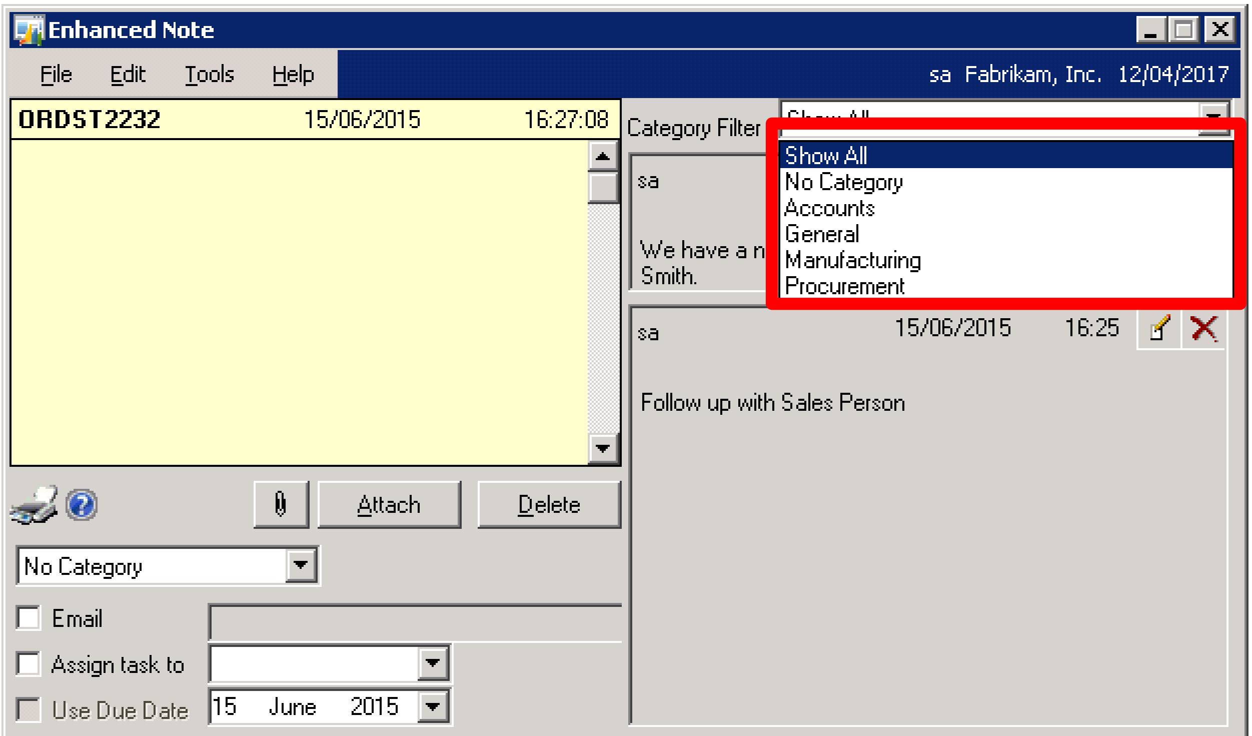


To assign a category to a note, select the category from the drop down list under the notes input area **before attaching** it. If the option to require categories has been setup the user will not be able to save the note without selecting a category.



The category of each note is then displayed for each note.

Filtering notes to display those with a particular category



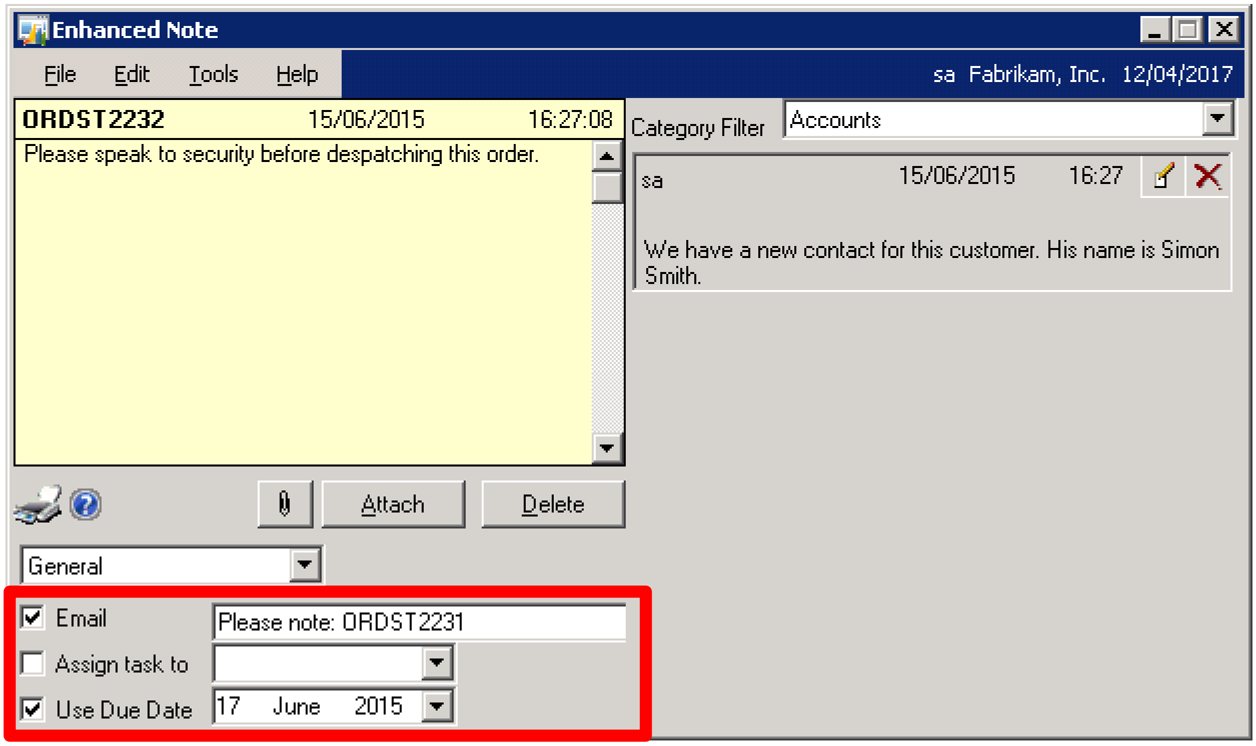
Select the required category from the drop down Category Filter list above the notes history area.

Notes:

'Show All' *is the default category displaying all notes with and without a set category*

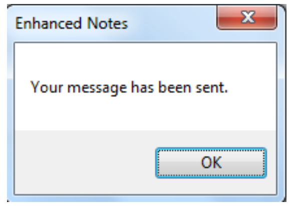
'No category' *displays those notes without a set category*

Sending a note as an email



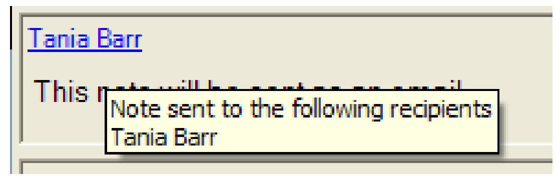
Note. A Note cannot be emailed once it has been attached.

1. Enter the Note text in the usual way.
2. Select the Email option **before** the Note is attached.
3. Enter a subject for the email. If there is a default subject assigned to the category it will be populated in the text box. Leave the text box empty for the default subject.
4. If you wish to include a **Due Date** on the email, then select the **Use Due Date** option and pick a date from the calendar. *(Please refer to Due Dates on Page 18)*
5. Click the **Attach** button. This opens the user's address book.
6. Select the recipient(s) and click **OK**. A message is displayed confirming the email has been sent.

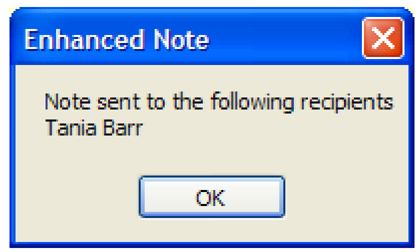


7. Any note that has been sent as an email is shown in the Enhanced Notes History area with the Author name as a hyperlink.

Hover on the hyperlink to briefly view details of the recipient(s)

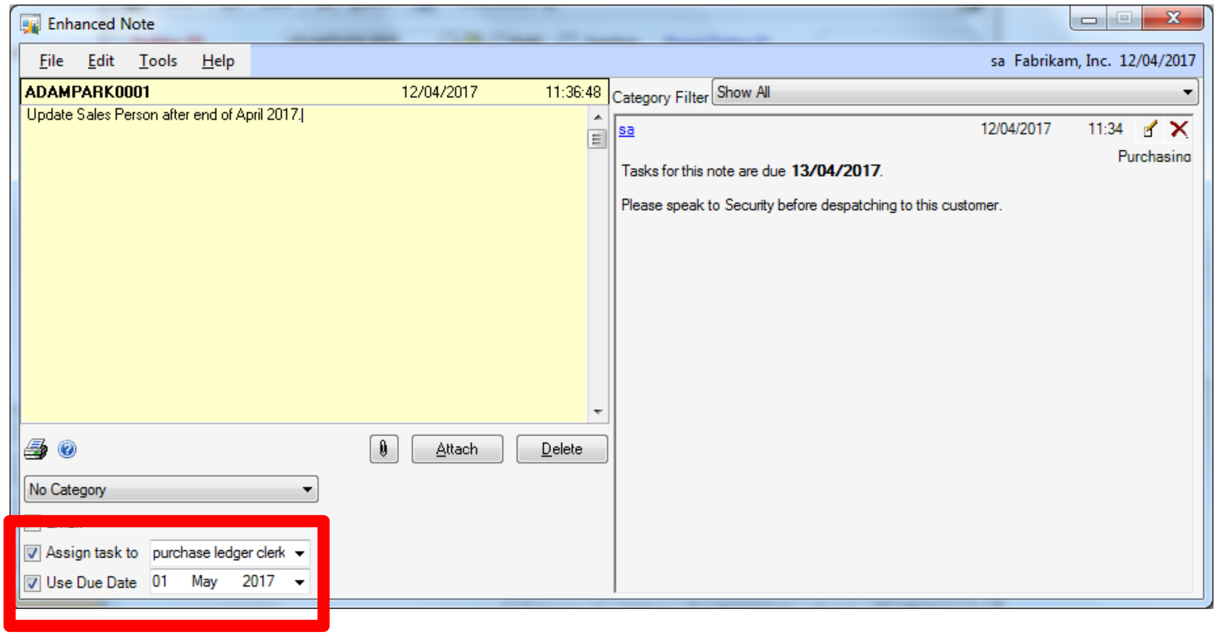


Click on the hyperlink to display details of the recipients until OK is clicked.



Note: The displayed list of recipients will include those included in the To: and Cc: fields but will ***NOT*** *display any recipients listed in the Bcc: field.*

Setting the note as a Dynamics GP task



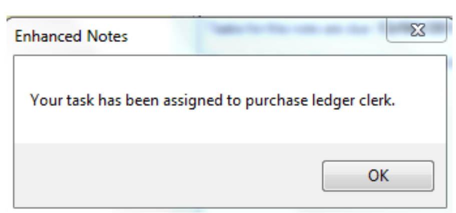
Note. A Note cannot be assigned to a task once it has been attached.

1. Enter the Note text in the usual way.

2. Check **Assign task to** and pick an individual or a Security group. (The capability to assign a Note task to a Security group must have been previously enabled in Setup.)

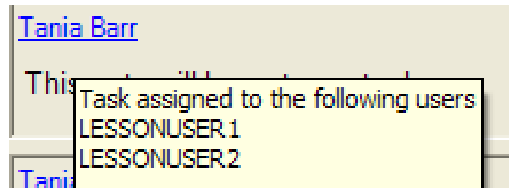
3. If you wish to include a **Due Date** on the Task, then select the **Use Due Date** option and pick a date from the calendar. *(Please refer to Due Dates on Page 18)*

4. Click the **Attach** button. When the Note is attached, successful assignment of the task is indicated and the task will appear in the assignees Dynamics GP Home page, To Do area.



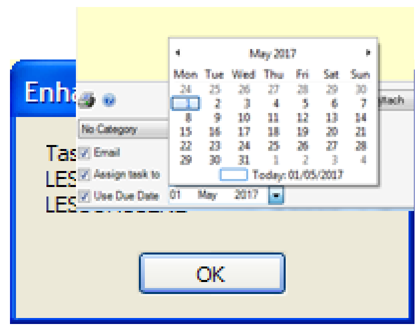
5. Any note that has been assigned as a task is shown in the Enhanced Notes Extension area with the Author name as a hyperlink

Hover on the hyperlink to briefly view details of the users that have had the task assigned



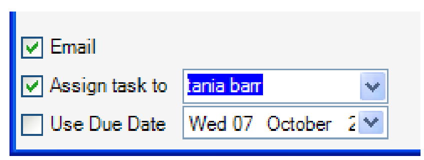
Note: Members of a user role group will be listed individually

Click on the hyperlink to display details of the users that have been assigned the task and click OK to close the window.



Sending an email to inform a user of a Note task assignment

Check both the **Email** and **Assign task to** options



Due Dates

Adding a due date to a note sent as an email or assigned as a task

Check **Use Due Date** and select the due date for the note from the drop down calendar.

The note is then sent as an email and/or assigned as a task as usual.

Due date indication in Notes history

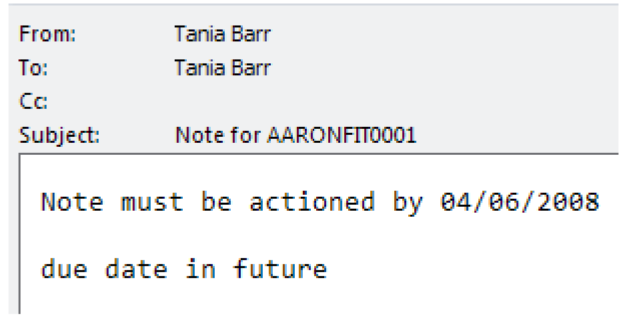
Due dates in the future are shown as 'are due **<date in black>'**

Tasks due today are shown as **'**are due **<Today in red>**'

When the due date is passed the Note will show **'**were due **<date in black>'**

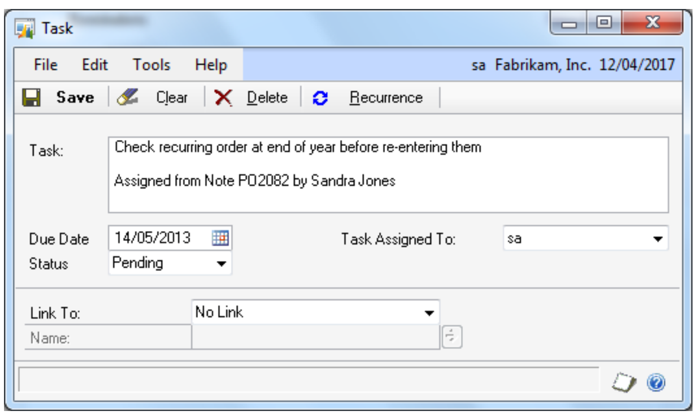
Due date indication in Notes emails

The due date requirement is inserted as a line at the top of the email with the Notes text below



Due date indication in Assigned Notes Tasks

The Due Date set in the Note will set the Due Date in the Assigned task



Note: Details of who created the task and the related note name are also automatically added to the task.

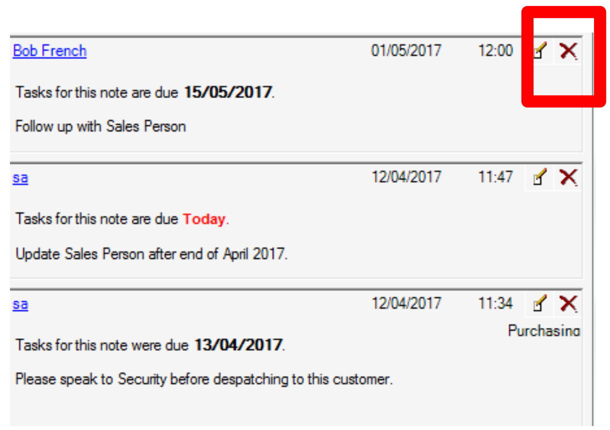
Deleting Notes

Note: Users can only delete notes if they have been given permission.

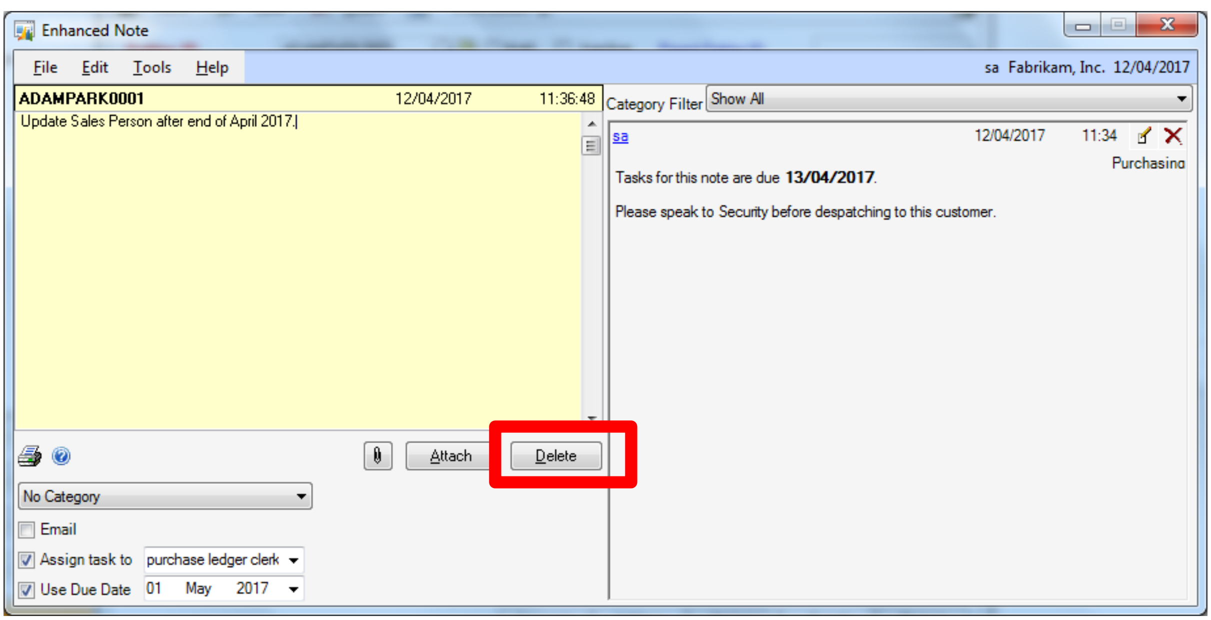
Deleting Individual Notes

Each note has an individual **Delete** button

When the last Note is deleted it will continue to appear in the main area until it is deleted using the main area **Delete** button



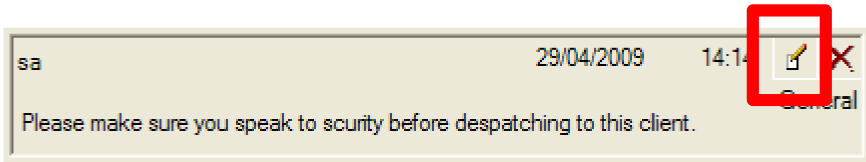
Deleting All Notes



All notes in History can be deleted in a single operation using the main area **Delete** button.

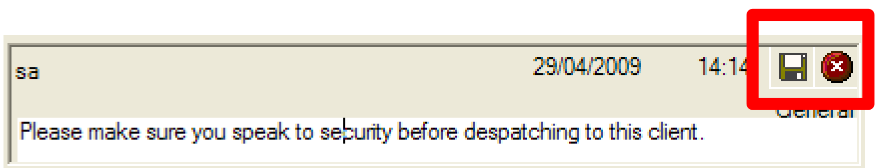
Editing Historical Notes

Note: Users can only edit notes if they have been given permission.

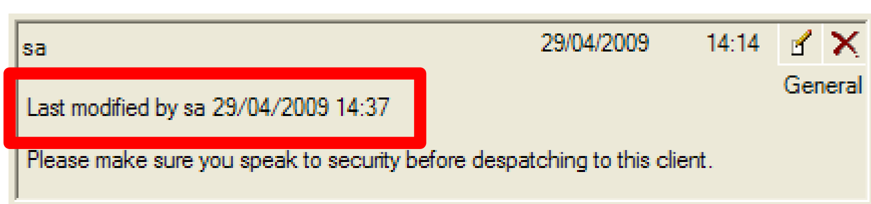


1. If the user has the authority to edit the text in note entries in the history window they can click on the edit button, this will swap the note item to edit mode.

2. When the display is in edit mode you can only view the note text. Any details regarding due date or previous maintenance are not displayed.



3. After making your changes press the save button. To cancel editing the note entry, press the cancel button. When the save button is pressed the changes will be saved to the note entry. A log will also be displayed of who last edited a note entry.



OLE container (GP2010)

The standard functionality is retained in Enhanced Notes, allowing one OLE item to be attached to the Note.

Document Attachments (GP2013 & GP2015)

The standard notes function for attaching documents to notes is supported in Enhanced Notes.

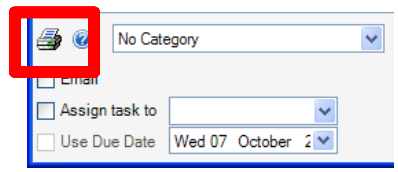
Enhanced Window Notes

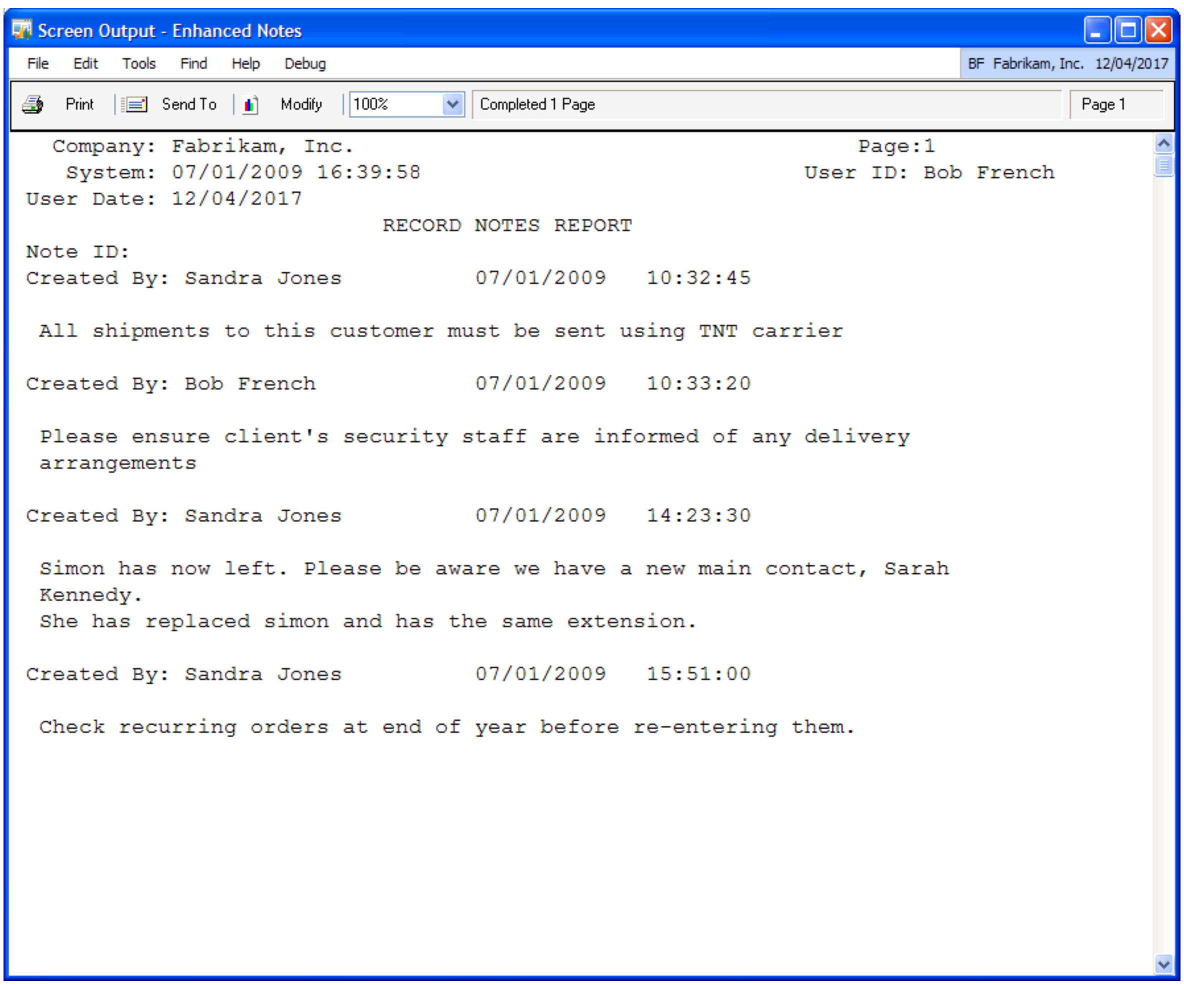
All Enhanced Notes features for Record Notes are also available for Windows Notes.

Section 4: Printing Enhanced Notes

Printing notes history

Use the Print button in the Notes window to print the full notes history.






```
  Company: Fabrikam, Inc.                                      Page:1
   System: 07/01/2009 16:39:58                             User ID: Bob French
User Date: 12/04/2017
                           RECORD NOTES REPORT
Note ID:
Created By: Sandra Jones          07/01/2009   10:32:45

 All shipments to this customer must be sent using TNT carrier

Created By: Bob French            07/01/2009   10:33:20

 Please ensure client's security staff are informed of any delivery
 arrangements

Created By: Sandra Jones          07/01/2009   14:23:30

 Simon has now left. Please be aware we have a new main contact, Sarah
 Kennedy.
 She has replaced simon and has the same extension.

Created By: Sandra Jones          07/01/2009   15:51:00

 Check recurring orders at end of year before re-entering them.
```

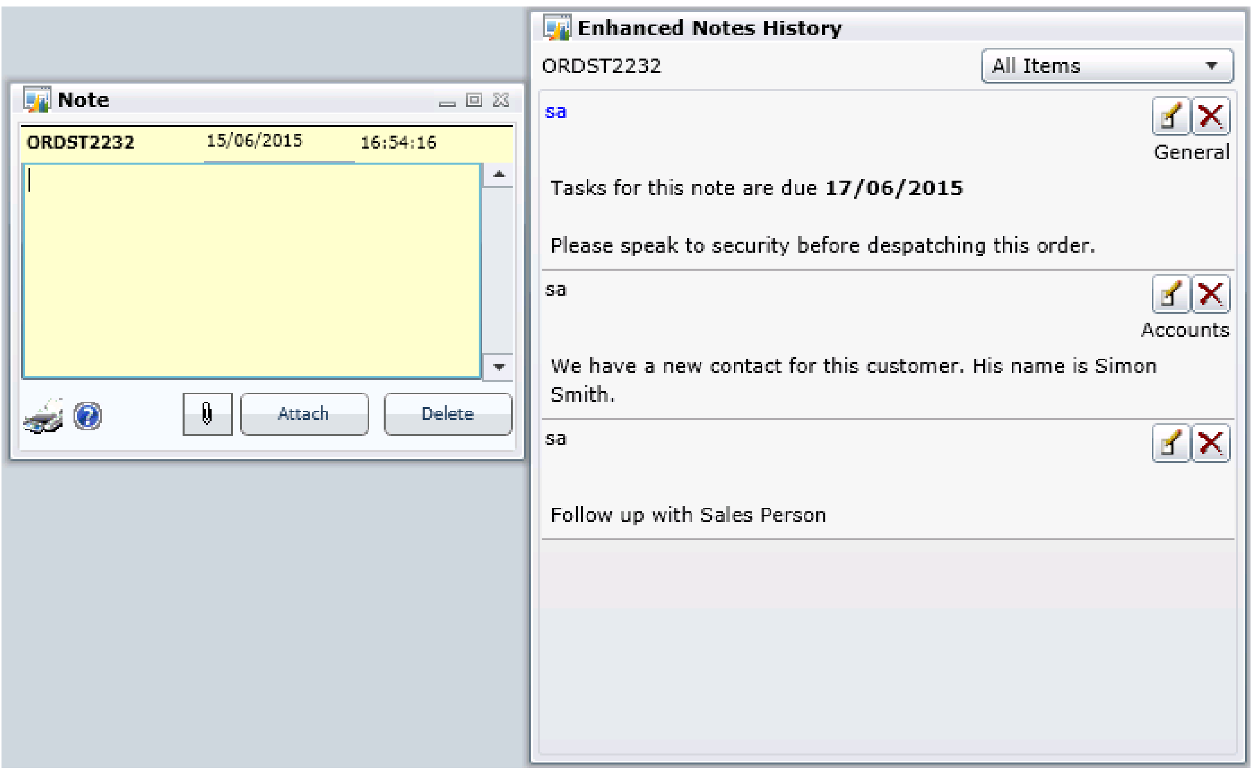
Section 5: Web Client Differences (GP2013 & GP2015)

Enhanced Notes is also supported in the new Web Client that was made available in Dynamics GP2013 and GP2015. Because of some technical differences between the Desktop and Web client Enhanced Notes operates slightly differently.

All setup and configuration tasks are identical in both the Desktop and Web Client. The changes are only related to how notes are displayed and added.

Note History View

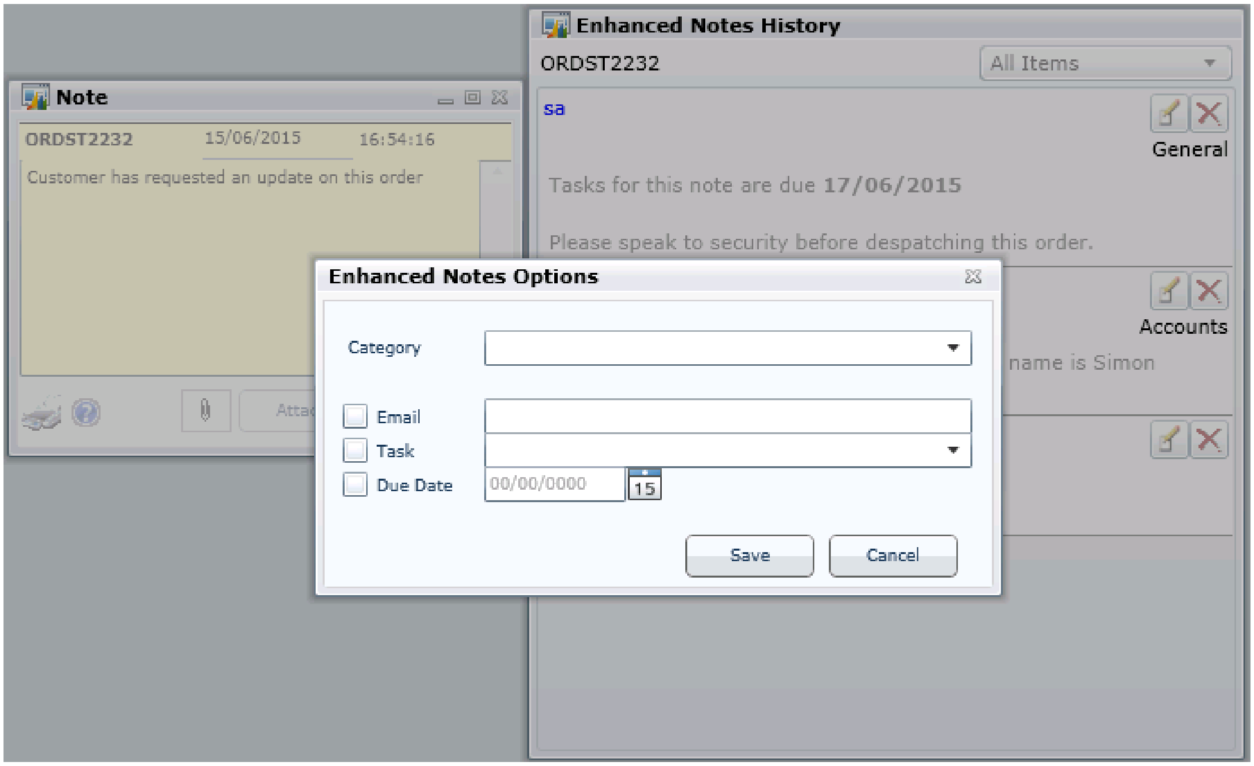
When a note is opened in the Web Client you will see the following.



There is a standard note window with a note history window next to it. The note history window follows the note window around the screen if it is moved.

Attaching a Note

When you attach a note in the Web Client a separate dialog is displayed for selecting the category, email and task options.



From this window the Category can be selected and the email and task can be assigned if required. The email and task process is identical to the desktop client. Press save to finish attaching the note.