CHAPTER 1: MODIFIER OVERVIEW

Training Objectives

Actively participating during this chapter helps you learn:

- The features and benefits of using Modifier.
- How to locate and use the Forms Dictionary.
- The difference between Forms and Windows.
- How to use Modifier.

Introduction

Microsoft Dynamics™ GP Modifier is a powerful tool you can use to customize the application and provide specialized solutions for your accounting team. Modifier offers a variety of features to modify the look and feel of the Microsoft Dynamics GP system without changing the underlying computing logic and accounting integrity.

Features and Benefits

Microsoft Dynamics GP Modifier helps you modify the appearance of the windows in the application using graphics, color, and text. With Modifier you can add new information to windows and determine how existing information is presented.

Customize Windows Based on User Needs

You can assign either modified or original Microsoft Dynamics GP windows to each user, customizing the system to meet individual needs and preferences. For example, you can simplify a data entry window for primary sales personnel, yet keep the original order fulfillment window for more detailed sales entry. Limit access to sensitive information or tasks by setting certain fields to be display only. For example, you can set all fields in a General Ledger budgets window to be display-only, creating a "read-only" budgets window for your staff, and reserve the ability to change budget information for senior data entry personnel.

Save Modified Windows in a Separate Location

To ensure data integrity, each change made with Modifier is saved in a separate file, apart from the code files provided with the product. This allows you to deliver changes easily to an accounting department since the separate file contains only modified windows, text and graphics. Therefore, it is much smaller than the code files. In addition, by storing the changes in a separate file, this prevents the customizations from being overwritten if the Microsoft Dynamics GP product needs to be reinstalled.

Make Global Changes to Graphics and Text

All text and graphics can be modified from a central source, and the changes are cascaded throughout the Microsoft Dynamics GP system. For example, to change all "Customer" prompts to "Client," or all "State" prompts to "Province," you make the change only once. You also can change the names of toolbar and menu bar selections to fit your business practices.

Add Fields to Microsoft Dynamics GP Windows

With Modifier, you can add new fields to Microsoft Dynamics GP windows two different ways.

- Add fields to a window from a Microsoft Dynamics GP table that is auto-linked to the window.
- Create new fields to add to the window populated through the use of Visual Basic for Applications (VBA).

VBA allows you to store or track additional detail that Microsoft Dynamics GP either does not currently store or does not currently display.

NOTE: *VBA is a component of Microsoft Dynamics GP Modifier and is available when Modifier is registered.*

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Rearrange Fields in a Microsoft Dynamics GP Window

Rearrange the fields in a window or hide fields that are not used. This enables you to create data entry forms specific to your application. By rearranging fields in a Microsoft Dynamics GP window, you can change the sequence that your data entry personnel enter information, ensuring the most important information is entered first. You can also change each window's tab sequence to increase keyboard efficiency and speed during data entry.

Customize Windows with Graphics and Color

Change fonts, color, and typefaces in Microsoft Dynamics GP windows to look more like your paper forms or to draw attention to important information. Use standard copy-and-paste techniques to add graphics.

Getting Started

Using the Forms Dictionary

All the resources used by the Microsoft Dynamics GP system, such as fields, tables, forms, windows, pictures and text, are stored in a single file – a dictionary. To ensure data integrity, each change made with Modifier is saved in a separate dictionary file. All original Microsoft Dynamics GP resources are stored in a dictionary called DYNAMICS.DIC, and all modifications to those original resources using Modifier are stored in a forms dictionary called FORMS.DIC.

NOTE: *A new dictionary file (FORMS.DIC) is automatically created when you access Modifier for the first time and select Microsoft Dynamics GP as the product.*

Because changes are stored in a separate file, they can be easily delivered to customers or an accounting department. Since the separate file contains only modified windows, text and graphics, it is smaller than the code files, and therefore, easier to transfer from one system to another. In addition, by storing the changes in a separate file, this prevents the customizations from being overwritten if the product needs to be reinstalled.

NOTE: *When transferring a Forms dictionary from one system to another, make sure that each system has either the Modifier or the Customization Site Enabler registered. It is necessary to have one of those two modules registered for the forms dictionary to be referenced. Modifier allows them to both use and create modifications, while the Customization Site Enabler allows existing customizations to be used.*

The Forms dictionary can be stored in one of two places–on the local workstation or on a network server. Specify where the Forms dictionary is stored in a file on each workstation called Dynamics.set. This file exists in the folder where the Microsoft Dynamics GP product was installed.

Storing Modifications at Workstations

If you have installed the Microsoft Dynamics GP dictionary file (DYNAMICS.DIC) on individual workstations, by default the Forms dictionary is also located at each of those workstations. Storing the file on each machine on the system gives the user the ability to use a unique file with different modifications. In addition, storing the Forms dictionary on each machine makes processing time within the application faster.

NOTE: *If you specified a different location for the Forms dictionary file during the Microsoft Dynamics GP installation or by using the Edit Launch File window, the Forms dictionary will be in that location instead of each individual machine.*

Where the Forms dictionary is located becomes important when distributing modifications to a number of workstations on a system. Instead of always creating modifications for each workstation by using Modifier on each individual machine, modifications can be made on one machine and distributed to other workstations appropriately.

For example, in the following illustration the Administrator (workstation one) has used Modifier to create customizations for workstations two and three. Those customizations were made on workstation one and then distributed to the two users by copying the Forms dictionary (FORMS.DIC) from workstation one to workstations two and three. The same administrator then created additional modifications for the user at workstation four. Again those changes were made on workstation one and distributed to the other user by copying the new Forms dictionary (FORMS.DIC) from workstation one to workstation four.

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Storing Modifications on a Network

With Microsoft Dynamics GP, you can create one single Forms dictionary (FORMS.DIC) file that can be used by all workstations on the system. This is done by specifying a network location for the Forms dictionary file during the installation of the product or by using the Edit Launch File window to specify a network drive. In this case, the FORMS.DIC file is created on the network server and is accessed by all workstations. Because changes are stored at a central location, the customizations only need to be made once, and each user in the accounting system is updated.

HINT: *If the Forms dictionary is stored at a network location, you can only access the dictionary with Modifier if no other users on the system currently have Microsoft Dynamics GP open. Often times, you may copy the Forms dictionary to your local machine to make changes and then copy the dictionary back to the network location when everyone else is out of the system.*

In the following illustration, an administrator with access to Modifier (workstation one) has created customized forms and windows for all users in the accounting system by setting access to modified forms using system security.

NOTE: *If storing the Forms dictionary at a network location, use the Edit Launch File window to verify that each workstation "points" to the location of the file on the server.*

Setting Access to Modified Forms

Since the Microsoft Dynamics GP system can use two different types of forms, modified and original, you need to determine which users have access to the modified forms that have been created. To set access to a modified form, enter the application and choose TOOLS→SETUP→SYSTEM. Use either the User Class Setup or Security Setup window. Forms customized using Modifier appears in the Type list as Modified Microsoft Dynamics GP Windows.

HINT: *Once access is set to a modified form, you can continue to make changes to that form without setting access again.*

Using either user classes or individual security settings, you can set access to customized forms and windows based on individual user needs or the needs of an entire accounting department. To grant access to a form, double-click the form within the Access List.

HINT: *If a user or user class does not have access to a window from an original form, the modified version does not appear in the User Class Setup or Security Setup window. In this case, set access to the original form, and the modified version should appear in these windows when selecting Modified Microsoft Dynamics GP Windows.*

Forms and Windows

Since much of the work done with Modifier involves changing windows, yet each window is contained within a form, it is important to understand how Modifier uses windows in conjunction with forms.

Forms are groups of windows that function together for a common purpose. A form may have several windows displayed and used separately, but together all the windows function for a specific purpose. For example, a customer maintenance form may use one window to store information about customer balances and another to store information about the customer's shipping addresses. Together, both windows allow users to maintain customer records.

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Overview of the Microsoft Dynamics GP Modifier

Enter Microsoft Dynamics GP to begin using Modifier. If you have registered Modifier, it is available from the Customize options on the Tools menu.

NOTE: *If using Microsoft Dynamics GP in a multi-user environment, be sure that no other users are in the application when using Modifier.*

To access Modifier, go to TOOLS→CUSTOMIZE→MODIFIER.

Multiple dictionaries are installed in the Microsoft Dynamics GP directory. A prompt displays asking you to select a product containing the resource to modify.

The Modifier Main Menu

When accessing Modifier, the Modifier's main menu appears listing menu items to select from as well as a Toolbar to quickly access data types, fields, and forms.

Refer to the following table for information about each of the items appearing in the Modifier main menu and how it can be used:

Selection	Function
File	Quit Modifier and Microsoft Dynamics GP by selecting Exit, or return to Microsoft Dynamics GP by selecting Microsoft Dynamics GP.
Edit	Place a selected graphic on the clipboard by selecting Copy, or paste the contents of the clipboard in a window layout by selecting Paste. Remove objects by selecting the Clear command.
Macro	Select to use or record a macro by selecting the appropriate menu item. Refer to the System Manager User's Guide for information about how to use macros.
Resources	Display a list of selected Microsoft Dynamics GP resources. From the resources list, view information about a selected resource. For example, to view a list of the formats the application uses, select Formats from the Resources menu. Select a format from the list, and click the **Open** button to display the Format Definition window.

Selection	Function
Windows	Select an open window in Modifier. All windows currently open within Modifier appear in this menu.
Help	Access Modifier's online documentation.

Click this...	To do this...
Data Types	Display a list of all data types in the application. From this list view information about a data type, change a data type's keyable length, text and picture values, and change the format used by a data type.
Fields	Display a list of all fields in the application. From this list view information about a field, and change a data type used by a field.
Forms	Display the Forms window. This window displays forms selected for modification. You can insert original Microsoft Dynamics GP forms in the list of modified forms and view the form's windows and each window's layout.

Finding the Correct Microsoft Dynamics GP Window to Modify

Within Microsoft Dynamics GP, a window has two names:

- Display name – Appears in the application as the title for the window.
- Technical name – Modifier's name for the window.

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If the technical name for the window you want to modify is known, select it from the list of forms from within Modifier.

If you do not know the technical name of the window, return the application by selecting Microsoft Dynamics GP from Modifier's File menu. Navigate to the window you want to modify. With the window open, select TOOLS→CUSTOMIZE→MODIFIER CURRENT WINDOW. Modifier launches and the layout window for the current window automatically opens.

HINT: *Another way to find a window's technical name is from the Tools menu. Select Resource Descriptions, then Windows. Once the Window Descriptions form is open, select a series and view by window display name. Click the scrolling window expansion button to display the window technical name.*

Form Definition Window

After selecting or opening a form using Modifier, you can view the information using the Form Definition window. To open the Form Definition window, select the form from the Modified Forms list, and click the **Open** button. The definition window appears as shown in the following illustration.

***NOTE**: After a form is selected or opened it is automatically copied and added to the Forms dictionary. All changes made using Modifier are saved to the same Forms dictionary. Using the Microsoft Dynamics GP Modifier, you never actually change or update the original objects in the Microsoft Dynamics GP dictionary.*

Selection	Function
Tables Tab	Select this to open the Tables window for the selected form. Use it to view which tables are accessed by this form.
Menus Tab	Select this to open the Form Menus window for the selected form. You can view menus and modify menu options that are available when this form is opened.
Windows Tab	Select this to view a list of the windows on the selected form. To view the layout for one of the windows, double-click the window or select it from the list, and click the **Open** button.

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The Layout Window

On the Form Definition window, select a window, and click **Open** to display the Layout window. Three different components are available within the Layout window to customize the window:

- The toolbox offers a set of drawing tools.
- The properties window lets you make visual and object changes to the window.
- The window layout represents the window being modified.

The Layout Area

The layout area within the Layout window displays all the fields, controls, graphics, and text used by the window. Each object can be selected with the arrow tool and then dragged to a different position in the window layout.

There are three sections that may exist on a window layout.

- The Control Area at the top typically contains push buttons such as **Save**, **Clear**, and **Delete**.
- The middle of the window contains text objects used to describe fields on the window. This area displays field data or information entered by the user.
- The status area at the bottom contains navigational controls, such as browse buttons.

For a comprehensive list of the objects appearing in a window's layout and a definition of each, refer to the Modifier Reference manual.

The Properties Window

The Properties window is used to set several characteristics for the window and the objects on the window. To display the properties for the window, select Properties from the Layout menu. If it is not already open, the Properties window appears.

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To use the Properties window, select the tab that indicates which type of properties to view – Object or Visual.

To set a property, select it in the list, and then change its value in the settings box. Change its value by one of the following actions:

- Selecting a value from a drop-down list
- Typing a value
- Using a lookup list

If a property cannot be specified, the settings box is not available.

HINT: *Double-click a property in the properties list to change its value. For instance, double-clicking a property whose value is set with a drop-down list sets the property to the next value in the list.*

The Toolbox

The Toolbox window's **Layout** and **Arrange** tabs let you toggle between two different sets of tools.

- Tools in the **Layout** tab are used place information in the Layout window.
- Tools in the **Arrange** tab are used to arrange selected items on the window.

The Modifier uses design tools similar to other graphic design programs you may be familiar with. To activate the Toolbox window, move the pointer from the Layout window to the Toolbox window.

HINT: *Tooltips appear below the mouse pointer as you move the pointer over each of the tools within the Toolbox. These tooltips indicate the name of each tool. Similar tips are available for the fields shown in the fields list. As the mouse pointer is placed over a field that is not completely displayed in the list, a titletip appears giving you the full name of the field.*

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Layout Tools

Tool	Function
	Select and move objects in the window layout. Objects highlighted by the arrow tool can be dragged into position on a window's layout. To set properties for an object, highlight an object with the arrow tool, and then define the object or visual properties using the Properties window.
	Add text objects to the window layout. Highlight the static text tool, and click the mouse in the window layout to type text onto the window. Text can be formatted with a different color, font, and point size by defining the visual properties of the object using the Properties window.
	Draw lines in the window layout. Specify the point size and color of these lines by defining the visual properties of the object using the Properties window.
	Add rectangles, circles, ovals, and rounded rectangles to the window layout. Specify colors and patterns for these objects by defining the visual properties of the object using the Properties window. To add a circle, add a rectangle to the window, and then change the Shape property to Ellipse**.**
	Place graphics from the Modifier's graphics library to a window's layout. Add graphics, such as your company logo, to this library by selecting Pictures from the Resources menu.

NOTE: *There are other tools available on the* ***Layout*** *tab. These tools are used for creating new local fields on a window.*

Arrange Tools

The arrange tools are divided into three sections:

- Align tools
- Size tools
- Tile tools

HINT: *Arranging objects cannot be undone. Be sure to save your report layout before arranging objects. If unsatisfied with the result of an arrangement, close the window without saving the changes.*

Align Tools

The Align tools arrange the selected fields without changing the spacing between the fields and without changing the size of the individual fields.

Tool	Function
	Use this to align the selected objects with the top object in the group.
	Use this to align the selected objects with the leftmost object in the group.
	Use this to align the selected objects with the rightmost object in the group.
	Use this to align the selected objects with the bottom object in the group.

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Size Tools

The size tools are used to uniformly size selected objects. These tools do not change the spacing between the individual objects.

Tool	Function
	Use this to shrink the selected objects to the height of the smallest object in the group.
	Use this to shrink the selected objects to the width of the smallest object in the group.
	Use this to expand the selected objects to the width of the largest object in the group.
	Use this to expand the selected objects to the height of the largest object in the group.
	Use this to automatically resize the space in which text items appear when the text size changes.

Tile Tools

The tile tools are used to tile a group of selected objects. Enter a value in the **Space** field to specify the desired number of pixels between objects.

Tool	Function
	Use this to align the selected objects with the top object in the group. In addition to aligning the objects, this tool changes the horizontal spacing between the objects. The objects are separated by the number of pixels specified in the **Space** field.
	Use this to align the selected objects with the leftmost object in the group. In addition to aligning the objects, this tool changes the vertical spacing between the objects. The number of pixels specified in the **Space** field separates the objects.

The Layout Menu

Changing the Display Type

By default, the window appears similar in Modifier as in Microsoft Dynamics GP. You can change the way it displays by showing the names of all of the fields on the window. To do this, select Show Field Names from the Layout menu. After field names are shown, you can revert to the original display by selecting Show Field Names from the Layout menu.

Using the Layout Grid

The Layout window uses a grid that is automatically turned on when opening the Layout window. Use the layout grid when adding or rearranging items in the window layout, so items remain aligned automatically. To turn the grid on or off, select Grid from the Layout menu. When the grid is turned on, it appears in the menu as checked. To turn the grid off, select Grid from the menu to remove the check mark. Align existing objects to the grid by selecting Align To Grid from the Layout menu. To display the grid "blocks" in the Layout window, select Show Grid from the Layout menu. Select Grid To Back from the Layout menu to move the layout grid behind window objects.

HINT: *Use the arrow keys to move highlighted items in the window one pixel at a time, whether or not the grid is turned on.*

Preview the Window

After you have made all of the changes to the window, select LAYOUT→PREVIEW to view the window. The preview mode shows how the window looks, but it is not a functioning window. To see how the window actually functions, go into Microsoft Dynamics GP.

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Conclusion

In this chapter, you learned that original Microsoft Dynamics GP forms can be customized with Modifier. These customized forms are saved in a separate file and this file can be stored on a local computer or saved on the network. You learned how to navigate to the different resources within Modifier such as the Layout Window, the Toolbox and the Properties sheet to help you make customizations.

Test Your Knowledge – 1.1

Define the Options in the Modifier Main Menu

Fill in the blanks provided with the name of each of the numbered options and an explanation of the function.

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7. _____

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Test Your Knowledge – 1.2

Specify two different ways to open the Window Layout for the Microsoft Dynamics GP window you want to modify.

Test Your Knowledge – 1.3

Describe the differences between storing modifications on each individual workstation versus on a network server.

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Quick Interaction: Lessons Learned

Take a moment and write down three Key Points you have learned from this chapter:

1.

2.

3.

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