

How to Train Your "New to GP" Employees Tips/Tricks to Creating Training Assets

AMBER J. BELL TRAINING DYNAMO, LLC

- Microsoft Dynamics GP consultant for over 20 Years!
- GPUG All-Star
- Dynamic Communities LEGEND 2023
- DUG Advisory Board Member
- Author: Microsoft Dynamics GP Year-End Closing Workbook and GP User Workbook!



USER WORK





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Session Description

- This was an interactive session. Those that attended live were asked to answer a survey about how they learned Microsoft Dynamics GP.
- During the session I (Amber Bell from Training Dynamo) took notes and created a training document.

Session Description

This was an interactive session that included a LIVE SURVEY!

We took notes and created a training document.*

*Formatted and edited after class.

Important Training Resources!!

Microsoft Dynamics GP 2015 Help	X		 ✓ – □ × ○ ピ ☆ ■ ★ □ ④ :: 	Dynamics GP Resource Directory × + ← → C ■ learn.microsoft.com/en-us/dynamii	cs-gp/resources G 😢 🖈 🖏
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Dynamic Communities
Dynamics GP UG



ended to

GP Resource Directory

Note about the following slides...

 The following slides were presented at a previous Summit event. They are included because they have some helpful hints and tips. Please refer to this <u>document</u> for current links to Microsoft and Dynamic Communities sites.

Don't Reinvent the Wheel...

- Microsoft Dynamics Documentation (CustomerSource)
- GPUG Website Resources (Webinars/Forums)
- MVP's Specific Details (Tables/Formats)
- Microsoft Dynamics Connect Within GP
 - YouTube Videos by MS, Partners, Experts
 - Books by Channel Experts Excel Spreadsheet Available
 - Subscription Services for Videos (GP, BI, Dev)





Within GP (Help/ Microsoft Connect)

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Project Time & Expense		Power BI Show All		Connect		

What's new in Microsoft Dynamics GP 2018

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Learn more about all the exciting features in Microsoft Dynamics GP 2018

Inside Microsoft Dynamics GP Blog

What's New Blog Series GP 2018 http://bit.ly/WhatsNewGP2018

GP 2018 R2 = #GP2018R2 (Jodi Christiansen)

Feature of the Day series starts today for GP 2018 R2 - Monthly Recurring Batches

Welcome to the Feature of the Day series for Microsoft Dynamics GP 2018 R2! Each day we will high new functionality coming soon. First up is Monthly...

Microsoft Dynamics GP

Blog Article By **Jodi Christiansen** 0 Comments Date Posted: 9/10/2018 2:30:00 PM

#GP2018R2 Feature of the Day- Sales Transaction Workflow

A new workflow type is the next feature of the day for #GP2018R2. Sales Transaction Workflow has Maintenance. Not only can you set workflow approval on customer...

Microsoft Dynamics GP

Blog Article By Jodi Christiansen

0 Comments Date Posted: 9/11/2018 8:20:00 AM

#GP2018R2 Feature of the Day - Display Vendor Hold Status

Today's #GP2018R2 Feature of the Day is a new visual to Display Vendor Hold Status . This is simila earlier version of Dynamics GP. The new red icon will... Microsoft Dynamics GP

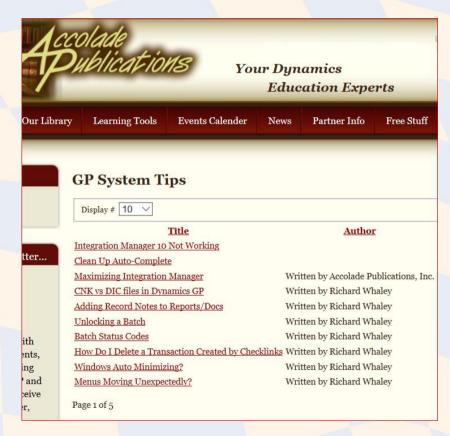
CustomerSource/GPUG

Download "Documentation"

Name

- GP2013_SystemWide.docx
 GP2013_Distribution.docx
- GP2013_Financials.docx
- 2010What's New.put
- MicrosoftDynamicsGP2018.pdf
- 📆 GP 2018 Installation.pdf
- 📆 GP 2018 Upgrade.pdf
- 📆 Web Components Install-Admin Guide.pdf
- PayrollConnect.pdf
- 📜 eExpense.pdf
- 📜 ig.pdf
- MicrosoftDynamicsGP2016TopReasonsToUpgrade.pdf
- 📆 ContractAdministration.pdf
- 📜 DepotManagement.pdf
- 📆 PreventiveMaintenance.pdf
- 📆 ReturnsManagement.pdf
- 🗒 ServiceCallManagement.pdf
- 🗒 Inventory.pdf
- 📆 MultilingualChecks.pdf
- 党 PayablesManagement.pdf
- 📆 PaymentDocumentManagement.pdf
- 📜 PurchaseOrderProcessing.pdf
- 📆 ReceivablesManagement.pdf

Channel Content



GPUG Website



Current GP Books



Microsoft Dynamics GP 2016 Cookbook

Ner 100 powerful and effective reopes to twip you selve sel-word Dynamics GP problems

lan Grieve Mark Polino [PACKT] enterprise⁸⁸



Real-world Business Intelligence with Microsoft Dynamics GP Become an export at property large during Dynamics GP occupy and reference.

Belinda Allen Mark Polino [PACKT] enterprise



GP2TheMAX



(GP – Richard Whaley Award)

What Do Trainers Do?

Microsoft Blogs — Daily Blogs Microsoft Document - What's New (Terry Heley) Load Product, Test Upgrade, Step Thru Creating their own "How-To" Content Specific for company, users, modules...using their data

What Are Your Favorite Resources?

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Tips to creating your own docs

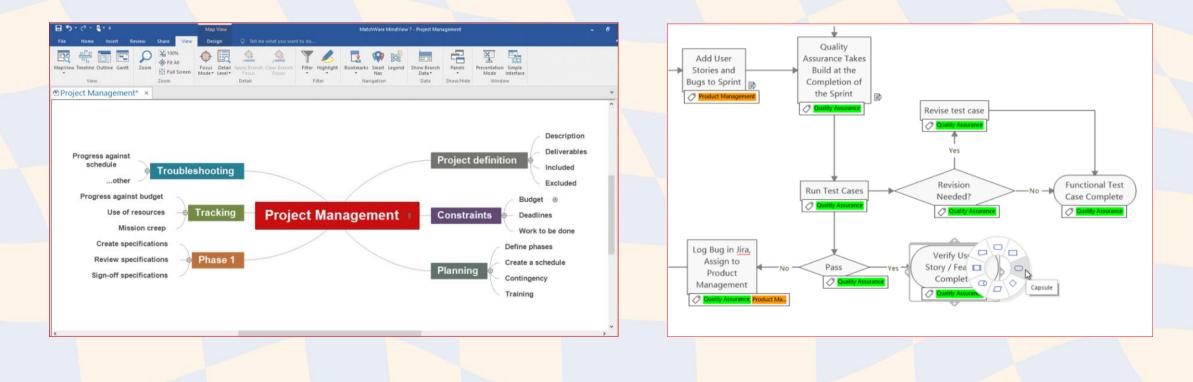
Along the way...you have the power at your disposal...

- Start with hitting F1!
 - Copy/Paste into Word and Add Some Screenshots!
- During Support Calls and Training Sessions
 - Record the Session and Take Screenshots
- Have a Plan for Where to Store Your Training Documents
 - Unified Folders/Servers (SharePoint, OneDrive, DropBox, OneNote)
 - Printed Binders for Some Users (Initial docs, Emails, Blogs)
- Links on Home Page/Navigation Pane/Class (SHOW)
- Download Materials from GPUG Events
 - Share Links to Recorded Webinars
 - Download and Share Content (Tech Tips, Presentations, etc.)

KEEP THINGS ORGANIZED!

(Start Small with an Excel Spreadsheet with Links)
 2023 Dynamic Communities
 Create Process Flow Diagram

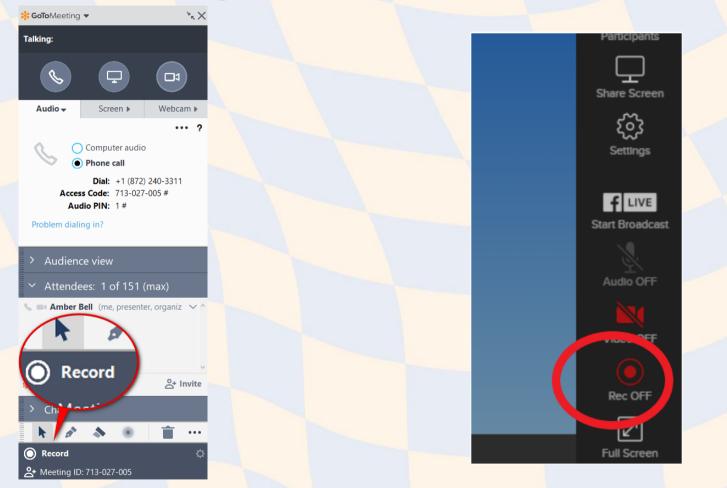
MindMapping / Process Flow Diagrams



Screenshot/Video Tools

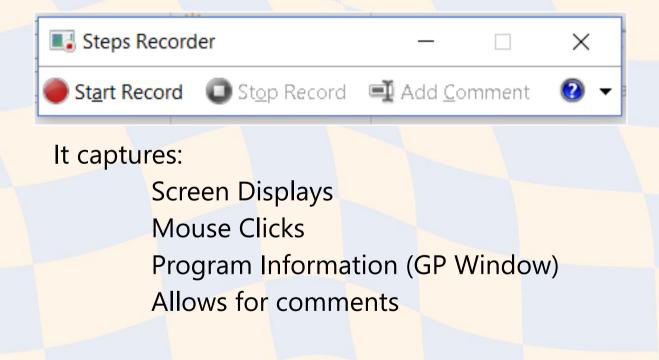
- Snipping Tool Free
- Print Screen Button Free
- Steps Recorder Free
- FastStone Capture \$19.99
- Snaglt \$49.95 per user
- iorad Tutorial Builder- \$99 Per User Per Month
- Camtasia Polished Videos \$249
- BlueJeans, GoToMeeting, etc. Included with Subscription

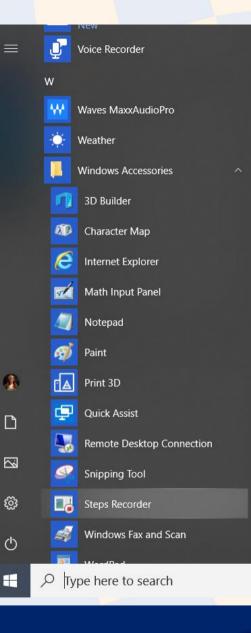
Recording Meetings GoToMeeting or BlueJeans



Steps Recorder

• "Problem Steps Recorder" in Windows 7





Steps Recorder Samples

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Step 10: User left click on "Close (button)" in "Scr" Program: Microsoft Dynamics GP, 18.00.0011.000, Microsoft Corporation, DYNAMICS.EXE DYNAMICS.SET, DYNAMICS.EXE UI Elements: Close, Screen Output - SOP Blank Order Form, WindowsForms10.Window.8.app.0.54(5582, r41, ad1

Step 11: User left click on "Close (button)" in "Scr"

Program: Microsoft Dynamics GP, 18.00.0011.000, Microsoft Corporation, DYNAMICS.EXE

DYNAMICS.SET, DYNAMICS.EXE UI Elements: Close, Screen Outple - SOP Long Packing Slip Form, WindowsForms10.Window.8.app.0.34[5502_141_ad1

Step 12: User left click on "Close (button)" in "Scr"

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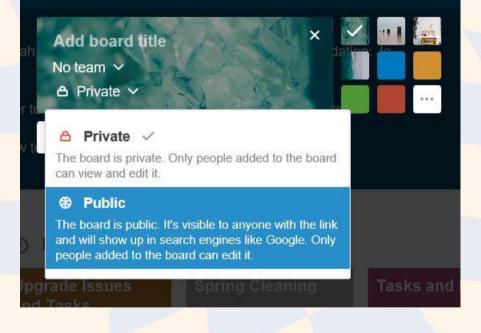
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Desktop Demonstration

GP2018 R2 Features!

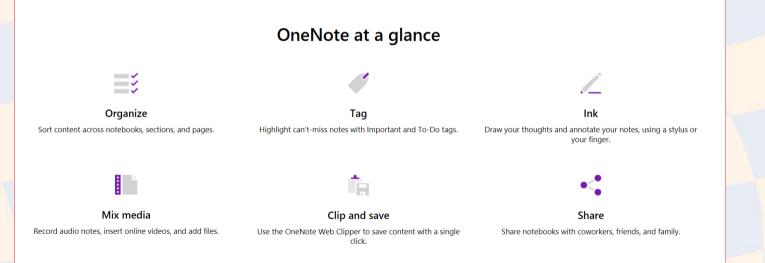
Creating Self Help Shareable Content Trello – Free site

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OneNote (Keeping it in the MS Family)

https://products.office.com/en-US/onenote



What's New

Handwrite your notes, annotate documents, or sketch out your next big idea with new drawing tools.



Ideas for sharing within company and channel... Searchable Content for re-purposing!

How Do You Share Your Training Docs?

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What Did You Learn/Takeaways?

Steps Recorder – Windows 10! Snipping Tool and FastStone! Feature of the Day/What's New Blogs! Channel Experts/GPUG Forums