



COMMUNITY SUMMIT GP

2023



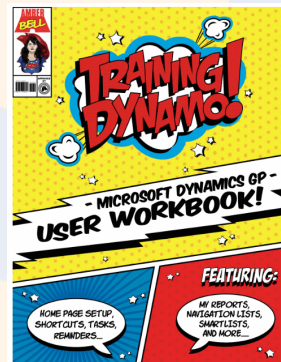
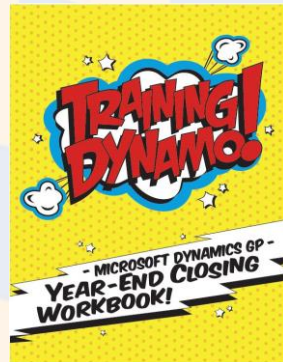
How to Train Your “New to GP” Employees

Tips/Tricks to Creating Training Assets

AMBER J. BELL

TRAINING DYNAMO, LLC

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





AMBER BELL

Email: amber@trainingdynamo.com

Website: trainingdynamo.com

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.

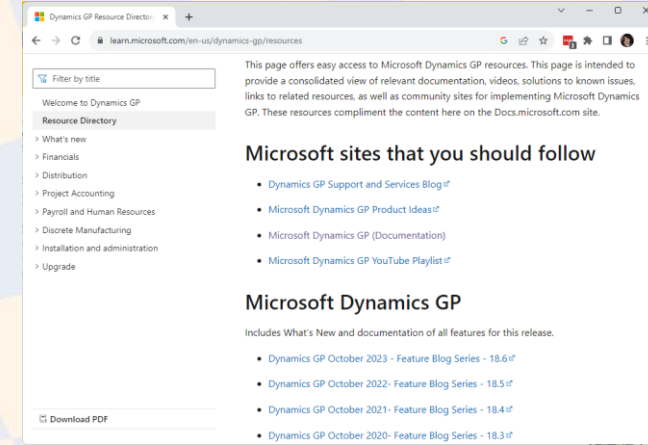
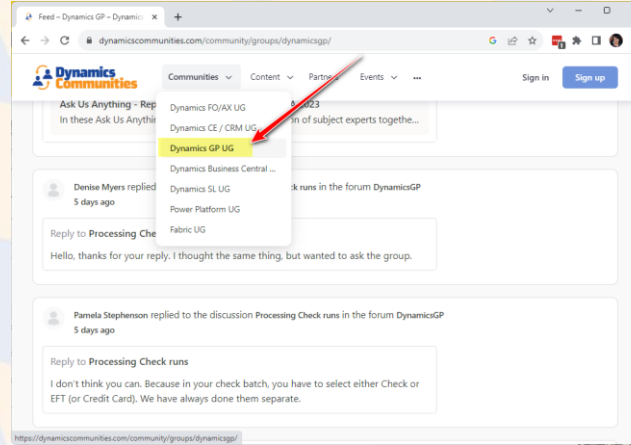
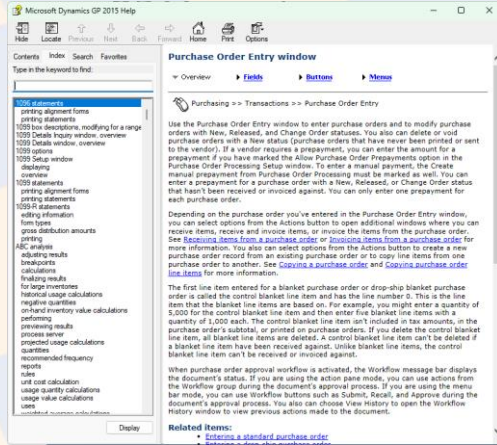
Session Description

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!!



Dynamic Communities
Dynamics GP UG



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 [document](#) for current links to Microsoft and Dynamic Communities sites.

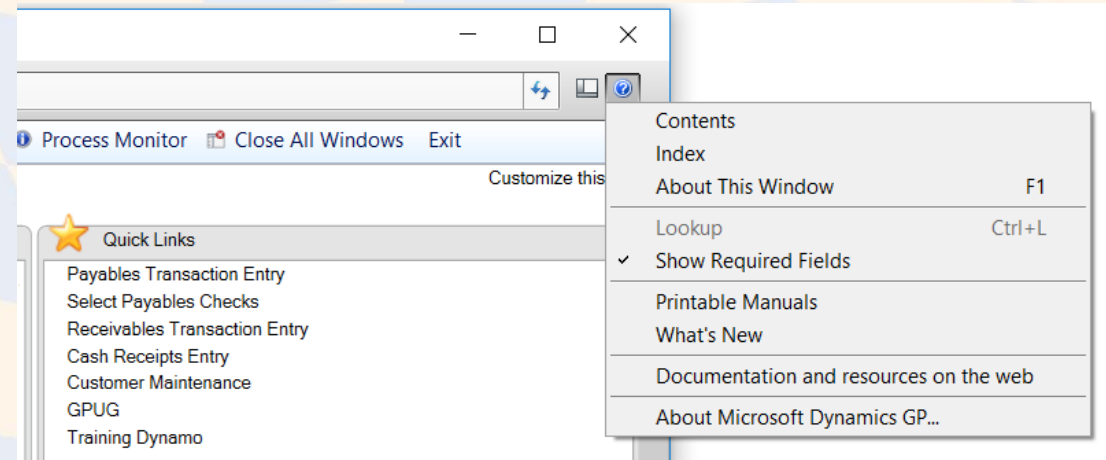
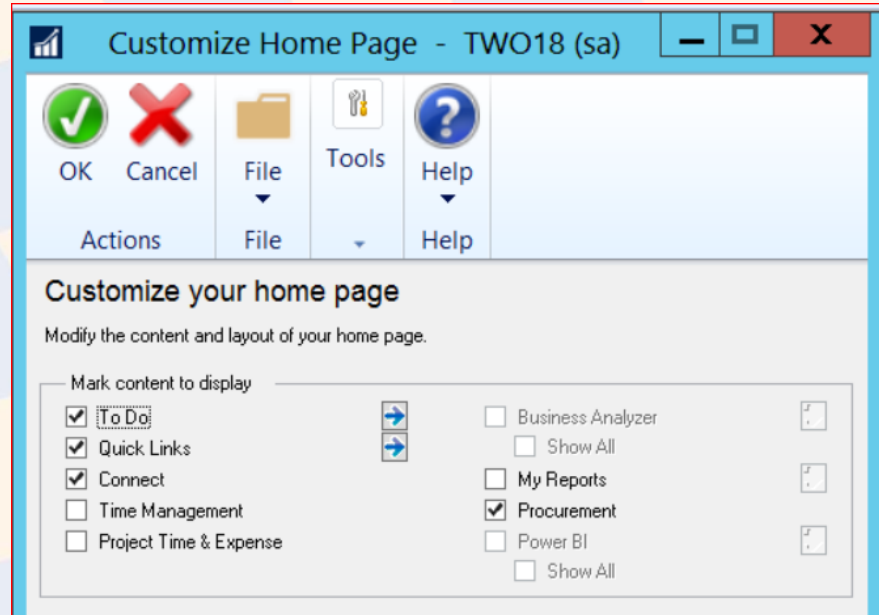
Don't Reinvent the Wheel...

- 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)

WHY REINVENT THE
WHEEL WHEN YOU
DON'T HAVE TO?



Within GP (Help/ Microsoft Connect)



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 highlight 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 similar to an 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
 2018What's New.pdf
 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
 PayablesManagement.pdf
 PaymentDocumentManagement.pdf
 PurchaseOrderProcessing.pdf
 ReceivablesManagement.pdf

Channel Content

Accolade Publications
Your Dynamics Education Experts

Our Library | Learning Tools | Events Calendar | News | Partner Info | Free Stuff

GP System Tips

Display # 10

Title	Author
Integration Manager 10 Not Working	Written by Accolade Publications, Inc. Written by Richard Whaley Written by Richard Whaley Written by Richard Whaley Written by Richard Whaley Written by Richard Whaley Written by Richard Whaley Written by Richard Whaley
Clean Up Auto-Complete	
Maximizing Integration Manager	
CNK vs DIC files in Dynamics GP	
Adding Record Notes to Reports/Docs	
Unlocking a Batch	
Batch Status Codes	
How Do I Delete a Transaction Created by Checklinks	
Windows Auto Minimizing?	Written by Richard Whaley
Menus Moving Unexpectedly?	Written by Richard Whaley

Page 1 of 5

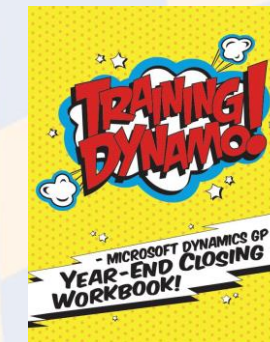
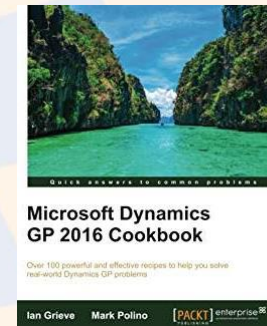
GPUG Website

GPUG
DYNAMICS GP USER GROUP

- Home
- JOIN YOUR COMMUNITY
- Membership
- Chapters
- Communities
- Learn & Engage
 - Upcoming Webinars
 - Academy Courses
 - Special Interest Groups
 - Webinar Recordings
 - Open Forum
 - Volunteer
 - Partner Company Directory
 - Credentialing Exams
- Conferences
- News & Resources
- About Us

RECENTLY ADDED PUBLIC RECORDING: Distribution Setup & Fundamentals

Current GP Books



(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



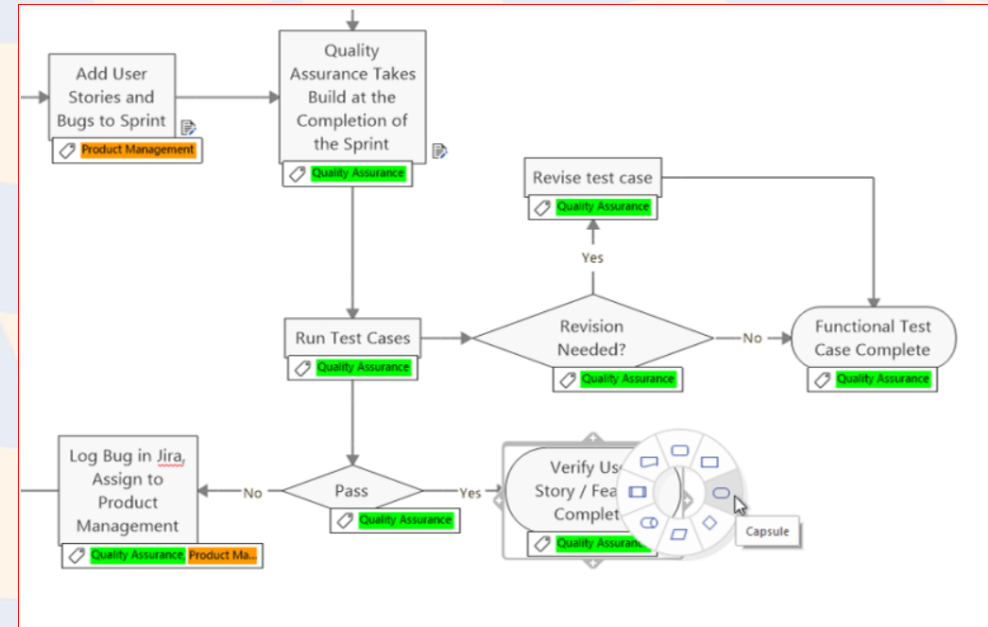
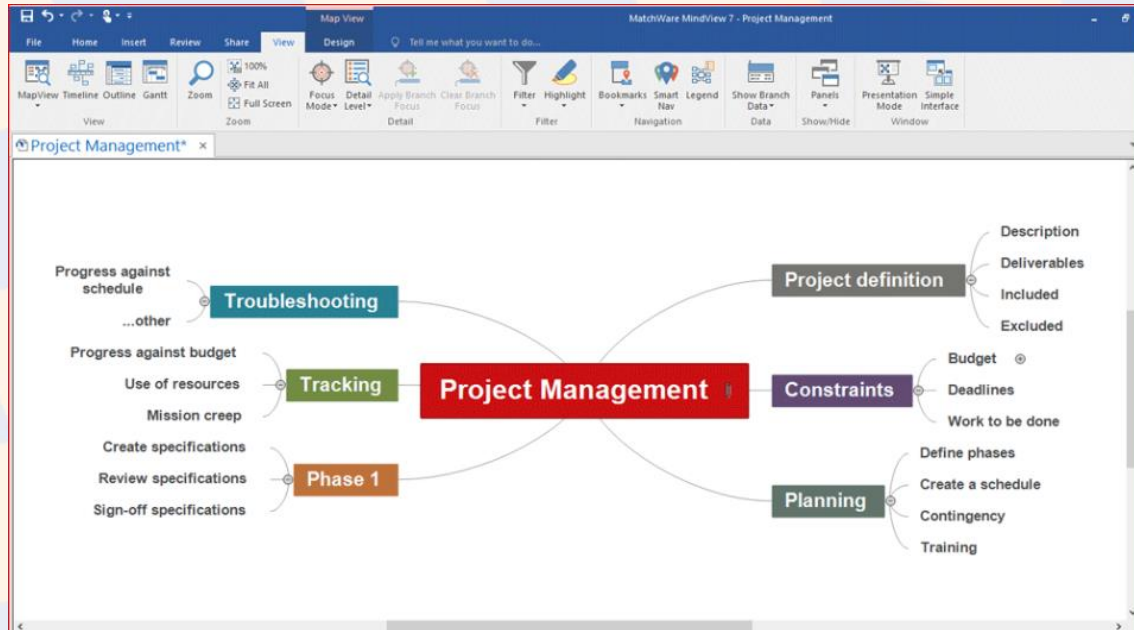
**What Are Your Favorite
Resources?**

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)
 - Create Process Flow Diagram

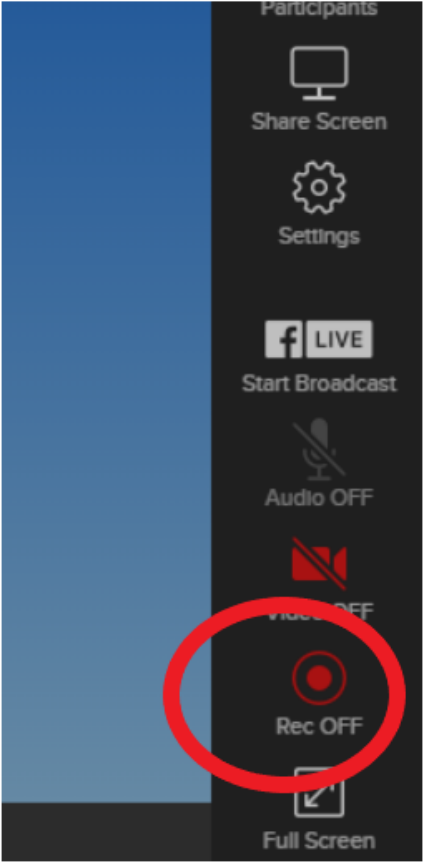
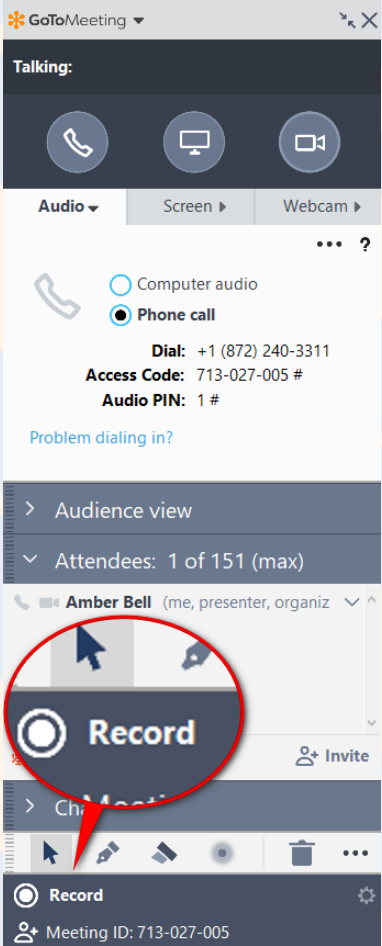
MindMapping / Process Flow Diagrams



Screenshot/Video Tools

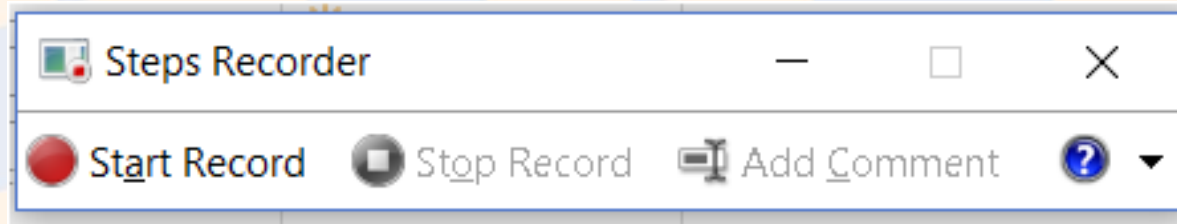
- Snipping Tool – Free
- Print Screen Button – Free
- Steps Recorder – Free
- FastStone Capture - \$19.99
- SnagIt – \$49.95 per user
- iorad – Tutorial Builder- \$99 Per User Per Month
- Camtasia – Polished Videos - \$249
- BlueJeans, GoToMeeting, etc. – Included with Subscription

Recording Meetings GoToMeeting or BlueJeans



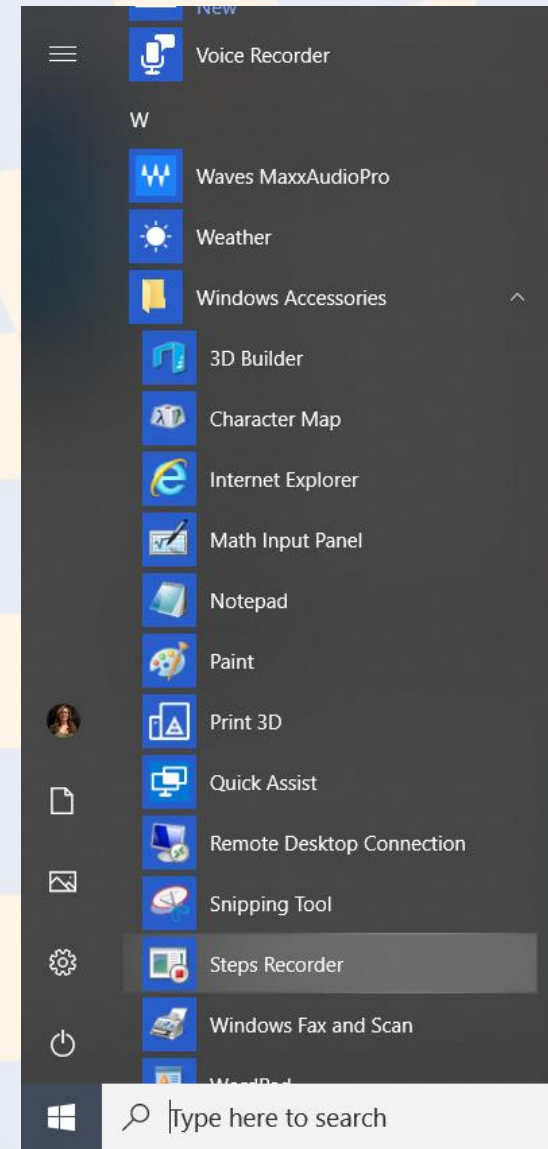
Steps Recorder

- “Problem Steps Recorder” in Windows 7

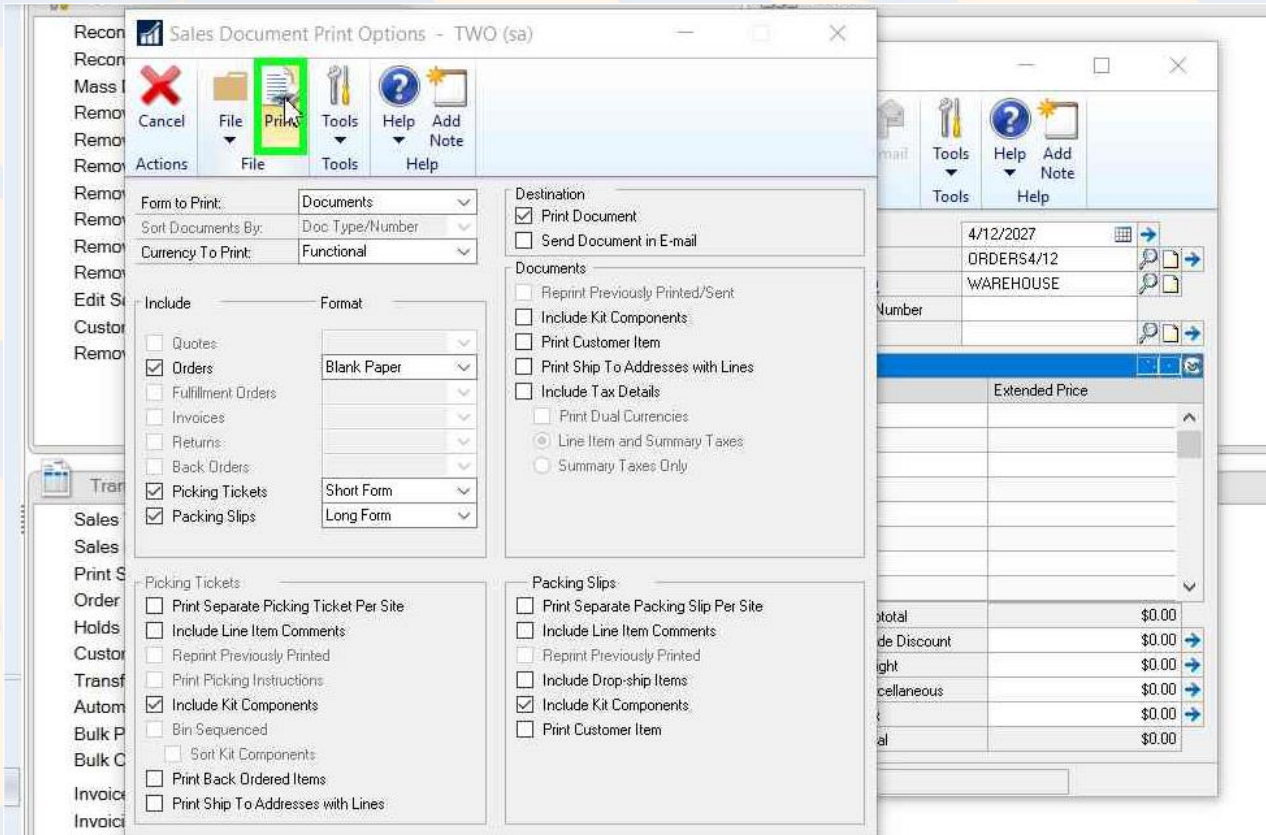


It captures:

- Screen Displays
- Mouse Clicks
- Program Information (GP Window)
- Allows for comments



Steps Recorder Samples



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.0.34f5502_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 Output - SOP Long Packing Slip Form,
WindowsForms10.Window.8.app.0.34f5502_r41_ad1

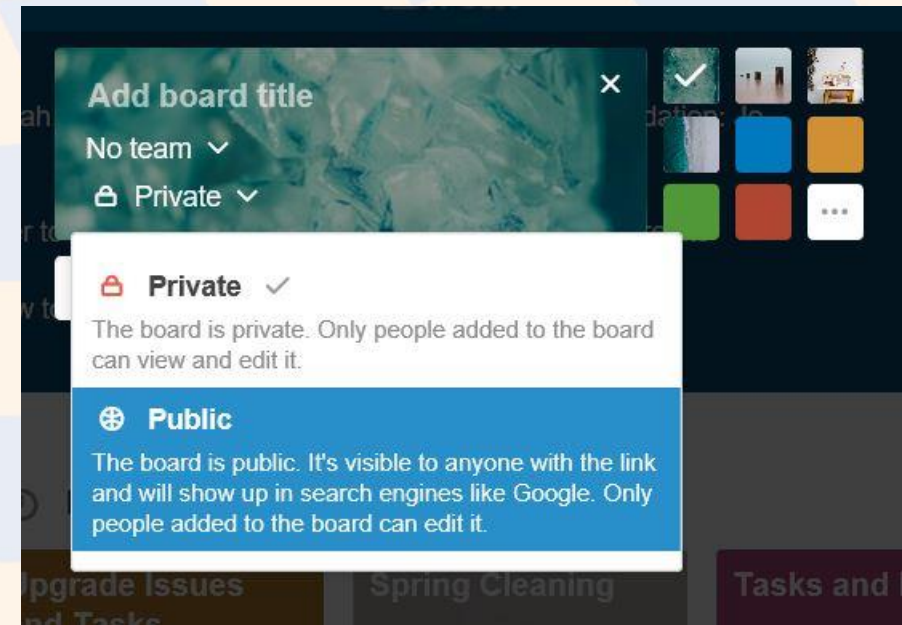
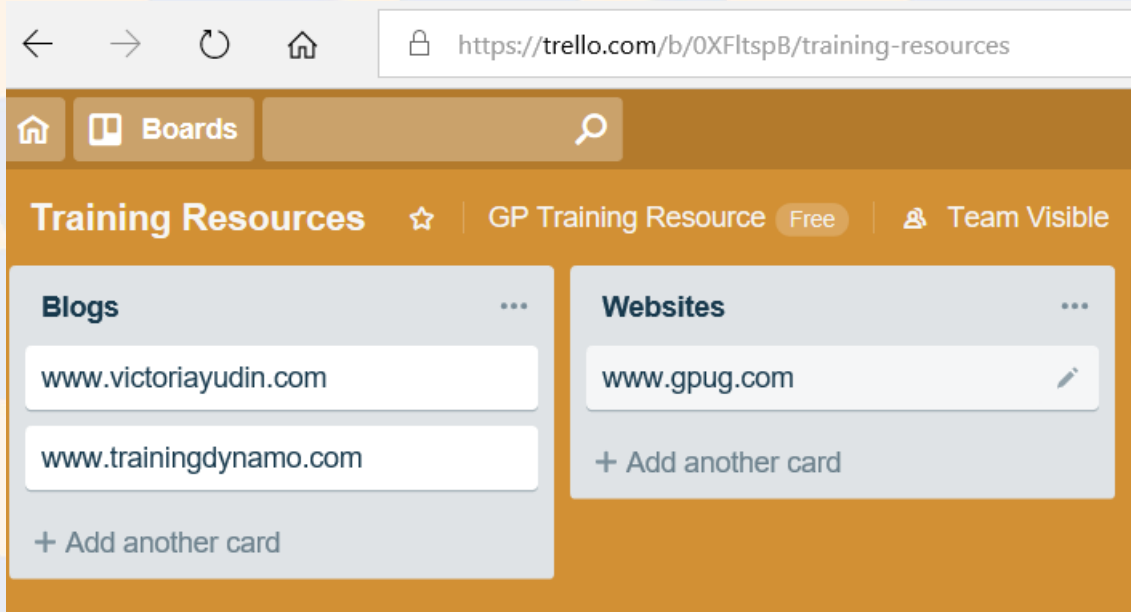
Step 12: User left click on "Close (button)" in "Scr"
Program: Microsoft Dynamics GP, 18.00.0011.000 , Microsoft Corporation, DYNAMICS.EXE
DYNAMICS.SET, DYNAMICS.EXE
UI Elements: Close, Screen Output - SOP Short Picking Ticket Form,
WindowsForms10.Window.8.app.0.34f5502_r41_ad1

Desktop Demonstration

GP2018 R2 Features!

Creating Self Help Shareable Content

Trello – Free site



OneNote (Keeping it in the MS Family)

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

OneNote at a glance



Organize

Sort content across notebooks, sections, and pages.



Tag

Highlight can't-miss notes with Important and To-Do tags.



Ink

Draw your thoughts and annotate your notes, using a stylus or your finger.



Mix media

Record audio notes, insert online videos, and add files.



Clip and save

Use the OneNote Web Clipper to save content with a single click.



Share

Share notebooks with coworkers, friends, and family.

What's New



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

Got it!

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



**How Do You Share
Your Training Docs?**

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