

# Get Smart!

## Utilizing SmartList Builder and Excel Builder

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2010



# Session Objectives

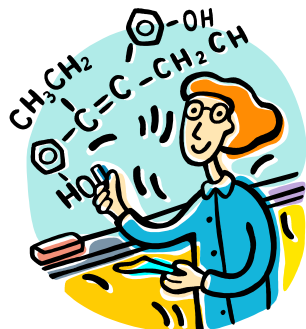


- Provide overview and examples of the advantages of SmartList and Excel Builder
- Go beyond the builder to include non-standard GP data
- Understand security around SmartList and Excel Builder

# SLB/EB TOP 10



10. You can combine multiple tables to go beyond basic SmartList data



9. You can create calculated fields

# SLB/EB TOP 10



8. You can use more than FOUR search criteria in RESTRICTIONS



7. You can summarize data  
- group & count & total, oh my!

# SLB/EB TOP 10



6. You can create your own go-to's



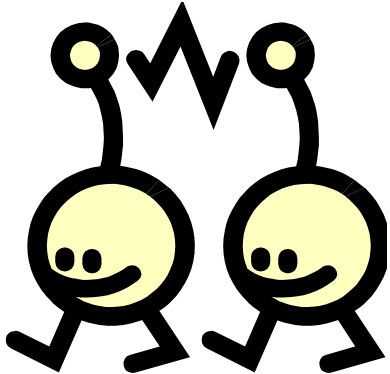
5. You can connect to other data sources

- SQL, Data Connections & Extender Resources

# SLB/EB TOP 10



4. You can use data from multiple companies in the same SmartList



3. You can duplicate your SmartList

- SmartList Builder Report, Excel Builder Report or Navigation List (GP2010)

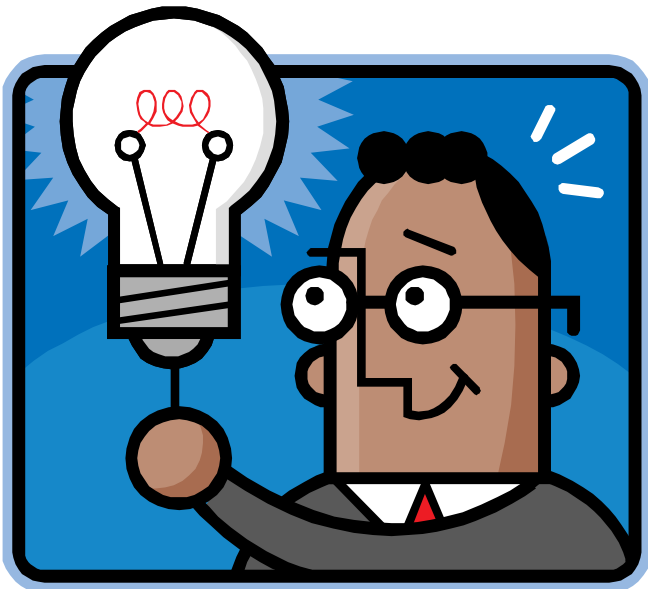
# SLB/EB TOP 10

2. You can create pivot tables for non-GP users to access

item	itmdesc	Data	
		Sum of ionhand	Sum of lscost
0001	Repair charges	0	50.00
012204B	Digital NMS by Theratech	0	38.15
012205B	Digital TENS/NMS Combo Unit by Theratech	0	-
01510101020	STAODYN EMS+2 NMS	8	380.92
01BIONMS	Biomedical Life Systems Biostim NMS	26	141.25
01CONTI4000	Zynex Medical, Conti 4000 dual muscle stimulator	0	350.00
Grand Total		34	960.32

# SLB/EB TOP 10

And the number one thing about SLB/EB....



1. Becoming proficient in SLB/EB will make you look like a genius among your peers!

# Going Beyond Standard GP Data



- Examples of data requirements in recent client situations:
  - Needed to compare period sales values in current year against prior year. When period sales looked like \$0, they were really blank.
  - Needed to compare period ledger activity against budget. When period budget looked like \$0, they were really blank.

# Going Beyond Standard GP Data



- Creating views in SQL to pull into SLB and Excel Builder
- Creating extra tables to pull into SLB and Excel Builder
- Brainstorm with IT and Socius staff to come up with the best solution

# SLB Security



- Because Microsoft Dynamics GP can contain information that you may not want all of your users to have access to, SmartList Builder has a number of security features that allow you to restrict the data that users can view and export. You can also control which features of SmartList Builder users have access to.

# SLB Security



- SmartList Builder security allows you to grant access to operations in SmartList Builder.
- **Access to all operations is explicitly turned off by default.**
- Users in the POWERUSER role have access to all SmartList Builder operations.

# Assign SmartList Builder Permissions



- Create a new Task in Dynamics Security (Tools > Setup > System > Security Task)
  - Enter a Task ID, Name, Description & Category
  - Select SmartList Builder as the Product
  - Select SmartList Builder Permissions as the Type
  - Select SmartList Builder as the Series
  - Mark the Operations to which you want to grant access. Typically, the creator should have access to all tasks.
  - Click SAVE to save the task
  - Assign the task to the appropriate Role

# SmartList Builder Security Task

The screenshot shows the 'Security Task Setup' window for 'SmartList Builder Creator'. The window title is 'Security Task Setup' and the user is 'sa Fabrikam, Inc. 4/12/2017'. The menu bar includes 'File', 'Edit', 'Tools', and 'Help'. The toolbar contains 'Save', 'Clear', 'Delete', and 'Copy'. The main form fields are:

- Task ID:** SLB - CREATOR
- Task Name:** SmartList Builder Creator
- Task Description:** This task is for users who create the SmartList Objects from scratch
- Category:** Company
- Product:** SmartList Builder
- Type:** SmartList Builder Permissions
- Series:** SmartList Builder

Buttons for 'Mark All' and 'Unmark All' are located to the right of the dropdowns. Below these is the 'Access List' section, which contains a table of operations with checkboxes:

Operations
<input type="checkbox"/> Create a Go To that opens a Dynamics GP form
<input type="checkbox"/> Create a Go To that opens a file
<input type="checkbox"/> Create a Go To that opens a website
<input type="checkbox"/> Create a Go To that opens another SmartList
<input type="checkbox"/> Create a Go To that runs a procedure
<input type="checkbox"/> Create SmartLists with SQL Tables
<input type="checkbox"/> Enter Calculated Fields
<input type="checkbox"/> Update SmartList
<input type="checkbox"/> View SmartLists with SQL Tables

At the bottom of the window, there is a 'Print Operation Access' button and a navigation bar with left and right arrow icons.

# Excel Builder Security Task

The screenshot shows the 'Security Task Setup' dialog box. The title bar reads 'Security Task Setup' and the user is 'sa Fabrikam, Inc.' with the date '4/12/2017'. The menu bar includes 'File', 'Edit', 'Tools', and 'Help'. The toolbar contains 'Save', 'Clear', 'Delete', and 'Copy'.

The main area contains the following fields:

- Task ID:** EXCEL BUILDER CREATOR
- Task Name:** Excel Builder Creator
- Task Description:** (empty)
- Category:** System
- Product:** SmartList Builder
- Type:** SmartList Builder Permissions
- Series:** Excel Report Builder

Buttons for 'Mark All' and 'Unmark All' are located to the right of the dropdowns.

The 'Access List' section is titled 'Operations' and contains a list of permissions, all of which are unchecked:

- Create Excel Reports with Dynamics GP tables
- Create Excel Reports with SQL tables
- Enter Calculated Fields
- Overwrite data connections
- Publish to file
- Publish to reports library
- Publish to SharePoint

A 'Print Operation Access' button is located below the list. The bottom of the dialog features navigation arrows and a help icon.

# Security to SmartList Object



- Create a new Task in Dynamics Security (Tools > Setup > System > Security Task)
  - Enter a Task ID, Name, Description & Category
  - Select SmartList as the Product
  - Select SmartList Objects as the Type
  - Select SmartList Objects as the Series
  - Mark the Objects to which you want to grant access
  - Click SAVE to save the task
  - Assign the task to the appropriate Role

# Security to SmartList Object

The screenshot shows the 'Security Task Setup' application window. The title bar includes the application name and window controls. The menu bar contains 'File', 'Edit', 'Tools', and 'Help'. The status bar at the top right shows 'sa: Fabrikam, Inc. 4/12/2017'. The main interface includes a toolbar with 'Save', 'Clear', 'Delete', and 'Copy' buttons. Below the toolbar, there are fields for 'Task ID' (SMARTLISTS), 'Task Name' (SmartLists created with SmartList Builder), and 'Task Description'. A 'Category' dropdown menu is set to 'Company'. Further down, there are dropdown menus for 'Product' (SmartList), 'Type' (SmartList Object), and 'Series' (SmartList Objects). To the right of these dropdowns are 'Mark All' and 'Unmark All' buttons. The 'Access List' section contains a list of operations with checkboxes, including Account Summary, Account Transactions, Accounts, Applicant, Applicant Education, Bank Transactions, CHECK DISTRIBUTION, Contract Lines, Contracts, Customer Addresses, Customer Items, Customers, Employee Benefit, Employee Education, Employee Summary, Employees, Equipment, Field Service Calls, Fixed Assets, Fixed Assets Books, Fixed Assets Purchase, History Contract Lines, History Contracts, History Field Service Calls, History RMA Lines, History RMAs, History RTV Lines, and History RTVs. A 'Print Operation Access' button is located at the bottom left of the list. The bottom of the window features a navigation bar with left and right arrow buttons.

Security Task Setup

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

Save Clear Delete Copy

Task ID: SMARTLISTS Category: Company

Task Name: SmartLists created with SmartList Builder

Task Description:

Product: SmartList

Type: SmartList Object

Series: SmartList Objects

Mark All Unmark All

Access List:

Operations

- Account Summary
- Account Transactions
- Accounts
- Applicant
- Applicant Education
- Bank Transactions
- CHECK DISTRIBUTION
- Contract Lines
- Contracts
- Customer Addresses
- Customer Items
- Customers
- Employee Benefit
- Employee Education
- Employee Summary
- Employees
- Equipment
- Field Service Calls
- Fixed Assets
- Fixed Assets Books
- Fixed Assets Purchase
- History Contract Lines
- History Contracts
- History Field Service Calls
- History RMA Lines
- History RMAs
- History RTV Lines
- History RTVs

Print Operation Access

# Questions?



**Thank you for attending Get Smart!**

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