



# Microsoft Dynamics GP 2015 R2 New Features

---

System Wide



Released: June 1, 2015

## Conditions and Terms of Use

### Microsoft Partner

This training package content is proprietary and confidential, and is intended only for users described in the training materials. This content and information is provided to you under a Non-Disclosure Agreement and cannot be distributed. Copying or disclosing all or any portion of the content and/or information included in this package is strictly prohibited.

The contents of this package are for informational and training purposes only and are provided "as is" without warranty of any kind, whether express or implied, including but not limited to the implied warranties of merchantability, fitness for a particular purpose, and non-infringement.

Training package content, including URL and other Internet Web site references, is subject to change without notice. Because Microsoft must respond to changing market conditions, the content should not be interpreted to be a commitment on the part of Microsoft, and Microsoft cannot guarantee the accuracy of any information presented after the date of publication. Unless otherwise noted, the companies, organizations, products, domain names, e-mail addresses, logos, people, places, and events depicted herein are fictitious, and no association with any real company, organization, product, domain name, e-mail address, logo, person, place, or event is intended or should be inferred.

## Copyright and Trademarks

© 2015 Microsoft Corporation. All rights reserved.

Microsoft may have patents, patent applications, trademarks, copyrights, or other intellectual property rights covering subject matter in this document. Except as expressly provided in written license agreement from Microsoft, the furnishing of this document does not give you any license to these patents, trademarks, copyrights, or other intellectual property.

Complying with all applicable copyright laws is the responsibility of the user. Without limiting the rights under copyright, no part of this document may be reproduced, stored in or introduced into a retrieval system, or transmitted in any form or by any means (electronic, mechanical, photocopying, recording, or otherwise), or for any purpose, without the express written permission of Microsoft Corporation.

For more information, see **Use of Microsoft Copyrighted Content** at <http://www.microsoft.com/about/legal/permissions/>

Microsoft®, Internet Explorer®, and Windows® are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries. Microsoft products mentioned herein may be either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries. All other trademarks are property of their respective owners.

<b>About the Authors</b>	
<b>Author:</b>	Lucas Miller
<b>Bio:</b>	Lucas is a Support Escalation Engineer on the Dynamics GP team with 10 years of support experience. His focus is on supporting System and integration features such as the Web Client, Integration Manager, eConnect and Service Based Architecture.
<b>Author:</b>	Lucas Reuss
<b>Bio:</b>	Lucas is a Senior Support Engineer on the Dynamics GP team with 7 years of support experience. His focus is on supporting Application oriented features such as Project Accounting, Analytical Accounting, Fixed Assets, SQL Server Reporting Services reports for Dynamics GP, and other modules within Dynamics GP.
<b>Author:</b>	Andrea Melroe
<b>Bio:</b>	Andrea is a Technical Advisor with 4 years of experience supporting the Microsoft Dynamics GP product. Her primary focus is on the Financials Modules. However, she also has experience with Distributions, Payroll, and Manufacturing Modules.

## Table of Contents

<b>MODULE 1: WORKFLOW DOCUMENT ATTACHMENT .....</b>	<b>5</b>
<b>Lesson 1: Workflow Document Attachment .....</b>	<b>6</b>
Configuration.....	6
<b>Lesson 2: Document Attachment Status Inquiry .....</b>	<b>14</b>
<b>MODULE 2: SMARTLIST DESIGNER VIEW WORKFLOW .....</b>	<b>18</b>
<b>Lesson 1: Workflow Configuration for SmartList Designer View Creation .....</b>	<b>19</b>
Workflow Configuration.....	19
<b>Lesson 2: Submitting and Approving a Workflow from SmartList Designer.....</b>	<b>25</b>
Try This: Setup and Submit a new SmartList View Workflow .....	31
<b>MODULE 3: SELF SERVICE USER TYPE .....</b>	<b>32</b>
<b>Lesson 1: Self Service User Type .....</b>	<b>33</b>
Self Service User Type .....	33
Functionality Described .....	33
Changes to Windows .....	35
Changes to Reports.....	42
Script Available - Change Limited Users to Self Service User Type in Microsoft Dynamics GP 2015 R2 When Appropriate .....	44
Try This: Set Up A Self Service User .....	45
Lesson Review .....	48
<b>MODULE 4: ENABLE EMAIL FOR ALL SALES/PURCHASING FORMS (SHORT, LONG, OTHER).....</b>	<b>49</b>
<b>Lesson 1: Enabling the New Formats in GP2015 R2 .....</b>	<b>50</b>
<b>Lesson 2: Emailing SOP Documents.....</b>	<b>51</b>
Formats .....	51
SOP Documents.....	51
Try This: Email a SOP Invoice Using the Long Format .....	51
Lesson Review .....	52
<b>Lesson 3: Emailing POP Documents .....</b>	<b>54</b>
Formats .....	54
POP Documents.....	54
Try This: Email a POP Purchase Order Using the Other Format.....	54
Lesson Review .....	55

# Module 1: Workflow Document Attachment

This module introduces the new feature in Microsoft Dynamics GP 2015 R2 that enables attached documents to be included in Workflow notification e-mails.

## What You Will Learn

After you complete this module, you will be able to:

- Configure workflow document attachment
- Inquire on attached documents that are included in workflow notifications
- Enable Word Template attachments for batch approval types

# Lesson 1: Workflow Document Attachment

---

This lesson explains the prerequisites and setup for the workflow document attachment functionality that is introduced in Microsoft Dynamics GP 2015 R2.

## What You Will Learn

After you complete this lesson, you will be able to:

- Configure workflow document attachment

In Microsoft Dynamics GP 2015 R2 new functionality was added that lets users include documents attached to the business objects (for example timecards, purchase orders, purchase requisitions, payables batches and transactions, etc.) in the notification emails that workflow approvers receive. This, paired with the Workflow Email Action functionality that was previously included in Workflow, will enable an approver to receive a notification email, review the included attachments and approve or reject the document directly within the email.

## Configuration

There are just a few steps you need to complete in order to configure Microsoft Dynamics GP 2015 R2 to include document attachments in workflow notification emails.

- 1) The **Allow Document Attachments** check box must be marked on the **Document Attachment Setup** window (**Administration – Setup – Company – Document Attachment Setup**)**

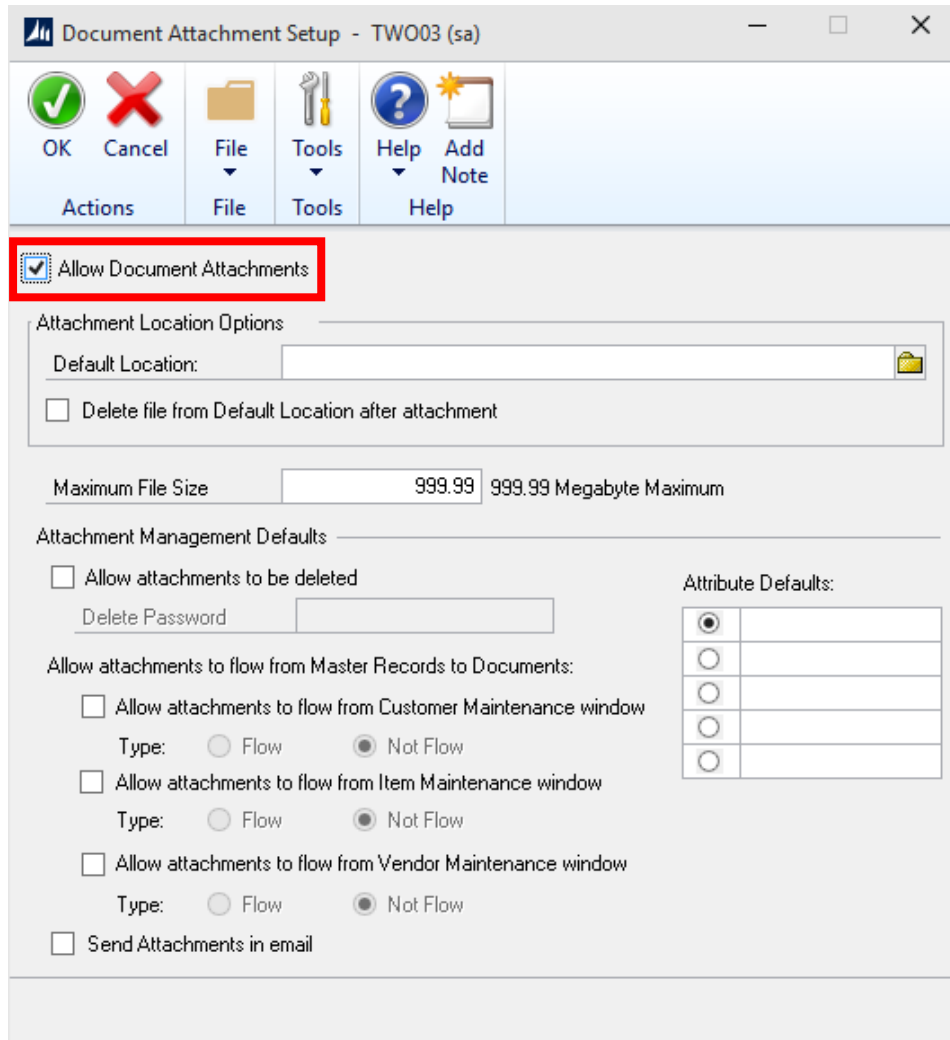
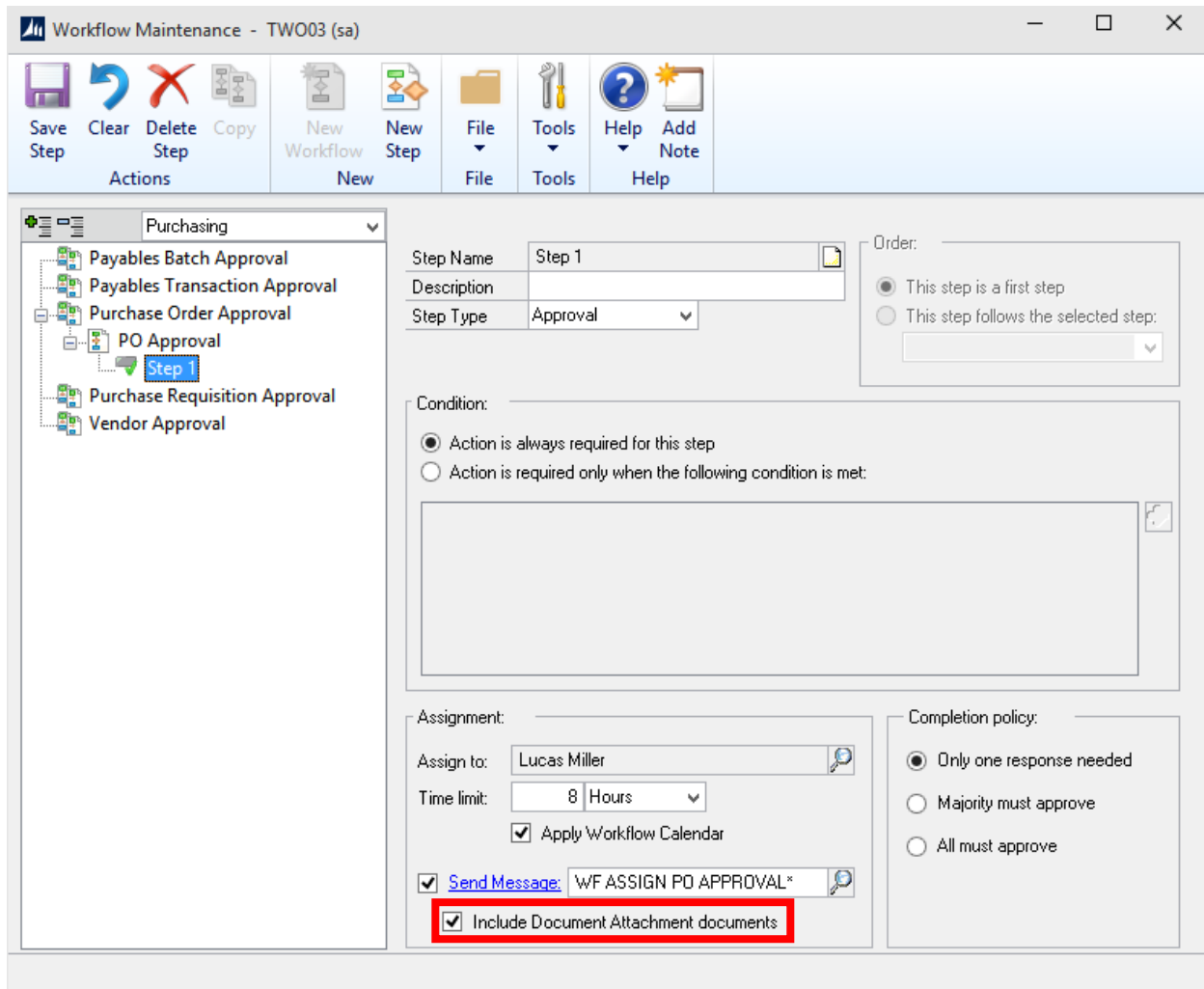


Figure 1-Allow Document Attachments Box Marked

NOTE: The **Send Attachments in email** check box is for existing functionality to send emails to vendors and customers. This check box does not affect the workflow messages and does not need to be marked for the new workflow functionality.

- 2) The **Include Document Attachment documents** check box on Workflow Maintenance (**Administration | Setup | Company | Workflow Maintenance**) is only enabled if you have marked **Allow Document Attachments** in **Document Attachment Maintenance** and **Send Message** on **Workflow Maintenance**.



**Figure 2-Include Document Attachment documents check box**

Note 1: Some windows allow for a document attachment documents at both the header and the line item level (for example sales line items, purchasing line items). When the message is sent, all document attachment documents on the window will be sent.

Note 2: Document Attachments from the Note window will not be sent in the workflow message.

At this point you have successfully configured the workflow document attachment functionality. In order to test this you can go through the following example. Be aware that you will have needed to enable email for workflow in the Workflow Setup window before you will receive any notifications.

- 1) Browse to the **Administration** area page and go to **Setup**, then **Company**, then **Workflow** and then click **Workflow Maintenance**
- 2) Create a simple Purchase Order Approval workflow
  - a. Assign a Manager for the type
  - b. Create a workflow with a name of your choice. Also, mark the **Allow originator to be an approver option**, then save the Workflow



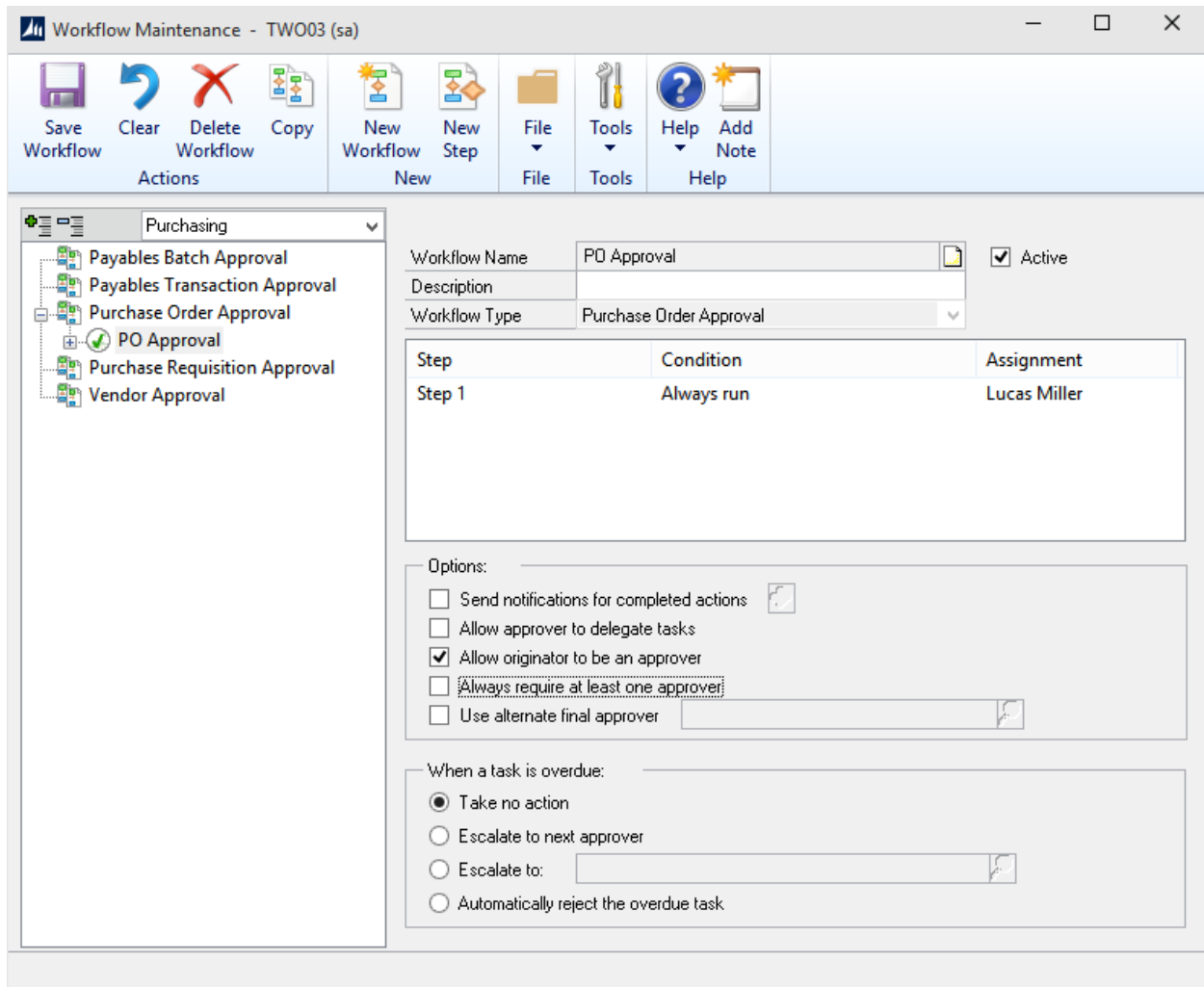
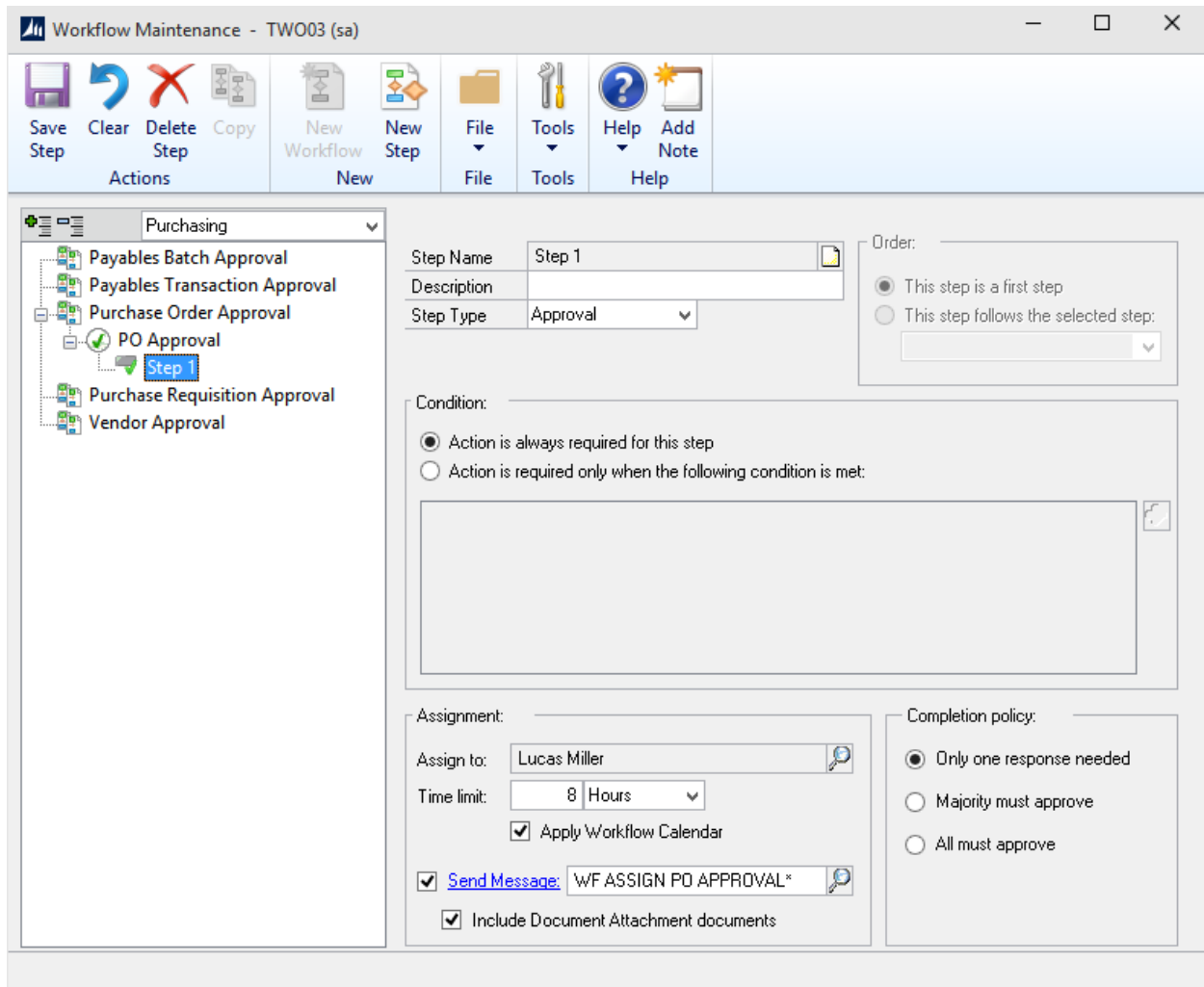


Figure 3-Workflow with Allow originator to be an approver checked

- c. Create a Workflow Step called Step 1 where you have marked **Action is always required for this step**. Make yourself the approver and mark **Send Message** and **Include Document Attachment documents**, then save the step



**Figure 4-Action is always required for this step marked**

- 3) Highlight your workflow and verify that the Active box is marked, then save the Workflow again

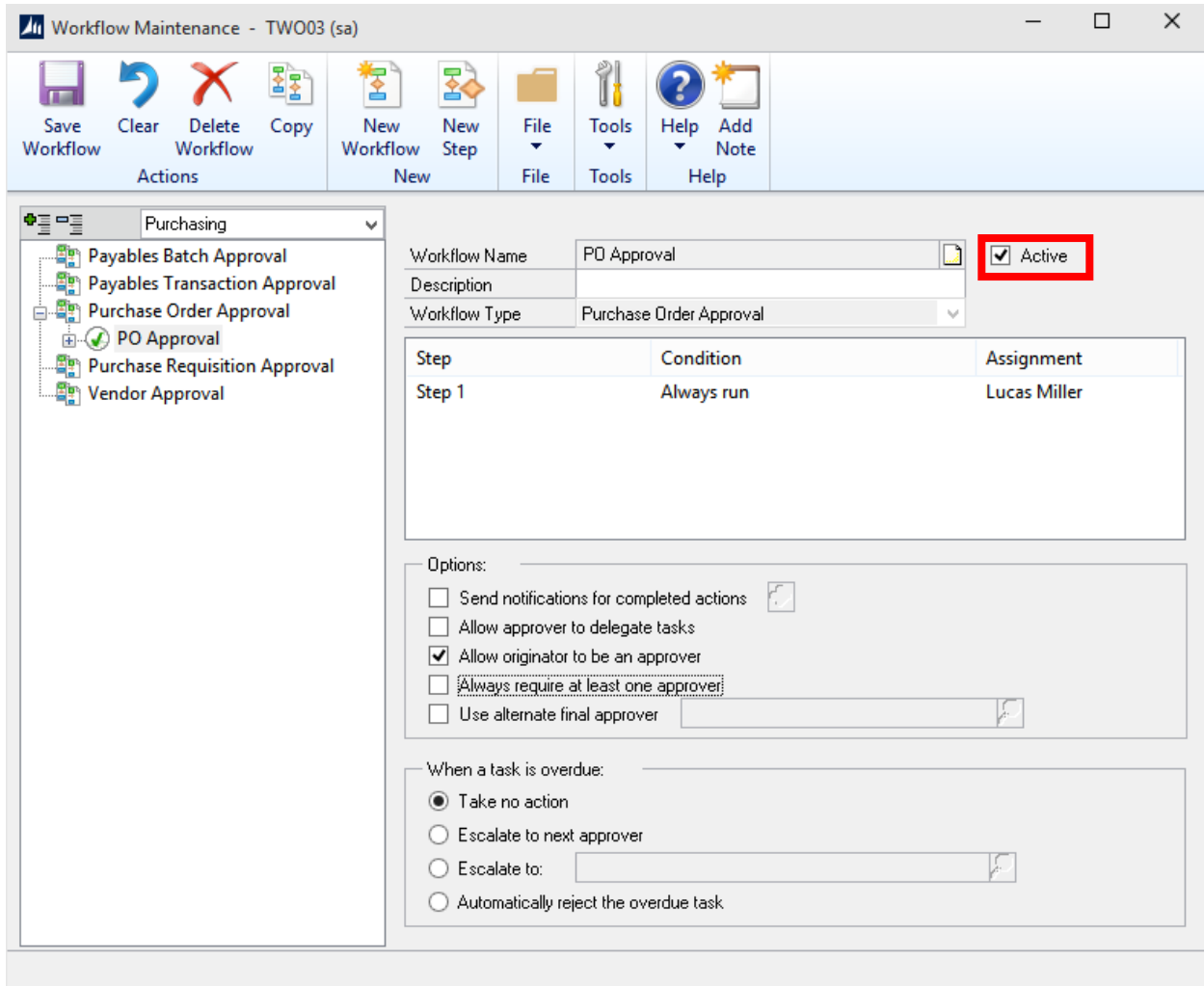


Figure 5-Workflow with Active box marked

- 4) Move to the **Purchasing** area page, then under **Transactions** click **Purchase Order Entry** and create a Purchase Order using the vendor/item/quantity of your choice. Then click the **Attach** button in the Action Pane and attach a document of your choosing to the Purchase Order

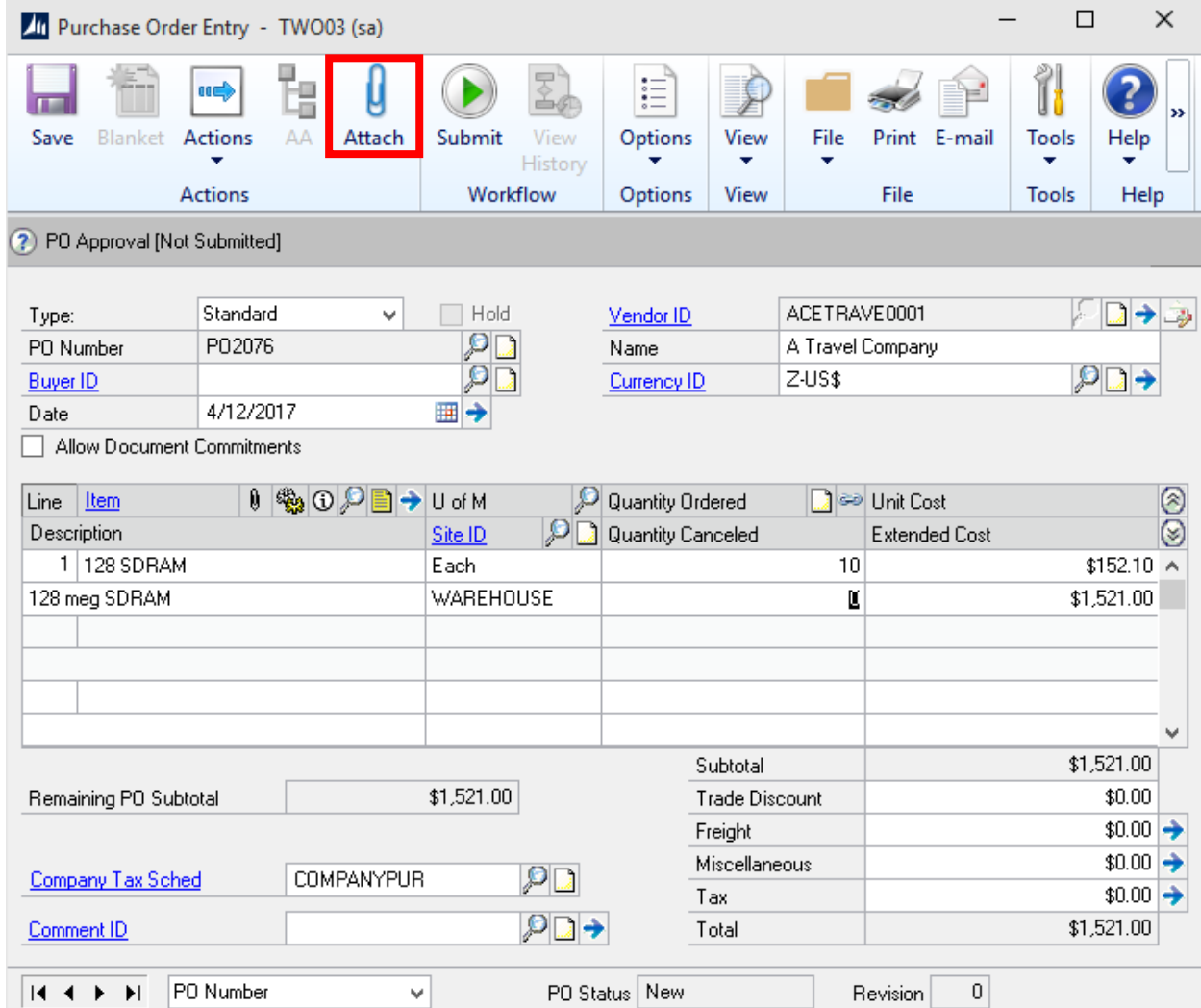


Figure 6-Attach button in the Purchase Order Entry window

- 5) After you have attached the document, you can submit your document for approval by clicking the **Submit** button in the Action Pane.
- 6) When you receive your approval notification email it will resemble the following. Note that your document has been attached



[Who's Who](#)

You have been assigned a task for the Step 1 step in the Purchase Order Approval workflow for Purchase Order PO2076.

Task Deadline: 5/27/2015 12:59:00 PM

Edit or view the document: [PO2076](#)

[Approve](#)

[Reject](#)

Company: Fabrikam, Inc.

Document Type: Purchase Order

PO Number: PO2076

Vendor: A Travel Company

Document Date: 4/12/2017

On Order Amount: 0.00000

Comments:

Lucas Miller, 5/26/2015 1:59:00 PM: PO Approval

**Figure 7-Sample approval notification email**

## Lesson 2: Document Attachment Status Inquiry

---

This lesson explains the new functionality in the Document Attachment Status Inquiry window.

### What You Will Learn

After you complete this lesson, you will be able to:

- View when an attached document was included in a workflow notification.

Now that you have setup Workflow for Microsoft Dynamics GP 2015 R2 to include Document Attachment documents in your notifications you may have the need to determine when those documents were included in a workflow notification email. To accommodate this information the Document Attachment Status Inquiry window has been updated to include a Workflow Message status.

If you go back to our example Purchase Order from Lesson 1 you can drill down into the attachment object as follows:

- 1) Navigate to the **Purchase Order Entry** window and open the Purchase Order That You submitted in Lesson 1
- 2) Click the **Attach** button to open the **Document Attachment Management** window

Purchase Order Entry - TWO03 (sa)

Save Blanket Actions AA **Attach** Workflow View History Options View File Print E-mail Tools Help

Step 1 [Pending approval by Lucas Miller; due 5/27/2015 12:59:34 PM]

Type: Standard  Hold Vendor ID: ACETRAVE0001  
 PO Number: PO2076 Name: A Travel Company  
 Buyer ID: Currency ID: Z-US\$  
 Date: 4/12/2017  
 Allow Document Commitments

Line	Item	U of M	Quantity Ordered	Unit Cost
1	128 SDRAM	Each	10	\$152.10
	128 meg SDRAM	WAREHOUSE	0	\$1,521.00
0			0.00	\$0.00
			0.00	\$0.00
Subtotal				\$1,521.00
Trade Discount				\$0.00
Freight				\$0.00
Miscellaneous				\$0.00
Tax				\$0.00
Total				\$1,521.00

Remaining PO Subtotal: \$1,521.00

Company Tax Sched: COMPANYPUR

Comment ID:

PO Number: PO Number PO Status: New Revision: 0

**Figure 8-Click the Attach button to open the Document Attachment Management window**

- 3) Highlight your attachment, then click the blue expansion arrow by the Date field to open **Document Attachment Status Inquiry**





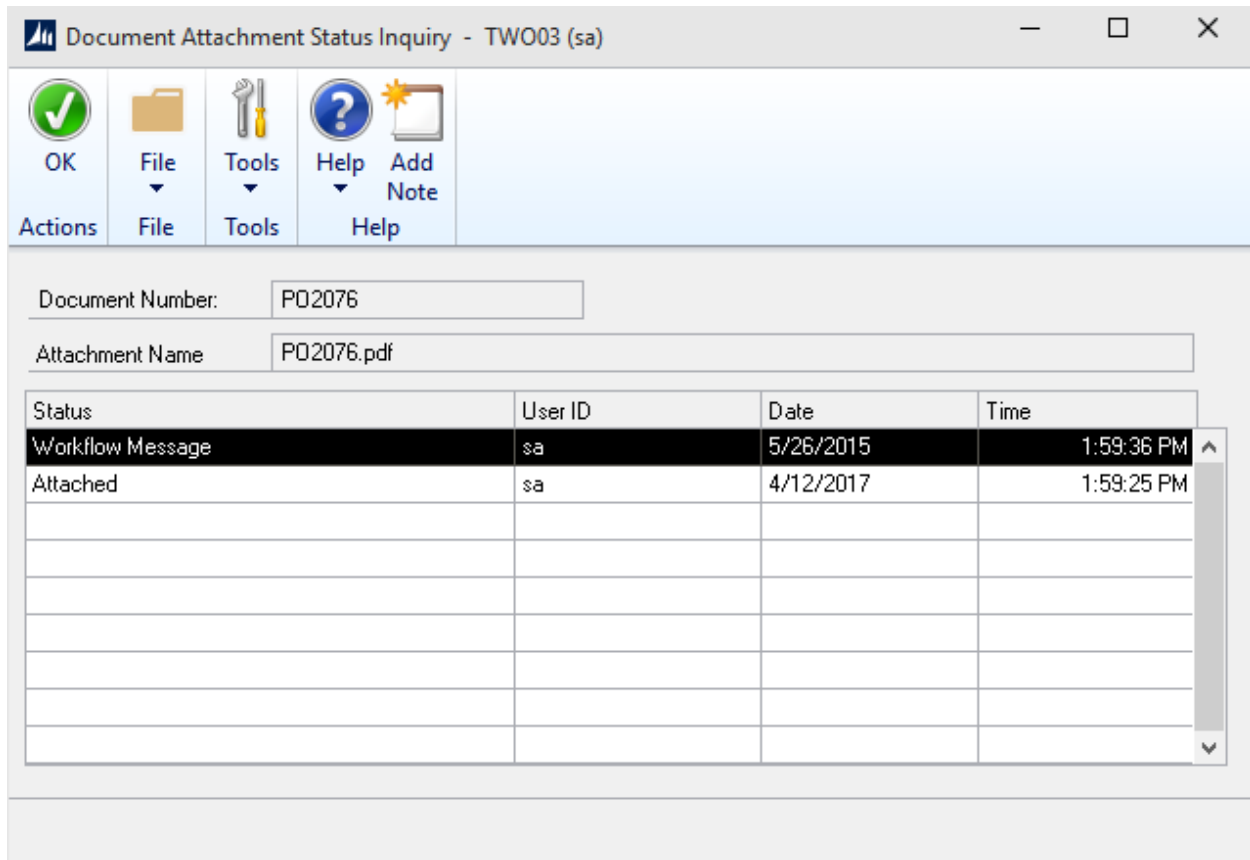


Figure 10-Document Attachment Status Inquiry window

## Module 2: SmartList Designer View Workflow

This module introduces the new feature in Microsoft Dynamics GP 2015 R2 that allows users to set up a Workflow for SmartList Designer View creation.

### **What You Will Learn**

After you complete this module, you will be able to:

- Configure workflow for SmartList Designer view creation
- Process and submit a new SmartList Designer view through workflow

# Lesson 1: Workflow Configuration for SmartList Designer View Creation

---

This lesson explains the prerequisites and setup for the workflow that has been introduced in Microsoft Dynamics GP 2015 R2 for use with SmartList Designer view creation.

## What You Will Learn

After you complete this lesson, you will be able to:

- Configure workflow for SmartList Designer views

In Microsoft Dynamics GP 2015 R2, new functionality has been added to allow for the configuration of a workflow for use with SmartList Designer view creation. This will allow for processes to be put in place for the approval and rejection of new views that can be used within SmartList Designer or leveraged for Excel Reports.

## Workflow Configuration

The following information will help you with the setup of the new SmartList Designer View workflow that has been created for use with Dynamics GP 2015 R2.

### Setup

- 1) The SmartList Designer View workflow option is now available in the Workflow Maintenance window (Administration – Setup – Company – Workflow – Workflow Maintenance) with the following attributes.**
  - a. Series – Administration
  - b. Workflow Type – SmartList Designer View
  - c. Description – Approval process for creating SQL Views
  - d. Window – SmartList Designer

- 2) In the **Workflow Maintenance** window, assign a **Manager** to the Workflow Type, click **Save Type**, and then click the **New Workflow** button.

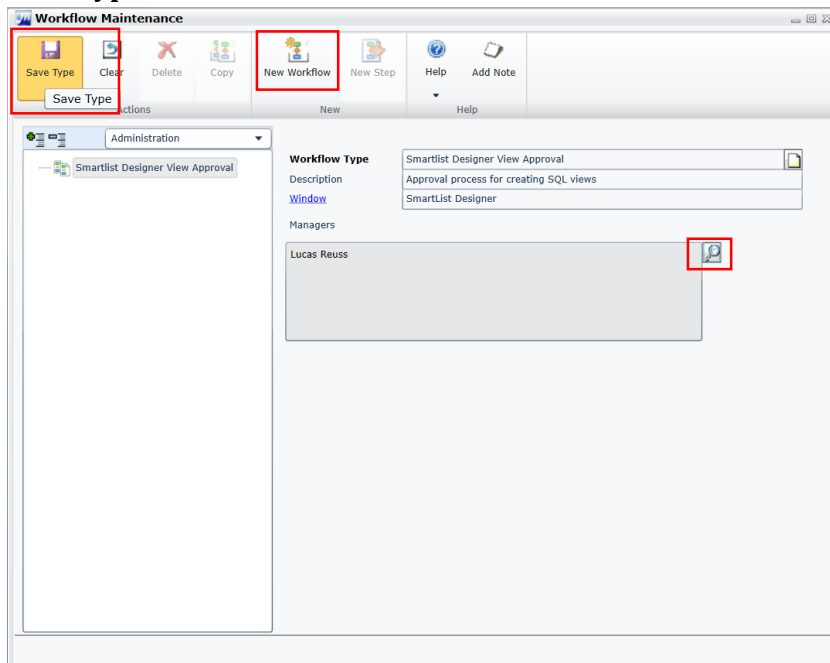


Figure 11-Workflow Maintenance window

- 3) Provide the new workflow with a name in the **Workflow Name** field, and enter a **Description** if desired. Make sure that any **Option** check boxes that need to be marked are marked, as well as the action to take under the **When a task is overdue:** section.

4) After the settings that you want are marked, click the Save Workflow button.

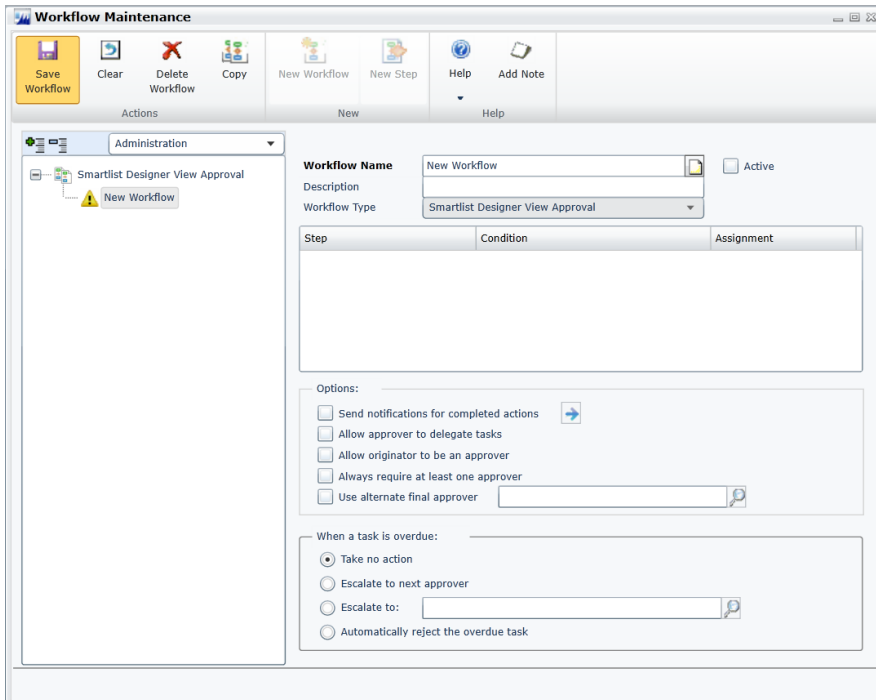


Figure 12-Save Workflow button in the Workflow Maintenance window

5) Next, click the New Step button in the Workflow Maintenance window.

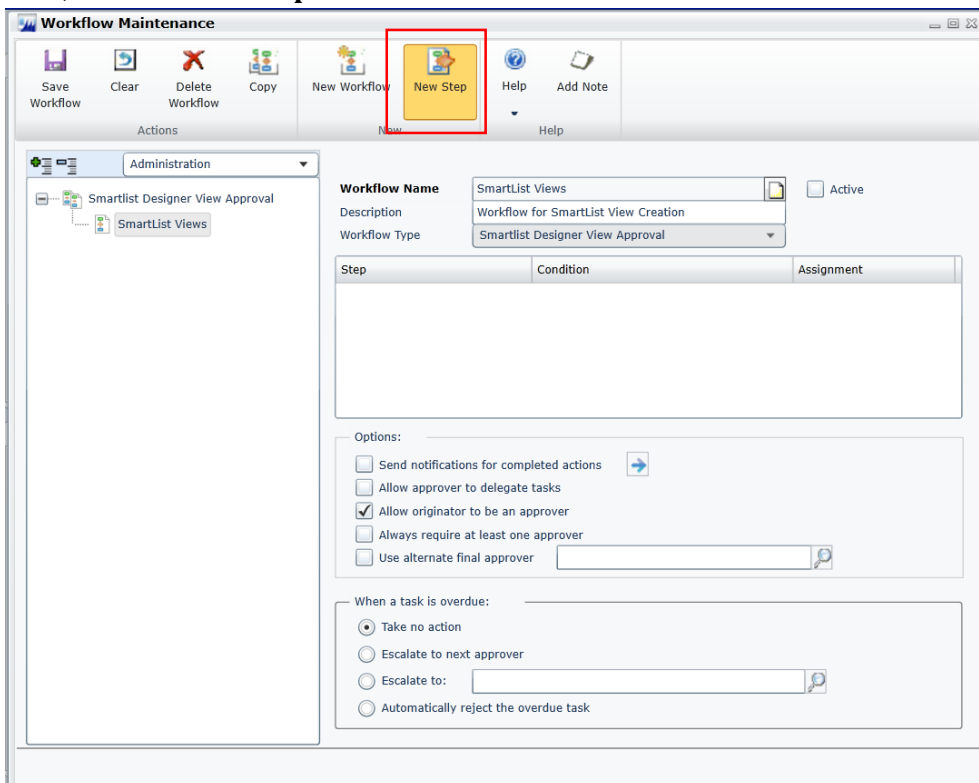


Figure 13-New Step button in the Workflow Maintenance window

- 6) Provide the new step with a **Step Name** and **Description**. For this example, only the **Step Type** of **Approval** will be used. Enter a User or Group in the **Assign to:** field and set a **Time limit**. Choose to mark other options, such as **Send Message** and the **Completion Policy**. Then click **Save Step**.

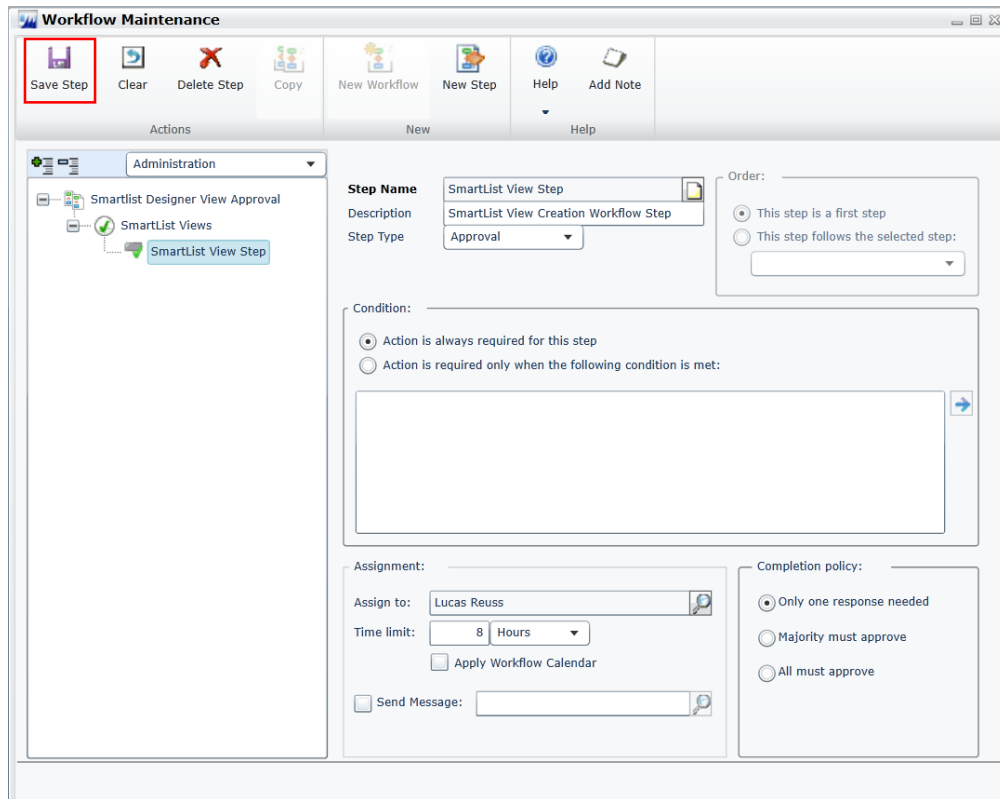


Figure 14-Save Step button in Workflow Maintenance window

- 7) After the step has been saved, click the Workflow and then mark the **Active** check box, then click **Save Workflow**.

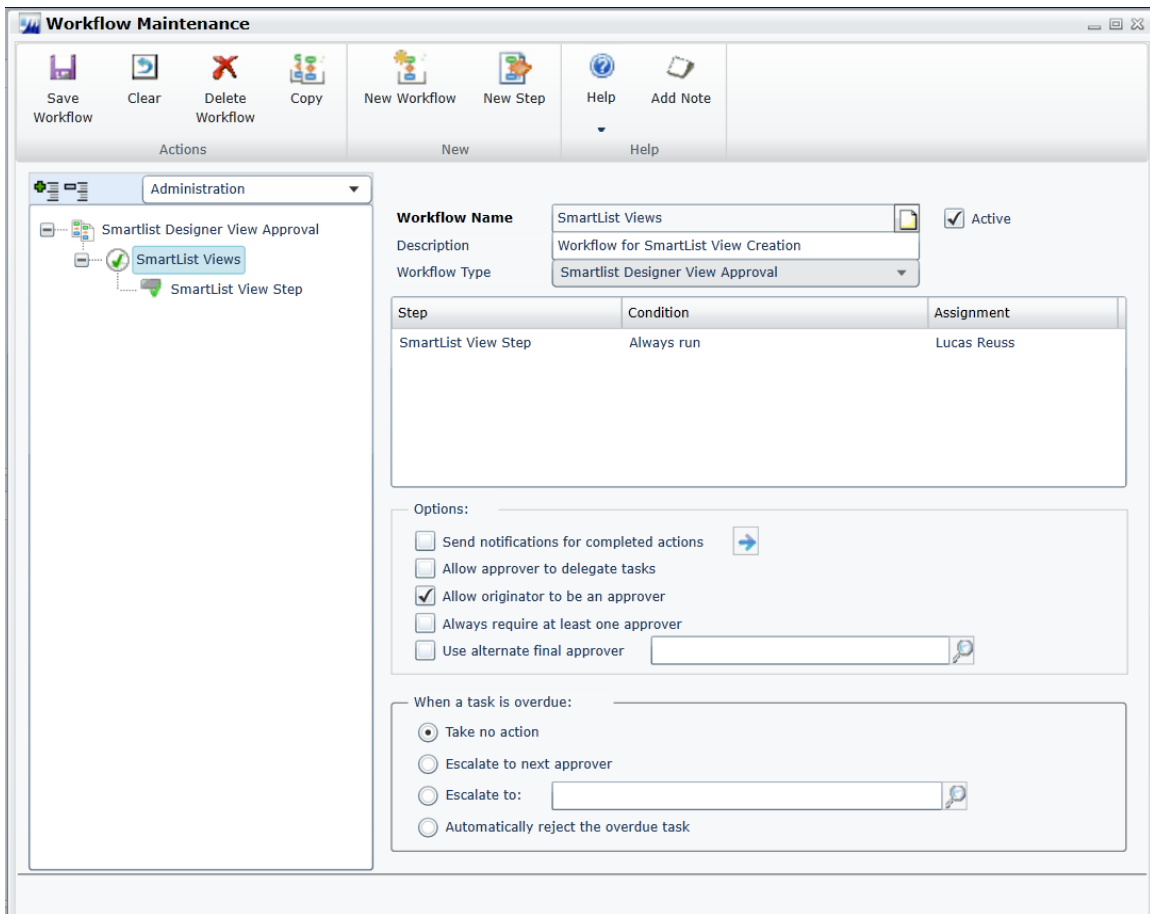


Figure 15- Workflow Maintenance window with Active box marked

- 8) The workflow is now available for use within the **SmartList Designer** window for creating **SQL Views**.



## Lesson 2: Submitting and Approving a Workflow from SmartList Designer

---

This lesson works through submitting and approving a workflow for SQL Views created in SmartList Designer.

### What You Will Learn

After you complete this lesson, you will be able to:

- Submit a workflow for a SQL View created in SmartList Designer.
- Approve a workflow for a SQL View created in SmartList Designer.

Now that Workflow for SQL Views created in SmartList Designer on Microsoft Dynamics GP 2015 R2 has been set up, we can work through submitting and approving a workflow from the SmartList Designer window.

### Creating a SQL View and Submitting Workflow

- 1)** Open the **SmartList Designer** window (**Administration – Reports – SmartList Designer**). You will not see the Workflow **Submit** button as seen below until you enter a **List Name** for

the SmartList view.

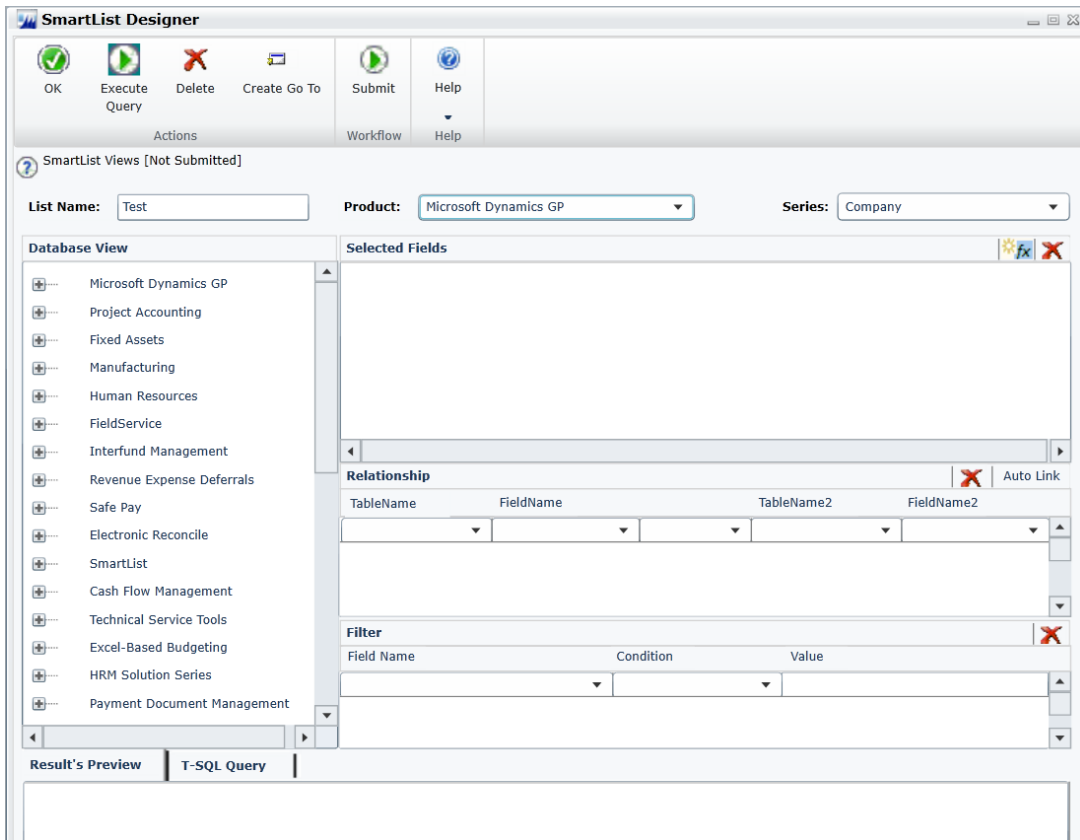


Figure 16-SmartList Designer window with a List Name entered

2) Create a SmartList view. The view created below will pull all accounts with the Account Type of **Posting Account** in the company.

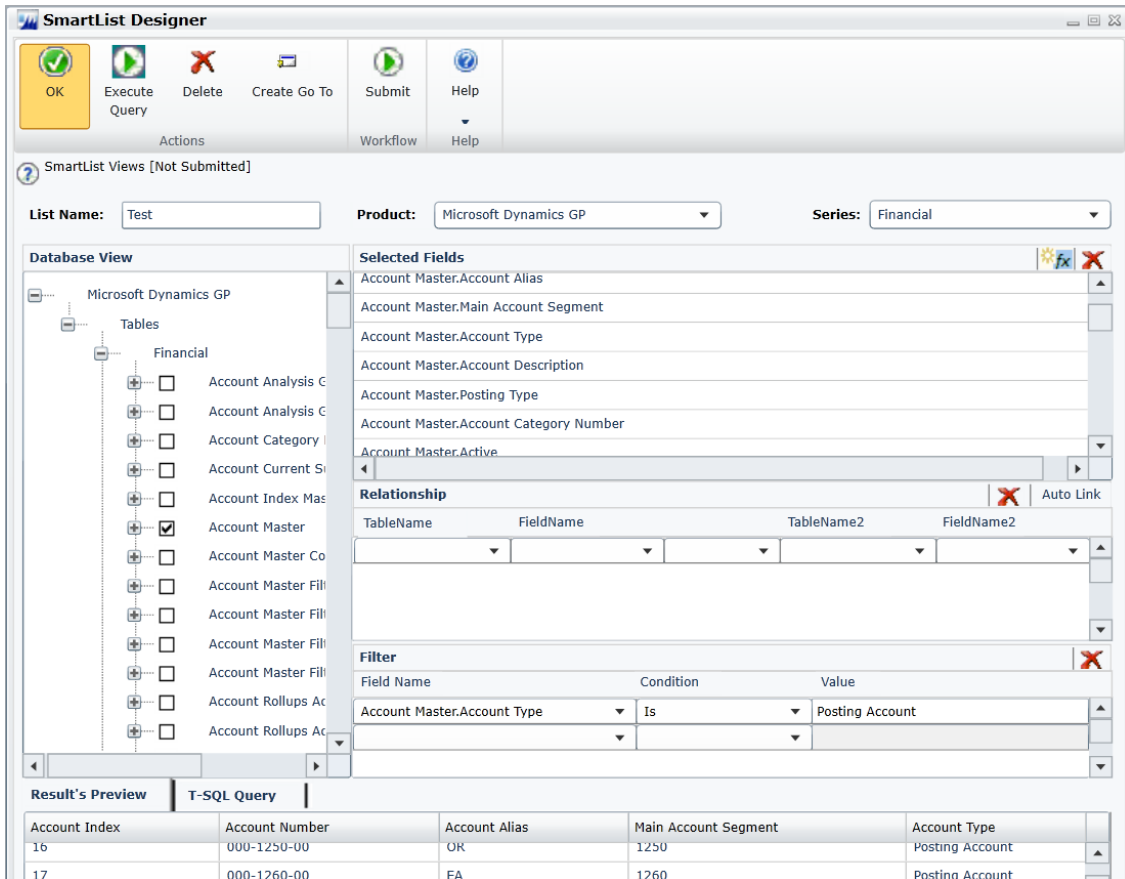


Figure 17-SmartList Designer with a Filter set to Posting Account

3) Next, click the **Submit** button. Enter any needed **Comments** in the **Workflow Action** dialogue box that is presented and then click **Submit**.

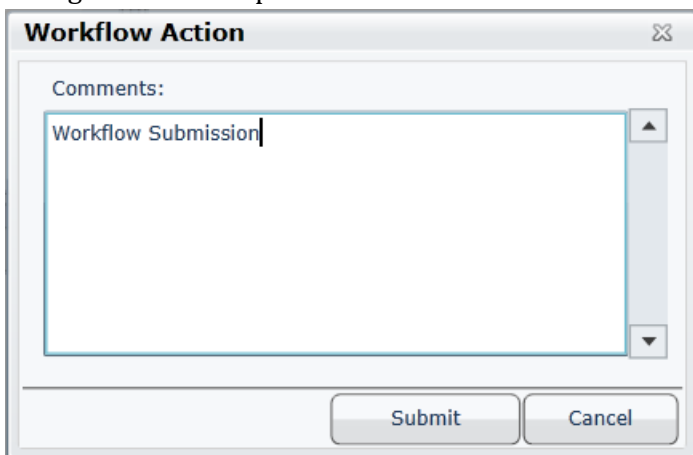


Figure 18-Workflow Action window with comments

- 4) Then click the **SmartList Designer View Pending Approval** navigation pane option under the **Administration** area (this will require you to be signed in to Dynamics GP as the user set up to approve the workflow).

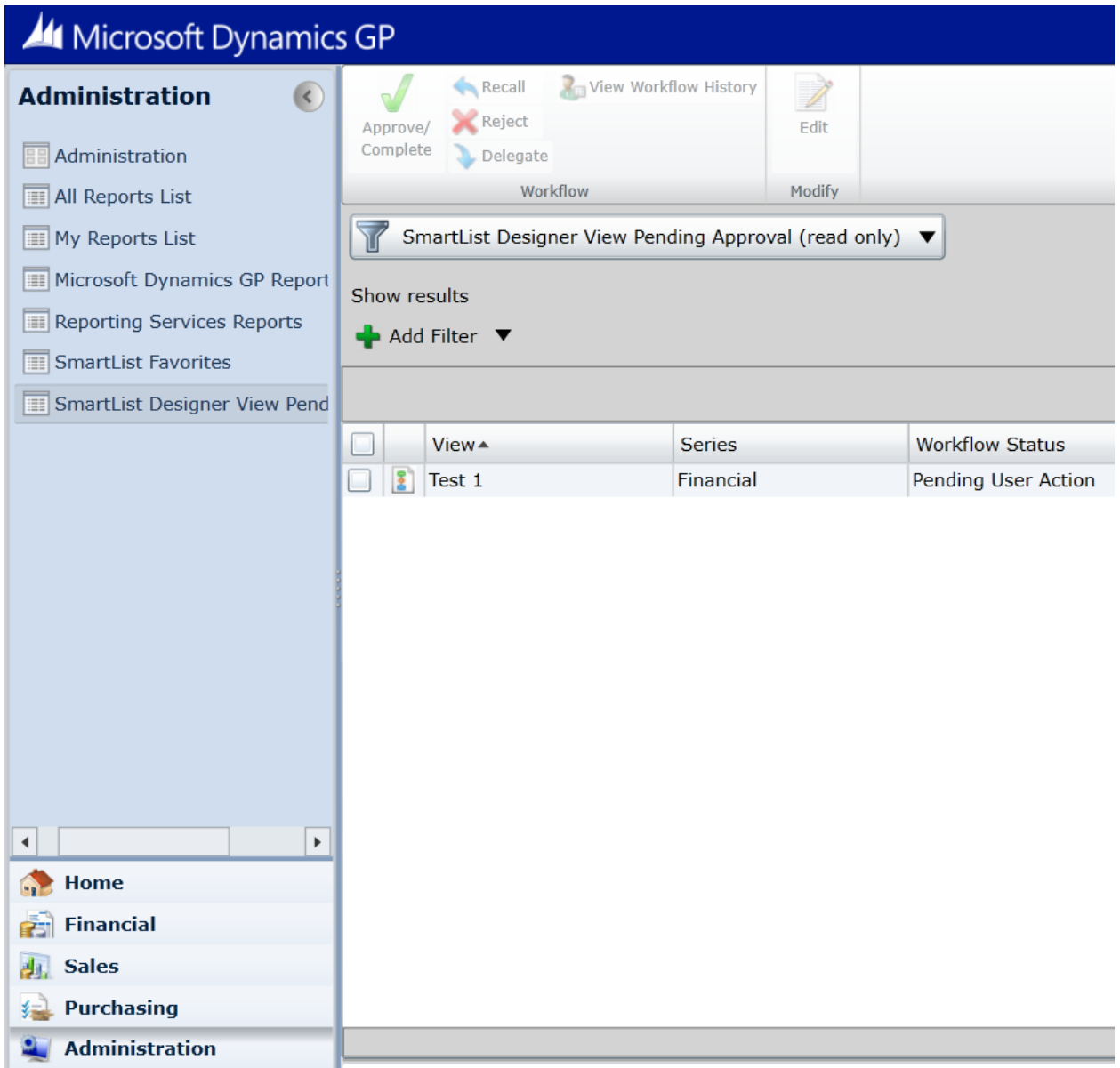


Figure 19-SmartList Designer View Pending Approval

- 5) Check the check box next to the workflow that you want to approve, and then click **Approve/Complete**.

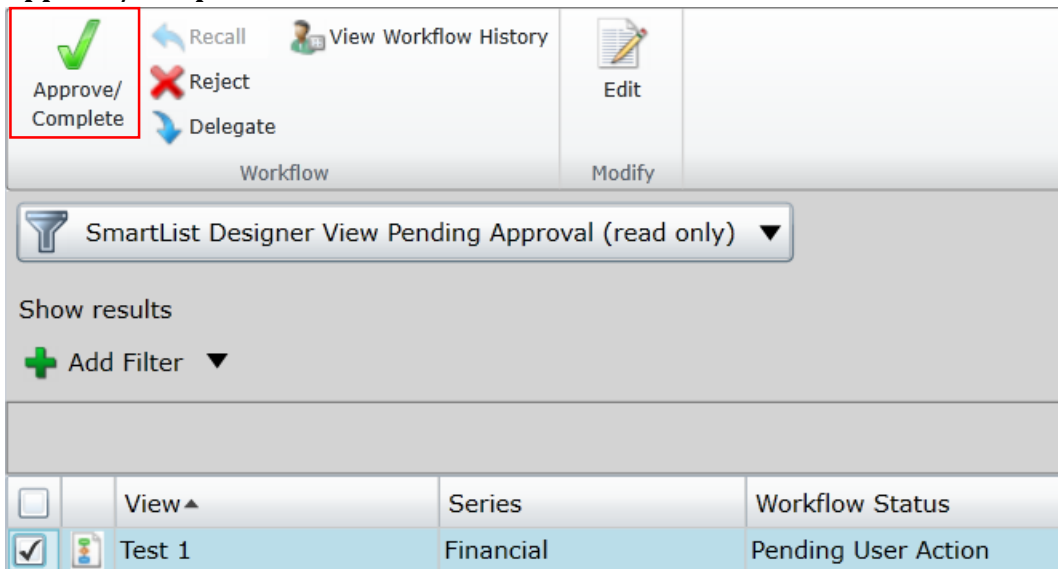


Figure 20- Workflow Approve/Complete box

- 6) Enter **Comments** as needed into the **Workflow Action** dialogue window and then click **Approve**.

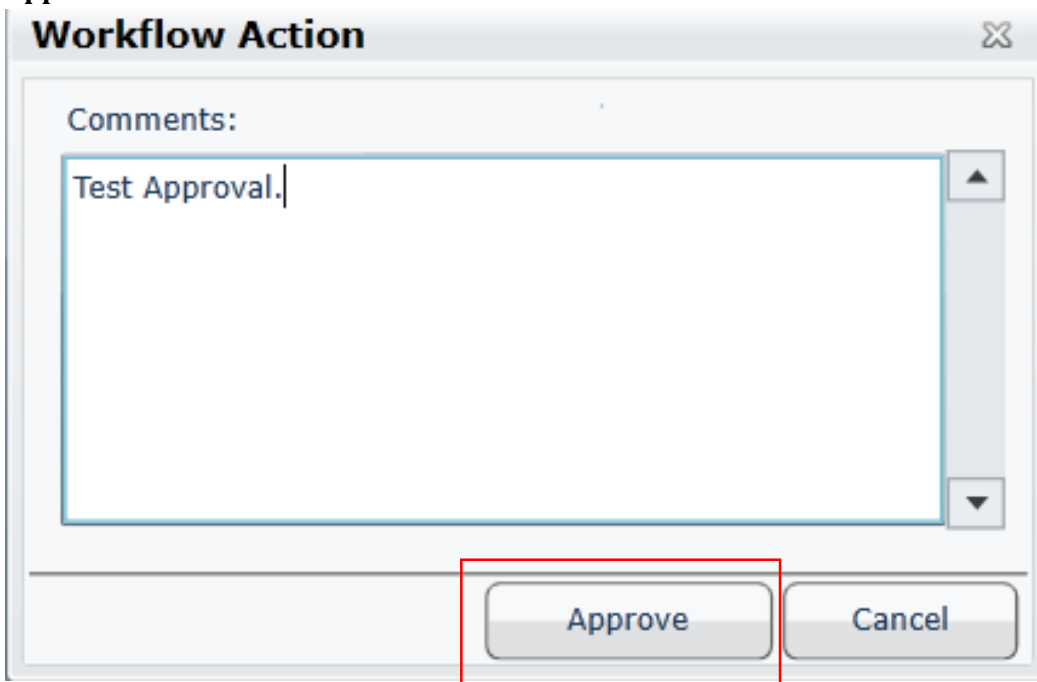


Figure 21-Approval button in Workflow Action window

- 7) The list view will now be available in the **SmartList** window (**Administration - Reports - SmartList**) under the path set in **SmartList Designer**.

## Try This: Setup and Submit a new SmartList View Workflow

Take what you have learned in Lessons 1 and 2 and try to create a new SmartList Designer View workflow, and then create a new SmartList view to submit and approve.

1. Start by setting up a new SmartList Designer View workflow in the **Workflow Maintenance** window.
2. Next, go to the **SmartList Designer** window and create a new list using a new **List Name**.
3. Finish by submitting the workflow for approval and then approve the view.

## Module 3: Self Service User Type

This module introduces the new feature in Microsoft Dynamics GP 2015 R2 that enables users to perform very limited self-service types tasks such as entering payroll time.

### **Before You Begin**

Before starting this module, you should:

- Have a working installation of Microsoft Dynamics GP 2015 R2.
- Understand Security Roles and Security Tasks.

### **What You Will Learn**

After you complete this module, you will be able to:

- Explain what the Self Service user type is.



# Lesson 1: Self Service User Type

---

This lesson explains the new Self Service User Type in Microsoft Dynamics GP 2015 R2.

## What You Will Learn

After you complete this lesson, you will be able to:

- Have access to a Microsoft Dynamics GP 2015 R2 install.
- Understand User Types.
- Have knowledge of Security Roles and Security Tasks.

## Self Service User Type

### Functionality Described

With the release of Microsoft Dynamics GP 2015 R2, the **Self Service** User Type was added. The **Self Service** user type was created for users who require very limited access to the system. This is a less expensive option which enables users to perform tasks such as entering payroll time, entering project time and expenses, and/or creating a purchase requisition.



**Note:**

**Self Service** Users Types are available with the Perpetual Licensing model.

For more information on Licensing click the link below:

<https://mbs.microsoft.com/partnersource/northamerica/pricing-ordering/licensing-policies/perpetual-licensing>



**Note:**

**Previous to Microsoft Dynamics GP 2015 R2:**

With the release of Microsoft Dynamics GP 2013: Full and Limited User Types were added.

In Microsoft Dynamics GP 2013 R2 and 2015: The foundation was laid to enable self-service type functionality, which previously was available only in the Business Portal.

**Self Service Users may have access to the following Self Service features** (depending on security access granted):

Microsoft Dynamics GP 2013 R2:

- Purchase Requisition
- Payroll Timecard
- Project Timesheet

- Home Page Parts

Added with Microsoft Dynamics GP 2015:

- Employee Profile
- Paystubs
- W4
- Benefits
- Direct Deposit
- Skills and Training
- Project Expense

Added with Microsoft Dynamics GP 2015 R2:

- W2

## Changes to Windows

Some windows were updated to accommodate the new Self Service User Type. The following are those windows:

### User Setup window

The Self Service User Type has been added to the **User Setup** window with the release of Microsoft Dynamics GP 2015 R2. To open the **User setup** window: On the **Administration** area pane, select **Setup**, and then click **User** under **System**.

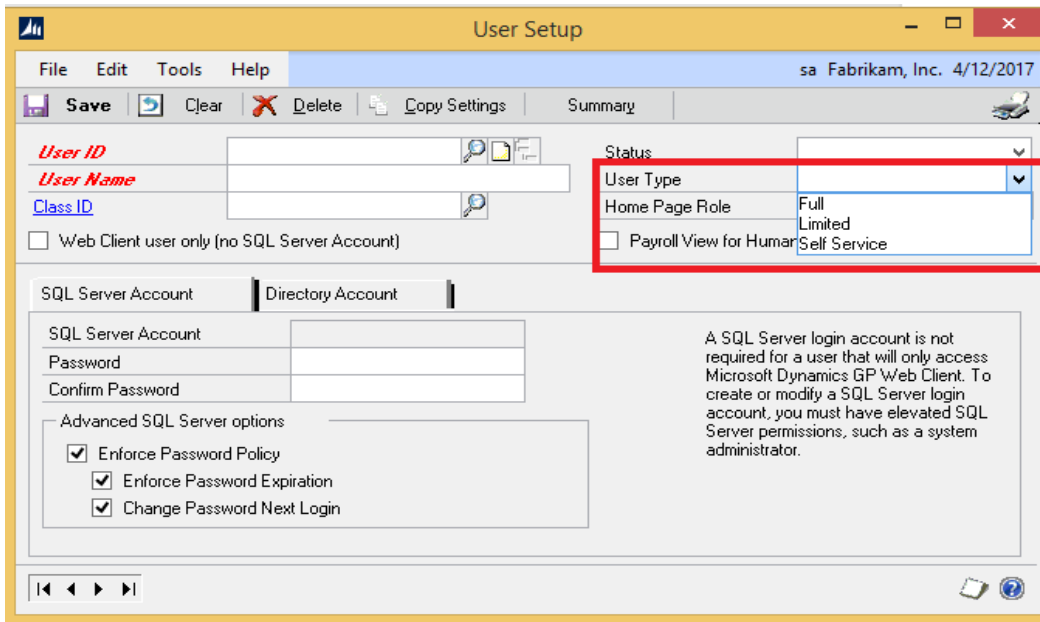


Figure 22: User Setup window



#### Note:

The POWERUSER role must be unmarked in the User Security Setup window prior to assigning the Self Service User Type.

If **POWERUSER** is marked in **User Security Setup** when you change a user to the **Self Service** user type, the following error will occur, “This user has been assigned access to POWERUSER security role and cannot be defined as a Self Service user typ. Review the security that has been set up for this user.”



**Figure 23-Error message if POWERUSER is marked in User Security Setup when you change a user to the Self Service user type**

### **User Summary window**

The **Active Self Service Users** field has been added to the **User Summary** window. Users can see how many Self Service users are currently logged into the system and also how many Self Service users are allowed in the system at one time. In addition, the **Self Service** user type will display appropriately in the **Type column** for any Self Service users. To open the **User Summary** window: On the **Administration** area pane, select **Setup**, and then click **User** under **System**, and then click the **Summary** button.

User Summary

File Edit Tools Help sa Fabrikam, Inc. 4/12/2017

OK

Site: Two, Inc.  
 Mode: Concurrent User System

User Totals	Current	Allowed
Active Full Users	1	5
Active Limited Users	0	30
Active Self Service Users	0	20

User ID	User Name	Status	Type
ANDREA	ANDREA	Active	Self Service
DYNSA	DYNSA	Active	Full
JULIE	JULIE	Active	Self Service
LESSONUSER1	LESSONUSER1	Lesson User	Full
LESSONUSER2	LESSONUSER2	Lesson User	Full
sa	sa	Active	Full
terry	terry	Active	Self Service

Figure 24: User Summary window showing number of Active Self Service Users

## User Security Setup window

The **User Type** field has been updated to reflect the **Self Service** User Type for any **Self Service** users in the **User Security Setup** window with the release of Microsoft Dynamics GP 2015 R2. To open the **User Security Setup** window: On the **Administration** area pane, select **Setup**, and then click **User Security** under **System**.

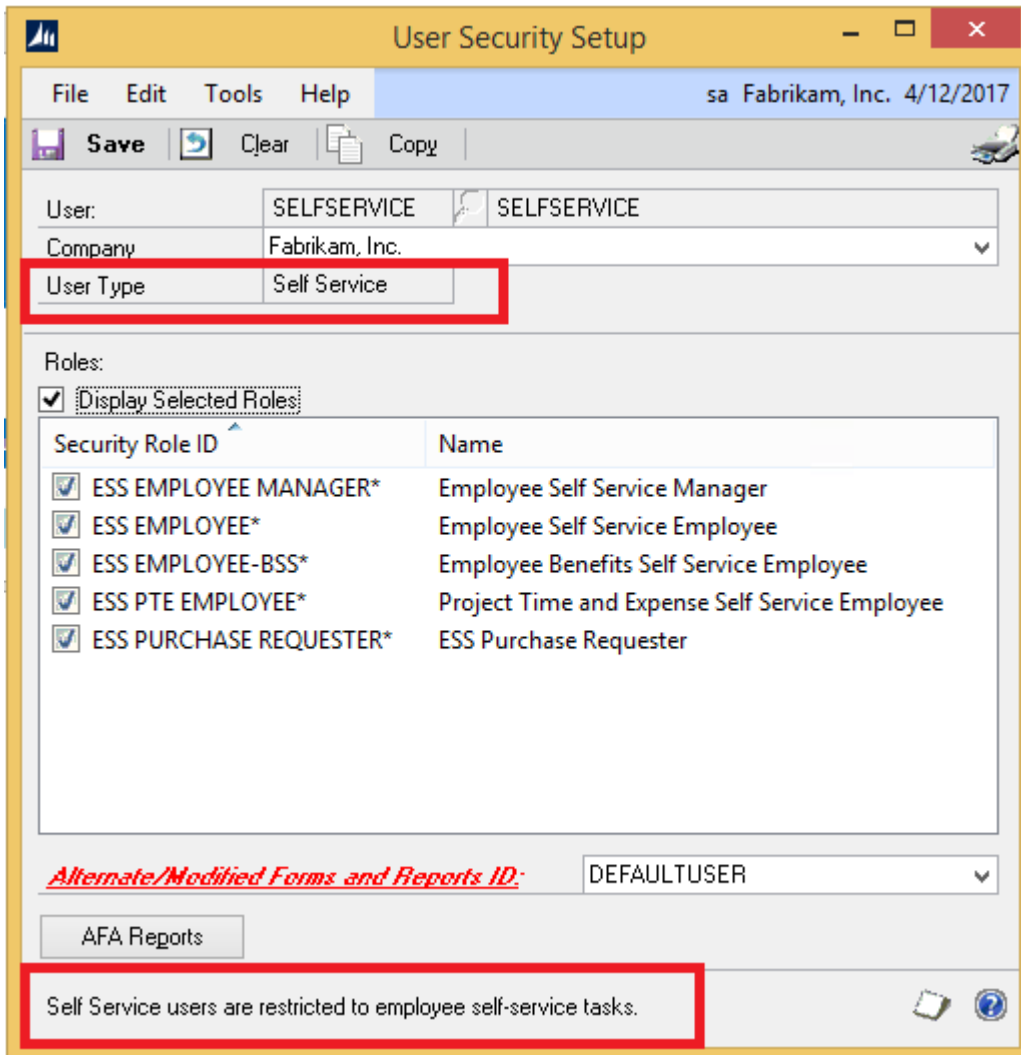


Figure 25: User Security Setup window



**Note:**

The **POWERUSER** role will be **removed** from the list of available roles to select from when a **Self Service** Type user is displayed in this window.



**Note:**

The following Security Roles exist in Microsoft Dynamics GP for the Self Service User Type:

- ESS EMPLOYEE MANAGER\*

- ESS EMPLOYEE\*
- ESS PURCHASE REQUESTER\*
- ESS EMPLOYEE-BSS\*
- ESS PTE EMPLOYEE\*

### Security Task Setup window

The User Type field has been updated to reflect the Self Service User Type which allows users to filter results based on user type in the **Security Task Setup** window. To open the **Security Task Setup** window: On the **Administration** area pane, select **Setup**, and select **Security Task** under **System**.

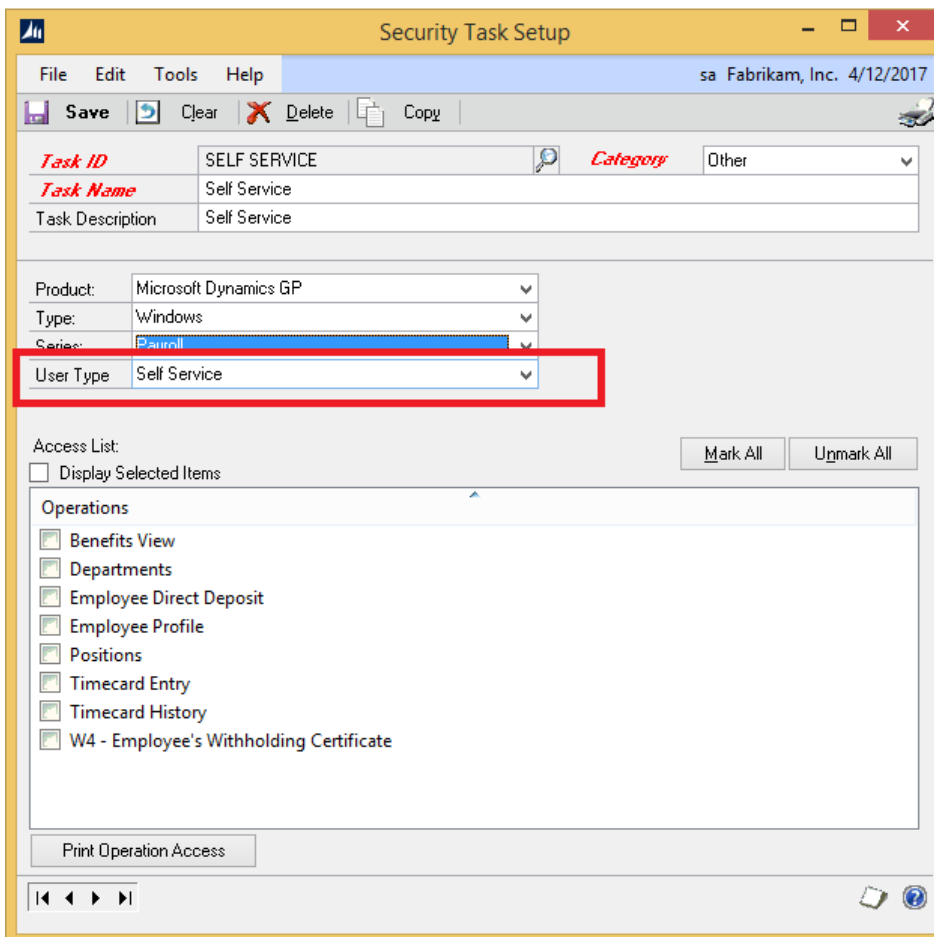


Figure 26: Security Task Setup window with User Type of Self Service



**Note:**

When the User Type is **Self Service** in this window, only resources that are available to **self-service** users will be displayed.

When the User Type is **Limited** in this window, only resources that are available to limited users will be displayed.

When the User Type is **Full** in this window, all available resources will be displayed.

The following are **Security Tasks** assigned by default to each **Self Service Security Role ID** in Microsoft Dynamics GP 2015 R2:

<b>ESS EMPLOYEE MANAGER Security Role ID – Employee Self Service Manager</b>	
<b>Task ID</b>	<b>Task Name</b>
DEFAULTUSER	Default User
EMP_PROFILE_MANAGER_01*	Approve Employee Profile
EMP_SKILLS_MANAGER_01*	Approve Employee Skills and Training
EMP_TIME_MANAGER_01*	Approve Timecards

<b>ESS EMPLOYEE Security Role ID – Employee Self Service Employee</b>	
<b>Task ID</b>	<b>Task Name</b>
DEFAULTUSER	Default User
EMP_BENEFITS_EMPLOYEE_01*	View Employee Benefits
EMP_DIRECTDEP_EMP_01*	Update Direct Deposit information
EMP_PAYSTUBS_EMPLOYEE_01*	View Employee Paystubs
EMP_PROFILE_EMPLOYEE_01*	Update Employee Profile
EMP_SKILLS_EMPLOYEE_01*	Update Employee Skills and Training
EMP_TIME_EMPLOYEE_001*	Enter Payroll Time and View Reports
EMP_W2_EMPLOYEE_01*	View Employee W2
EMP_W4_EMPLOYEE_01*	Update W4 information



<b>ESS PTE EMPLOYEE Security Role ID – Project Time and Expense Self Service Employee</b>	
<b>Task ID</b>	<b>Task Name</b>
DEFAULTUSER	Default User
PADEFAULTUSER*	Project Accounting default user
PTE_EXPENSE_ENTRY_001*	Self-Service employee project expense entry
PTE_TIME_ENTRY_001*	Self-Service employee project time entry

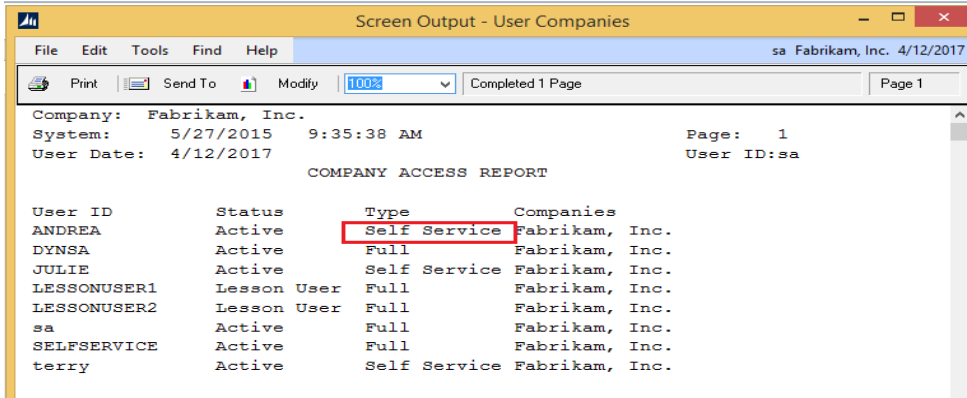
<b>ESS PURCHASE REQUESTER Security Role ID – ESS Purchase Requester</b>	
<b>Task ID</b>	<b>Task Name</b>
DEFAULTUSER	Default User
ADMIN_PURREQ_021*	Purchase requisition tables
INQ_PURREQ_005*	View purchase requisition transactions
TRX_PURREQ_026*	Enter purchase requisition transactions

## Changes to Reports

Some reports were updated to accommodate the new Self Service User Type. The following are those reports:

### Company Access Report

The **Self Service** User Type has been added to the **Company Access** report. To open the **Company Access** report: On the **Administration** area pane, select **Setup**, open the **User Access** window under **System**, and then click the **printer** icon .



Screen Output - User Companies

File Edit Tools Find Help sa Fabrikam, Inc. 4/12/2017

Print Send To Modify 100% Completed 1 Page Page 1

Company: Fabrikam, Inc.  
System: 5/27/2015 9:35:38 AM Page: 1  
User Date: 4/12/2017 User ID:sa

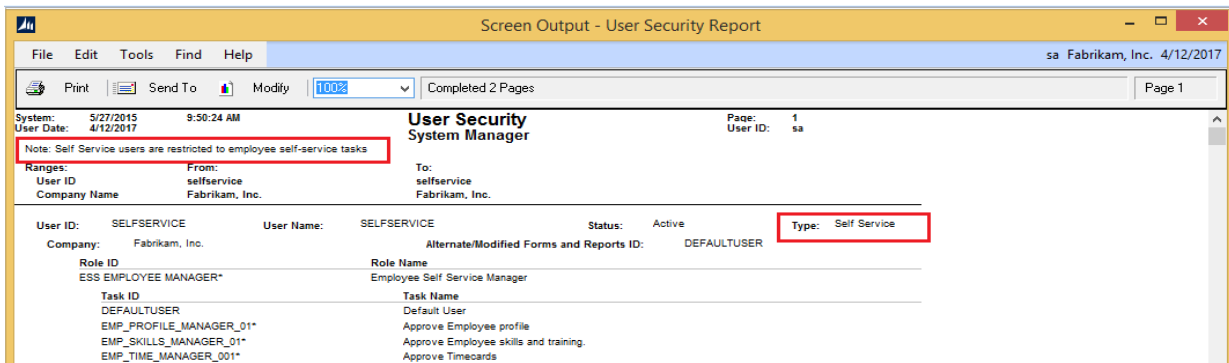
COMPANY ACCESS REPORT

User ID	Status	Type	Companies
ANDREA	Active	Self Service	Fabrikam, Inc.
DYNSA	Active	Full	Fabrikam, Inc.
JULIE	Active	Self Service	Fabrikam, Inc.
LESSONUSER1	Lesson User	Full	Fabrikam, Inc.
LESSONUSER2	Lesson User	Full	Fabrikam, Inc.
sa	Active	Full	Fabrikam, Inc.
SELFSERVICE	Active	Full	Fabrikam, Inc.
terry	Active	Self Service	Fabrikam, Inc.

Figure 27: Company Access Report showing Self Service User Type

### User Security Report

The **Self Service** User Type has been added to the **User Security** report. To open the **User Security** report: On the **Administration** area pane, select **Setup**, open the **User Security** window under **System**, and then click the **printer** icon.



Screen Output - User Security Report

File Edit Tools Find Help sa Fabrikam, Inc. 4/12/2017

Print Send To Modify 100% Completed 2 Pages Page 1

System: 5/27/2015 9:50:24 AM  
User Date: 4/12/2017

**User Security System Manager** Page: 1  
User ID: sa

Note: Self Service users are restricted to employee self-service tasks

Ranges:  
From: selfservice  
To: selfservice  
Company Name: Fabrikam, Inc.

User ID: SELFSERVICE User Name: SELFSERVICE Status: Active Type: Self Service  
Company: Fabrikam, Inc. Alternate/Modified Forms and Reports ID: DEFAULTUSER

Role ID: ESS EMPLOYEE MANAGER\* Role Name: Employee Self Service Manager

Task ID	Task Name
DEFAULTUSER	Default User
EMP_PROFILE_MANAGER_01*	Approve Employee profile
EMP_SKILLS_MANAGER_01*	Approve Employee skills and training
EMP_TIME_MANAGER_001*	Approve Timecards

Figure 28: User Security Report showing Self Service User Type



#### Note:

The following Note will appear when the User Security Report is generated for a Self Service User Type, "Note: Self Service users are restricted to employee self-service tasks."

## Security Task Setup Report

The **Security Task Setup** report has been updated to show which resources are associated with the **Self Service** User type. To open the **Security Task Setup** report: On the **Administration** area pane, select **Setup**, open the **Security Tasks** window under **System**, and then click the **printer** icon.

Figure 24: Company Access Report



### Note:

^ Indicates resources that are available to **Self Service** users.

\* Indicates resources that are available to **Limited** users.

## Registration Report

The **Number of Self Service Users Allowed** field has been added to the **Registration** report. To open the **Registration** report: On **Help (question mark in blue circle)** in the upper-right corner of Microsoft Dynamics GP, select **About Microsoft Dynamics GP**, click the **Options** button, and then click the **printer** icon.

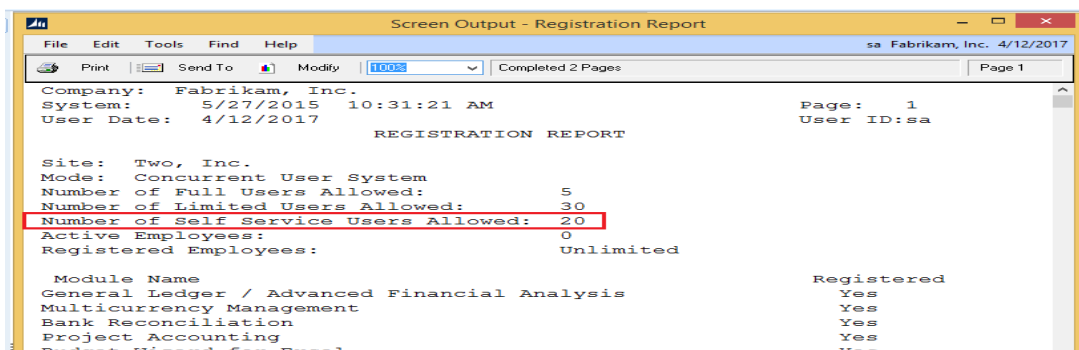


Figure 29: Registration Report showing number of Self Service Users Allowed

## Script Available - Change Limited Users to Self Service User Type in Microsoft Dynamics GP 2015 R2 When Appropriate

The **Self Service** User Type was available for purchase **before** it was implemented into the product with the release of Microsoft Dynamics GP 2015 R2.

Before 2015 R2, **Self Service** users were set up as **Limited users** with the understanding these users would only have access to the **ESS Security** Roles and Tasks.

Now in Microsoft Dynamics GP 2015 R2, **Self Service** users originally created as **Limited** users can be switched to the **Self Service** user type appropriately.

Development created the UpdateESSUserType.sql script to let users easily change the user type for self-service users originally created as **Limited** users to the **Self Service** user type in mass.

Click [HERE](#) to download the UpdateESSUserType.sql script.



**Note:**

The **User Type** can be changed manually in GP in the **User Setup** window.

This script is meant for scenarios where multiple users need to be updated to the **Self Service** user type.



**Note:**

This script should **ONLY be run on Microsoft Dynamics GP 2015 R2 or later versions**. The script will produce an error if run on a earlier version.



**Note:**

**IMPORTANT: Verify that Registration Keys include Self Service users prior to running the script.**

**Self Service** User Type **MUST** be registered in order to successfully utilize **Self Service** User Type functionality.

**Note:** If script is processed while not registered for **Self Service** users, all users changed to **Self Service** user type on the back-end will be unable to log on to Microsoft Dynamics GP successfully.



**Note:**

The script will update users who have the user type of **Limited** that are assigned to one or more of the following ESS security roles, and not assigned to any other security roles, to a user type of "**Self Service**."

### ESS Security Roles:

- ESS EMPLOYEE MANAGER\*
- ESS EMPLOYEE\*
- ESS PURCHASE REQUESTER\*
- ESS EMPLOYEE-BSS\*
- ESS PTE EMPLOYEE\*

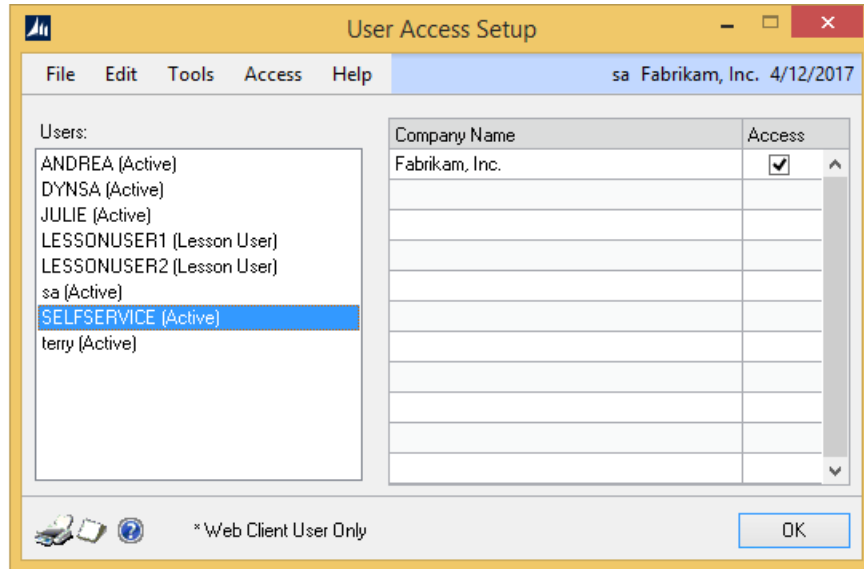
## Try This: Set Up A Self Service User

Take what you have learned and try to set up a Self Service User and view the users Employee Profile in Fabrikam:

1. Start by logging into Microsoft Dynamics GP 2015 R2 as 'sa'.
2. Navigate to the User Setup window (Microsoft Dynamics GP >> Tools >> Setup >> System >> User Setup), and create a new Self Service user:
  - a. Next to 'User ID' enter a new User ID.
  - b. In the 'User Name' field, enter a name for the new user.
  - c. The 'Status' field should be marked as 'Active'.
  - d. Select 'Self Service' for the 'User Type'
  - e. Enter and confirm a password for the user (make note of it).
  - f. Click Save, and close the window.

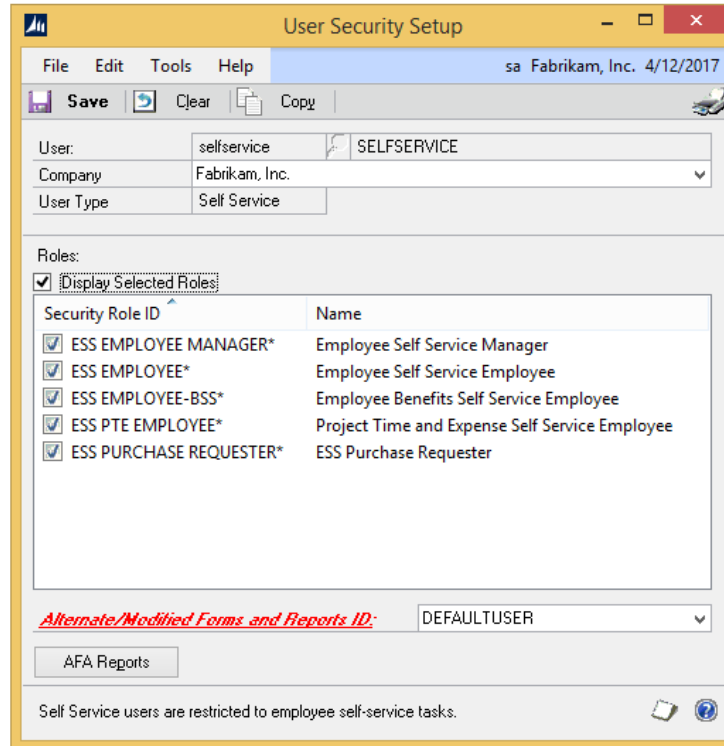
Figure 30-User Setup for Self Service User Type

3. Give the new Self Service user access to appropriate company databases in the User Access Setup window (Microsoft Dynamics GP >> Tools >> Setup >> System >> User Access):
  - a. Highlight the appropriate user in the 'Users' column.
  - b. Mark the box under 'Access' for the appropriate company.
  - c. Click OK, and close the window.



**Figure 31- User Access Setup window for a Self Service User**

4. Assign ESS Security Roles to the new Self Service user in the User Security Setup window (Microsoft Dynamics GP >> Tools >> Setup >> System >> User Security):
  - a. Next to 'User' enter appropriate User ID.
  - b. Select appropriate company in the 'Company' drop-down field \*Note: User Type will automatically populate as 'Self Service'.
  - c. Under 'Roles', scroll down and mark the boxes next to ESS EMPLOYEE MANAGER\*, ESS EMPLOYEE\*, ESS PURCHASE REQUESTER\*, ESS EMPLOYEE-BSS\* , and ESS PTE EMPLOYEE\*.
  - d. Click Save and close the window.



**Figure 32- User Security Setup window for Self Service User with Security Roles**

5. Associate the new Self Service user with employee Pilar Ackerman (Cards >> Payroll >> Employee):
  - a. Next to 'Employee ID' in the Employee Maintenance window, enter ACKE0001, and tab off the field.
  - b. Click the Additional Information button to open the Employee Additional Information window.
  - c. In the 'GP User ID' field, enter the new Self Service User ID.
  - d. Click OK, and close the window.
  - e. Click OK in the Employee Maintenance window, and close it.

**Figure 33- GP User ID field in the Employee Additional Information Maintenance Window for Self Service User**

6. Log on to Microsoft Dynamics GP using the new Self Service users User ID and password.
7. Click Cards >> Self Service >> Employee Profile.

Verify that you are able to successfully view Pilar Ackerman's Employee Profile. View other Self Service windows to verify what the user does and does not have access to.

## Lesson Review

Topics that are covered in this lesson include the following:

- Self Service User Type was added with the release of Microsoft Dynamics GP R2.
- Self Service User Type is a less expensive option compared to Limited or Full User Types.
- Scripts are available to assist with changing self-service users currently in the system as Limited Users to Self Service User Type in mass.



# Module 4: Enable Email for all Sales/Purchasing Forms (Short, Long, Other)

This module explains the new functionality added to GP2015 R2 involving the ability to email additional formats for the SOP and Purchasing Modules.

## **Before You Begin**

Before starting this module, you should:

- Enable the new functionality in the desktop client
- Have access to Microsoft Dynamics GP2015 R2.
- Have customers and vendors that are set up with an email address.

## **What You Will Learn**

After you complete this module, you will be able to:

- Email SOP and Purchasing documents in the new formats added in R2.

## Lesson 1: Enabling the New Formats in GP2015 R2

This lesson explains how to enable the functionality in Microsoft Dynamics GP2015 R2. The functionality will automatically work in the Web client, but changes need to be made to the Dex.ini file for the desktop client.

### What You Will Learn

After you complete this lesson, you will be able to:

- How to enable the email options for the new formats.

### How to Enable

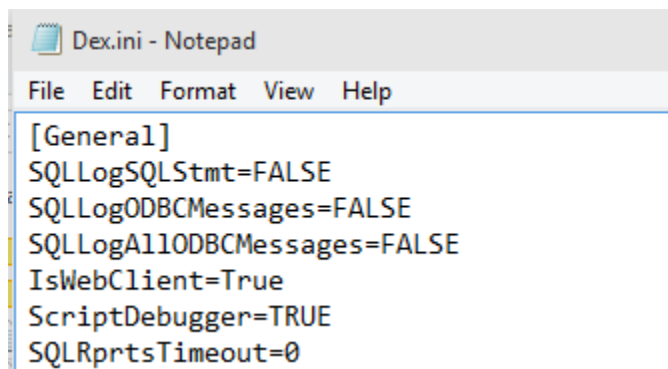
To enable this new feature, follow these steps:

1. Open the Dex.ini file from the GP2015 R2 code folder. This is usually found here:

C:\Program Files (x86)\Microsoft Dynamics\GP2015\Data

2. In the Dex.ini, add the following line:

IsWebClient=True

A screenshot of a Notepad window titled "Dex.ini - Notepad". The window has a menu bar with "File", "Edit", "Format", "View", and "Help". The text content of the file is as follows:

```
[General]
SQLLogSQLStmt=FALSE
SQLLogODBCMessages=FALSE
SQLLogAllODBCMessages=FALSE
IsWebClient=True
ScriptDebugger=TRUE
SQLRptsTimeout=0
```

Figure 34-Dex.ini file with IsWebClient=True added

3. Save the file.
4. Start Microsoft Dynamics GP

The new formats will be available options when you print SOP and POP documents.



**Note:**

When enabling IsWebClient=True, the Blank format templates that are being used will now convert to the Template Generator reports that the other formats use.

## Lesson 2: Emailing SOP Documents

---

This lesson explains which formats are added to the SOP module and which document types can use the new formats. The Print Options for Sales documents currently only supports email for 'Blank' document formats. This feature is supported when printing from the Transaction Entry Window, Navigation Lists, and Print Sales Documents window.

### What You Will Learn

After you complete this lesson, you will be able to:

- Identify the new formats made available in GP2015 R2.
- Email a SOP document by using the new formats.

### Formats

There are 3 new formats available for SOP documents when sending an email:

- Short
- Long
- Other

Now, when a user goes into the Print Sales Document Options or Print Sales Document windows, the new formats will be available options when selecting documents to be emailed. In earlier versions, only the Blank format was enabled.

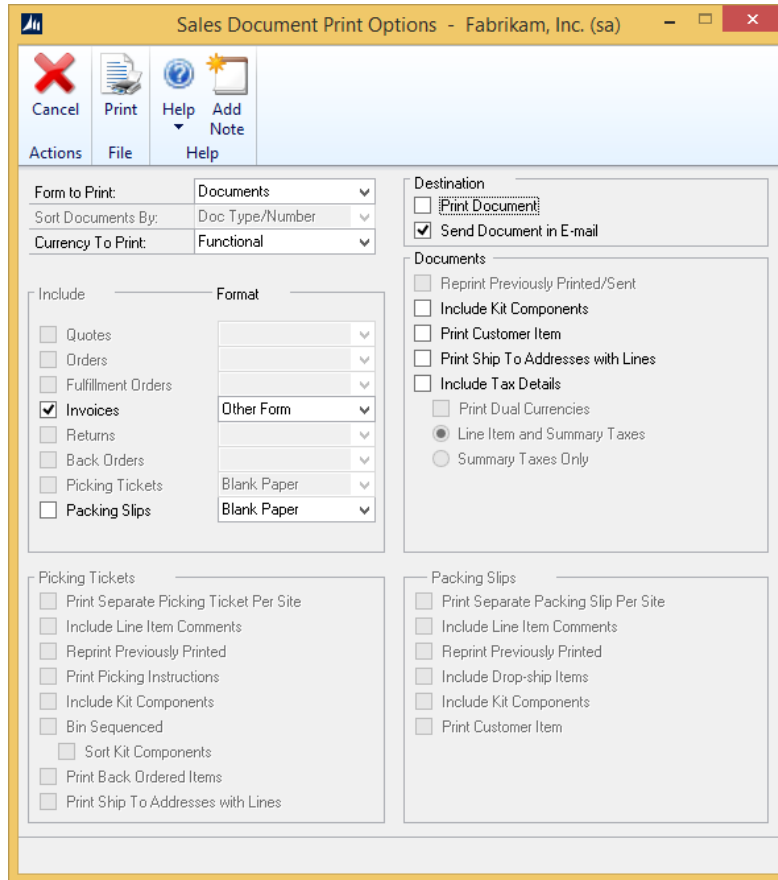
### SOP Documents

The new functionality will support all SOP Document Types, Packing Slips and their related reports; Blank, Short, Long and Other.

### Try This: Email a SOP Invoice Using the Long Format

Take what you have learned and try to send a sales document using a new format.

8. Start by creating an invoice for a customer who has an email address entered.
9. After this invoice has been created, click the print icon to display the Print Sales Document Options window(Sales >> Transactions >> Sales Transaction Entry >> File >> Print)



**Figure 35-Sales Document Print Options with Send Document in E-mail selected as the Destination**

In earlier versions, the Send Document in Email option would be disabled when selecting a format other than Blank.

10. Finish by selecting the print option at the top. Currently, the template is created and emailed to the specified address.

You should see an email that contains the SOP Invoice Other Word template in the inbox for the customer.

## Lesson Review

Topics that are covered in this lesson include the following:

- The new formats available for emailing in GP2015 R2 and the SOP documents that can use them
- How to email an invoice using the new formats

Answer the following questions to confirm your understanding of lesson topics.

1. Which formats have been made available for emailing SOP Documents in GP2015 R2?

Other, Long and Short

2. Which SOP documents are able to utilize these new formats?

All SOP Document Types, Packing Slips and their related reports

## Lesson 3: Emailing POP Documents

---

This lesson explains which formats have been added to the POP module and which document types can use the new formats. The Print Options for Purchase Orders currently only support email for 'Blank' document formats. This feature will support email for any document format for all Purchase Order documents.

This feature is supported when printing from the Transaction Entry Window, Navigation Lists, and Print Purchasing Documents window.

### What You Will Learn

After you complete this lesson, you will be able to:

- Identify the new formats made available in GP2015 R2.
- Email a POP document using the new formats.

### Formats

There is 1 new formats available for POP documents when sending an email:

- Other

Now, when a user goes into the Purchase Order Print Options or Print Sales Document windows, the new format will be an available option when selecting documents to be emailed. In earlier versions, only the Blank format was enabled.

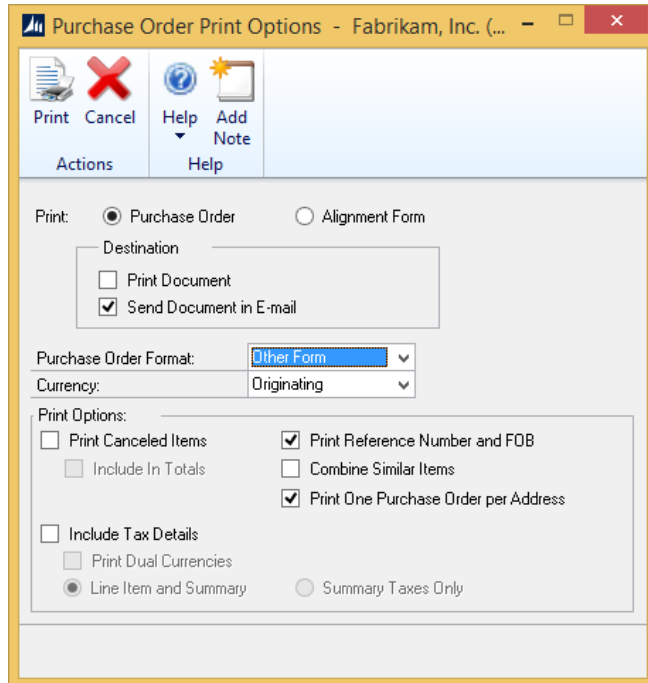
### POP Documents

The new functionality will support the Purchase Order document; Blank and Other.

### Try This: Email a POP Purchase Order Using the Other Format

Take what you have learned and try to send a sales document using a new format.

1. Start by creating a Purchase Order for a vendor that has an email address entered.
2. After this PO has been created, click the print icon to display the Print Purchase Order Document Options window(Purchasing >> Transactions >> Purchase Order Entry >> enter or select a purchase order >> Choose File >> Print)



**Figure 36- Send Document in E-mail marked**

In earlier versions, the Send Document in Email option would be disabled when selecting a format other than Blank.

3. Finish by selecting the print option at the top. At this time, the template is created and emailed to the specified address.

You should see an email containing the Purchase Order Other Word template in the inbox for the Vendor.

## Lesson Review

Topics that are covered in this lesson include the following:

- The new formats available for emailing in GP2015 R2 and the POP documents that can use them
- How to email a PO using the new format

Answer the following questions to confirm your understanding of lesson topics.

1. Which format has been made available for emailing POP Documents in GP2015 R2?

Other

2. Which POP documents are able to utilize these new formats?

The Purchase Order