



Omni Tools

For Dynamics GP 10.0
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User input into improving this product or constructive feedback is greatly appreciated.

If you have registered your Omni Tools product, support is available depending on the support plan agreement you purchased. Your first line of support should always be your Microsoft Business Solutions reseller.

As always, technical ideas and user input is highly encouraged. At Rockton, we want to hear your input. So drop us a line whenever you feel like it. Enjoy!

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Chapter 1: Introduction

Omni Tools has been developed specifically to enhance and simplify areas of Microsoft Dynamics™ GP making them a pleasure to use. It offers powerful Explorer style interfaces into existing features as well as a number of entirely new features.

Omni Tools contains the following component modules:

Module	Description
Omni Password	Password Restrictions for User & System Passwords with many options, including System Maintenance Lockout
Omni Menu	Explorer based editor for Omni Palettes user defined palettes
Omni Reset	Reset "Held" batches back to available status with ease
Omni Login	Automatic Login system for Dynamics GP
Omni Palettes	2 User Defined Palettes for common tasks on a per company basis
Omni Notify	Additional dialog boxes to make using Dynamics GP easier

Chapter 2: Installation

Omni Tools is easy to install and register. It should be loaded on each workstation. Omni Tools is compatible with Windows 95, Windows 98, Windows NT Windows 2000 and Windows XP.

The latest version is always available from the Rockton Software web site's Products page, located at <http://www.rocktonsoftware.com>.

This chapter contains the following sections:

- *Installing & Registering Omni Tools*
- *Registering Omni Tools at a later stage*

Installing & Registering Omni Tools

Prior to installing Omni Tools, close all other applications, including Dynamics GP, on the workstation. Make sure that no other applications are running in the background or are minimized.

You must install the same version of Omni Tools as the version of Dynamics GP already installed and operating on the workstation. To check the version, launch Dynamics GP and choose Help >> About Microsoft Dynamics GP.

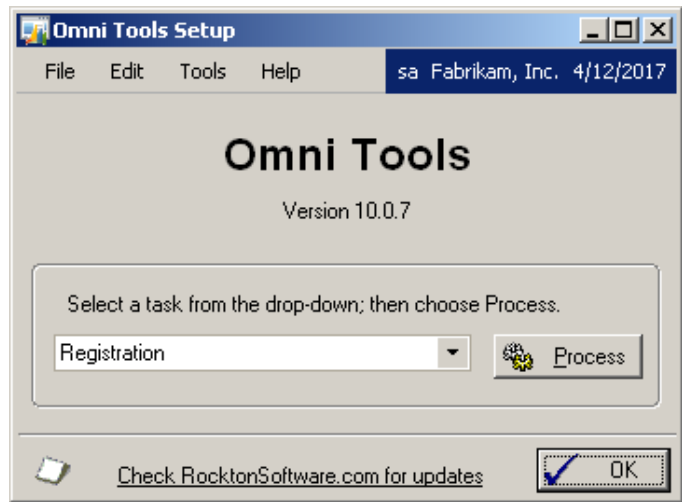
To install Omni Tools:

1. From the first computer you wish to install Omni Tools, copy the **OmniTool.cnk** file included in the downloaded zip file into your local Dynamics GP installation folder.
2. Install the dictionary by launching Dynamics GP. The following message will appear:

New code must be included in the DYNAMICS.SET dictionary. Do you wish to include new code now?

Choose Yes and your DYNAMICS.SET file will be modified to include Omni Tools information, and the **OmniTool.cnk** file will create an **OmniTool.dic** file.

3. Log into the system as the System Administrator using the **sa** or **DYNSA** User ID. This is important for building the tables that contain data for the product.
4. Log into any company. Omni Tools maintains data only at the System level, therefore it is not necessary to install the software in each company. If you are evaluating the software and do not yet have a registration key, it is recommended that you log into the Dynamics GP test company. Without a valid registration key, Omni Tools will not work in other companies.
5. After being prompted to install or upgrade, the Omni Tools Setup window opens. Select Install/Upgrade and choose Process to complete the install for this Company.



Once you exit and restart Dynamics GP, the installation is complete. After registering the product, you can install Omni Tools on all other network workstations by following steps 1 and 2 above. No further workstation-specific installation is required.

Registering Omni Tools at a later stage

If you have installed Omni Tools to trial with the lesson company and have now purchased Registration Keys, use the following steps to enter them into Omni Tools.

1. Choose Microsoft Dynamics GP > Tools > Setup > Omni Tools Setup, or select Omni Tools Setup from the Administration Area Page.
2. Select the Registration option, then choose the Process button to open the Omni Tools Registration window.
3. Enter the Registration Keys.

Removing Omni Tools

The following steps will completely remove Omni Tools from both workstation and server:

1. Log on to Dynamics GP as 'sa' or 'DYNSA' and open the Omni Tools Setup window.
2. Select Uninstall Omni Tools from the drop-down and click the Process button. When this process completes, click OK on the message to close Dynamics GP.
3. Delete the following files from the Dynamics GP installation directory (you may not find all of these files):
 - OMNITool.DIC
 - FRMS2054.DIC
 - RPTS2054.DIC
 - Omni Tools ReadMe.txt
 - Omni Tools Manual.pdf
 - OmniTool.cnk
4. Log on to Dynamics GP as a User with access to update Security. Remove the ADMIN_OMNITOOLS_01 Security Task and OMNI TOOLS ADMIN Security Role.

Chapter 3: Using Omni Tools

When Omni Tools has been installed, you will find the Omni Tools options available on several of the Microsoft Dynamics GP Menus.

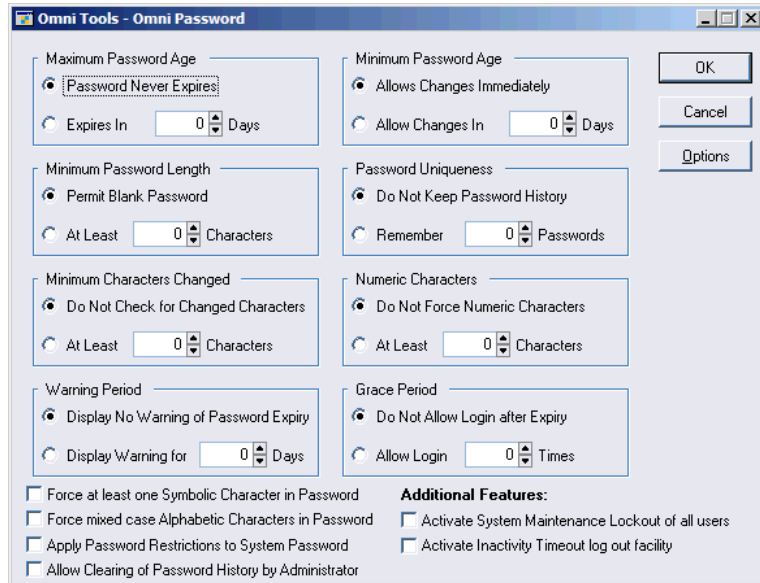
This chapter includes the following sections:

- *Omni Password*
- *Omni Menu*
- *Omni Reset*
- *Omni Login*
- *Omni Palettes*
- *Omni Notify*
- *Control Panel*

Omni Password

Omni Password provides Password Restrictions similar to those available in Windows NT. These options can be applied to both User passwords and the System password. There is also an option to lock Users out of the system during System Maintenance.

Omni Password is accessed via Tools >> Setup >> Omni Tools >> Omni Password. If a System Password is active, it must be entered before the window will open.



The options available can be divided into 4 groups; these groups are explained in the following sections.

Password Expiry

The Password Expiry options are Maximum Password Age and Minimum Password Age. These 2 options control how quickly passwords need to be changed and also they can stop passwords being changed too often.



If the Apply Password Restrictions to System Password checkbox is selected, these options will apply to the System Password as well.

Password Entry

The Password Entry options are Minimum Password Length, Password Uniqueness, Minimum Characters Changed and Numeric Characters. These 6 options control what passwords can be changed to, the length, number of numeric characters, making sure that the password is different from previously used passwords, forcing at least one symbolic character, and forcing mixed case alphabetic characters (at least one uppercase and one lowercase).



If the Apply Password Restrictions to System Password checkbox is selected, these options will apply to the System Password as well.

If the Allow Clearing of Password History by Administrator checkbox is selected, an option to delete the password history will be displayed from the User Maintenance window.

Warnings and Grace Periods

The Warning Period and Grace Period options control how many days warning a user has before the password expires and how many times they can log in after the password has expired.



Leaving the 2 options as Display No Warning of Password Expiry and Do Not Allow Login after Expiry, is not recommended as users will be suddenly locked out of Dynamics GP, and can only be let back in by the System Administrator.

System Maintenance Lockout

The System Maintenance Lockout feature allows the system administrator to prevent users logging into a specified company or all companies. It can also be used to ask users already logged in to exit the system.



Note that the User activating the System Maintenance Lockout is always allowed back into the system, they are the Override user.

Selecting the Activate System Maintenance Lockout of all users checkbox will open the Options window so that the lockout settings can be confirmed. The Options window can also be opened using the Options Button.

Options

Automatic Check

No Check for Maintenance or Inactivity

Check every Minutes

Changes to the Automatic Check facility do not take effect until next login.

OK

Cancel

System Maintenance Lockout

Override User ID

Select Company

Optional Lockout Message:

NB: Only the Override User will be able to log into the selected Companies.

Inactivity Timeout

Attempt to close application after Inactivity for Minutes

The Options window displays the Override User who will still be allowed back into the system. You can then select an individual Company to lock, or select All Companies.

An Optional Lockout Message can be entered, this message is used when denying access or requesting a user to exit.

The final option is the Automatic Check facility, this uses a time process to check if the System Maintenance Lockout feature has been activated and then pop up a dialog requesting the users to exit.



Changes made to the Automatic Check facility settings do not take effect until next login to Dynamics GP.

The Periodic Check process can affect switching between Companies and may need manual removal. The Periodic Check process can be displayed and removed from the File >> Process Monitor under the Timed Queue.



It is recommended that this facility only be activated when System Maintenance is expected within the next few days.

Inactivity Timeout

The Inactivity Timeout feature works in conjunction with the Periodic Check to monitor inactivity.

If a user has not performed any actions to access a table, or open a window or report for at least the specified time, the system will attempt to log out.

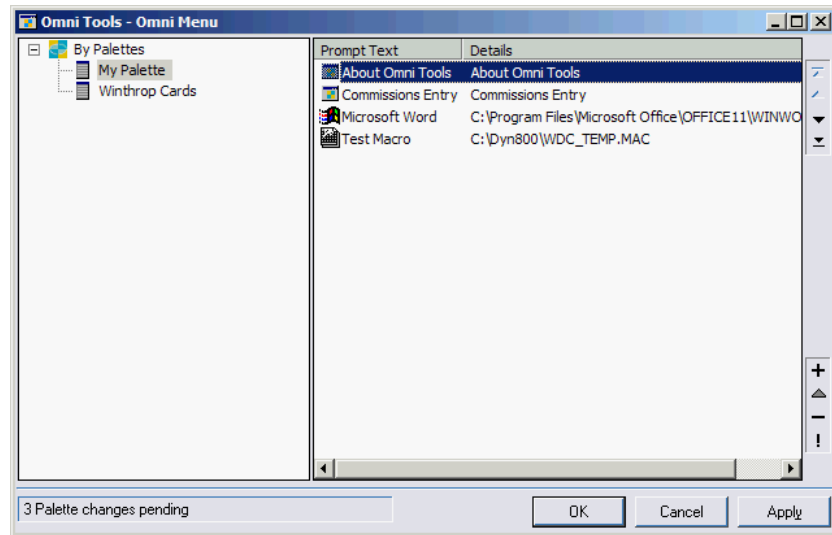


The Periodic Check process can affect switching between Companies and may need manual removal. The Periodic Check process can be displayed and removed from the File >> Process Monitor under the Timed Queue.

Omni Menu

Omni Menu provides an Explorer style interface for editing the Omni Palettes user defined palettes.

Omni Menu is accessed via Tools >> Setup >> Omni Tools >> Omni Menu. If a System Password is active, it must be entered before the window will open.



The Omni Menu window is divided into three areas, the Menu Tree, the Entry List and the control buttons.

Menu Tree

The Menu Tree shows the palettes available for editing.

Entry List


The Entry List displays the contents of the selected palette. The entries can be windows, external applications and macros.

Below are the steps for Moving an entry, Deleting an entry, Executing an entry, Adding a new entries and Editing an existing entry.




All changes are recorded as pending and do not actually happen unless you press the Apply Button or close the window with the OK Button.


Moving an Entry:

1. Select the entry you wish to move from the Entry List.
2. Use the  Buttons to move the entry to required position.


Deleting an Entry:

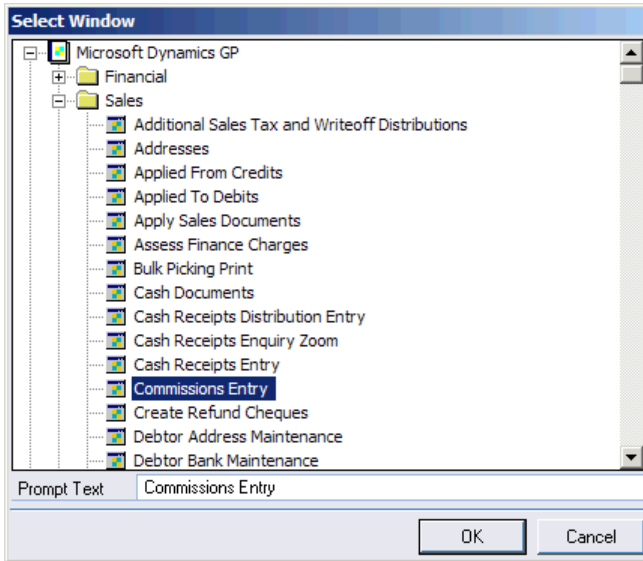
1. Select the entry you wish to remove from the Entry List.
2. Use the  Button to remove the entry.

Executing an Entry:

1. Select the entry you wish to execute from the Entry List.
2. Use the  Button to execute the entry.


Adding a New Window Entry:

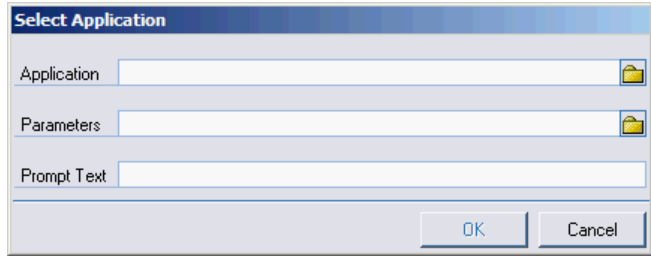
1. Press the  Button to add a new entry.
2. Select Window from the dialog offered to open the Select Window window.



3. Select the required window from the tree by Dictionary and Series.
4. Change the Prompt Text, if required. It will default to the window name where possible.
5. Press the OK Button to save.


Adding a New Application Entry:

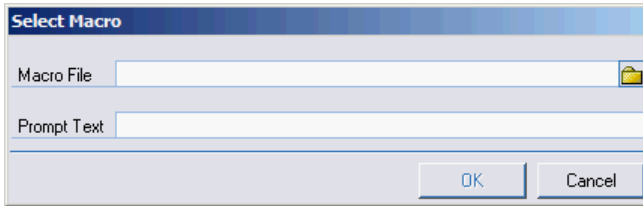
1. Press the  Button to add a new entry.
2. Select Application from the dialog offered to open the Select Application window.



3. Select the required application, either by typing in the path or using the Browse button on the right-hand edge of the window.
4. Optionally, type in some parameters or enter the file name using the Browse button on the right-hand edge of the window.
5. Change the Prompt Text, if required. It will default to the application name where possible.
6. Press the OK Button to save.



Adding a New Macro Entry:

1. Press the  Button to add a new entry.
2. Select Macro from the dialog offered to open the Select Macro window.



3. Select the required macro, either by typing in the path or using the Browse button on the right-hand edge of the window.
4. Change the Prompt Text, if required. It will default to the macro name where possible.
5. Press the OK Button to save.

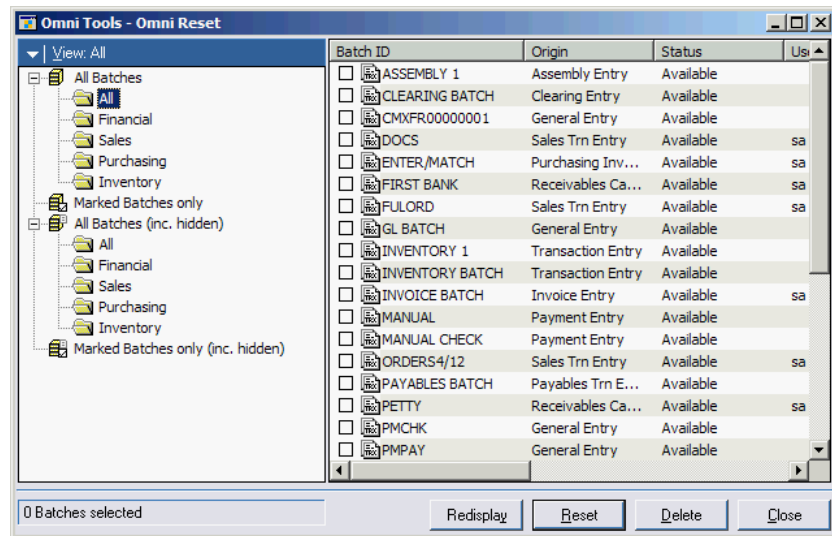
Editing an Entry:

1. Select the entry you wish to execute from the Entry List. 
2. Use the  Button to edit the entry, or just double-click on the entry to open it for editing.
3. The appropriate Select window will open showing the current settings.
4. Make the required changes.
5. Press the OK Button to save.

Omni Reset

Omni Reset provides an Explorer style interface, which can be used to Reset "Held" batches or delete Batch records. This replaces a very long *Techknowledge* (#: 7213) with a single click fix. Omni Reset does not affect the individual transactions, it just allows clearing of activity records and resetting of posting flags.

Omni Reset is accessed via Tools >> Routines >> Omni Reset. If a System Password is active, it must be entered before the window will open.



Using the Tree in the left-hand pane of the window, you can select the type of batches you wish to view. You can select whether to see the hidden or "real time" batches, whether to only show marked batches and which series to view.

Once the desired view is selected, the matching batches are shown in the List in the right-hand pane of the window. Batches can be sorted into ascending or descending order for any of the displayed columns.

Batches can then be selected and either Reset back to “Available” Status or deleted, using the Reset or Delete Buttons respectively. Also, Double-clicking on a batch will open it for editing.



To select more than one Batch, either hold down the control key and select individually or select a range by holding down the shift key.



WARNING!

Note that this tool only resets the flags on the Batch Header and removes batch activity records. It does not repair damage left by partially posted batches. It also cannot tell if a batch is actually in use, so it should be used with caution.



Omni Reset will suggest the use of Batch Recovery when appropriate. Batch Recovery can use Microsoft SQL Server’s transaction rollback feature to undo the results of an incomplete posting.

Omni Login

Omni Login is an Automatic Login System for Dynamics GP. It works on a per Workstation basis.

It allows the selection of the User and Company to use when logging in. The ODBC Data Source can be selected. It also can optionally store a password to be used when logging in.



Note that when storing a password in Omni Login, the password will be stored without any encryption. However, if you are using Automatic Login on an account with a password, you have already forsaken the security of the system.



It is recommended not to store the password and to uncheck the Complete User Login option. This will make Omni Login pause while the password is entered manually.

Omni Tools - Omni Login

These settings are for the current Workstation and are not related to User or Company.

Do Not Remember Last User during Login

Do Not Remember Last Company during Login

Enable Automatic Login System

Selections

Data Server for SQL: Great Plains v9.0

User ID: sa

Password: xxxxxx

Company from: Last Used Selected

Company Name: Fabrikam, Ltd.

Actions

Complete User Login using selections defined above

Complete Company Login using selections defined above

OK Cancel

Last User & Company

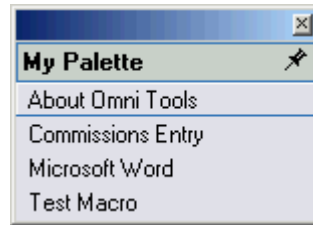
Dynamics GP normally stores the Last User used during Login. Omni Login will also store the Last Company used and offer this as the default when logging in. This occurs even if the Automatic Login system is not enabled.

However, you may ask Omni Login to stop the system remembering either one or both of the Last User and Last Company. This can be used to improve security on a Citrix system where the last user is normally shown.

Omni Palettes

Omni Palettes provides 2 additional User Defined Palettes, which can be used to group common tasks on a per company basis.

They can be added to the Shortcut bar or added into the existing menu structure.



Editing the Palette

The Palettes can only be edited using Omni Menu.

Naming the Palette

The Palettes can be renamed by clicking on the name or by using the Palette >> Change Palette Name option on the menu bar when the palette is selected. Just type in the new name and press the OK button.

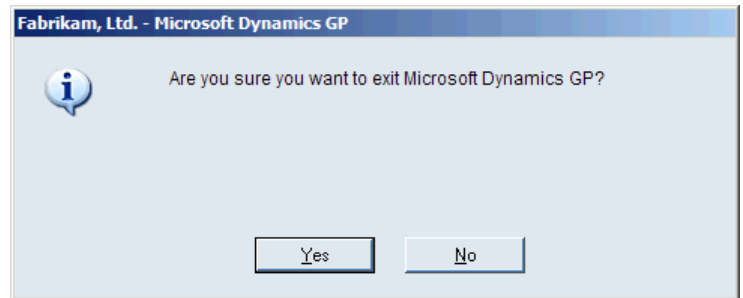
Omni Notify

Omni Notify provides a number of additional dialogs to make using Dynamics GP easier.

Omni Notify does not have any configuration windows, it is turned on and off via the Omni Tools Registration window.

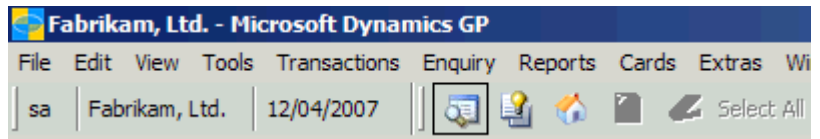
Exit Warning

The Exit Warning dialog gives the user a chance to abort an accidental closing of the Dynamics GP application.



Company in Title Bar

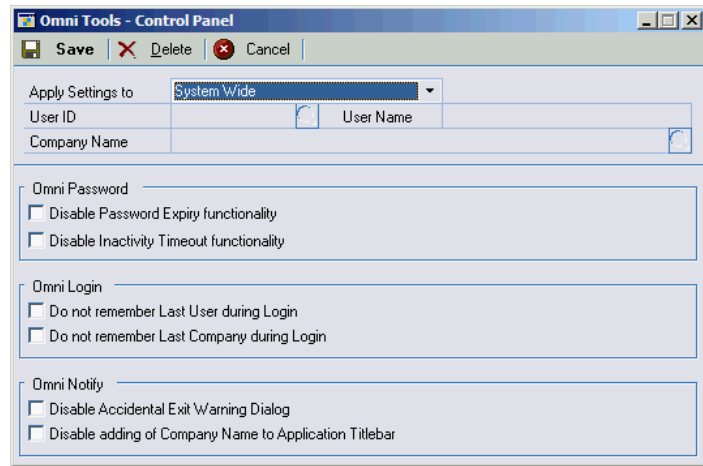
Omni Notify will update the Dynamics GP Application Title Bar to show the name of the company currently in use. This makes it easier when running multiple sessions, because the company name can be seen in the Windows Task Bar.



Control Panel

The Omni Tools – Control Panel allows the configuration of many of the additional features offered by the various modules of Omni Tools.

The Control Panel settings can be applied to 4 levels; System Wide, All Users of the current Company, All Companies for the current User, and for a specific User and Company combination.



The order of priority is the reverse of the levels listed here. For example: Settings for a specific User and Company will be used before System Wide defaults are used.

Chapter 4: Administering Omni Tools

Omni Tools Administrator functions are described here.

This chapter includes the following sections:

- *About Omni Tools window*
- *Omni Tools File Maintenance*

About Omni Tools window

The About Omni Tools window shows the Omni Tools version as well as Rockton Software's contact details. To open this window, go to Help >> About Microsoft Dynamics GP; then choose Additional >> About Omni Tools.



Register button

The Register button can be used to open the Omni Tools Registration window as described in Chapter 2.

Omni Tools Setup

The Omni Tools Setup window allows you to perform setup and maintenance tasks.

To reach this window, choose Microsoft Dynamics GP >> Tools >> Setup >> Omni Tools Setup.

The task drop-down is used to select which task you want to perform. Once you have selected a task, choose the Process button. The tasks available are described below:

Install/Upgrade Omni Tools

Installs or upgrades from a previous version. It will also set table permissions to all users in the system and company databases. This may take a few minutes. You can perform this task multiple times.

Registration

Opens the window where you enter the Omni Tools Registration Key.

Re-add Security Data

Adds Security Roles and Tasks, if they have been deleted.

System Settings

Opens the window where you enter settings for Omni Tools.

Login Log Maintenance

Opens the window from where you would archive and purge the Login Log table.

Uninstall Omni Tools

Tables will be removed from the database, Named Printer definitions will be removed and Omni Tools will be removed from the launch file.

Omni Tools Security Settings

Security in Omni Tools can be administered via the following Security items:

OMNI TOOLS ADMIN Security Role.

Used to set access to an Administrator of Omni Tools.

ADMIN_OMNITOOLS_001 Security Task

Contains all windows necessary to setup and administer Omni Tools. Typical Users do not need to have access to these windows.

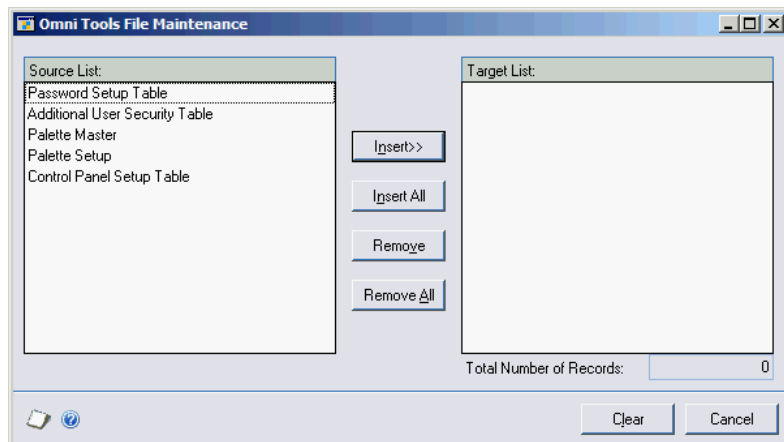
DEFAULT_USER Security Task

Contains all the windows that are required for the average User to be able to use Omni Tools. No setup and administration windows are included.

Omni Tools File Maintenance

The standard File Maintenance options of Shrink, Rebuild and Clear are available for the Omni Tools tables from the Omni Tools File Maintenance window.

To reach this window, choose File >> Maintenance >> Omni Tools.



Insert the files to be processed and then press the Shrink, Rebuild or Clear button.

Chapter 5: FAQ

Below are the answers to the Frequently Asked Questions (FAQ) about Omni Tools.

Omni Tools Menu entries have disappeared or do not work

Check Help >> About Microsoft Dynamics GP and then select the Options button to see if the Omni Tools product is still installed. If it is not installed, follow the normal installation procedure in Chapter 2.

If Omni Tools is installed, please open the Omni Tools Setup window by going to Microsoft Dynamics GP >> Tools >> Setup >> Omni Tools >> Omni Tools Setup. Select *Install/Upgrade Omni Tools* from the drop-down and then choose the Process button.

How do I Remove Omni Tools?

The instructions for removing Omni Tools are now found in the [Removing Omni Tools](#) section in Chapter 2.

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