

AnyView Creator User Guide

*Build 26 of AnyView
for GP2013*

AnyView Creator Build

Version: 13.00.26

System Requirements

Microsoft Dynamics 2013

Microsoft SQL Server 2005 or Higher

Contact Us

For more information, pricing details or
to schedule a demo, please contact us at:

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- www.accountable.com

A Guide for the Administration, Installation & Implementation of AnyView Creator



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Documentation Files

When AnyView Browser or AnyView Creator are installed, several Documentation files are installed, Links to these files are installed in Start -> Programs -> Accountable Software – AnyView.

[Whats New in AnyView \(2013\).pdf](#) – A summary of the newest features in AnyView.
[AnyView Browser \(2013\).pdf](#) – Description of Installation and use of AnyView Browser.
[AnyView Creator \(2013\).pdf](#) -- Description of Installation and use of AnyView Creator.
[AnyView Upgrade \(2013\).pdf](#) – Steps for upgrading to the latest AnyView Build or Version
[AnyView Tutorial.chm](#) – Examples of real-world use of AnyView features.

Installing AnyView Creator

The installation of AnyView Creator is three-step process:

1. Install AnyView Creator code files.
2. Include the new code into Great Plains
3. Initialize AnyView Tables and Stored Procedures

Important Setup Information

It is highly recommended that you download the latest version of AnyView from our web site prior to installation.

1. Install AnyView code files.

- Insert the Accountable Software CD into the CD-ROM drive or launch the application downloaded from our website.
- The setup program should start as soon as you insert the CD into the drive. If it does not launch automatically, then it may be started manually by selecting Start » Run from the Windows Taskbar and selecting the application CDSETUP on the CD.
- If using the website download, find the file that was downloaded (EX: AnyView Creator (2013) Build 96.exe) , and double click it to run the setup.

The Main InstallShield installation window opens.

- Click **NEXT >**.

Wait while InstallShield extracts the files needed for the installation.

The installation program begins with the AnyView Setup window.

- Click **NEXT >**.

Review the license agreement, and confirm your acceptance to the terms described within.

- Click **YES**.

Review the important installation information. Be sure to follow all of the recommended setup steps.

- Click **NEXT >**.

On the SELECT TYPE window, choose the desired setup type.

- AnyView – All Server and Client Components: Installs the web server and client components.
- AnyView Creator and Browser Client Components: Installs the client components for all of the AnyView products.
- AnyView – Web Server Components Only: Installs only the files used by the IIS Web server
- Custom: Allows you to select AnyView components for installation.
- If you choose Custom, the Select Components window appears. Select which components to install:
 - AnyView Server System Files: Installs the web server files necessary to run AnyView, including the web application files.
 - AnyView Browser Web Server: Installs the web pages for use with AnyView Browser.
 - MDAC: Installs the Microsoft Data Access Components 2.5 required on the web server.
 - AnyView Documentation: Installs the AnyView installation, configuration, and user documentation in the Microsoft Dynamics™ GP program directory.
 - AnyView Creator & Server Admin: Installs the AnyView Creator and AnyView Server Administration modules for use with Microsoft Dynamics™ GP.
 - AnyView Browser Documentation: Installs the AnyView installation, configuration, and user documentation in the AnyView Browser directory.
- Click **Next >**.

If you elected to install AnyView Creator components during this installation, the MICROSOFT DYNAMICS™ GP DIRECTORY screen will appear. Specify the folder where the Microsoft Dynamics™ GP application is installed. This folder is typically located on your local hard drive.

Important: The installation routine may default the installation to “C:\Dynamics” or “C:\eEnterprise”. If this is not the location where Microsoft Dynamics™ GP is installed on your machine, you will need to specify the correct directory.

- Verify that it is the correct directory, or use the BROWSE... button to select the location of the desired version of Microsoft Dynamics™ GP.
- Click **Next >**.

The installation routine will then begin to copy all files to the appropriate directories. The InstallShield Wizard Completed window opens when installation is done.

If installing the AnyView – Server and Client Components, you will be asked to restart your system.

You are given the option to restart on your own or have InstallShield restart for you.

- Click **FINISH**.

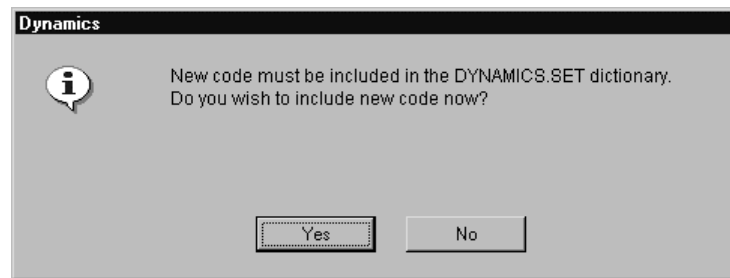
2. Include the new code into Microsoft Dynamics™ GP.

If you are installing the AnyView Creator and Server Administrator, you will need to complete the following steps.

Once the AnyView code files have been copied to your system, you then need to have Microsoft Dynamics™ GP “include” the code.

- To do so, start Microsoft Dynamics™ GP.

You will see a prompt asking you if you want to include the new AnyView Creator code, as shown in the following illustration.



- Click **YES**.

A progress bar will display, while the “unchunking” process is executing:

This installation step accomplishes the following two tasks:

- The DYNAMICS.SET file will be modified to include the information required to run AnyView.
- A dictionary named “AV2377.DIC” will be created in your Microsoft Dynamics™ GP folder.

3. Creation of Microsoft SQL Server Objects – Tables and Stored Procedures

When starting Microsoft Dynamics™ GP for the first time after installing AnyView, you must log into the Application as the system administrator (sa or Dynsa or a user in the fixed sysadmin role) in order to complete the installation process.

When starting Microsoft Dynamics™ GP, you may be presented with the following prompt:

AnyView needs to be initialized by the system administrator or access has not been granted to AnyView tables. Would you like to proceed with initialization now?

Select YES to create the required SQL tables and stored procedures.

This process does not destroy any data; it simply creates objects in SQL Server and grants access to all users to these objects.

This process may take some time to complete and will report a completion status of successful or unsuccessful. If you received an unsuccessful message, try the process again.

Un-Installing AnyView Creator

If it becomes necessary to temporarily disable AnyView Creator on a Microsoft Dynamics™ GP workstation, one can use the Microsoft Dynamics™ GP Tools->Customization->Customization Status Window to Disable the Forms Printer product for one login Session.

In order to more permanently disable AnyView Creator on a Workstation, one must edit the Microsoft Dynamics™ GP "Launch" file (typically named dynamics.set) to remove references to the AnyView Creator Product (ID = 2377. Microsoft Dynamics™ GP provides a facility for editing the launch file from the Tools->Setup->System->Edit Launch file menu. The Microsoft Dynamics™ GP Help Topic from this window describes how to remove a product from the Launch File using a text editor, or the Uninstall program applet can edit the .set file for you. (see below).

In order to Completely remove AnyView Creator and the Components that it installed, one should remove the runtime components using Windows "Add –Remove Programs" Control Panel Applet, Then optionally delete the AV2377.DIC AnyView Creator Dictionary, and optionally Drop the ASIAV* Tables and stored procedures in the Microsoft Dynamics™ GP System and Company SQL Databases.

When using the Windows "Add –Remove Programs" Control Panel Applet, to remove AnyView Creator:
-You may wish to Answer YES to the prompt "Do you wish to remove AnyView from the dynamics.set file.

Some Explanation:

In The Microsoft Dynamics™ GP environment, all enhancement products (like AnyView), register themselves in a text file called Dynamics.set. - When uninstalling, they should be removed from the .SET file - historically, this has been done manually, the un-installer provides the option to do it automatically or you can elect to leave the .set file alone, but if you do, the AV2377.dic file will not be removed, since it would cause fatal errors when starting Microsoft Dynamics™ GP until the .SET file was manually edited.

-Answer yes to the shared DLL question for
ASIWERDS.DLL,ASIWEDEFS.DLL,ASIEXPRT.DLL,ASIPROXY.DLL,ASIUTILITES.DLL,AV600.
cnk,asi_script.dll,asicrypt.dll

These DLL's can be used by other Accountable software programs, so they are marked as "shared" which causes Installshield to ask the question.

-Click FINISH to the "Installation Complete" dialog - should say "uninstalled" – The uninstall may cause a request for re-boot if dlls or other files were in use.

Synchronizing AnyView Tables

After installing AnyView Browser, you will get a message that reads:

***"The AnyView Utilities Process needs to run in order to use AnyView.
Do you want to run the process now?"***

If you answer "Yes", the synchronization process will run.

The synchronization is complete when all of the status boxes have been updated to Completed and the Process button is enabled. You can then proceed to the registration process.

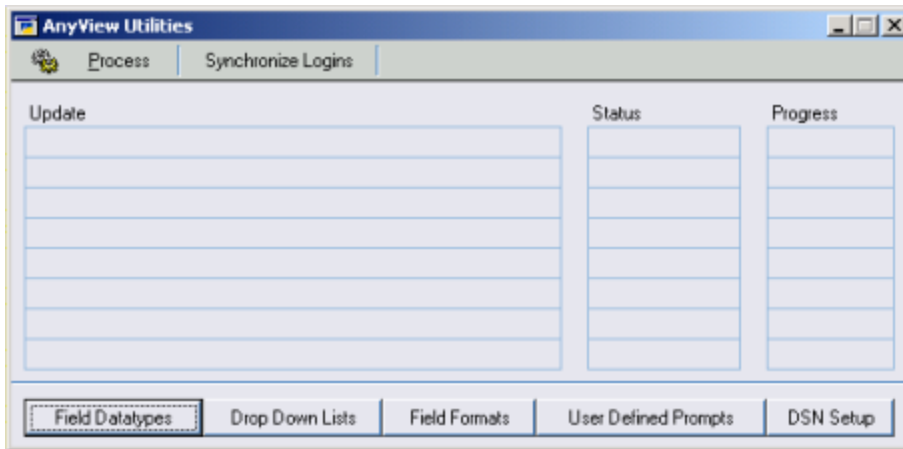


Figure 1. AnyView Utilities Window.

The PROCESS button on the AnyView Utilities window should be used to re-run the Synchronization, whenever products/modules are added or removed from the Microsoft Dynamics™ GP Installation.

In cases where AnyView Browser is used to view data from multiple companies, The Synchronization Process should be run once while logged in to each company, in order to update the company specific User Defined Field Prompts that may vary by company.

The SYNCHRONIZE LOGINS button on this window is typically only used when upgrading from earlier builds of AnyView Browser.

If you are upgrading a system using External Logins (Customers, Vendors, Salespeople) with AnyView Browser, click the SYNCHRONIZE LOGINS button on the AnyView Utilities window. SYNCHRONIZE LOGINS runs a 'Check Links' style verification on the records in the Internet Address table and the AnyView Login tables. Any discrepancies found will be corrected and reported on the AnyView Login Errors Report when the process finishes. An example of a discrepancy that would be corrected by the synchronize process is orphaned records in the AnyView login tables. Should a record exist in the AnyView User Master table that does not exist in the Internet Information table, this process would remove that record.

Registering the Software

By registering your copy of AnyView, you will enable us to keep you informed of all enhancements, improvements, and upgrades for the software. By communicating with you we can gather information about additional Microsoft Dynamics™ GP enhancements that will work towards Enhancing The Experience.

Software registration can also eliminate unauthorized use of software without imposing restrictive copy protection.

Registration keys are provided by Accountable Software directly. For more information or to obtain your registration keys, please call (484) 875-0600 or email <mailto:ASIsales@accountable.com>.

To register the AnyView Browser or AnyView Creator software:

1. Respond to the prompt.
2. Enter your Registration key.
3. Close the Registration window.

1. Respond to the prompt.

- Start Microsoft Dynamics™ GP.

When starting Microsoft Dynamics™ GP, respond to the prompt that informs you that you are running an unregistered version.

- Click REGISTER.
- The Accountable Software Registration window will display.

2. Enter your Registration keys.

- Select the record for the **AnyView Creator** module by clicking in the Key 1 field.
- Enter the AnyView Creator key 1 exactly as you received it from us.
- Tab to the Key 2 field and enter AnyView Creator Key 2 exactly as you received it from us.
- If you are also registering **AnyView Browser**, repeat these steps entering the registration keys you received for AnyView Browser.
- Click REGISTER.
- Verify the User count and Expiration date.

If you mistyped the keys, you will receive a warning message. Try to enter the keys again, and if you still receive a warning, contact Accountable Software for assistance.

3. Close the Registration window.

If the module(s) you are registering now appears with a checkbox in its Registered column, close the Accountable Software Registration window.

You can reach the registration window any time by choosing Help > About Microsoft Business Solutions - Microsoft Dynamics™ GP and then clicking Extras > AnyView from the toolbar.

Click the HELP button on the Accountable Software Registration window to send an email to Accountable Software requesting assistance with registration.

***AnyView Browser must be registered separately from
AnyView Creator using separate registration keys.***

Technical Support

Accountable Software Customer Support is available Monday through Friday from 9:00 am to 5:00 pm Eastern time. Support is charged on a per-incident basis.

Customer Support can be reached in the following ways:

484.875.0600 (voice)

484.875.0620 (fax)

TechSupport@accountable.com

<http://www.accountable.com>

When you call, fax, or email Accountable Software for support, please include the following information:

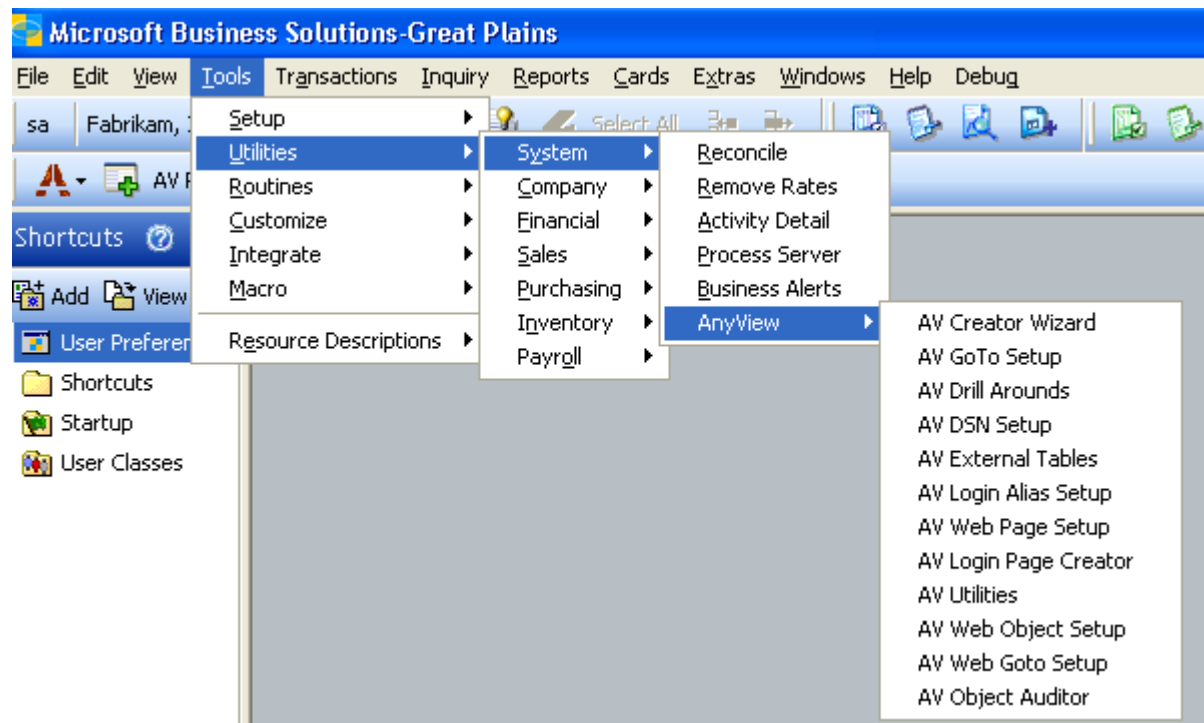
- Your company name and phone number.
- Your name.
- The name of the product you are working with and the version you are running (from the registration window).
- A brief description of the problem.
- In addition, have this manual available when you are connected with Customer Support—you may be directed to various pages in the manual as you receive assistance.
- Please also be aware that all technical support issues are chargeable unless the issue you are calling about is a result of a defect in an Accountable Software product or accompanying documentation. Customers without pre-paid support incidents, will be required to provide credit card information prior to opening an incident, but will not be charged if the call is nonbillable. For the latest Accountable Software Support Policies, see the "Support" section of the Accountable Software Web site. www.accountable.com

About AnyView Creator

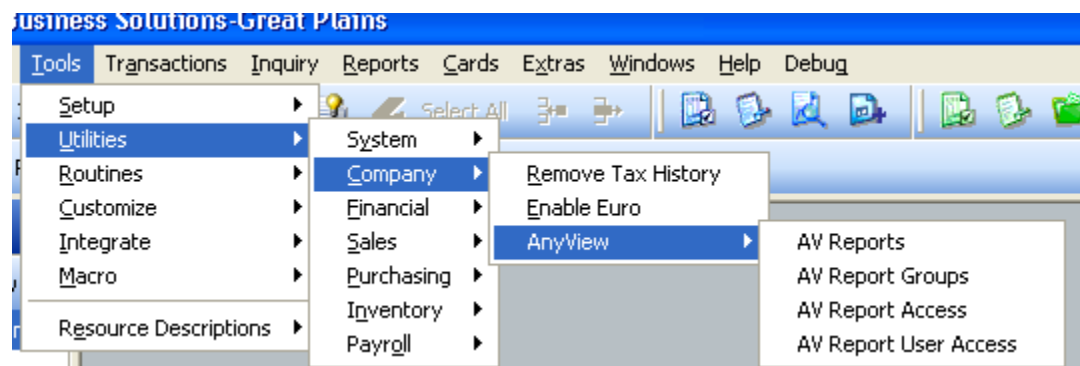
AnyView Creator is a wizard style interface that allows you to create views in SmartList based on any table in your system including third party tables and tables external to Microsoft Dynamics™ GP (such as Siebel or other external products). You can define links to other tables, choose which columns are available to be searched on, and which columns are in the default view. You can also change the column display types, formats and names.

AnyView Creator Window Navigation

The following items are added to your Microsoft Dynamics™ GP menus during AnyView Initialization: Several of these menu items apply to AnyView Browser only.



The following Menu Items are used for the AnyView Browser Report Publishing Feature.



AnyView Creator Windows

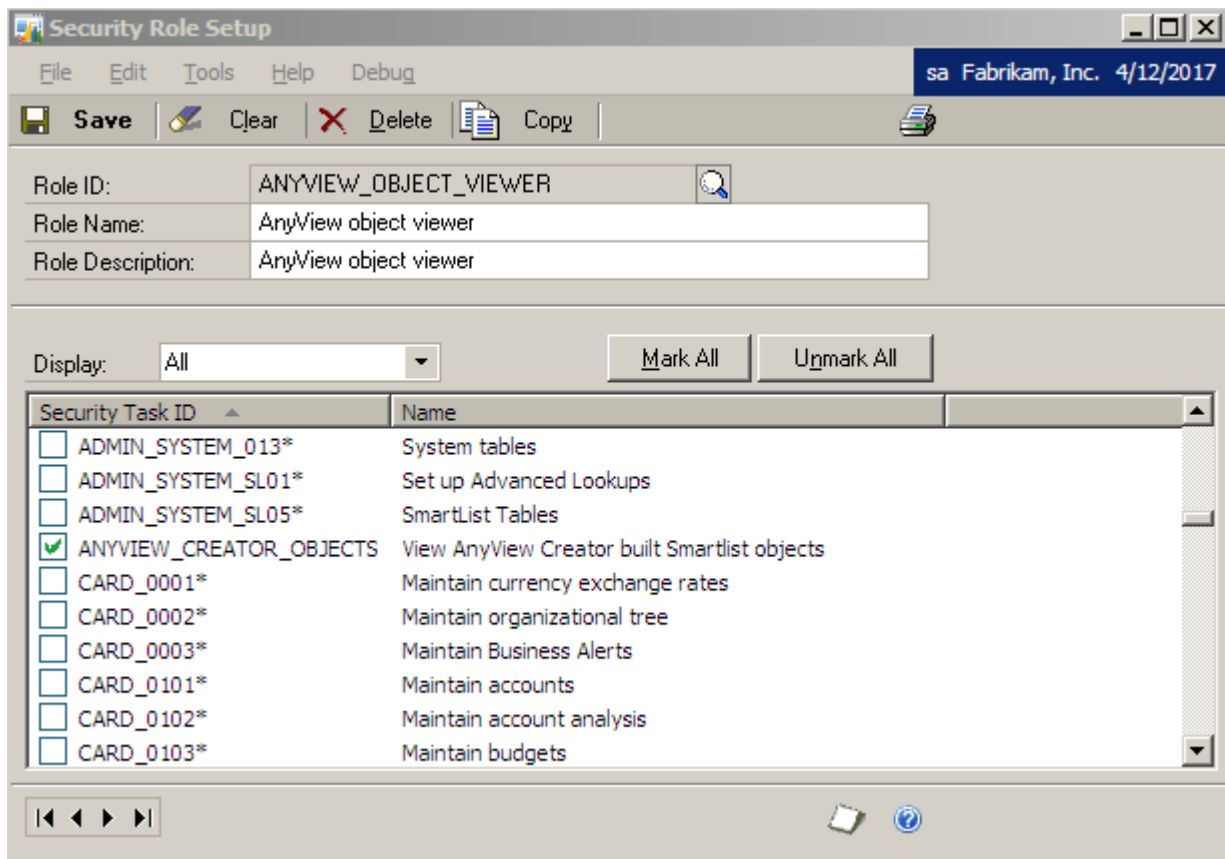
Menu Item	Window
AV Creator Wizard	ASI_AnyView_Creator_Wizard
AV GoTo Setup	ASI_AnyView Goto Maintenance
AV Drill Arounds	Drill_Around_Wizard
AV DSN Setup	Applies to Browser Only
AV External Tables	AnyView External Tables Setup
AV Login Alias Setup	Applies to Browser Only
AV Web Page Setup	Applies to Browser Only
AV Login Page Creator	Applies to Browser Only
AV Utilities	ASI_AnyView_Utilities
AV Web Object Setup	Applies to Browser Only
AV Web Goto Setup	Applies to Browser Only
AV Object Auditor	ASI_AnyView_Object Auditor

AnyView Creator Security Roles and Tasks

With the new Security model implemented beginning with Microsoft Dynamics™ GP 10, it becomes necessary to enable Users to Use or Administrate AnyView Creator by Placing the Users in GP Roles that are made of GP Tasks that allow access to various program and code resources.

When AnyView Creator Is initialized and logged into the first time, by 'sa' or 'DYNSA', The Following Tasks and Roles are created:

Roles: (ANYVIEW_OBJECT_VIEWER)



All Dynamics GP users who need to View ALL AnyView Creator Objects should have the ANYVIEW_OBJECT_VIEWER Role added to their user security role list. Typically one would create other ANYVIEW_OBJECT* roles with Specific AnyView Object Smartlist Tasks for higher Granularity of Object Security.

The Task ID above, can be duplicated, and then modified, if you need to apply finer grained control to users with regards to which AnyView Creator Smartlists they can view.

If all users need access to ALL AnyView Objects, one can add the ANYVIEW_CREATOR_OBJECTS Task or other Specific Task IDs that include Smartlist objects Created with AnyView Creator, directly to a broadly applicable role which many users already have been placed in, such as "ORDER PROCESSOR" Additional Role Created upon Initialization:

Role: (ANYVIEW_ADMIN)

The screenshot shows the 'Security Role Setup' window. The 'Role ID' is 'ANYVIEW_ADMIN'. The 'Role Name' is 'AnyView Creator/Browser Administration'. The 'Role Description' is 'Run Creator Wizard, External Table Wizard, and AV Utilities, and Web'. The 'Display' dropdown is set to 'All'. The 'Mark All' and 'Unmark All' buttons are visible. The table below lists the tasks assigned to this role.

Security Task ID	Name
<input checked="" type="checkbox"/> ADMIN_ANYVIEW_01	Set up AnyView Creator/Browser Objects - Create/Mod
<input type="checkbox"/> ADMIN_COMPANY_001*	Set up company
<input type="checkbox"/> ADMIN_COMPANY_002*	Set up taxes
<input type="checkbox"/> ADMIN_COMPANY_003*	Set up payment terms and shipping methods
<input type="checkbox"/> ADMIN_COMPANY_004*	Set up bank accounts
<input type="checkbox"/> ADMIN_COMPANY_005*	Set up credit cards
<input type="checkbox"/> ADMIN_COMPANY_006*	Set up customer/vendor consolidation
<input type="checkbox"/> ADMIN_COMPANY_007*	Set up posting
<input type="checkbox"/> ADMIN_COMPANY_008*	General company administration
<input type="checkbox"/> ADMIN_COMPANY_009*	Modify period-end routines

Tasks:

The Default Security Task ID's for AnyView Creator are defined as shown below:

Note the ANYVIEW_CREATOR_OBJECTS task, manages Smartlist Objects from the Product Smartlist, (even though the objects are created by the product AnyView Creator.)

The screenshot shows the 'Security Task Setup' window. The title bar includes the application name and standard window controls. The menu bar contains 'File', 'Edit', 'Tools', 'Additional', 'Help', and 'Debug'. The status bar at the top right shows 'sa Fabrikam, Inc. 4/12/2017'. The toolbar includes icons for 'Save', 'Clear', 'Delete', and 'Copy'. The main configuration area includes fields for 'Task ID' (ANYVIEW_CREATOR_OBJECTS), 'Task Name' (View AnyView Creator built Smartlist objects), and 'Task Description' (Base Task for allowing roles to View all AnyView Creator Created Objects that were placed in this T...). Below these are dropdown menus for 'Product' (SmartList), 'Type' (SmartList Object), and 'Series' (SmartList Objects). To the right of these are 'Mark All' and 'Unmark All' buttons. The 'Access List' section contains a list of operations with checkboxes: 'test', 'Vendor Addresses', 'Vendor Items', 'Vendors', 'Work Orders', 'z_Avtest1' (checked), 'zNotask', and 'zTestAdd'. A 'Print Operation Access' button is located below the list. The bottom of the window features navigation arrows and a help icon.

Task ID	ANYVIEW_CREATOR_OBJECTS	Category	System
Task Name	View AnyView Creator built Smartlist objects		
Task Description	Base Task for allowing roles to View all AnyView Creator Created Objects that were placed in this T...		

Product: SmartList
Type: SmartList Object
Series: SmartList Objects

Access List:

Operations
<input type="checkbox"/> test
<input type="checkbox"/> Vendor Addresses
<input type="checkbox"/> Vendor Items
<input type="checkbox"/> Vendors
<input type="checkbox"/> Work Orders
<input checked="" type="checkbox"/> z_Avtest1
<input type="checkbox"/> zNotask
<input type="checkbox"/> zTestAdd

Print Operation Access

Security Task Setup sa Fabrikam, Inc. 4/12/2017

File Edit Tools Additional Help Debug

Save Clear Delete Copy

Task ID: ADMIN_ANYVIEW_01 Category: System

Task Name: Set up AnyView Creator/Browser Objects - Create/Mod

Task Description: Run Creator Wizard, External Table Wizard, and AV Utilities, and Web Object Settings

Product: AnyView

Type: Windows

Series: Company

Mark All Unmark All

Access List:

Operations

- ☒ AnyView Browser Gotos
- ☒ AnyView Creator Wizard Control
- ☒ AnyView Detail Page Wizard Control
- ☒ AnyView Drill Around Wizard
- ☒ AnyView DSN Setup
- ☒ AnyView External Tables Setup
- ☒ AnyView File Extension Maintenance
- ☒ AnyView Goto Maintenance
- ☒ AnyView Gotos
- ☒ AnyView Login Alias Setup
- ☒ AnyView Login Page Generator
- ☒ AnyView Object Auditor
- ☒ AnyView Report Group Maintenance
- ☒ AnyView Report Publishing Maintenance
- ☒ AnyView Report Security By Report
- ☒ AnyView Report Security By User
- ☒ AnyView Utilities
- ☒ AnyView Web Page Setup
- ☐ ASI SQL Utilities
- ☒ ASI User Activity
- ☒ Control
- ☒ Control
- ☒ Drop Down List Maintenance
- ☒ Edit Field Datatype
- ☒ Enter Favorite Parameters
- ☒ Field Format Maintenance
- ☒ Join Window
- ☒ Login Alias Maintenance
- ☒ Select Column
- ☐ Test Restriction
- ☒ User Defined Field Maintenance
- ☐ VB Script Test

Print Operation Access

Navigation icons: Back, Forward, Home, Search

The ADMIN_ANYVIEW_01 Task contains access to all of the Windows needed to set up and administer AnyView Creator.

AnyView Creator Wizard

Welcome

To open the AnyView Creator Wizard, go to Utilities > System > AV Creator Wizard.

The AnyView Creator Welcome window begins the wizard with a dropdown list of the actions you can perform with the Creator wizard.

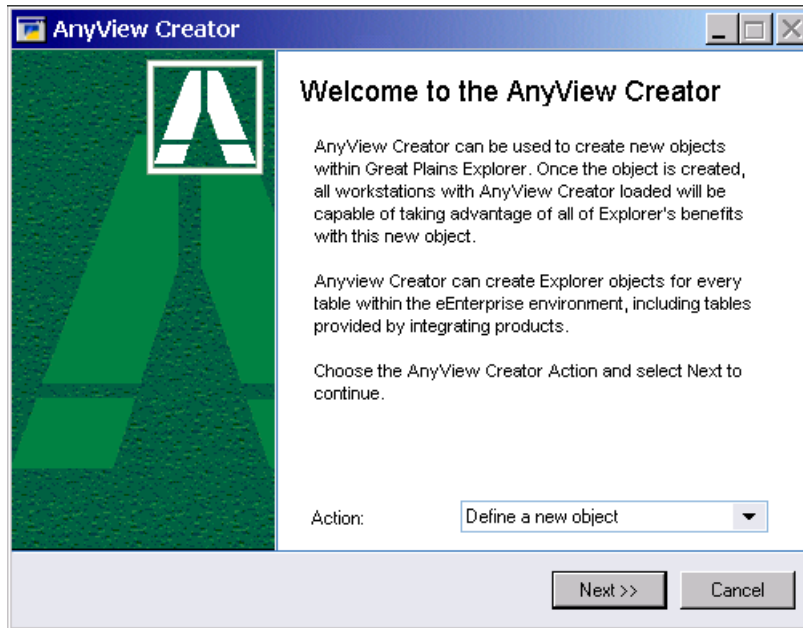


Figure 2. The AnyView Creator Welcome screen.

Actions on this screen include:

- Define a new object
- Import a new object
- Modify an existing object
- Export an existing object
- Delete an existing object
- Import Gotos
- Export Gotos

These actions are detailed in the following pages.

Define a New Object

Select Main Table

The SELECT MAIN TABLE window allows you to search tables by Product or Series. The table you choose on this window will be the main table for your object.

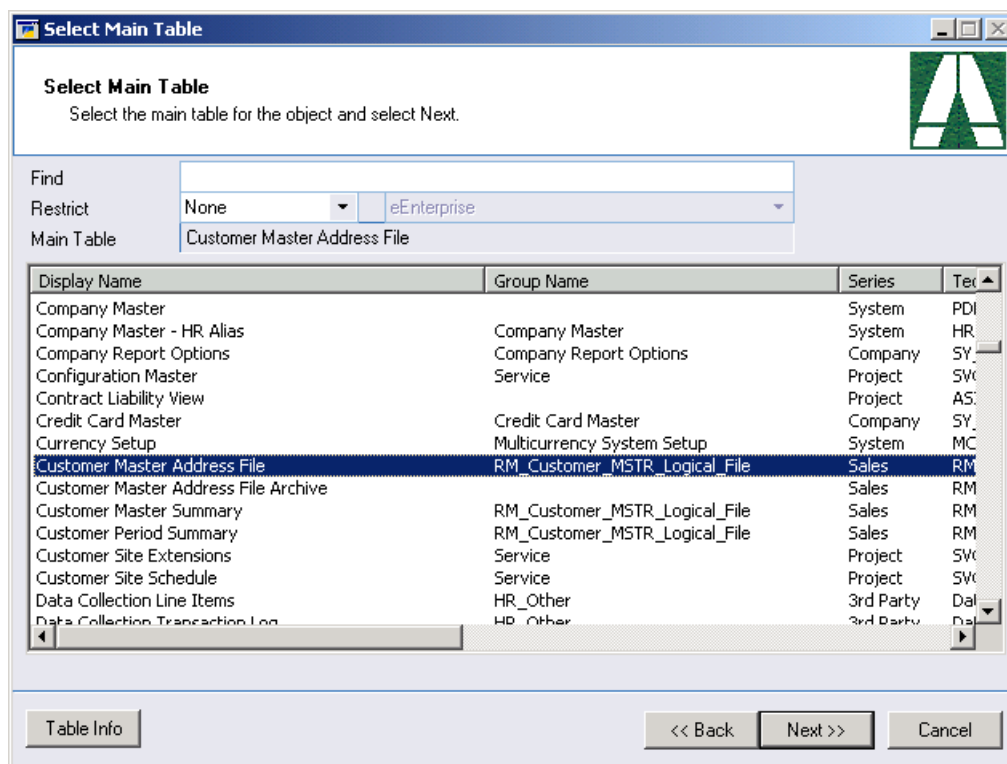


Figure 3. The Select Main Table screen.

Select the main table (or SQL Server view) and click **NEXT >>**.

NOTE: AnyView performs the Join from the main table to the secondary tables as a “left outer join”. Therefore, if you are creating an object that contains a one-to-many relationship between two tables, you should select the “Many” table, which defines the records that you want returned, as the Main Table. For Example: in a Join between SOP Documents and Customers, You would want SOP Documents to be the main table if you wanted to list all SOP Documents and the additional Customer data associated with each.

NOTE: As of AnyView Build 86, the Tables visible in this window and the Additional Tables window may be restricted for a given user by using the Microsoft Dynamics™ GP Setup->System->Security window to restrict access to type: 'Files'.

The "Files" that are secured in this manner are actually Microsoft Dynamics™ GP "Table Groups". For example, the Microsoft Dynamics™ GP Product 'File' shown as 'Inventory Control' under the inventory series on the Microsoft Dynamics™ GP Security Setup Window is made up of 3 physical tables (IV40100,IV40800,IV40900) as shown by Microsoft Dynamics™ GP Tools->Resource Descriptions->Tables->Table lookup.

Select Additional Tables

From this window you can choose the other tables to use in the view. Highlight the table and click ADD to add it.

Select Additional Tables
Add additional tables by selecting them in the list and select Next.

Find:
Restrict:
Main Table:

Display Name	Group Name	Series	Text
RM Apply Reprint Journal File	RM_Batch_History_Logical_File	Sales	RM
RM Batch History	RM_Batch_History_Logical_File	Sales	RM
RM Cash Receipts Work File	RM_Open_Transaction_Logical_File	Sales	RM
RM Class Intrastat MSTR	RM_Open_Transaction_Logical_File	Sales	RM
RM Commission Work File	RM_Open_Transaction_Logical_File	Sales	RM
RM Customer Intrastat MSTR	RM_Open_Transaction_Logical_File	Sales	RM
RM Customer MSTR	RM_Customer_MSTR_Logical_File	Sales	RM
RM Customer MSTR		Sales	RM

RM Customer MSTR

Figure 4. The Select Additional Tables window.

Select additional tables by highlighting them and clicking the ADD button.

Once you have selected all tables for this object, click **NEXT >>**.

Define Table Joins

The tables added to the view must be joined together by a field or fields from each table. The DEFINE TABLE JOINS window automatically joins fields based on the selected key of the Table to join to, if fields of the same name and datatype are found in the table to join from. If this is not the field you want to link with, you can change the linking field by either changing the table key or choosing another field from the FIELD TO JOIN TO lookup. To create a proper join, you must be able to link all fields in the Secondary table key with a field from the Main table¹. For SQL Server databases you may wish to select 'Other' as the table key, in order to allow you to use any columns desired to create the SQL join.

All tables in the Object must be properly joined to save this screen. The Creator wizard populates as much of the join information as possible in attempting to ensure that you complete the join information properly.

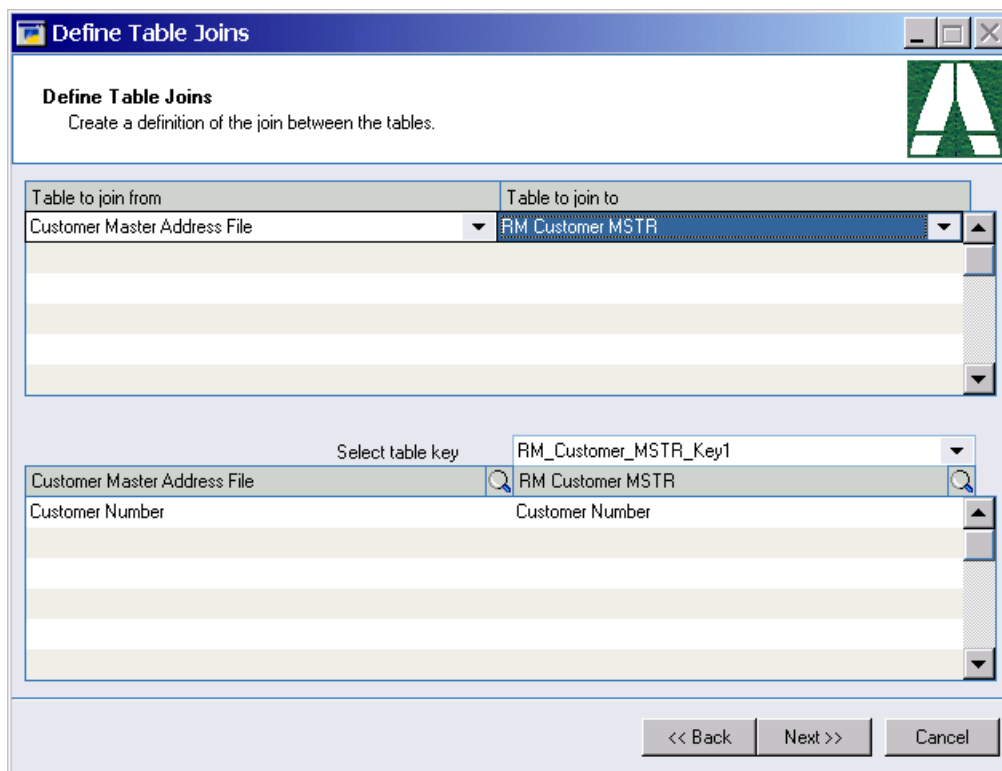


Figure 5. The Define Table Joins window.

Click **NEXT >>** to complete the Joins window.

Technical note: The join created by AnyView Creator is always a left outer join. For Pervasive and C-tree databases, The AnyView Creator wizard will only display columns in the joining table that are part of a key.

¹ As an aid to finding the tables and joins needed for creating an object, you can use several sources and methods. One method is to find a report in Great Plains that is similar to the object you are creating. By examining the report in Report Writer, you can find the tables and relationships used to create the report. These relationships can help define the necessary joins for your object. Other sources of table and join information are the Great Plains SDK (Software Developers Kit) found on CD2, and the Table Descriptions window in Great Plains (this window can be found under Tools >> Resource Descriptions >> Tables).

Object Restrictions

Object restrictions can be used to narrow the list of records that are returned to the AnyView Browser.

To create a restriction:

- Select the desired TABLE from the drop down list of tables
- Specify a FIELD by typing its name or selecting from the lookup
- Specify a SEARCH TYPE
- Select a restriction TYPE from the drop down list. Possible values include: contains, is equal to, begins with, is between, is not equal to, is greater than, and is less than.
- Specify the FROM value for the restriction
- Specify the TO value for the restriction when using the BETWEEN restriction type.
- Click the ADD RESTRICTION button to add the restriction to this object.

When you are done creating restrictions, click the **NEXT >>** button to proceed.

Table	Field	Restrict By	Search Type
Customer Master Address File	Salesperson ID	<input checked="" type="checkbox"/>	Match All
		<input type="checkbox"/>	

is equal to

Type: is equal to

From: |

To: |

☐ Match Case

Remove Restriction Add Restriction

<< Back Next >> Cancel

Figure 6. The Object Restriction window.

Note: This window is also used to implement Role Based Login Security. For a discussion of this capability, see the Role Based Login Security section of the [AnyView Browser](#) documentation.

Note: If you are creating a restriction for a Drop Down List data type, you must use the literal description of the value, not the numeric value (i.e., if restricting SOPHeader.Type, use "Order" instead of "0").

Click **NEXT >>** to complete the Object Restriction window.

Select Columns to Include

From this window, you can define which columns will be available in the view. Select any columns that you may want to display in the SmartList or AnyView display or search on from the SmartList or AnyView search window.

By omitting columns from the object, you can implement column level security on your object. Any omitted field cannot be used in the display, restriction or search of an object.

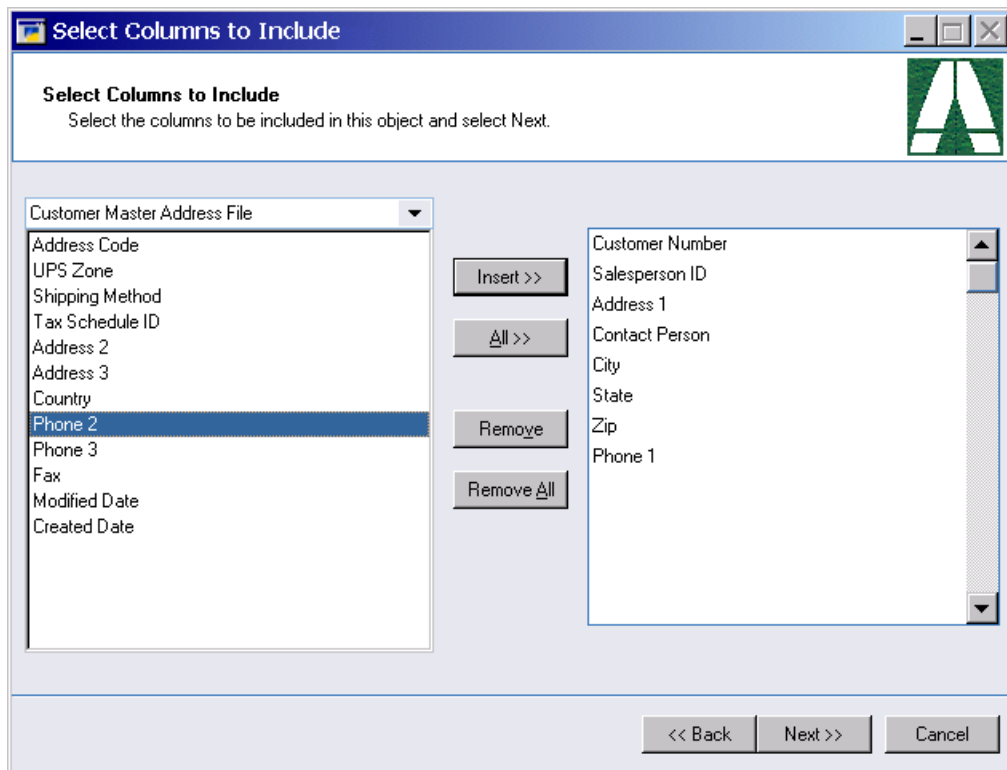


Figure 7. The Included Columns window.

Click **NEXT >>** to complete the Included Columns window.

Select Default Columns

This window allows you to define which of the selected columns for the view are displayed in the default view of this object. You can also add formatting to the fields in your view while creating the object. By clicking on the column name, you edit the name to appear as you would like it displayed in SmartList and AnyView.

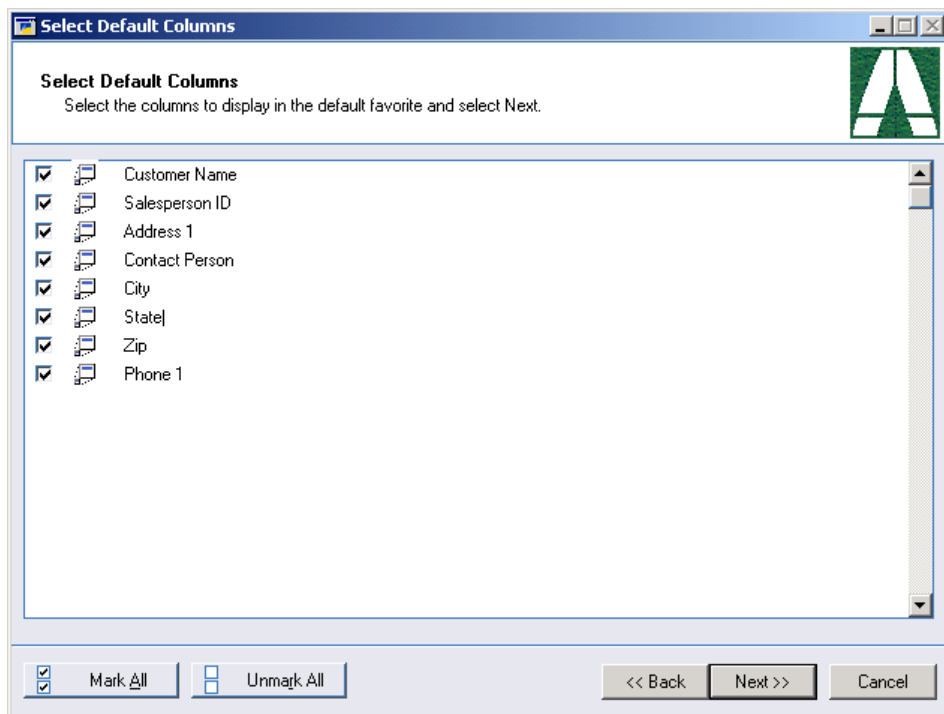


Figure 8. The Default Columns window.

By clicking on the column expansion button, you will open the format column window. Here you can enter data type, format, dropdown list and user defined values while creating your object. This can also be done using the AnyView Utilities window. For detail on each of these formatting options see the section titled 'Modifying AnyView Creator Views'.

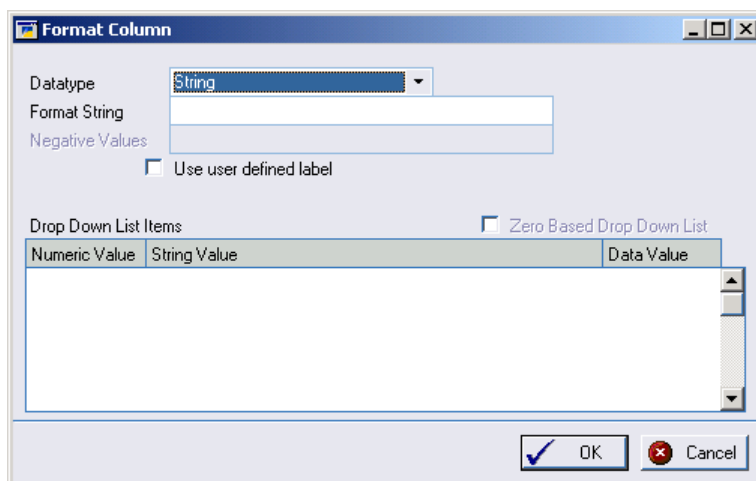


Figure 8a. The Format Column window.

Click **NEXT >>** to complete the Default Columns window.

Column Summary Options

The COLUMN SUMMARY OPTIONS window allows you to add simple totaling functions to your object. Each column with a data type of Currency, Integer, or Long, will be displayed when the window opens.

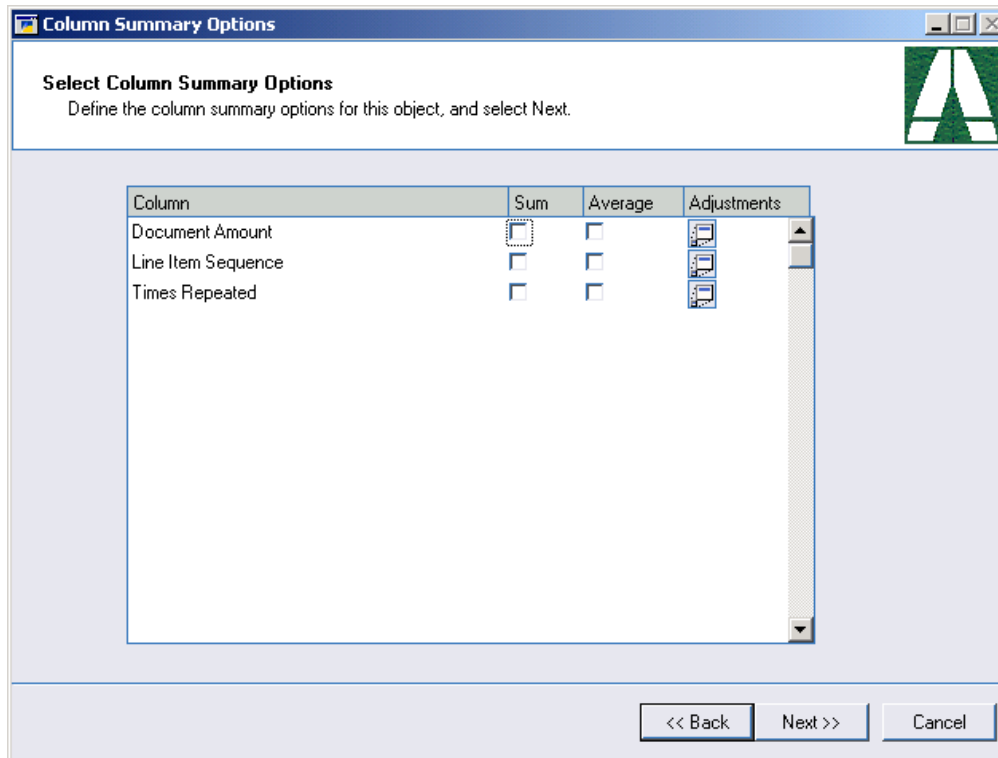


Figure 9. Column Summary Options window.

The available summary operations are:

- Sum – Creates a grand total for the value in the selected column.
- Average – Displays the average for the data in the selected column.

To alter the results of the Sum or Average calculated, click the Adjustments button.

Note: Summary Options are implemented in AnyView Browser only. For information regarding totals in the Microsoft Dynamics™ GP SmartList, see the [SmartList Totals](#) section of this document.

Column Summary Adjustments

The COLUMN SUMMARY ADJUSTMENTS window allows you to build logic into the summary operation by selecting a conditional column on which to transform the data.

Column To Summarize: Document Amount

Add adjustment criteria in order to modify the data in the column as it is summarized. If a data row does not match any adjustment criteria it will still be included in the summary.

Column that determines if Document Amount should be adjusted:
SOP Type

If SOP Type
Is Equal To: Return
Then: Force Data Negative

Add Adjustment

Document Amount Adjustments

Remove, Remove All

OK, Cancel

Figure 9a. Column Summary Adjustments window.

To Create a Summary Adjustment:

1. Using the Column Lookup button, select the column that contains the value on which to base your adjustment.
2. Enter the column value that creates the desired condition.
3. Choose the operation from the “Then” dropdown list. Choices for the operation are:
 - Force Data Positive
 - Force Data Negative
 - Multiply by –1
4. Click the Add Adjustment button to insert the condition into the list.
5. Click OK when finished entering adjustment conditions.

Multiple conditions can be added to the Adjustments list, however all conditions must be based on a single column. If a value is found in the selected column that has not been added as a conditional value, that record's column will be added to the total with no adjustment applied.

Select Gotos

Object Gotos are actions that can be taken based on the selected record or the entire result set in your view. These Gotos are divided into two categories. Code Gotos and Drill Arounds.

Code Gotos

Through VBScript or Dexterity code, Solution Developers can create custom Gotos on objects created using AnyView Creator. These Gotos can then be launched using Microsoft Dynamics™ GP SmartList so users can drill into maintenance and inquiry windows from custom SmartList objects results.

Gotos can be exported from and imported into AnyView, so end user organizations that lack Dexterity and VBScript expertise can obtain Goto code for their critical SmartList objects². Pre-built, importable are installed in the 'AnyView (8.00)\Example Goto Actions' folder within your Microsoft Dynamics™ GP client install folder. There is a file for each Goto, and a combined file, containing all of the Gotos.

Drill Arounds

A drill around is a means to navigate from one object to another, using the selected record in the source view as a restriction for the second view. Drill arounds must be defined using the Drill Around wizard before they can be attached to an object in Creator.

To create a Goto:

- Use the Goto lookup window to select GOTO ITEM.
- Specify the MENU PROMPT that will appear on the SmartList Goto menu.
- When you select the Goto Item, the lower grid will fill with required Goto parameters. For each, specify the ASSIGNED FIELD in this object that will serve as the parameter value.

Order	Goto Item	Goto Menu Prompt
1	Open Salesperson Maintenance	Open Salesperson Maintenance
0		

Goto Variable	Assigned Field
Salesperson ID	Salesperson ID

Figure 10. The Select Gotos window.

Click **NEXT >>** to complete the Gotos window.

² Goto and Drill Around Maintenance is detailed in a later section of this document.

Object Security

The OBJECT SECURITY window allows you to assign access to the object being created while in the Creator wizard. The only option is to have the wizard Assign the current Smartlist object to the fixed Security Task ID = ANYVIEW_CREATOR_OBJECTS. This task would normally be granted to a Dynamics GP Role that any AnyView Object Testers or Designers would have assigned. The Object would normally be assigned to other GP Tasks using the Dynamics GP Security Windows (see :_AnyView Creator Security Roles and Tasks_)

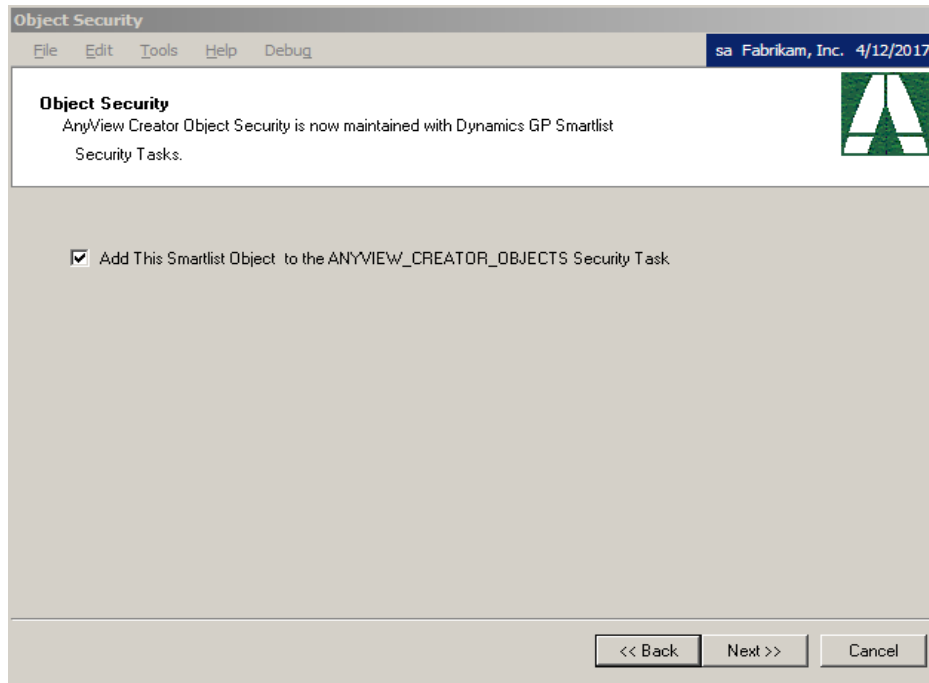


Figure 11. The Create AnyView Object window.

Click **NEXT >>** to complete the Security window.

Create Object

The CREATE OBJECT window allows you to name the object as you would like it displayed in SmartList.

Enter the name for the view in the space provided.

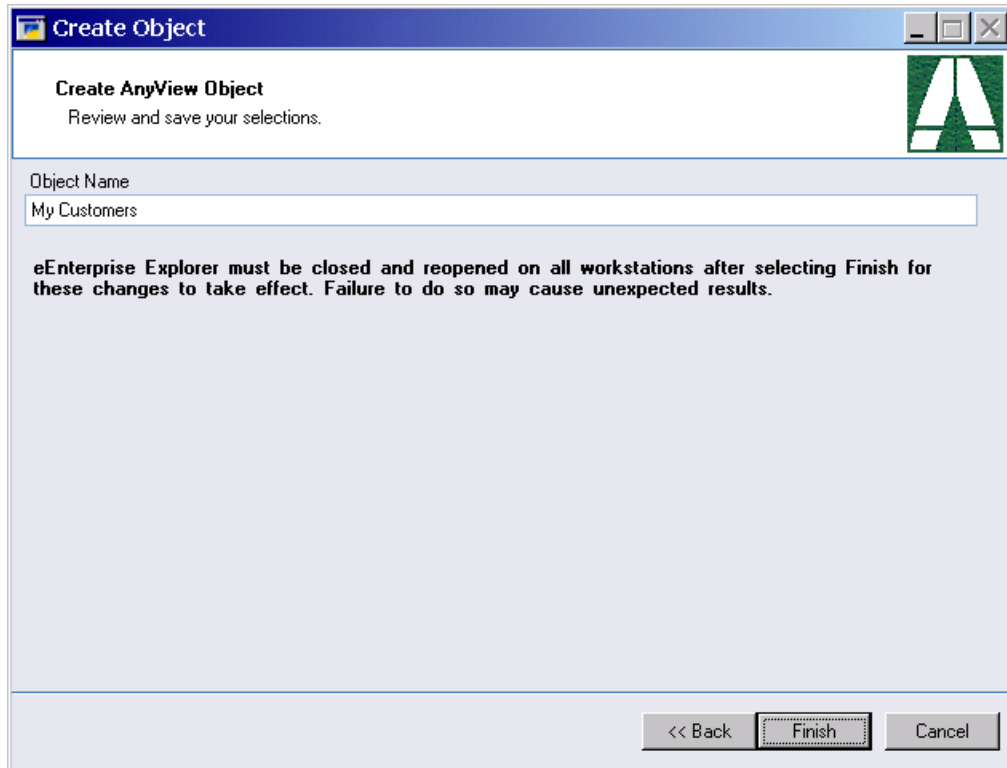


Figure 12. The Create AnyView Object window.

***** After clicking *FINISH*, the new object will appear in SmartList and AnyView the next time they are opened. To modify access to this Object, use the modify object option of the AnyView Creator wizard or the SmartList Security window (from Utilities > System > SmartList Security).**

Note: It is recommended before creating a new view, that you close SmartList on all workstations, as this process modifies the table data and can cause unexpected results.

Modify an Existing Object

AnyView Creator allows you to modify objects that have been created with AnyView Creator. Once the object is created, you can add tables, and columns to the object, change both the included and the default column list and change summary information. **Note:** You cannot remove Tables once an object is created.

Warning: If existing Columns of an object are removed or re-ordered, all Saved Favorites and all Column Formatting for the object will be Deleted for all users. If an object already has many favorites created, you may wish to create a new object instead of modifying an existing one.

Delete an Existing Object

Objects created with AnyView Creator can be deleted from SmartList through the AnyView Creator wizard by selecting the DELETE EXISTING OBJECT action from the Welcome window and following the wizard instructions.

Export an Existing Object

Existing objects created by AnyView Creator can be exported to a file, and then imported on another system, provided the other system also has AnyView Creator. Exporting an object does not affect the original object; it will remain in your system. To export an object, choose the EXPORT AN EXISTING OBJECT action and click NEXT >>. Choose the object to be exported then click NEXT >>. Enter or browse to the path for storing the exported file, then click NEXT >>. Click FINISH to complete the export.

Import a New Object

New objects can be imported from files created by another system by choosing the IMPORT A NEW OBJECT option. Click NEXT >> then select the file to be imported. From the create object window, you can change the name of the object being imported from its original name. Choose FINISH to complete the import.

An imported Object will initially be visible to only the user who imported it. To grant access for this Object to other users, use the AnyView Creator Wizard or the SmartList Security window (from Utilities > System > SmartList Security).

Note: Objects containing External tables or SQL Views can now be imported and exported. For detailed information on this process, see the Exporting and Importing External Table Objects section of the AnyView Browser documentation.

Export Gotos

Existing Goto code can be exported into a text file for shipping to another location. To export Gotos, select the EXPORT GOTOS option on the main Creator window. Click NEXT >>. Select the Gotos you wish to export from the list provided. Click NEXT >>. Supply a name for the export file. Click NEXT >> to proceed. Click FINISH to create the file.

When exporting Gotos, Creator creates a file of all the selected gotos. From the Export Gotos window, you can create a single export that contains multiple gotos.

Import Gotos

Files of Gotos can be imported into by AnyView Creator. To import Gotos, select Import Gotos from the main Creator window. Click NEXT >>. Creator will ask you for a file name. Supply one, or browse to one, then click NEXT >>. Click FINISH to import the file.

Pre-built, importable Gotos for many Microsoft Dynamics™ GP windows are included with the AnyView product.

These files are installed in the 'AnyView (8.00)\Example Goto Actions' folder within your Microsoft Dynamics™ GP client install folder. There is a file for each Goto, and also a combined file, containing all of the Gotos.

Modifying AnyView Creator Views

To open the AnyView Creator Utilities window, go to Utilities > System > AV Utilities.

After creating a new view with AnyView Creator, you may want to edit the way certain fields display in SmartList and AnyView. For example, you can change the format of phone numbers and show the Sales Order Processing Document Type as the text "Order" instead of the number 2. AnyView Creator allows you to define formatting, datatypes, user defined prompts, and dropdown lists.

From the AnyView Utilities screen you can open the maintenance windows where you can perform each of these actions. You can also use the Creator Wizard Format Columns window to perform the same modifications.

AnyView Utilities

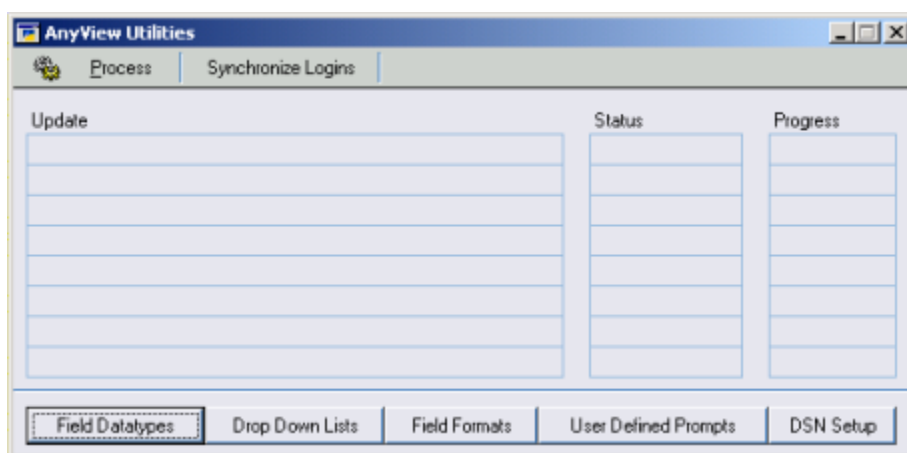


Figure 13. The AnyView Utilities screen.

The processes and screens for each of the buttons on this screen are detailed in subsequent sections of this document.

Process

The PROCESS button is used to rebuild AnyView's list of tables for each product in your system. This process should be run whenever a product which is part of your Microsoft Dynamics™ GP installation is upgraded or a new third party product is loaded. This allows AnyView to create and display objects based on that product's tables.

Synchronize Logins

The SYNCHRONIZE LOGINS button is used only if you have AnyView Browser installed, and you are utilizing the External Logins Functionality of AnyView Browser. The purpose of the Synchronize Logins button is to run a 'Check Links' style verification on the records in the Internet Address table and the AnyView Login tables. Any discrepancies found will be corrected and reported on the AnyView Login Errors Report when the process finishes. An example of a discrepancy that would be corrected by the synchronize process is orphaned records in the AnyView login tables. Should a record exist in the AnyView User Master table that does not exist in the Internet Information table, this process would remove that record.

Field Datatypes

This screen allows you to change Datatypes for selected columns in your Objects.

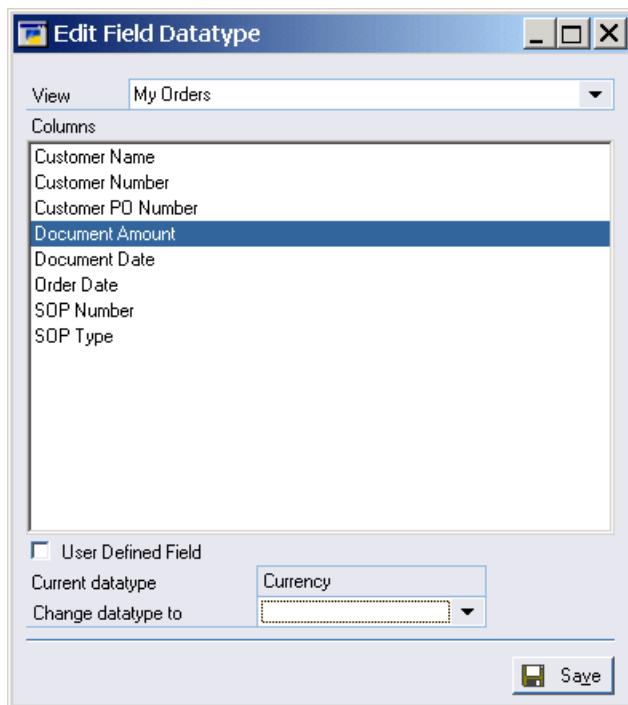


Figure 14. Field Data Types.

To use this screen:

- Select a view (Object).
- Select a column in that Object.
- Select a datatype from the drop down list box.
- Click **SAVE**.

For example, a Salesperson view created using the ASI Commission Work table Commission Plan contains a currency field ASI_Salesperson_Net_Comm_Amt. This column is stored as a float field in the table, but can be displayed as a currency in SmartList by changing the datatype to currency.

Dropdown Lists

This screen allows you to create meaningful lists of information that correspond to more cryptic code values inside the database.

Below is an example of a drop down list that will translate Order Type codes into meaningful labels.

Numeric Value	String Value	Data Value
1	Quote	0
2	Order	0
3	Invoice	0
4	Return	0
5	Back Order	0
0		0

Figure 15. Drop Down List Maintenance.

To set up a drop down list for a column:

- From the VIEW dropdown list select the view containing the fields you wish to edit.
- Displayed in the columns list are all of the dropdown list columns in the selected view.
- Click the desired column in the column list.
- Add the string values you wish to use in SmartList.
- For each string value added, you must enter a numeric value in sequential order.
- If the column is a Microsoft Dynamics™ GP field, the Numeric Value and String Value will fill in automatically.
- When editing dropdown lists, you can choose whether this dropdown list change applies only to the current company or all companies by toggling the radio buttons for VALUES ARE FOR....

Field Formats

This screen allows you to specify formats for columns in your objects. For instance, you may want to set formatting for Social Security numbers, phone numbers, et cetera.

Field Format Maintenance

View: Sales Summary

Columns:

- [Document Amount]
- Month
- Year

Format Applies To:

- ☒ All Companies
- ☐ This Company

Format String:

Positive Values: \$XXXX.XX

Negative Values: -\$XXXX.XX

Save

Figure 16. Field Format Maintenance.

To use this screen:

- From the VIEW dropdown list select the object containing the fields you wish to edit.
- Displayed in the columns list are columns in the selected view.
- To change the format, click on the column in the column list, then enter a value in the POSITIVE VALUES field and in the NEGATIVE VALUES field if it applies to the particular field you are editing.
- This format can be applied to either the current company or all companies by toggling the FORMAT APPLIES TO... radio buttons.
- An upper case "X" is the placeholder.

The format for a Social Security number is XXX-XX-XXXX.

Other common formats include: (one must always include at least 4 'X' characters for numeric formats, for correct operation, this also allows the thousand separator, if present, to be correctly detected.)

\$X,XXX.XX Formats currency fields with a dollar sign, a thousands separator, and 2 decimal places.

X,XXX Formats fields such as Quantity fields with a thousands separator and no decimal places.

User Defined Prompts

Because user defined fields will be displayed in your view as “User Defined ...” and not the value you have entered as the prompt, you can use the User Defined Maintenance window to edit the prompt displayed by SmartList or AnyView.

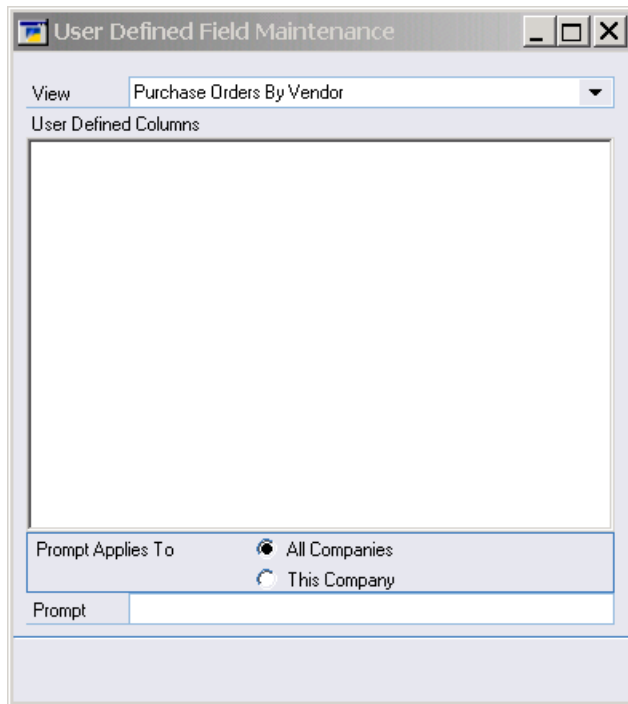


Figure 17. User Defined Field Maintenance.

To use this screen:

- From the VIEW dropdown list select the object containing the user defined field you wish to edit, then click on that column in the column list.
- Determine whether this prompt applies to only the current company or all companies by toggling the PROMPT APPLIES TO... radio buttons.
- Enter the prompt you want SmartList to display in the PROMPT field.

AnyView Goto Maintenance

Accessed from the Utilities > System menu, AnyView Goto Maintenance allows administrators and implementers to create custom SmartList functionality for newly created objects.

One of the key benefits of SmartList is that it provides “drill around” or “goto” functionality that allows users to open Microsoft Dynamics™ GP maintenance or inquiry screens pertinent to the database entries being viewed. For instance, when viewing a customer list, the user can drill into Customer Maintenance, Address Maintenance, Customer Transaction inquiry, et cetera.

AnyView Creator provides this functionality by allowing implementers to author Dexterity or VB Script code and position that code to provide Goto functionality for Creator objects.

Parameter	Datatype	Variable Name	Prompt
1	String	IN_Salesperson	Salesperson ID
0			

Figure 18. The AnyView Goto Maintenance screen.

To use this screen:

- Specify a GOTO NAME or select one from the lookup window.
- Select a PRODUCT for use with this Goto.
- Specify the Goto SCRIPT SCOPE:
 - Once for Selected Row – executes the Goto for the row selected in SmartList
 - Once for Every Row – executes the Goto for each record in the SmartList result set
- Select a SCRIPT TYPE of either Sanscript or VBScript.
- Type in the SCRIPT text.
- Specify the parameters for the script³.

You can test the script by clicking the Test button at the header of the screen.

³ The Variable Name field must be named for passing parameters to VB Script.

AnyView Drill Around Wizard

Welcome

To open the AnyView Drill Around Wizard, go to Utilities > System > AV Drill Arounds.

The AnyView Drill Around Welcome window begins the wizard with a dropdown list of the actions you can perform with the Drill Around wizard.

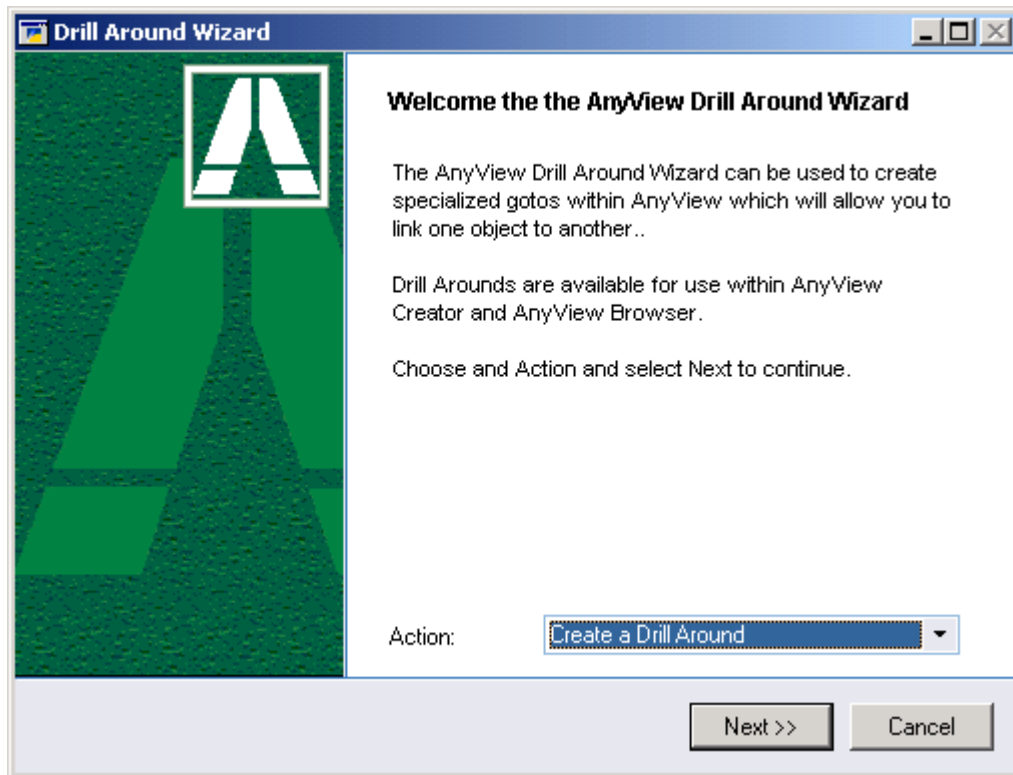


Figure 19. The Drill Around Welcome Window.

Actions on this screen include:

- Create a Drill Around
- Modify a Drill Around
- Delete a Drill Around

These actions are detailed in the following pages.

Create a Drill Around

Select Object

The select object window displays a list of all of the default SmartList objects, and any objects you have created with AnyView Creator. Select the object which you would like to be able to drill to.

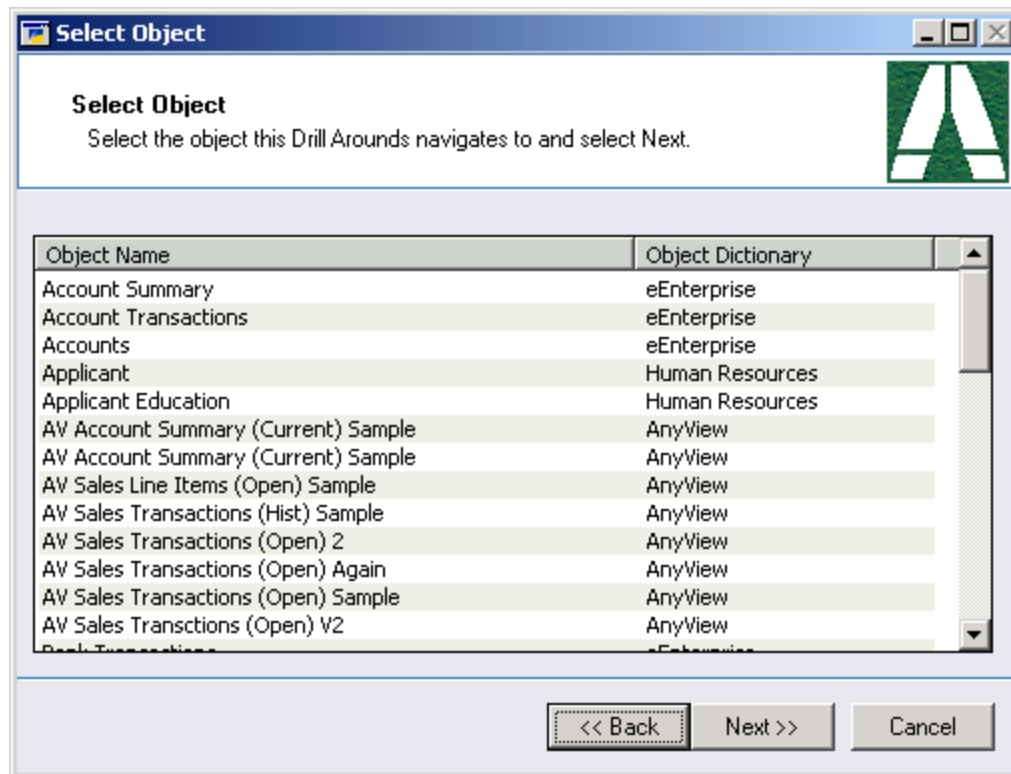


Figure 20. The Select Object Window.

Once you have selected object for this Drill Around, click **NEXT >>**.

Select Criteria

The Select Criteria window allows you to enter restrictions for your drill around. These restrictions are defined by two different types. Drill around restrictions, and drill around.

Drill Around Restrictions

A restriction for a drill around is a column or columns that filter the records by a predefined value when the drill around is used. For example, If you wanted to create a drill around that listed only orders using the Sales Transaction object, you would choose the SOP Type column, and enter a drill around restriction of 'SOP Type is equal to Order'. When used, this drill around would only display orders.

Drill Around Parameters

A parameter for a drill around is a column or columns that filter the records by a predefined field but not a predefined value. Continuing the example above, if you wanted to further restrict the records for your drill around to show only orders for the selected customer; you would also add the drill around parameter 'Customer Number'. But rather than entering a search operator and value, you would mark the drill around Parameter checkbox, identifying this column as a restriction that will be based on the selected record.

To add selection criteria

Enter a name for the restriction as you would like it to appear in the Creator Goto parameter list.

Select the column to restrict.

Choose the drill around type by either marking the Drill Around Parameter checkbox, or selecting a search operator and entering a search value.

Select Criteria
Enter the Drill Around search criteria and select Next.

Name: SOP Number
Column: SOP Number
is equal to
Clear

☒ Drill Around Parameter
☐ Match Case

Add Criteria Remove Criteria Remove All

☒ SOP Type

Maximum Records: 1,000 Search Type: Match All

<< Back Next >> Cancel

Figure 21. The Select Criteria Window.

Once you have entered the desired search criteria for this Drill Around, click **NEXT >>**.

Select Columns

The select columns window allows you to define the display columns for the drill around. To use the default column set from the object, mark the Leave Columns from (Default) favorite checkbox. To add, remove or re-order the display columns, uncheck the Leave Columns from (Default) favorite checkbox and make any desired changes.

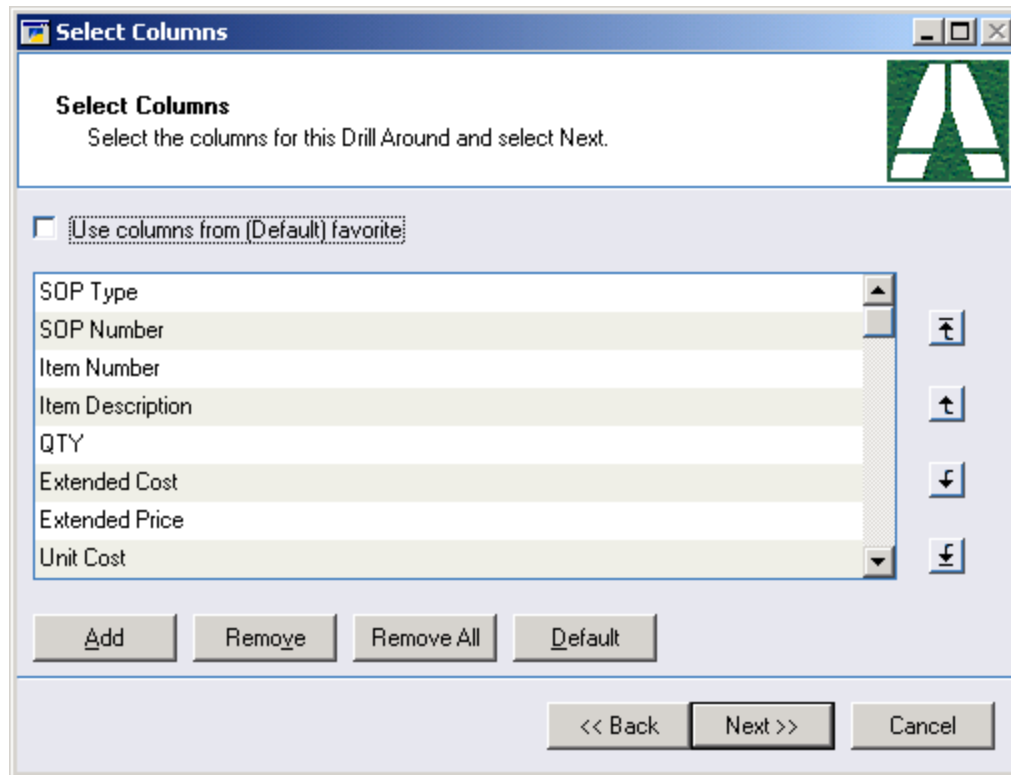


Figure 22. The Select Columns Window.

Once you have chosen the desired columns for this Drill Around, click **NEXT >>**.

Finish

After choosing the desired options for the drill around, name the drill around as you would like it to appear in the AnyView Creator Goto lookup window.

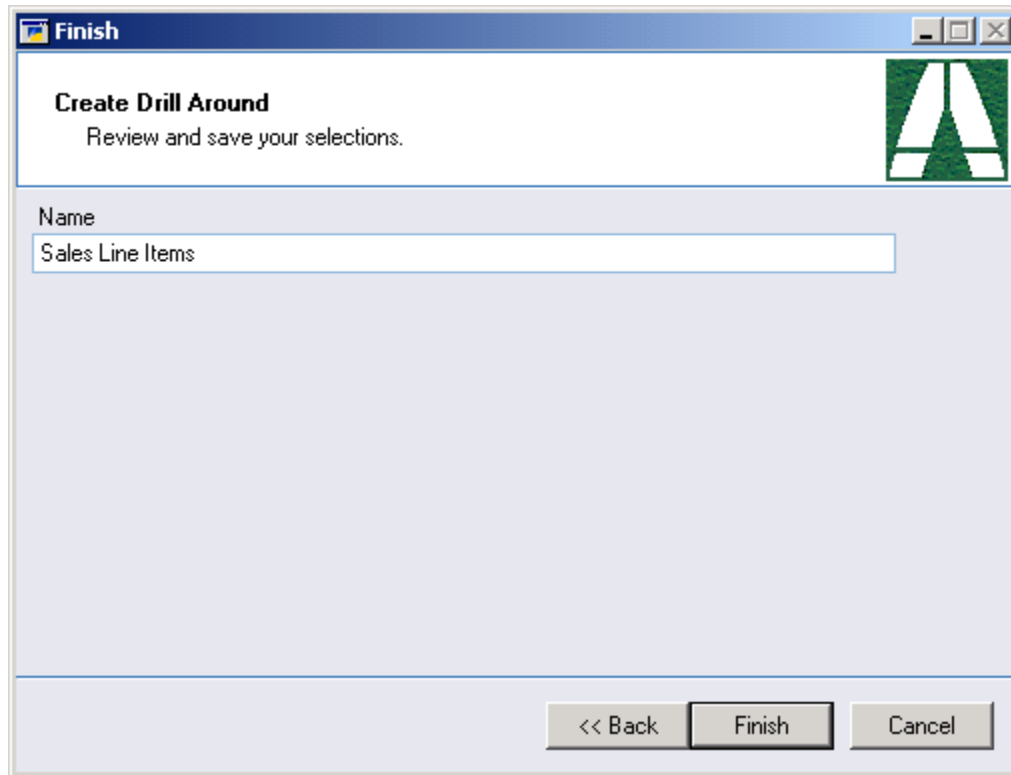


Figure 23. The Finish Window.

Once you have entered the name for this Drill Around, click **FINISH >>**.

Once the drill around has been created, it can be selected from the AnyView Creator wizard Goto lookup list. When added to an object, the search criteria that you defined as drill around parameters will be displayed in the Goto parameter list. Here you will map the search parameters to fields in the source object.

Note: Any object, whether it is a default SmartList object, or one created using AnyView Creator, can be the source object for a drill around. Only objects created with AnyView Creator, however, can have these drill arounds added as a goto.

Modify a Drill Around

After a drill around has been created, it's settings can be modified by selecting the Modify a Drill Around action. All of the drill around's properties can be modified, however, changing some properties will cause the drill around to be removed from any object to which it was added as a goto. The changes that will cause the goto to be removed are:

- Modifying the existing criteria
- Adding new criteria
- Removing existing criteria

Note: After making any of these types of changes, you will need to re-add the selected drill around to any objects for which it was originally assigned as a goto.

Delete a Drill Around

Choosing Delete a Drill Around will remove the selected drill around definition. Once deleted, this drill around will no longer be available in the AnyView Creator Goto lookup window.

Note: Deleting a drill around that has previously been added to an object will automatically remove it from any object to which it was added as a goto.

SmartList Totals

SmartList Totals Goto

The SmartList Totals goto is an added feature of AnyView Creator. This goto is automatically added to all default SmartList objects and all objects created with AnyView Creator. This feature allows you to view totals for fields with a datatype of Long, Integer, and Currency. An example of the use of this functionality would be a situation where you needed to see the total quantity and Extended Price of all items on unposted Returns. By restricting the list in SmartList and using the SmartList Totals goto, you can display these amounts.

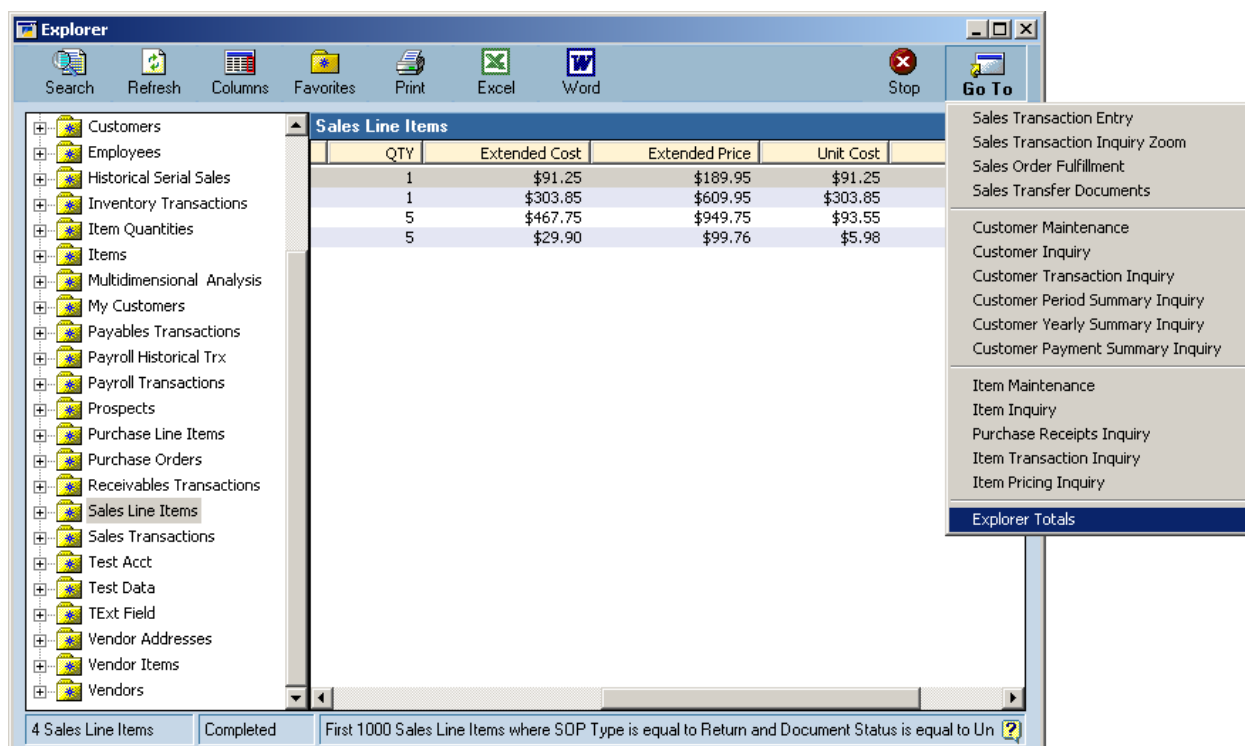
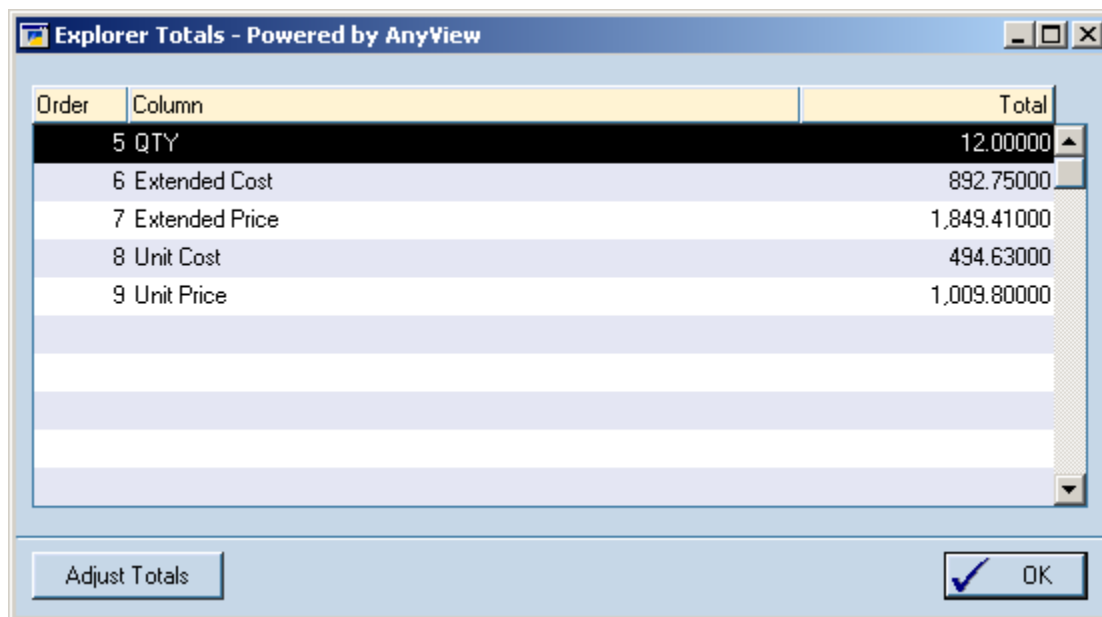


Figure 24. The SmartList Totals Goto.

SmartList Totals

The SmartList totals window opens when selecting the SmartList Totals Goto from SmartList. This window displays all of the display columns in the object that are of a datatype which can be totaled.



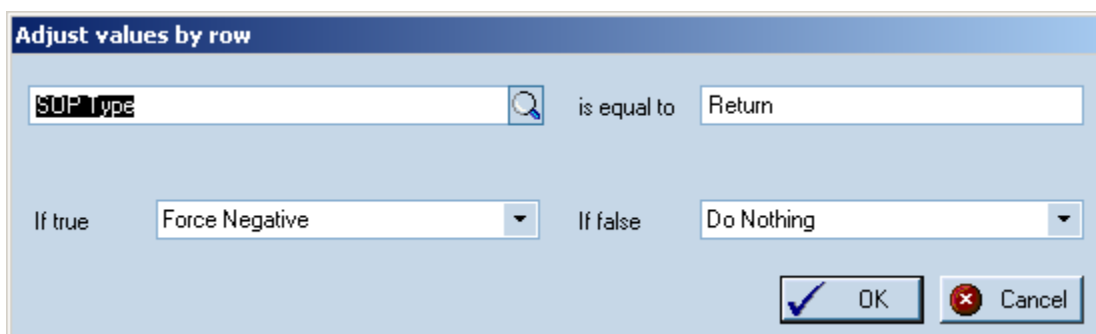
The image shows a window titled "Explorer Totals - Powered by AnyView". It contains a table with three columns: "Order", "Column", and "Total". The table has five rows of data. Below the table, there are two buttons: "Adjust Totals" and "OK".

Order	Column	Total
5	QTY	12.00000
6	Extended Cost	892.75000
7	Extended Price	1,849.41000
8	Unit Cost	494.63000
9	Unit Price	1,009.80000

Figure 25. The SmartList Totals Window.

Adjust Values by Row

The Adjust values by row window opens when clicking the Adjust Totals button from the SmartList Totals Window. Here you can change the display of the totals. In the example above, you may want to display the value of the Returns as a negative number. In this case, you could select the SOP Type field, enter the conditional value 'Return' and choose 'Force Negative' If true. This will change the display of your totals to show as negative.



The image shows a window titled "Adjust values by row". It contains a search field with "SOP Type" and a magnifying glass icon. To the right of the search field is the text "is equal to" followed by a text box containing "Return". Below the search field, there are two dropdown menus. The first is labeled "If true" and has "Force Negative" selected. The second is labeled "If false" and has "Do Nothing" selected. At the bottom right, there are two buttons: "OK" and "Cancel".

Figure 26. The Adjust values by row Window.

External Tables Support

In conjunction with AnyView Creator, you can now create Views based on tables that are not part of your Microsoft Dynamics™ GP solution, and view them with AnyView Browser. These tables can include any additional SQL tables, Access database tables, and other ODBC compliant data sources.

For detailed documentation regarding External Tables Support in AnyView, refer to the [AnyView Browser](#) documentation.

SQL Server objects in SmartList

When using AnyView Creator, objects that contain certain External Tables or SQL Views can be viewed in the Microsoft Dynamics™ GP SmartList under some conditions.

For detailed documentation regarding External Tables Support in AnyView, refer to the [External Tables Support](#) section in the [AnyView Browser](#) documentation.

Objects using External Tables will be available in Microsoft Dynamics™ GP SmartList ONLY IF the tables or views are on the same SQL Server as the Microsoft Dynamics™ GP data and the “Microsoft Dynamics™ GP SQL Server” option was specified as the Data Source in the second dialog of the External Table Setup Wizard as shown below.

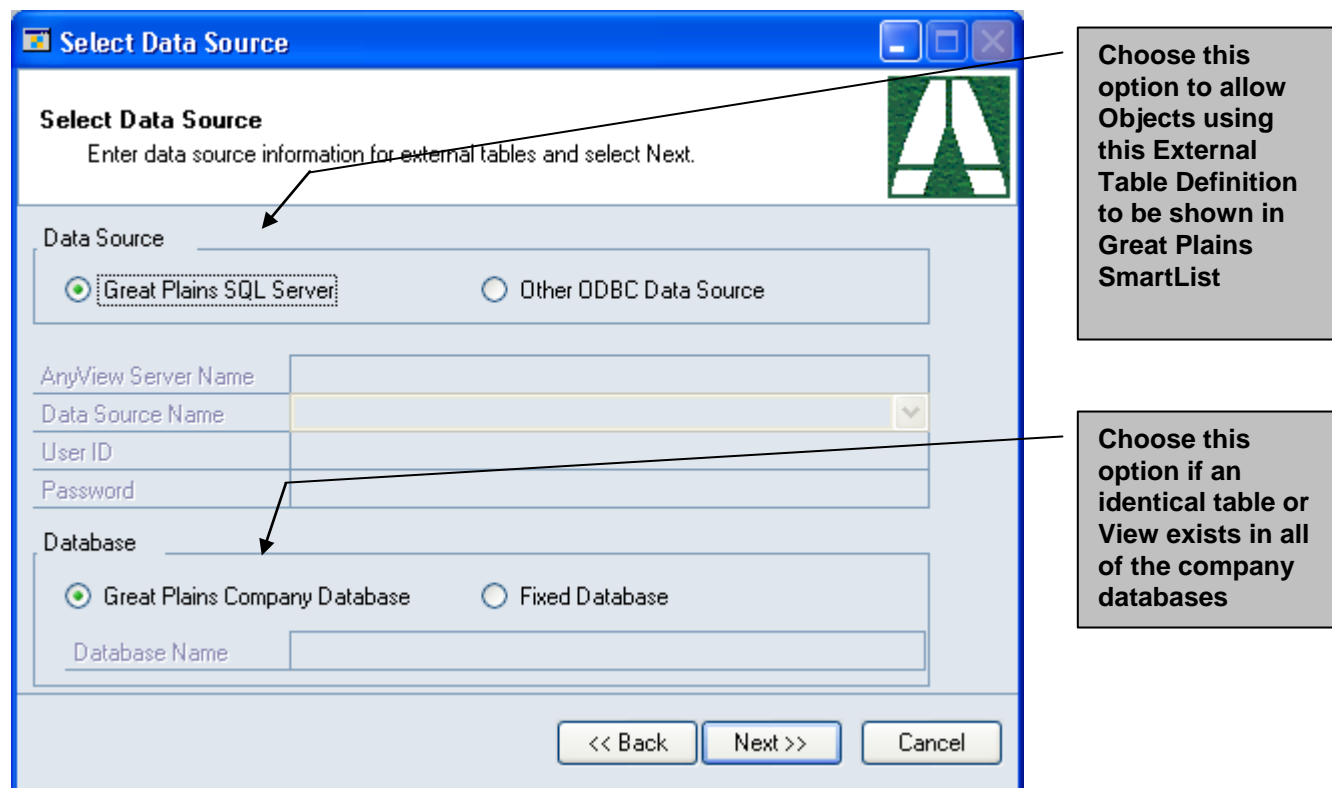


Figure 27. Allow External Tables to be visible in Microsoft Dynamics™ GP SmartList.

AnyView Object Auditor

The AnyView Object Auditor provides AnyView Administrators with the capability to audit AnyView Objects and Favorites for missing fields or tables. This capability is particularly handy when upgrading from one version of Microsoft Dynamics™ GP to another, or when applying a service pack. Version upgrades and service packs may include changes to the Microsoft Dynamics™ GP dictionaries and schemas in a way that will cause AnyView Objects for fail. Examples include Favorites that search of fields that no longer exist or Objects that reference tables that have been modified or removed from the product.

AnyView Object Auditor is started from Utilities > System > AV Auditor.

To use the Auditor, select an action (AUDIT or REPAIR), select an Object or Objects to examine, then click PROCESS.

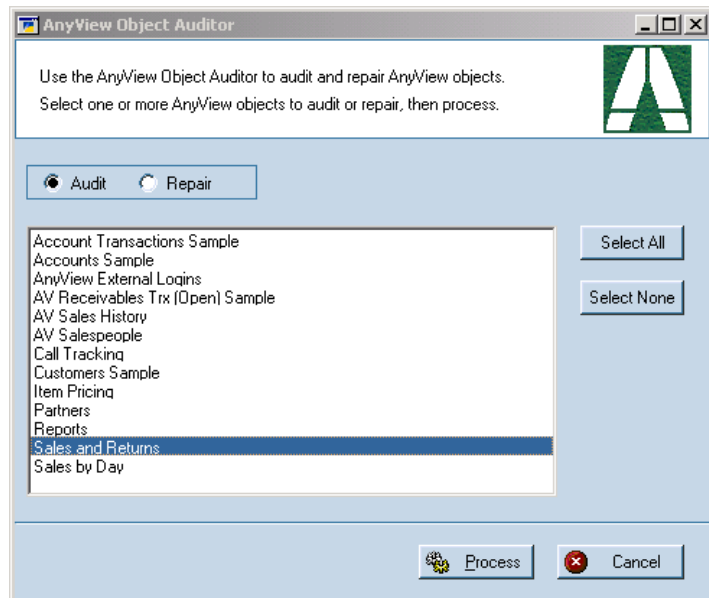


Figure 28. AnyView Object Auditor.

Audit

The Audit option will report on the following problems with AnyView object definitions:

- ☐ Incorrect Resource ID data for object tables.
- ☐ Incorrect Resource ID data for object columns.
- ☐ Object tables that do not exist in the schema.
- ☐ Object columns that do not exist in the schema.

The Audit Report will recommend:

- ☐ Repair option in Auditor for incorrect resource IDs.
- ☐ Deleting object for tables that do not exist in schema.
- ☐ Deleting column in Creator for columns that do not exist in schema.

Repair

The Repair option will fix:

- ☐ Incorrect Resource ID data for tables.
- ☐ Incorrect Resource ID data for columns.

If you have AnyView objects that contain external tables that are not in the Microsoft Dynamics™ GP data source, make sure that the data sources are accessible to the workstation that is performing the audit.