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Introduction

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.

SmartView works with all of the standard Microsoft Dynamics GP SmartLists as well as any SmartLists created with SmartList Builder.

This user guide is divided into the following chapters:

- Installing SmartView
- Overview of SmartView
- SmartView Maintenance
- List Maintenance
- Searching
- Grouping and totals
- Favorites
- Exporting
Chapter 1: Installing SmartView

This chapter describes how to install SmartView. You will need to have sufficient (administrative) privileges to complete this process correctly.

To install SmartView:

1. Run the SMARTVIEW11.MSI installer.

2. Click Next.

3. Select the location where Dynamics GP is installed and click Next.
3. Click Install.

4. Start Dynamics GP. Click Yes to include new code.
Chapter 2: Overview of SmartView

You can access SmartView by choosing Microsoft Dynamics GP menu >> SmartView. 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.
Chapter 3: SmartView Maintenance

In this chapter we will discuss three maintenance procedures:

- Create/update views
- Update field cache
- Update missing physical names

Create/Update Views

SmartView will automatically create the views 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’:
**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.

**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.
Chapter 4: List Maintenance

This chapter 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.

This information is divided into the following sections:

- Field Maintenance
- SmartList Maintenance

Field Maintenance

The field maintenance window will display all fields that are available for display within an existing SmartList. For custom built smartlists, display and default fields are managed in SmartList Builder. If a field has been added to the list, use Refresh Field Cache to update the table of available fields.
Default and Display
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 lit in SmartView.

Adding Field
To add a field, mark the display and or default checkbox for each field.

Removing a Field
To remove a field, uncheck the display and or default checkbox for each field.

Renaming a Field
To rename a field, select the field and modify the name.

Refresh Field Cache
Run this procedure to update field settings such as
SmartList Maintenance

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

This information is divided into the following sections:

- Maximum Records
- Display
- Refresh SmartLists

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.

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.

Refresh SmartLists

If a SmartList Builder list does not show here, run the Refresh SmartLists to update the SmartList Maintenance.
Chapter 5: Searching

This chapter describes how to search for records using SmartView.

This information is divided into the following sections:

- Columns
- Maximum records
- Quick find
- Filters
- Advanced filters

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.

Adding columns

To add a column, mark the column in the Columns list. It will be added to the end of the SmartView.

Removing columns

To remove a column, unmark it from the Columns list.

Reordering columns

To reorder columns, click on a column header and drag and drop it to the new position.
Display and Sort by Field Type

To display the field type, right-click somewhere in the Column panel. Click on the Type to sort by data type, e.g., currency, integer, string in ascending or descending order.

Sorting

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.

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

- Click a column header while holding the SHIFT key down, until an Up or Down Arrow icon is displayed within the header.
- Right-click a column header and select ‘Sort Ascending’ or ‘Sort Descending’ from the context menu.
To remove sorting by a column, click a column header while holding the CTRL key down.
Resizing columns

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

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'.

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)'.

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.

![Maximum Records](image)

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 on the Refresh button.

Quick Find

To access the quick find function hit CTRL+F or navigate to Edit→Find from the menu. The Quick Find bar filters the records displayed by finding all values that contain the string entered.

To search using Quick Find

1. Enter a string value into the quick find field. When you have finished 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. Remove the string entered using the delete key
2. Click the icon to close the search window.
3. If you do not cancel the quick find then this same search will be applied to the next list you select.

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 (in the sample database if you enter aaron park, it will return adam fitz as well as adam park, or if you enter aaron chicago SmartView will return all customers in Chicago and all those with the word Aaron in its name)

2. Enter a phrase in quotations for SmartView 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 (if you enter electrical -american, you will just get aaron fitz electrical and not american electrical)

4. Enter a plus sign to only show records that have that search term (if you enter redmond +resort, you will just get Kensington gardens resort, and not all companies in Redmond)

5. Search individual columns by putting the name of the column before the search term and separated by a colon ("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 (-"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 value:

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

By default, if filtering is applied, the filter dropdown will only display the values which match the current filter criteria. If the SHIFT key is pressed while opening the filter dropdown, all values will be listed (not only those that match the current filter criteria).

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

To remove a filter:

To clear the filter applied to a specific column, do one of the following:

- Select the filter dropdown list and mark (Select All).

- Right-click the column header and select ‘Clear Filter’.
To clear all filters for the view, click the Close Filter button.

**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 ‘begins with’ Search type – so records will be filtered for records that begin with the string entered.

To remove an Auto Filter

Remove the string text from the auto filter field and the list will refresh.
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, you do one of the following:

- Select SmartView >> Filter Editor
- Right-click on the column header and select ‘Filter Editor’.

To add a filter condition:

1. Click the Add (.Timestamp) button.
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 Apply or OK.
Chapter 6: Grouping and totals

This chapter describes how to create groups and totals for a view.

This information is divided into the following sections:

- Groups
- Totals
- Subtotals
- Multiple Summaries
- Group sorting

Groups

You can group a view on a column by doing one the following:

- Dragging and dropping a column to the grouping area.
- Right-click a column header and select ‘Group By This Column’ from the context menu.
You can add more columns to the grouping area to create subgroups.

To remove a grouping, do one of the following:

- Drag and drop the group back to the column header
- Right-click on the group and select ‘UnGroup’.

To remove all groups, do one of the following:

- Select SmartView >> Clear groups.
- Right-click the group area and select ‘Clear Grouping’ from the context menu.
Expanding and Collapsing

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

To expand or collapse a single group, click on the expansion button in the group header.

To expand all groups, do one of the following:

- Select SmartView >> Expand all groups.
- Right-click on the grouping field and select ‘Full Expand’.

To collapse all groups, do one of the following:

- Select SmartView >> Collapse all groups.
- Right-click on the grouping field and select ‘Full Collapse’.
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, right-click on the date grouping field and select an option from the Group Interval menu.
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 a summary or change the type of summary for a specific column, right-click on the column footer and the summary method from the menu.

To remove a summary, 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 a summary 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 summary, right-click on the group footer and select ‘None’ from the menu.
Multiple Summaries

You can have multiple summaries on any column. To add a new summary, right-click on the group footer and select a summary type from the Add New Summary menu.

Group sorting

When a group is added, the group can be sorted by the value of the column or by any of the summary values being displayed in the view.

To sort by the group value, click on the group field until an Up or Down Arrow icon is displayed within the field. The Up and Down Arrows indicate ascending and descending sort orders respectively.

To sort by a summary value, right-click on the group field and select an option from the Sort by Summary menu.
Chapter 7: Favorites

This chapter 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.

This information is divided into the following sections:

- Creating SmartView favorites
- Setting the default view
- Converting Favorites from SmartList

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 Favorites button and select ‘Add’ from the menu.

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. Click the Favorites button and select ‘Edit’ from the menu.

2. Enter the new details for the favorite.

3. Click Save.

**To delete a favorite:**

1. Select the favorite from the SmartList tree.

2. Right-click on the favorite and select ‘Delete’.

### Setting the default view

The default view is the view that is shown when you click on the header-level SmartList. Any SmartView favorite can be set as the default view.

**To set a favorite as the default view:**

1. Select the favorite from the SmartList tree.

2. Right-click on the favorite and select ‘Set as default view’.
To clear the default view:

1. Select the favorite from the SmartList tree.

2. Right-click on the favorite and select ‘Clear default view’.

Favorite Maintenance

Display the favorites by Series, SmartList, Company and User.
Edit a favorite

Edit the Favorite name, copy to users and other GP companies

Converting SmartView Favorites

You can use the convert SmartList favorite window to convert favorites from SmartList to SmartView.

To convert a favorite

1. Select the convert SmartList Favorites window from the menu Microsoft Dynamics GP >> Setup >> System >> SmartView >> Favorite Maintenance
2. 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.

5. Select Process

Warning: It is not recommended to convert all favorites across to SmartView. Most companies using Dynamics GP have a large list of favorites and there is no need to clutter SmartView with all these lists. Choose carefully and only convert the favorites you will need.

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.

Warning: 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

This functionality allows you to copy your SmartView favorites to other GP users. Note that if you have access to this window, you can only see your own favorites and not those owned by other SmartView users.

1. Select the From and To User.
2. Mark the SmartList favorite that you wish to copy to another user
3. Hit Process
Chapter 8: Exporting

This chapter describes how to print and export from SmartView.

This information is divided into the following sections:

- Printing
- Exporting
- Copying to the clipboard

Printing

To print the view, you can do one of the following:

- Select Print from the toolbar.
- Select File >> Print.

Exporting

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

To export a view to a file, click on the Export button and select the format option from the menu. PDF export has Portrait and Landscape options.

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.
Chapter 9: SmartView Registration and Security

To register SmartView go to Tools->Setup->System->SmartView->Registration.

Enter your key in the Registration Key field.

To register SmartView for Windows, you need to register it by providing the number of licensed External Users and the Registration Key.

To enable a user to access the main Smartview window go to Tools->Setup->System->Security Tasks. Select Product: SmartView, Type: Windows, Series Financials and mark the checkbox for SmartView.

If it’s a new Task, you will need to link it to a GP role. To change the security access for a user, please refer to your Dynamics GP system security manual.

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.

If a list is built off an external view or table, ensure that it is assigned to DYNGRP database role and select permissions granted.
Chapter 10: SmartView Setup

This is an example of a custom connection string that you can use to connect to your SQL server.
Chapter 11: SmartView Standalone

This section explains how to setup SmartView Standalone

**System Prerequisites**

- SmartView for GP is installed and must be at least on version 11.0.40 or 10.0.40
- .NET framework 3.5 is installed on the client machine
- SmartList Builder must be installed on the machine running MS Dynamics GP

**External SmartView registration**

Go to Tools-Setup->System->SmartView -> Registration

Enter the total number of licensed external users and your SmartView Standalone Registration key.
Create New External User Accounts

Go to Tools-Setup->System->SmartView ->External Users.

Enter a user id and password

Link the new user id to a GP based user or role.

NB: external user ids must be different from the existing GP user ids.

Select your GP companies that the external user will have access to and set the default company access
Installing SmartView Standalone

Click on the Installer file and click Next to start the installation process.

Create the SmartView shortcut on the Start Menu and click Next.
Select the location where SmartView Standalone will be installed and click Next.

Click on Install
Click Finish to close the install wizard.

Configure the application

1. Open the config file - by default it is installed in C:\Program Files\eOne IntegratedBusinessSolutions\SmartView\SmartView.exe

2. Enter the default or instance name of the SQL Server in the Server value section. (Instead of the name, you can use the IP address, port number)

3. Add the database to which you wish to connect. Under the user value, enter your external user ID.

Launch SmartView using the shortcut on the Start Menu.
Enter the external user’s credentials in the dialog box

The user can now access the same lists as the linked to GP user.

To view the data from a different GP database, click on the Company Name link in the top right hand corner and select another company.