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Introduction

SmartView provides an alternate, fast and flexible interface to all default SmartLists. SmartView leverages all the power of SmartList and SmartList Builder inside a very flexible and easy to use interface. Like all eOne tools, SmartView is configurable to your specific business needs and will work across all Dynamics GP modules as well as displaying data from outside of Dynamics GP.

SmartView is a replacement for SmartList. As well as significant performance improvements in retrieving and exporting data, SmartView also contains many functional improvements over SmartList, including unlimited search criteria, more search methods, grouping, totals and subtotals.

You can use SmartView to create customized inquiries to provide easier, faster access to information stored in the Microsoft Dynamics GP system. You can print or export the search results, and drill down to Dynamics GP windows to interact further.

With SmartView, you can create an unlimited number of filters. SmartView also allows you to group lists and display totals and subtotals.

SmartView is designed to work with the default Microsoft Dynamics GP SmartLists as well as those created with SmartList Builder.

Some of the benefits of using SmartView are as follows:

- Access to the GP SmartLists
- Display any SmartList Builder list
- Faster Lists
- Better Filtering
- Groups and Totals
- Familiar Environment
- Fastest Path to Excel
Installing Smartview

This section covers the installation of SmartView in your Microsoft Dynamics GP 2015 environment. It will also cover the registration for SmartView. You will need to have sufficient (administrative) privileges to complete this process correctly.

System Requirements

The system requirements for SmartView are the same as those for the version of Microsoft Dynamics GP you are using. You can review the Microsoft Dynamics GP 2015 System Requirements documentation on Microsoft's CustomerSource or PartnerSource sites. SmartView Internal does not run in the Microsoft Dynamics GP 2015 Web Client. When using the Web Client, you would need to use SmartView External.

If you are using SmartList Builder with Microsoft Dynamics GP 2015 in conjunction with SmartView Internal, it is recommended that you be on the latest version of both products when installing.

System Prerequisites

.NET Framework 3.5 must be installed on the client machine

Installation

To install SmartView:

1. Run the setup executable, SmartView2015.msi, which will start the SmartView installation.
2. Click on the Next button to continue.
3. Select the location where your Microsoft Dynamics GP program is installed using the Browse button.
4. Click on the Next button to continue.

5. Click on the Install button to begin the installation.

6. The SmartView Installation will run. It may take a few minutes for this to complete.
7. Click on the Finish button to complete the installation.
8. Launch Microsoft Dynamics GP.
9. Click on the Yes button to include the SmartView code into your Microsoft Dynamics GP workstation application. If you click on the No button, you will not be able to access the SmartView application.

![Dexterity Runtime]

If you the User Account Control setting in Windows is turned on, you may need to launch Microsoft Dynamics GP using the ‘Run as Administrator’ option in Windows to be able to successfully include the new code.

**Registration**

**To register SmartView:**

1. Open the SmartView Registration window (Microsoft Dynamics GP - Tools - SmartView - Registration).

![SmartView Registration]

2. Enter your supplied Registration Key in the Dynamics GP field for SmartView. If you are also using SmartView External, you will need to provide a standalone Registration Key to register that.
3. Click on the Save button.
Updating

If you have a previous release of SmartView 2015 installed or are updating from SmartView 2010 or 2013, there are additional steps that need to be completed to update the SmartView SQL objects. If you have already completed these steps with the SmartView External install, you do not need to complete them again.

To update the SQL Objects:

1. In Microsoft Dynamics GP, go to Microsoft Dynamics GP – Tools – SmartView – Create Views.
2. Mark all the companies listed if they aren't already marked.
3. Click Create.

By running the Create Views process, it will drop and recreate all of the SmartView SQL Views in each company database. If you have modified any of those views, those modifications will be lost.
To update field cache:

1. Run the Refresh Field Cache process by navigating to Microsoft Dynamics GP – Tools – Field Maintenance in Microsoft Dynamics GP.

2. Once in the Field Maintenance window, go to Maintenance – Refresh Field Cache.

3. There isn’t a window that opens for this, but you will see that it processes for a minute or two, and once it is done, you can navigate around the Field Maintenance window again.

4. Click OK on the Field Maintenance window.
Using SmartView

This section covers the navigation of SmartView as well as how to use it to return data. It will walk through adding search criteria, grouping, and totals to your SmartList. This section discusses how to create Favorites to save your setups as well as how to print and export them.

SmartView Navigation

This module covers the navigation of Smartview as well as how to use it to return data.

Opening SmartView

Once SmartView is installed, it can be accessed by going to Microsoft Dynamics GP - SmartView).
Displaying Data

The SmartView window is broken out into multiple sections. On the left, you will see the list of SmartLists available. They will be broken out into the different series available. SmartView, by default, will include the predefined searches, called favorites, which come with the Microsoft Dynamics GP SmartLists.

To display a list of data:

1. Open the SmartView window (Microsoft Dynamics GP - SmartView).
2. Expand the Series the favorite you would like to view is in.
3. Select the favorite you would like to display the data for.

Maximum Records

By default, the maximum records displayed is set to 1,000. This can be changed to show more or fewer records.

When displaying more than 1,000 records, there may be a performance lag when
adding new fields or performing searches. It is recommended that you keep the number of records under 1,000 until all search parameters and fields have been selected.

**To set the number of maximum records:**
1. Click on the status message that displays the number of records.
2. Enter the number of records that you would like to display. Leave the maximum records value blank to return an unlimited number of records.
3. Click Save.

**Columns**

This module describes how to change the columns displayed in SmartView.

**Columns**

When a SmartList is selected, the default set of columns is automatically displayed in their default order. The selected columns and the order can be changed.

**To Add Columns:**
1. To add a column, mark the column to display in the Columns list on the right side of the SmartView window.
   a. If the Columns list isn’t displayed, mark the Columns checkbox in the options tab, go to View - Columns, or use Alt + C to turn it on.

**To Remove Columns:**
1. To remove a column, unmark the column to display in the Columns list on the right side of the SmartView window.
   a. If the Columns list isn’t displayed, mark the Columns checkbox in the options tab, go to View - Columns, or use Alt + C to turn it on.

**To Reorder Columns:**
1. To reorder the columns, click on a column header and drag and drop it to the new position.

To Sort Columns:

1. To sort records by a column's values and replace existing sort conditions that are applied to the current or other columns, click the target column's header, until an UP or Down Arrow icon is displayed within the header. The Up and Down Arrows indicate ascending and descending sort orders respectively.

<table>
<thead>
<tr>
<th>State</th>
<th>Customer Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>IA</td>
<td>Comtel-Page Inc.</td>
</tr>
<tr>
<td>IA</td>
<td>Healthy Concepts</td>
</tr>
<tr>
<td>IA</td>
<td>MultiTech Office Components</td>
</tr>
<tr>
<td>IA</td>
<td>American Electrical Contractor</td>
</tr>
<tr>
<td>IA</td>
<td>Comtel-Page Inc.</td>
</tr>
<tr>
<td>IA</td>
<td>Healthy Concepts</td>
</tr>
<tr>
<td>IA</td>
<td>MultiTech Office Components</td>
</tr>
<tr>
<td>IA</td>
<td>American Electrical Contractor</td>
</tr>
</tbody>
</table>

2. To sort records by a column's values while preserving existing sort
conditions, do one of the following:

a. Click a column header while holding the SHIFT key down, until an Up or Down Arrow icon is displayed within the header.

b. Right-click a column header and select ‘Sort Ascending’ or ‘Sort Descending’ from the context menu.

3. To remove sorting by a column, click a column header while holding the CTRL key down or select ‘Clear Sorting’ from the context menu.

To Resize Columns:

1. To resize columns and bands, drag the right edge of the target column header.

2. To change a column's width so that it displays its contents in their entirety, right-click the column's header and select ‘Best Fit’ or double click the right edge of the target column header.
3. To change the widths of all columns so that they all display all of their contents, right-click the header of any column and select ‘Best Fit (all columns)’.

To Display Field Types:

1. To display the field type, right click somewhere in the Columns list on the right side of the SmartView window. Select Show field types.

   a. If the Columns list isn't displayed, mark the Columns checkbox in the options tab, go to View - Columns, or use Alt + C to turn it on.

To Sort by Field Types:

1. To sort by the field type, click on the Type column header in the Columns list on the right side of the SmartView window.
a. If the Columns list isn't displayed, mark the Columns checkbox in the options tab, go to View - Columns, or use Alt + C to turn it on.

2. To change the sort order between ascending and descending, click on the Type column header again.

Searching

This module describes how to Search the results displayed in SmartView.

Quick Find

The Quick Find bar filters the records displayed by finding all values that contain the string entered.

To search using Quick Find:

1. To access the quick find function hit CTRL+F or navigate to Edit and check the Find panel option in the View section of the menu.
2. Enter a string value into the quick find field.
3. Click the find button to search across all records in the list. The records found will be highlighted in yellow within your list.
To cancel a Quick Find:

1. Click the x icon to close the search window.

Please note that if you leave the Quick Find window open, when you change lists the same search will be applied. This is great functionality in the situation where you search for a SOP Number within Sales Line items, and then want to find the matching header record. By switching to the Sales Transaction list the same search is applied.

Advanced Quick Find Features

The Quick find search function can also be used for much more complex search functions.

1. Enter multiple words into the search field to search for all of those words across all columns of data. For example, in the sample database if you enter Aaron Park, it will return Aaron Fitz Electrical as well as Adam Park Resort, or if you enter Aaron Chicago, SmartView External will return all customers in Chicago and all those with the word Aaron in its name.

2. Enter a phrase in quotations for SmartView External to search for just that phrase and not the individual words contained in the phrase.

3. Enter a minus sign to exclude terms from a search. For example, in the sample database, if you enter Electrical -American, you will just get Aaron Fitz Electrical and not American Electrical Contractor.

4. Enter a plus sign to only show records that have that search term. For example, in the sample database, if you enter Redmond +Resort, you will just get Kensington Gardens Resort, and not all companies in the city of Redmond.

5. Search individual columns by putting the name of the column before the search term and separated by a colon. For example, in the sample database, "Customer Name":red will return just Red's Food Market and no customers from Redmond. Note, when you have a space in the column name, you must enclose it in quotes. You can also combine this with the minus operator to filter all values with that search term. For example, in the sample database, -"Customer Name":red will return everyone but Red's Food Market.
Filters

You can use SmartView to filter records that contain specific values in the SmartList.

To filter on a column name:

1. Click on the filter button (_filters) in the column header.
2. Mark the values that you want to filter on.

When filtering is applied, the filter dropdown will only display the values which match the current filter criteria. If the (Select All) is unchecked, the filters will be removed and all values will be returned.

3. Click OK to close the filter dropdown list and apply the filter.

To remove a filter:

1. To clear the filter applied to a specific column, do one of the following:
   a. Select the filter dropdown list and unmark (Select All).
b. Right-click the column header and select ‘Clear Filter’.

2. To clear all filters for the view, do one of the following:
   a. Click the Close Filter button at the bottom of the window.
   b. Click the Clear all button from the Filter section of the Home ribbon.
Incremental Search in Filters

Click on the Filter icon in Column Filter dropdown list and start the search by typing the text. SmartView will search for a string you entered and will highlight the record that matches it. This can be useful when you have to search for an item in long lists.

Auto Column Filters

Auto Filters are the free text version of the drop down filters described in the previous section.

To activate the Auto Filter Row right click on any column heading and select Show Auto Filter Row. This will add a blank row as the first row in your SmartList.

Note – this type of filter works best in text based searches.
To apply an Auto Filter:

1. Select Show Auto Filter Row as described above

2. Enter some text into the column that you wish to search and hit the tab key.

3. This is a ‘starts with’ Search type – so records will be filtered for records that begin with the string entered.

To remove an Auto Filter:

1. To clear the filter right-click the column header and select ‘Clear Filter’. 
2. To clear all filters for the view, do one of the following:
   a. Click the Close Filter button at the bottom of the window.

   ![Clear Filter]

   

   b. Click the Clear all button from the Filter section of the Home ribbon.

   ![Clear all]

**Advanced Filters**

You can use the Filter Editor to visually create advanced filters that contain multiple and/or clauses and advanced comparisons.

If you have a case sensitive database, the values in the filter editor you are searching for must be an exact match of those that are stored in the database. So if the SOP type is stored as ‘Invoice’, search for ‘invoice’ may return no result.
To open the Filter Editor:

1. Select Options - Filter Editor – or –

2. Right-click on the column header and select ‘Filter Editor’ – or –

3. Click the Edit filter button in the Filter section on the Home ribbon.

To add a filter condition:
1. Click the Add (.addButton.
2. Select a column.

3. Select a comparison operator. The comparison operator list displays only those operators that are supported by the current column's data type. For instance, when selecting a numeric field, the operator list doesn't display the 'Begins with' operator and other operators that are related to strings.
4. Enter a value or click on the comparison button (🔗) and select another column to compare the column to.

5. Click OK.

Source Column Filter Editor

Source Column filters can be added in SmartView. This can help in finding the column you are looking for when the list contains many of them.
To add a Source Column Filter:

1. Enter your filter criteria in the filter text box to filter your source columns.

2. Click the Edit Filter button at the bottom of the Columns pane to open the advanced filter editor for the source columns.

Grouping

This module describes how to create groups for a view.

Groups

A group allows you to categorize data by specifying the column(s) that you want to see the data grouped by. You will then see all the data that corresponds to the value in the column(s) you selected for the group under that group. There will be a total for each group as well.

To group a view on a column:

1. Dragging and dropping a column to the grouping area. – or –
2. Right-click a column header and select ‘Group By This Column’ from the context menu.

3. You can add more columns to the grouping area to create subgroups.

To remove a grouping:
1. Drag and drop the group back to the column header. – or –
2. Right-click on the group and select ‘UnGroup’.
To remove all groups:

1. Select Options - Clear groups.
2. Right-click the group area and select ‘Clear Grouping’ from the context menu.
3. Click Clear in the Groups section on the Home Ribbon.

Expanding and Collapsing

By default all groups will be expanded when a grouping is created.

To expand or collapse a single group:

1. Click on the expansion button in the group header.
To expand all groups:

1. Select Options - Expand all groups. – or –
2. Right-click on the grouping field and select ‘Full Expand’. – or –
3. Click the Expand all button in the Groups section of the Home Ribbon.

To collapse all groups:

1. Select Options - Collapse all groups. – or –
2. Right-click on the grouping field and select ‘Full Collapse’. – or –
3. Click the Collapse all button in the Groups section of the Home Ribbon.

**Date Group Intervals**

When grouping by a date field, the grouping interval can be changed to:

- Day
- Month
- Year
- Smart – will group into one of Today, Tomorrow, Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Next Week, Two Weeks Away, Three Weeks Away, Next Month, Beyond Next Month, Yesterday, Last Week, Two Weeks Ago, Three Weeks Ago, Last Month, Older.

**To change the date interval:**

1. Right-click on the date grouping field and select an option from the Group Interval menu.
Group Sorting

When a group is added, the group can be sorted by the value of the column.

To sort by the group value:

1. Click on the group field until an Up or Down Arrow icon is displayed within the field.
2. The Up and Down Arrows indicate ascending and descending sort orders respectively.

Totals

This module describes how to create Totals for a view.
Totals
By default, all numeric fields are automatically summed when they are added to the view. You can change the fields that are totaled and the summary method that is used for each column.

To add or change a total:
1. To add a total or change the type of summary for a specific column, right-click on the column footer and select the summary method from the menu.

To remove a total:
1. To remove a total, right-click on the column footer and select ‘None’ from the menu.

Subtotals
By default all numeric fields are automatically subtotaled when a group is created for the view. You can change the fields that are subtotaled and the summary method that is used for each column.

To add or change a subtotal:
1. To add a subtotal or change the type of summary for a specific column, right-click on the group footer and select the summary method from the menu.
To remove a subtotal:
   1. To remove a subtotal, right-click on the group footer and select ‘None’ from the menu.

Multiple Totals
You can have multiple summaries on any column.

To add a new total:
   1. Right-click on the group footer and select a summary type from the Add New Summary menu.

Total Sorting
When a group is added, the group can be sorted by any of the summary values being displayed in the view.
To sort by a total value:
  1. Right-click on the group field and select an option from the Sort by Summary menu.

Favorites

This module describes how to use SmartView Favorites. Favorites are used to store a set of defined views for each SmartList. These views contain information about the filters, fields and grouping for the SmartList. Favorites can be applied to a group of companies and users.

Creating SmartView Favorites

You can use the Add Favorite window to add and update SmartView favorites.

To create a new SmartList favorite:
  1. Click the Add button in the Favorites section of the Home Ribbon or right-click a SmartList and select ‘Add Favorite’.
2. Enter the Favorite Name. You can also add some notes text in the Description box.

3. Select the users and roles that will have access to the Favorite. By default the current user will be automatically marked.

4. If you want the favorite to be available to all users and new users that have not yet been created, mark the All users checkbox.

5. If you want the favorite to be available in all companies and new companies that have not yet been created, mark the All companies checkbox.

6. Select the companies that will have the Favorite. By default, the current company will be automatically marked.

7. Click Save.

To update an existing favorite:

1. Select the favorite and click the Edit button in the Favorites section of the
Home Ribbon or right-click a favorite and select ‘Edit’.
2. Enter the new details for the favorite.
3. Click Save.

**To delete a favorite:**
1. Select the favorite and click the Remove button in the Favorites section of the Home Ribbon or right-click a favorite and select ‘Delete’.

**Favorite Maintenance**

The Favorite Maintenance window can be used to edit existing SmartView Favorites. You can also lock and unlock favorites which dictates whether they can be edited through SmartView. The Favorite Maintenance window is also where you would delete a favorite.

The Favorites can be displayed by Series, SmartList, Company and User.
To edit a favorite:

1. Open the Favorite Maintenance window by going to Microsoft Dynamics GP - Tools - SmartView - Favorite Maintenance.
2. Select the Series, SmartList, Company, and/or User to view the favorites you want to edit.
3. Highlight the favorite to edit and click Edit.
4. In the Edit Favorite window, you can edit the Favorite name, change the maximum number of records returned, and copy to favorite to other users and GP companies.
5. Click Save to change the edits.

![Edit Favorite window](image)

To delete a favorite:

1. Open the Favorite Maintenance window by going to Microsoft Dynamics GP - Tools - SmartView - Favorite Maintenance.
2. Select the Series, SmartList, Company, and/or User to view the favorites you want to delete.
3. Highlight the favorite to delete and click Delete.
To lock a favorite:
1. Open the Favorite Maintenance window by going to Microsoft Dynamics GP - Tools - SmartView - Favorite Maintenance.
2. Select the Series, SmartList, Company, and/or User to view the favorites you want to lock.
3. Highlight the favorite to lock and click Lock.

To unlock a favorite:
1. Open the Favorite Maintenance window by going to Microsoft Dynamics GP - Tools - SmartView - Favorite Maintenance.
2. Select the Series, SmartList, Company, and/or User to view the favorites you want to unlock.
3. Highlight the favorite to unlock and click Unlock.

Converting SmartList Favorites
The Convert SmartList Favorites window can be used to convert existing favorites from SmartList to SmartView.

To convert a favorite:
1. Open the Favorite Maintenance window by going to Microsoft Dynamics GP - Tools - SmartView - Favorite Maintenance.
2. Go to Utilities - Convert Favorites.
3. By default all SmartList favorites are displayed. Use the filter function to restrict the list of favorites by user, company, SmartList etc.
4. Select the favorites you wish to convert to SmartView by marking the checkboxes next to the Favorites.

5. Select Process

- It is not recommended to convert all favorites across to SmartView. Most companies using Microsoft Dynamics GP have a large list of favorites that aren't ever used. There is no need to clutter up SmartView with all of these lists. Choose carefully and only convert the favorites you will need. If you don't convert a favorite the first time, you can always come back and convert it later.
- Often times it is better to build new favorites in SmartView rather than converting any favorites. There is better functionality available in SmartView and simply moving the lists across is not taking advantage of the better, more flexible ways of displaying data in SmartView.
- Not all favorites will convert perfectly. You must review the new list in
SmartView to determine if it has come across correctly to SmartView. The easiest way is to compare lists and ensure the same number of records is displayed in each. If your list does not convert correctly, simply modify the filters to accurately match the converted favorite in SmartView.

**Copy User Access**

The copy a SmartList Favorites from one user to another, you can use the Copy User Access window. Note that if you have access to this window, you can only see your own favorites and not those owned by other SmartView users.

**To copy user access:**

1. Open the Favorite Maintenance window by going to Microsoft Dynamics GP - Tools - SmartView - Favorite Maintenance.
2. Go to Utilities - Copy User Access.
3. Select the From and To User.
4. Mark the SmartList Favorite(s) that you wish to copy to another user.
Printing and Exporting

This module describes how to print and export from SmartView.

Printing

To print a view:

1. Select Print from the Print section of the Home Ribbon. – or –

2. Select File - Print.
Exporting

SmartView can export files in three formats; CSV, Excel and PDF.

To export a view:

1. Click on one of the export formats in the Export section of the Home Ribbon. If Export to PDF is selected, select the additional option of Portrait or Landscape.
2. Select where to save the export file and change the file name if desired.
3. Click Save.

Copying to the Clipboard

Records selected in the SmartView window can be copied to the clipboard and pasted into other applications. The records are copied to the clipboard as tab delimited text including the column headers. When this is copied into an Excel file, the records are automatically formatted into columns.

To copy records to the clipboard:

1. Select the records to copy using one of the following methods:
   a. Use the Select all, Select none, or Invert selection buttons on the Home ribbon.
b. Select the individual records to copy by holding down the CTRL key and selecting each record.

c. Select a range of records by clicking on the first record in the range, holding down the Shift key and selecting the last record in the range.

2. Copy the selected records using one of the following methods:
   a. Click the Copy button in the Edit section of the Home ribbon.
   b. Press CTRL + C key combination.

3. The records can now be pasted in the destination location.

Create and Modify SmartLists with SmartList Builder

This module describes how to access SmartList Builder directly from SmartView. This will only function in SmartList Builder is installed in the same client installation of Microsoft Dynamics GP.

To create a new SmartList:

1. Click on the New button in the SmartList Builder section of the Options ribbon.

To modify an existing SmartList:

1. Select the SmartList you want to modify.

2. Click on the Modify button in the SmartList Builder section of the Options ribbon.
Security

This section walks through how to grant or deny security to SmartView resources. SmartView resources can be added to existing Microsoft Dynamics GP security tasks or new security tasks can be created. These tasks can be added to Microsoft Dynamics GP security roles, which are then assigned to users.

Setting access to SmartView

This module describes how to grant access to SmartView.

Adding SmartView to Security Tasks

When installing SmartView, only PowerUsers will have access by default. You can give additional users access to SmartView as well by adding it to a new or existing Microsoft Dynamics GP security task.

To add SmartView to a security task:

2. Enter the Task ID of an existing task, or enter details for a new security task.
3. Select SmartView as the Product.
4. Select Windows as the Type.
5. Select the Financial as the Series.
6. Mark the SmartView Operation in the Access List.
7. Repeat steps 5 and 6 for all of the resource types that you want to grant access to. Others can be found under System and 3rd Party series.

Adding SmartView Security Tasks to Security Roles

Security roles contain one or more Security Tasks. A role is created and then assigned
to a user in order to provide them access to a group of Security Tasks in SmartView. All your Security Tasks should be created before starting to create your Security Roles. If the security task(s) you assigned SmartView to are new tasks, they will need to be assigned to a security role.

**To add a security task to a security role:**

1. Open the Security Role Setup window (Microsoft Dynamics GP - Tools - Setup - System - Security Roles)
2. Type in a Role ID, Role Name, and Role Description.
3. Check off the Tasks that you wish to assign to this Role.
4. Click Save

Setting Individual User Security

After creating the Security Role(s), the last step is to add the Security Role(s) to Individual users.

To set the user security for the role:
1. Open the User Security Setup window (Microsoft Dynamics GP - Tools - Setup - System - User Security)
2. Enter the user and company that you want to give access to the SmartView Security Role.
3. Check off the Role(s) that you want to give the user access to.
4. Click Save.

**Setting SmartView List Security**

Security for the SmartView Lists is based upon Microsoft Dynamics GP SmartList security. If a user has access to a SmartList within GP security they will also see this list within SmartView. There is no user level security to SmartView lists within SmartView itself.

**Adding SmartView Lists to Security Tasks**

When installing SmartView, only PowerUsers will have access to the SmartView lists by default. You can give additional users access to the lists as well by adding it to a new or existing Microsoft Dynamics GP security task.

**To add SmartView to a security task:**

2. Enter the Task ID of an existing task, or enter details for a new security task.
3. Select SmartList as the Product.
4. Select SmartList Object as the Type.
5. Select the SmartList Objects as the Series.
6. Mark the SmartList lists in the Access List.

Adding SmartList List Security Tasks to Security Roles

Security roles contain one or more Security Tasks. A role is created and then assigned to a user in order to provide them access to a group of Security Tasks in SmartView. All your Security Tasks should be created before starting to create your Security Roles. If
the security task(s) you assigned SmartList lists to are new tasks, they will need to be assigned to a security role.

**To add a security task to a security role:**

1. Open the Security Role Setup window (Microsoft Dynamics GP - Tools - Setup - System - Security Roles)
2. Type in a Role ID, Role Name, and Role Description.
3. Check off the Tasks that you wish to assign to this Role.

4. Click Save
Setting Individual User Security

After creating the Security Role(s), the last step is to add the Security Role(s) to Individual users.

To set the user security for the role:

1. Open the User Security Setup window (Microsoft Dynamics GP - Tools - Setup - System - User Security)
2. Enter the user and company that you want to give access to the SmartList Security Role.
3. Check off the Role(s) that you want to give the user access to.
4. Click Save.

   If a list is built off an external view or table, ensure that it is assigned to the DYNGRP database role and the select permission is granted.
Maintenance

This section will cover the Maintenance available with SmartView.

SmartView Maintenance

This module will walk you through the SmartView Maintenance procedures.

Create/Update Views

SmartView will automatically create views to retrieve the data in the lists from SQL when the ‘sa’ logs into each company. However, if the views need to be re-created, it can be done from the SmartView user interface. You need to have local administrator rights to complete this task correctly. If you log in as ‘sa’ you will see this option on the menu, non ‘sa’ users will not.

If you are upgrading SmartView and have multiple GP companies, you can create views by selecting those companies from the new window ‘Create Views’:

To create or update the views:

1. Open the Create Views window using one of the following two methods
   a. Microsoft Dynamics GP - Tools - SmartView - Create Views
   b. Microsoft Dynamics GP - SmartView and in SmartView go to File - Maintenance - Create/update views
2. Mark the company or companies that you want to create the views for.
3. Click Create.

**Update Field Cache**

Update Field cache stores the field settings in SmartView tables. Use it if a field is missing in the Columns section in your SmartView. This procedure will update the fields and their settings (e.g., number of decimal places, number of account segments, etc.) in SmartView tables and update the Columns accordingly making the fields available for display in your report.

**To update field cache:**
1. Run the Update Field cache process by navigating to (File - Maintenance - Update field cache)
2. There isn't a window that open for this, but you will see that it processes for a minute or two and once it is done, you can navigate around SmartView again.
Update Missing Physical Names

If you have SmartList Builder lists created prior to GP10 SP3, you need to run this procedure to update physical names in a SmartList Builder table which SmartView requires to work correctly. Only existing users who are upgrading a SmartView from an earlier version have to perform this task before viewing their SmartList Builder lists in SmartView. New installs include this procedure which is run automatically during the install process itself.

To update missing physical names:
1. Run the Update missing physical names process by navigating to (File - Maintenance - Update missing physical names)
2. There isn’t a window that open for this, but you will see that it processes for a minute or two and once it is done, you can navigate around SmartView again.

Field Maintenance

This module describes how to use field maintenance within SmartView. This function is important to help speed up the performance of SmartView lists. By selecting fewer fields to display and default the faster the list will return data within SmartView.

Field Maintenance

The Field Maintenance window will display all fields that are available for display within an existing SmartList. It will also show the fields that are displayed by Default. For custom built SmartLists that were built in SmartList Builder, the display and default fields are managed in SmartList Builder.

There are two settings available for each column that is contained within the SmartList selected.

- **Display**: Select this option if you would like this field to be available within this list inside SmartView. The less display fields you select the faster the list will run and return records within SmartView. All fields from your SmartList will be marked to display be default.
Default: Select the default option if you would like this field to be one of the default columns displayed within this list in SmartView.

To update the display and default fields:

1. Open the Field Maintenance window (Microsoft Dynamics GP - Tools - SmartView - Field Maintenance)
2. Select the SmartList that the columns are to be changed in.
3. Mark or unmark the Display and Default columns as desired.
4. Click OK.

If a field has been added to the list, use Refresh Field Cache to update the table of available fields.
To rename a field:
1. Open the Field Maintenance window  (Microsoft Dynamics GP - Tools - SmartView - Field Maintenance)
2. Select the SmartList that the columns are to be changed in.
3. Select the field name to be changed and type the new name.
4. Click OK.

SmartList Maintenance

This module describes how to use the SmartList Maintenance window to set the maximum number of records per list.

Maximum Records

Use the SmartList Maintenance window to enter the maximum number of records you would like to display for each SmartView list. The maximum record fields is defaulted to 1,000 for all lists. You are able to change this value to suit your specific use of this list.
To change the maximum records:

1. Open the SmartList Maintenance window (Microsoft Dynamics GP - Tools - SmartView - SmartList Maintenance)
2. Locate the SmartList that the maximum is to be changed for.
3. Change the maximum number of records to display.
4. Click OK.

Display

Mark this display box if you would like this SmartList to appear within SmartView. If you unmark the display field for a list it will not appear in SmartView – regardless of security settings for users.

To change the SmartLists displayed:

1. Open the SmartList Maintenance window (Microsoft Dynamics GP - Tools -
2. Locate the SmartList to change the display on.
3. Mark or unmark the Display checkbox.
4. Click OK.

**Refresh SmartLists**

If a SmartList Builder list does not show here, run the Refresh SmartLists to update the SmartList Maintenance.

**To run the refresh SmartLists:**

1. Open the SmartList Maintenance window (Microsoft Dynamics GP - Tools - SmartView - SmartList Maintenance)
2. Go to Maintenance - Refresh SmartLists

**SmartView Setup**

This module describes how to use the SmartList Setup window to reset the SmartView SQL login’s password and set a custom connection string.

**SmartView Setup**

The SmartView users password is set by default in the installation, but if you need to change it for any reason that can be done in the SmartView Setup window. You can also enter in a custom connection string if need to do something like set a specific port for your SQL Server. SmartView by default will use SQL’s default port.
To reset the SmartView SQL logins password:

1. Open the SmartView Setup window (Microsoft Dynamics GP - Tools - SmartView - SmartView Setup)
2. Change the password for the SmartView user ID.
3. Click Save.
4. Open SQL Management Studio and log into the SQL Server instance that Microsoft Dynamics GP is installed to.
5. Under Security - Logins, find the smartview login.
6. Right click on the Login and go to Properties.
7. On the General page, change the logins password, confirm the password, and click OK.
To enter a custom connection string:

1. Open the SmartView Setup window (Microsoft Dynamics GP - Tools - SmartView - SmartView Setup)
2. Mark the Custom connection string checkbox.
3. Enter in the connection string. It may look something like the following:
   
   Data Source=SQLServer,port;Network Library=DBMSSOCN;Initial Catalog=DYNAMICS;
   
4. Click Save.
Enhancements

- Release 14.0.2
- Release 14.0.50

14.0.2

This release is a compatibility release to allow SmartView to be compatible with Microsoft Dynamics GP 2015. There are no additional enhancements included.

14.0.6

New Features in Build 14.0.6

- Canadian Payroll Lists now Available
- Registration of SmartView Internal and External combined into one key

Problem Reports Fixed in Build 14.0.6

- Duplicates on Multicompany Lists built in SmartList Builder
- Record count on Aged Trial Balance incorrect when showing Details
- Errors converting SmartList Favorites
- Field Comparison Filters causing Syntax errors
- Negative values Field Option in SmartList Builder not working in SmartView
- Multipart Identifier error when using Modify button to get to SmartList Builder and delete a list
- Status options not staying marked on Favorite
- Index out of Range error when using Status options and filters on status field
- Index out of Range error when changing record count
- Incorrect Syntax error when setting filter on Document Status on Payables Transactions SmartList
- Ability to remove locked Favorites
- All Companies automatically checking when mark All Users
- Date Functions to include last day of the specified period
- Using SmartList Builder to modify lists with Favorites causes Incorrect Syntax error
- Negative values not displaying in Red
- Ability to have more than 99 External Users