

Enhanced Notes

For
Microsoft Dynamics™ GP10, GP2010
and GP2013

User Guide



Elementz

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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. From the Microsoft Dynamics GP menu, select Tools > Setup > Enhanced Notes > **Complete Installation**. Select **Process**.
6. Installation of Enhanced Notes must be completed in each company. A prompt is displayed when switching to a different company. Answering Yes to the prompt opens the **Complete Installation** window. Select **Process**.

Server (Application) Setup

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

Build Tables

This step needs to be performed once for each company where Enhanced Notes is to be enabled.

1. From the Microsoft Dynamics GP menu, select **Tools > Setup > Enhanced Notes > Build Enhanced Notes Tables > Process**

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 > Enhanced Notes > Registration**. 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 > Enhanced Notes > Setup Enhanced Notes**

The screenshot shows the 'Enhanced Notes Setup' window. The 'Allow Delete For' section has 'Power Users Only' selected. The 'Allow Edit For' section also has 'Power Users Only' selected. The 'Include Security Groups for Tasks' checkbox is unchecked. The 'Note Categories' list on the right contains 'Accounts', 'General', 'Manufacturing', and 'Procurement'.

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.

SECTION 2 ADMINISTRATOR'S GUIDE

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. 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.

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

The screenshot shows the 'Security Task Setup' window. At the top, there is a menu bar with 'File', 'Edit', 'Tools', and 'Help'. Below the menu bar is a toolbar with icons for 'Save', 'Clear', 'Delete', and 'Copy'. The main area contains a form for configuring a task. The 'Task ID' field is set to 'ENHANCED NOTES'. The 'Task Name' field is set to 'Enhanced Notes'. The 'Task Description' field is set to 'Access to Enhanced Notes.'. The 'Category' dropdown is set to 'Company'. Below these fields, there are three dropdown menus: 'Product' set to 'Enhanced Notes', 'Type' set to 'Windows', and 'Series' set to 'Project'. To the right of these dropdowns are two buttons: 'Mark All' and 'Unmark All'. Below the dropdowns is a section titled 'Access List' with a checkbox labeled 'Display Selected Items'. Below this is a list of operations with checkboxes: 'Complete Enhanced Notes Installation', 'EN_Categories' (which is checked and highlighted in blue), 'Enhanced Notes Setup', and 'Window1'. At the bottom of the window is a button labeled 'Print Operation Access' and a status bar with navigation icons.

Task ID	ENHANCED NOTES	Category	Company
Task Name	Enhanced Notes		
Task Description	Access to Enhanced Notes.		

Product: Enhanced Notes
 Type: Windows
 Series: Project

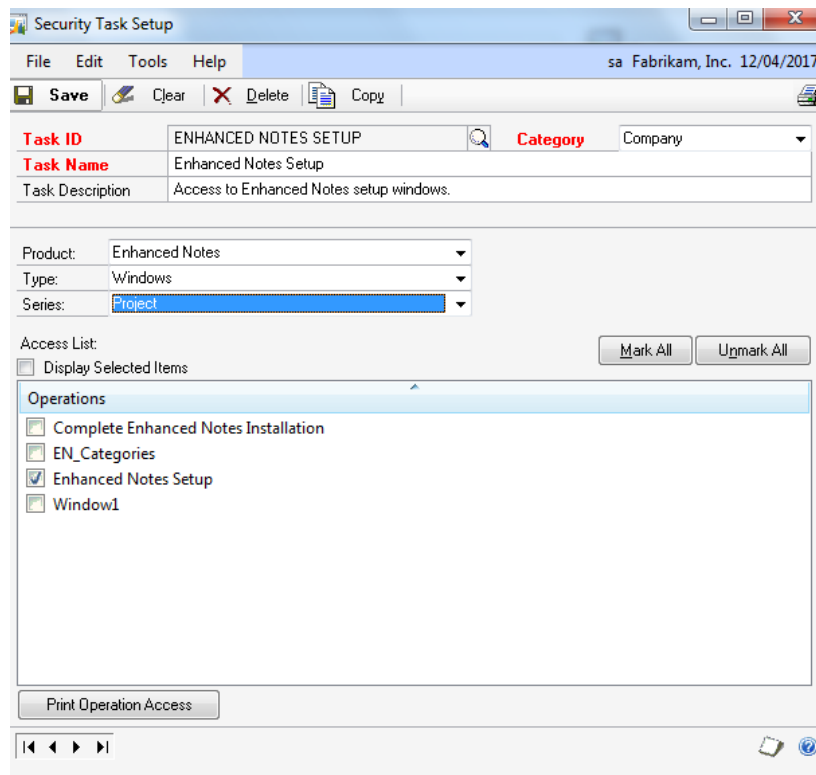
Access List:
☐ Display Selected Items

Operations

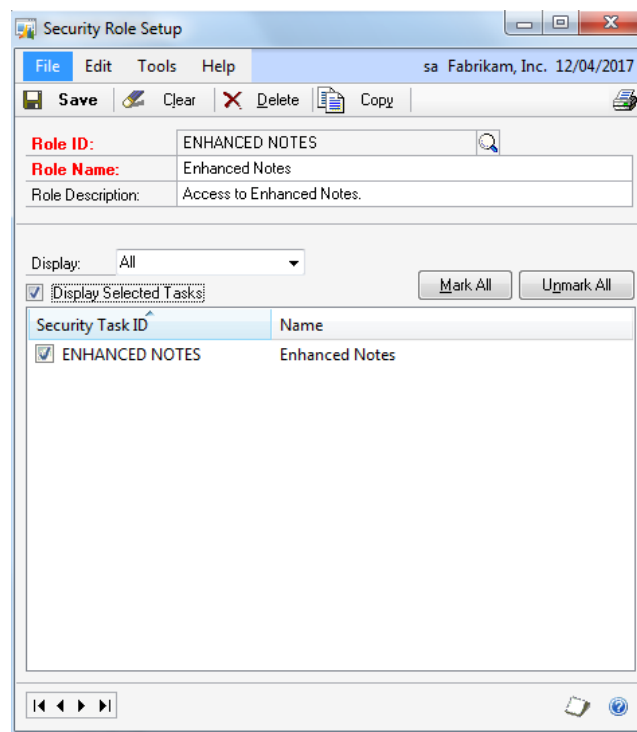
- ☐ Complete Enhanced Notes Installation
- ☒ EN_Categories
- ☐ Enhanced Notes Setup
- ☐ Window1

Print Operation Access

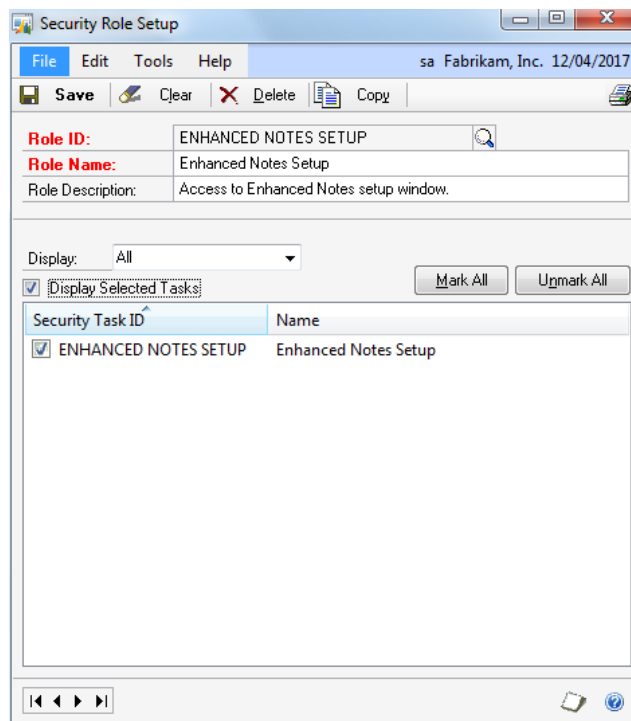
SECTION 2 ADMINISTRATOR'S GUIDE



Enhanced Notes Roles



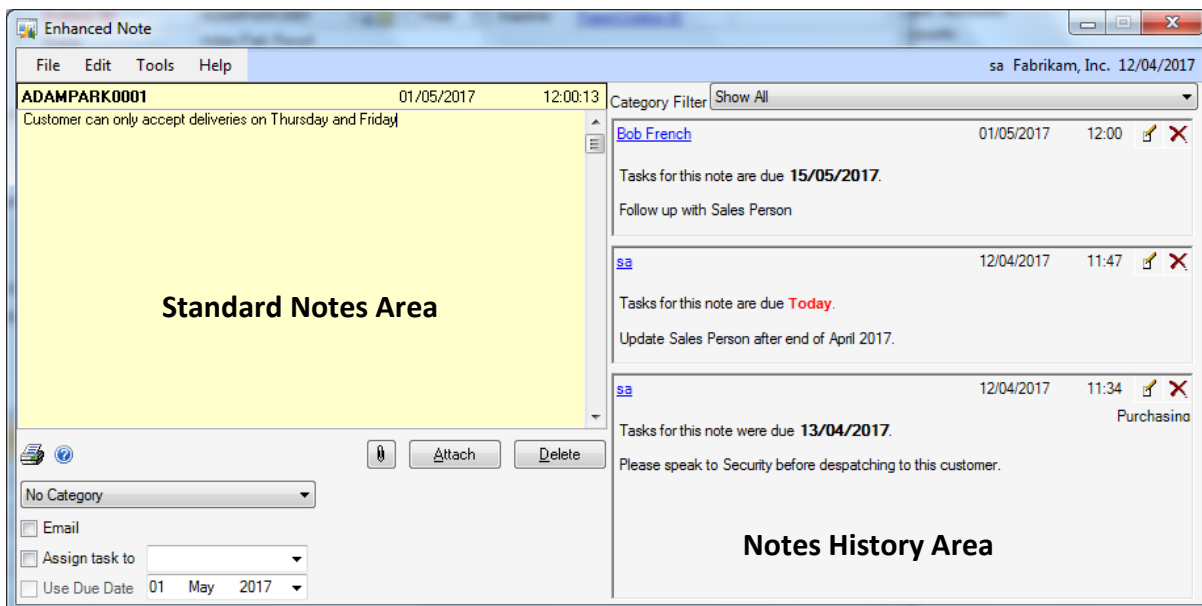
SECTION 2 ADMINISTRATOR'S GUIDE



Section 3: User's Guide

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

Enhanced Note Window



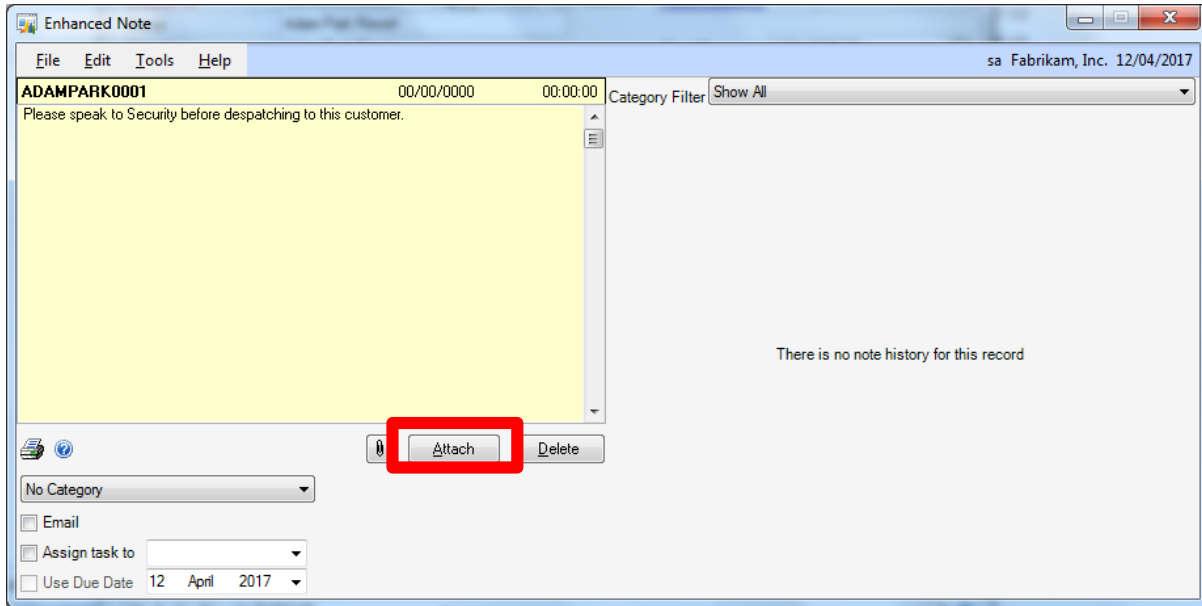
Note: This window shows a user with edit and delete permissions

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:

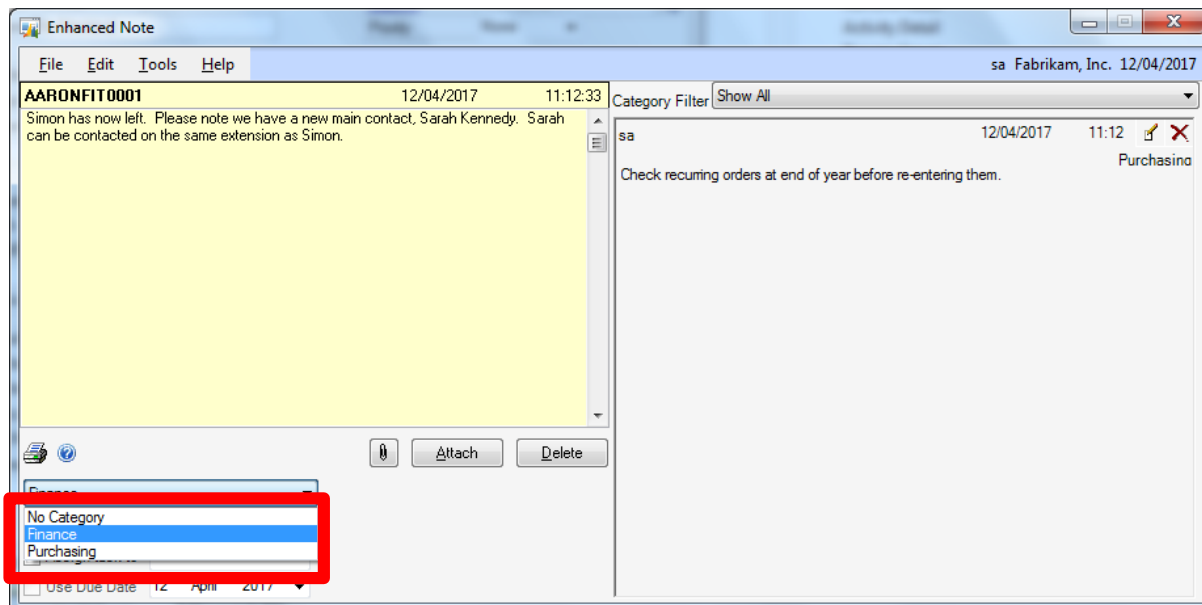
The most recent Note will appear at the top of the Notes History area.

Each Note can be a maximum of 2kbyte in size

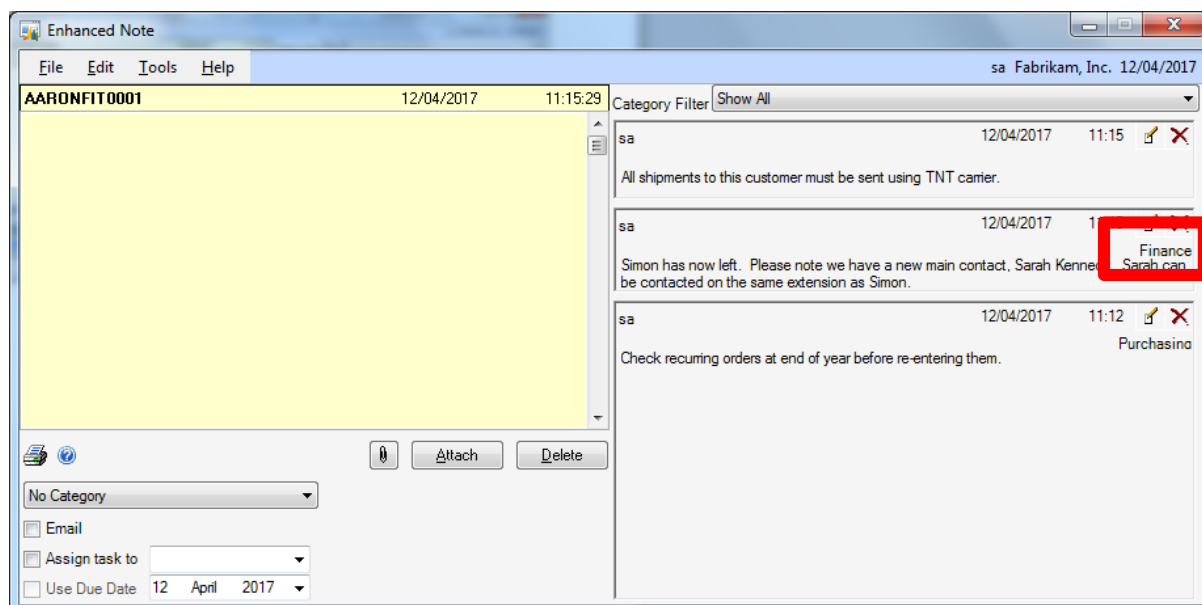
The system capacity is the only limit on the number of Notes that can be stored.

Notes can only be edited by authorized users once they are stored in History

Categorising Notes

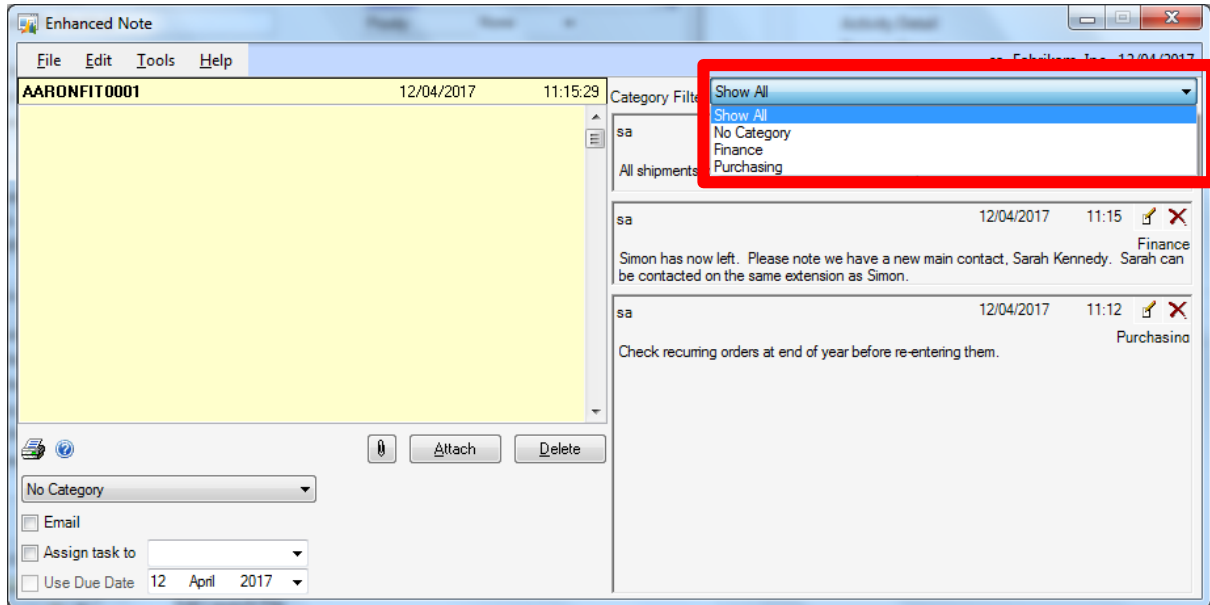


To assign a category to a note, select the category from the drop down list under the notes input area **before** attaching it.



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

Filtering notes to display those with a particular category



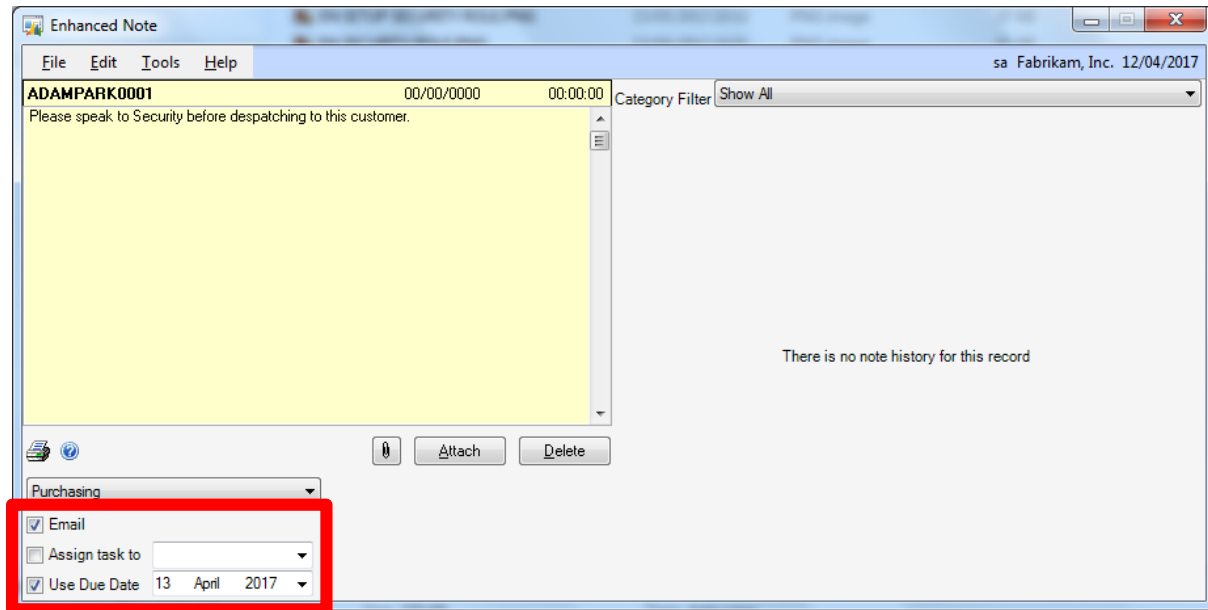
Select the required category from the drop down Category Filter list above the notes history area.

Notes:

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

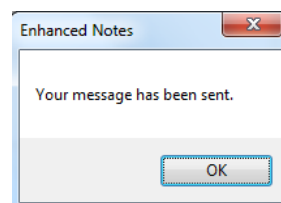
***'No category'** displays those notes without a set category*

Sending a note as an email



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

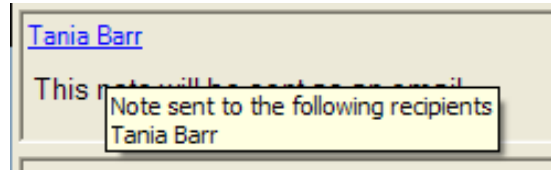
1. Enter the Note text in the usual way.
2. Select the Email option **before** the Note is attached.
3. If you wish to include a **Due Date** on the email, then select the **Use Due Date** option and pick a date from the calendar. *(Please refer to Due Dates on Page 18)*
4. Click the **Attach** button.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



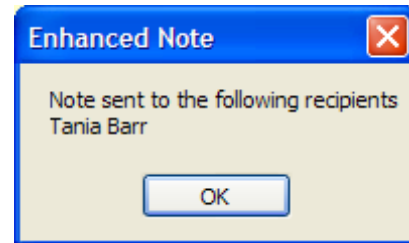
6. Any note that has been sent as an email is shown in the Enhanced Notes History area with the Author name as a hyperlink.

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

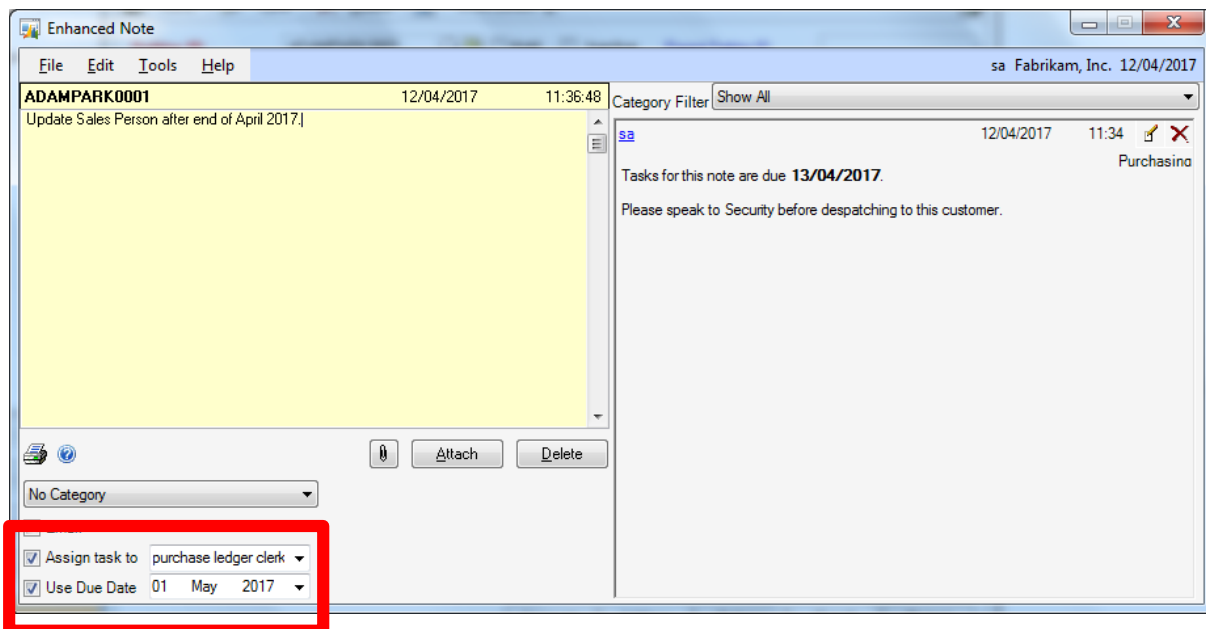


Click on the hyperlink to display details of the recipients until OK is clicked.



*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.*

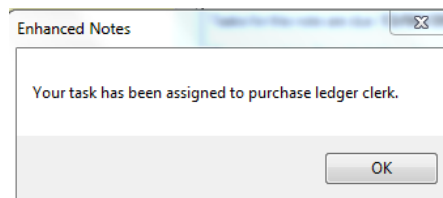
Setting the note as a Dynamics GP task



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

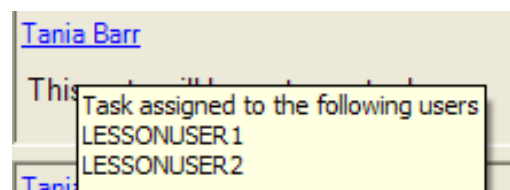
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1. Enter the Note text in the usual way.
2. Check **Assign task to** and pick an individual or a Security group. (The capability to assign a Note task to a Security group must have been previously enabled in Setup.)
3. If you wish to include a **Due 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.



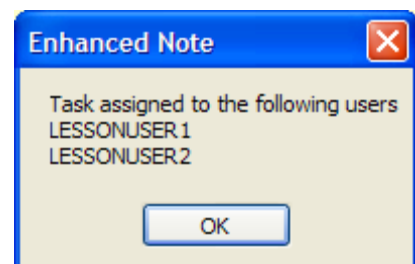
5. Any note that has been assigned as a task is shown in the Enhanced Notes Extension area with the Author name as a hyperlink

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



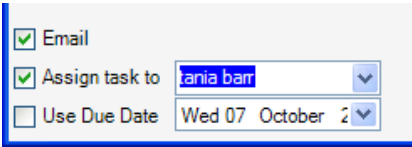
Note: *Members of a user role group will be listed individually*

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

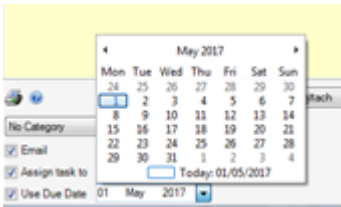


A screenshot of a software interface showing three options for task assignment. The first option, 'Email', is checked with a green box. The second option, 'Assign task to', is also checked and has a dropdown menu showing 'ania barr'. The third option, 'Use Due Date', is unchecked. To the right of this option is a date selector showing 'Wed 07 October 2'.

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.



A screenshot of a calendar interface for May 2017. The calendar shows days of the week and dates. A dropdown menu is open, showing a list of dates from 1 to 31. The date '01' is selected, and the text 'Today: 01/05/2017' is displayed below the 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>**’

Bob French	01/05/2017	12:00		
Tasks for this note are due 15/05/2017 .				
Follow up with Sales Person				
sa	12/04/2017	11:47		
Tasks for this note are due Today .				
Update Sales Person after end of April 2017.				
sa	12/04/2017	11:34		
Tasks for this note were due 13/04/2017 .				
Please speak to Security before despatching to this customer.				
Purchasing				

Due date indication in Notes emails

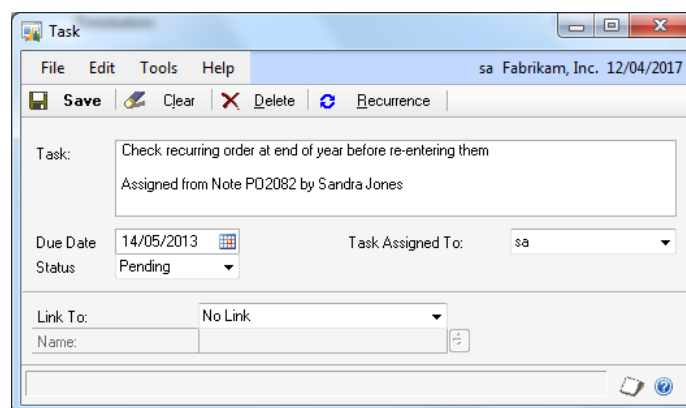
The due date requirement is inserted as a line at the top of the email with the Notes text below

From: Tania Barr
To: Tania Barr
Cc:
Subject: Note for AARONFIT0001

Note must be actioned by 04/06/2008
due date in future

Due date indication in Assigned Notes Tasks

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



The screenshot shows a 'Task' window with a menu bar (File, Edit, Tools, Help) and a toolbar (Save, Clear, Delete, Recurrence). The task description is 'Check recurring order at end of year before re-entering them' and 'Assigned from Note P02082 by Sandra Jones'. The 'Due Date' is set to '14/05/2013' with a calendar icon, and the 'Status' is 'Pending'. The 'Task Assigned To' is 'sa'. The 'Link To' is 'No Link' and the 'Name' field is empty.

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.

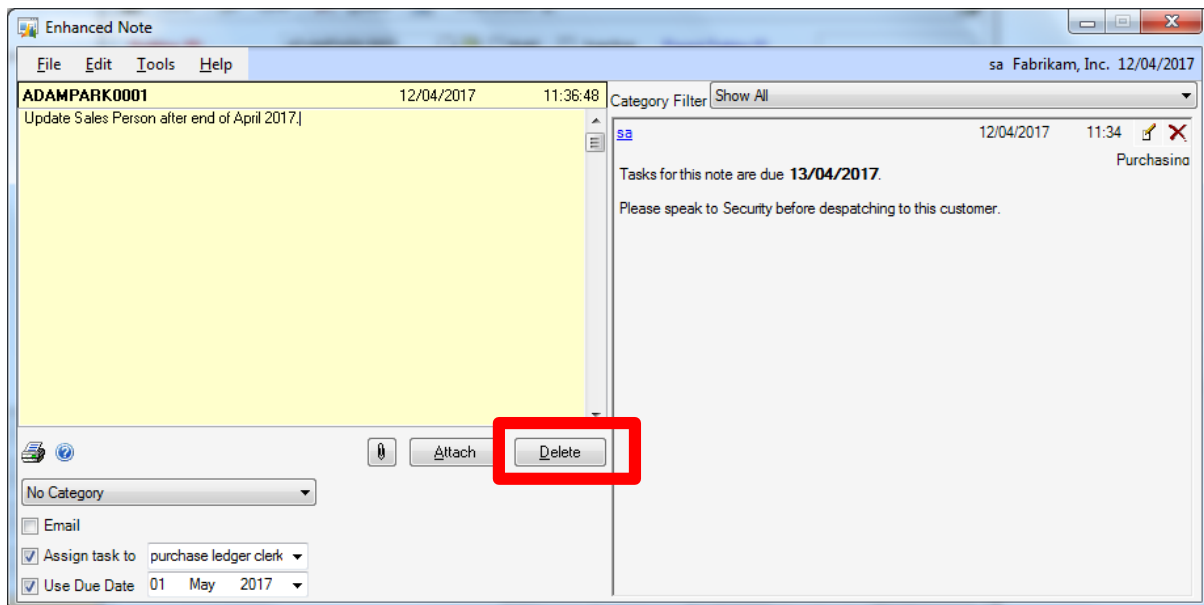
Deleting Individual Notes

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



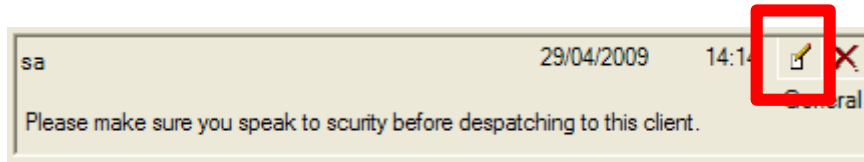
Deleting All Notes



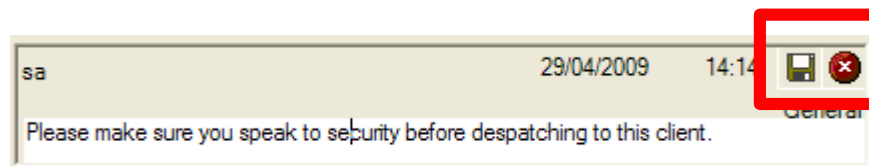
All notes in History can be deleted in a single operation using the main area **Delete** button.

Editing Historical Notes

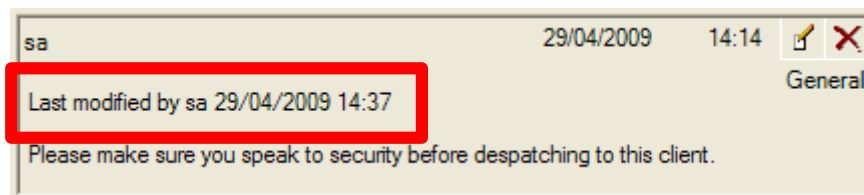
Note: Users can only edit notes if they have been given permission.



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

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

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.

