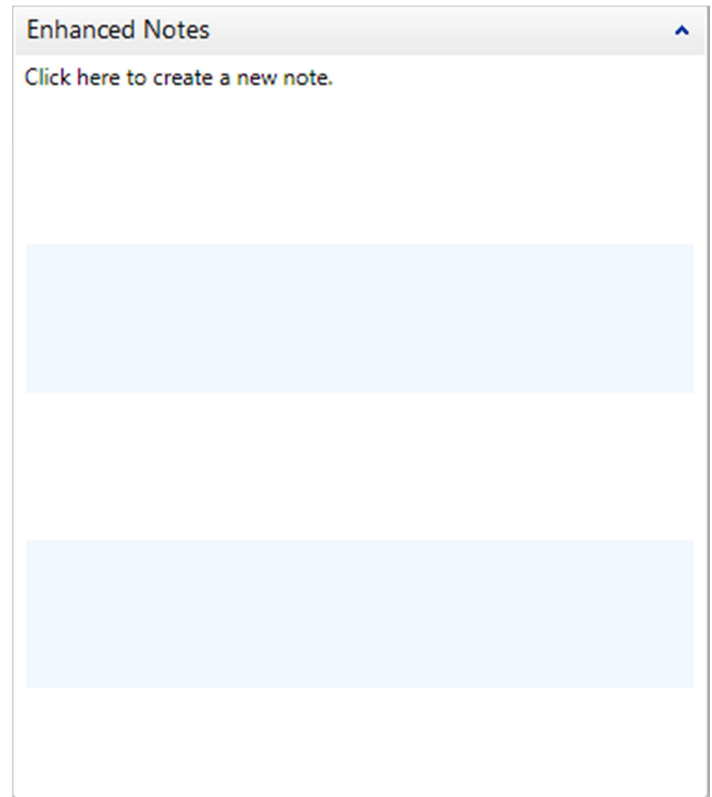
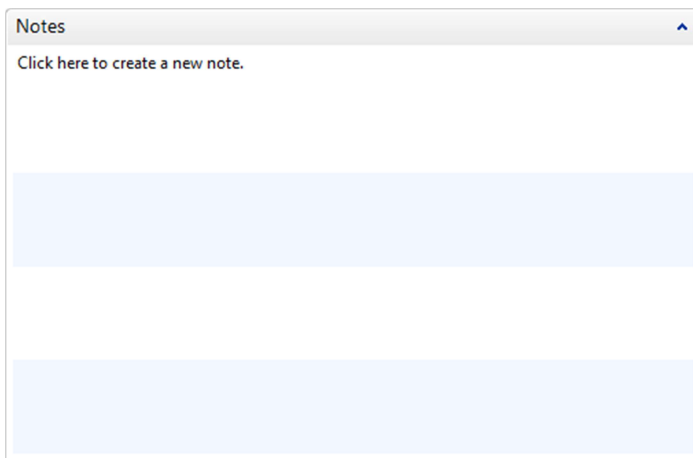


NAV Enhanced Notifications



The Enhanced Notes add-in is designed as a replacement tool for creating notifications in the NAV Role Tailored Client. Through the use of Windows Presentation Foundation (WPF) and C# we are able to create a control that can both receive data from NAV, as well as send it back.

The images below show both the out of the box Notes control and the add-in side by side. In these images no notes are associated to the current record. The major difference is the size of the Enhanced Note control, which allows for better readability.



NAV Enhanced Notifications



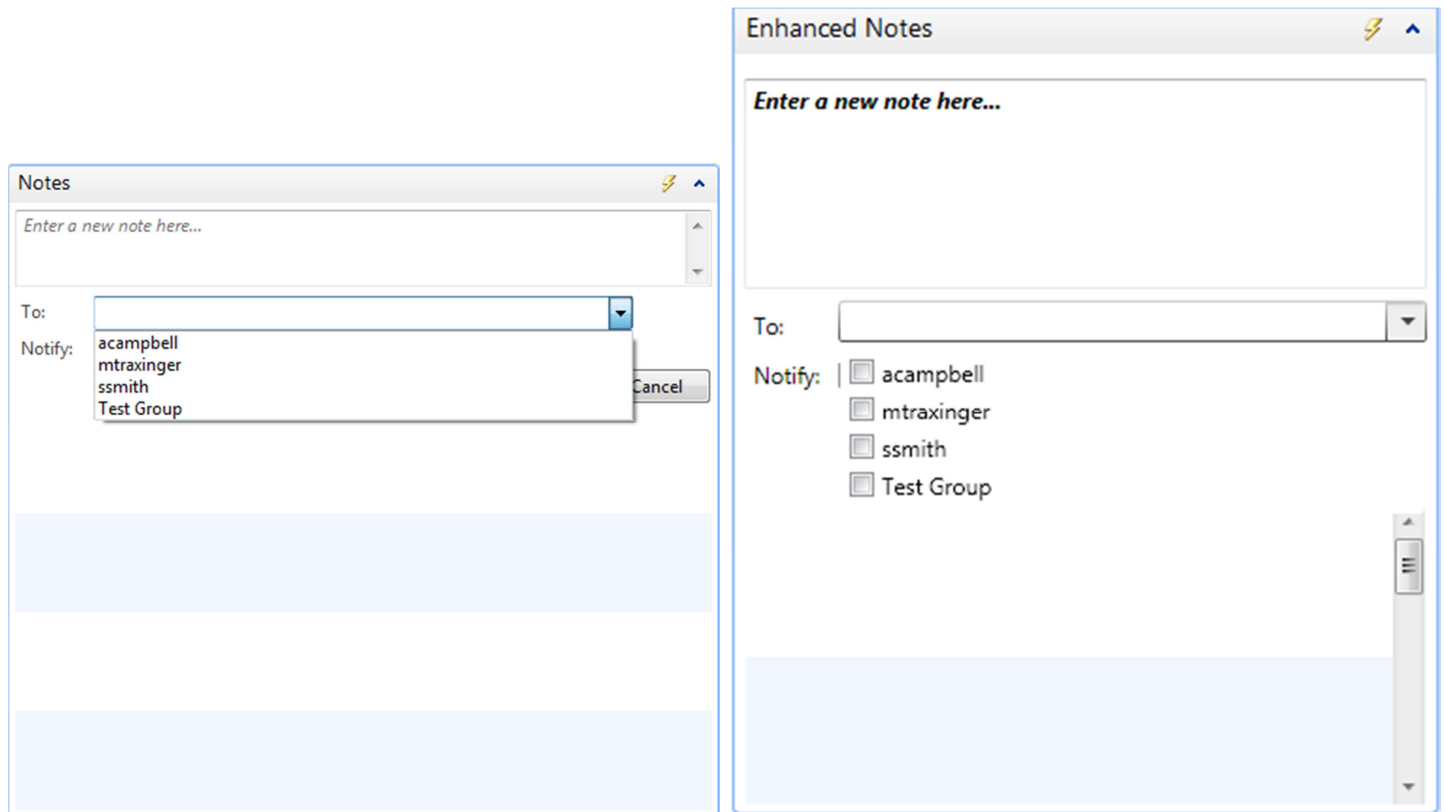
After clicking the “Click here to create a new note.” link we can see that both windows again look similar. Like the base Notes control, clicking the Cancel button will return the control to its original state.

A screenshot of a "Notes" dialog box. It has a title bar "Notes" with a close button. The main area contains a text input field with the placeholder "Enter a new note here...". Below the input field is a "To:" label followed by a dropdown menu. Underneath is a "Notify:" label with a checkbox. At the bottom right are "Save" and "Cancel" buttons. The dialog box is partially obscured by a light blue rectangular area.A screenshot of an "Enhanced Notes" dialog box. It has a title bar "Enhanced Notes" with a close button. The main area contains a text input field with the placeholder "Enter a new note here...". Below the input field is a "To:" label followed by a dropdown menu. Underneath is a "Notify:" label with a checkbox. At the bottom right are "Advanced", "Save", and "Cancel" buttons.

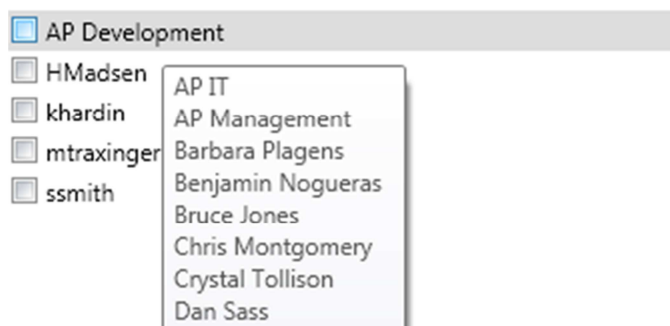
NAV Enhanced Notifications



The main difference is the “To:” selection box. In the classic Notes control the user is only able to notify one other person. With the Enhanced Notes control, the user can select as many users as they want.



If you hover your mouse over an item in the drop down list you can see that person’s name, or in the case of a group the people in that group.



NAV Enhanced Notifications



Here you can see the differences between the two “To:” text boxes when the users to notify have been selected. With the Enhanced Notes control, the selected users are presented as a comma separated list.

A standard Windows-style dialog box titled "Notes". It has a text area at the top with the placeholder text "Enter a new note here...". Below the text area is a "To:" label followed by a dropdown menu showing "mtraxinger". Below that is a "Notify:" label followed by an unchecked checkbox. At the bottom right are "Save" and "Cancel" buttons. The dialog box has a light blue header bar and a light blue border.

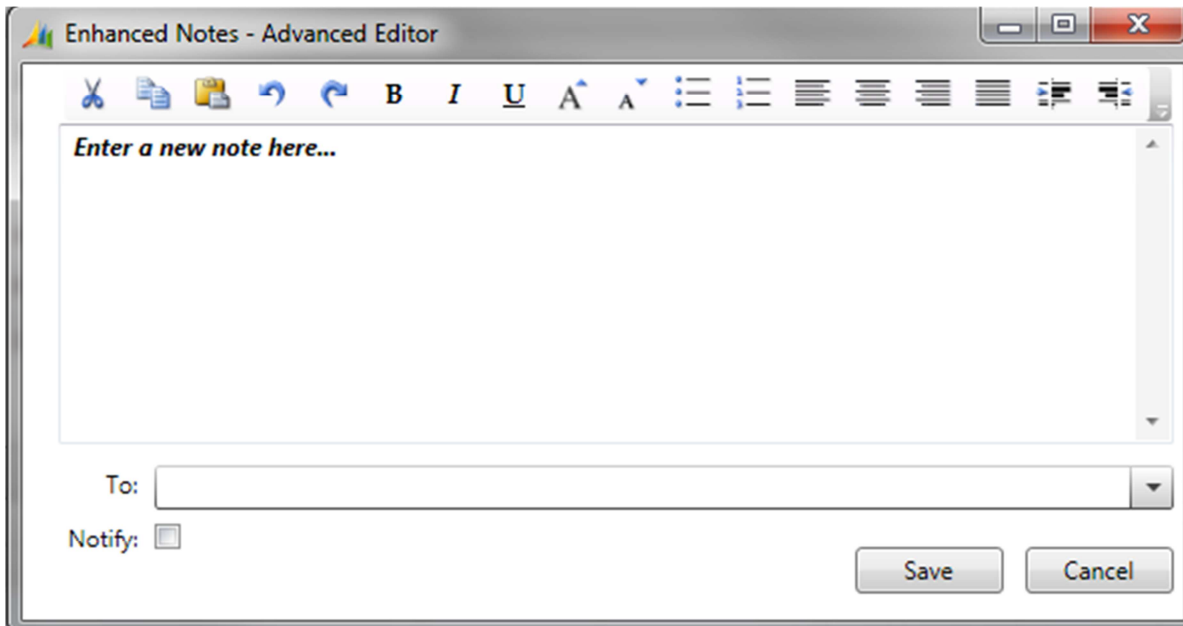
An enhanced version of the "Notes" dialog box titled "Enhanced Notes". It has a text area at the top with the placeholder text "Enter a new note here...". Below the text area is a "To:" label followed by a dropdown menu showing a comma-separated list of users: "acampbell,mtraxinger,ssmith". Below that is a "Notify:" label followed by an unchecked checkbox. At the bottom right are "Save" and "Cancel" buttons. The dialog box has a light blue header bar and a light blue border.



NAV Enhanced Notifications



An additional difference is the “Advanced” button. This will take you to a more traditional text editor to enter your note.



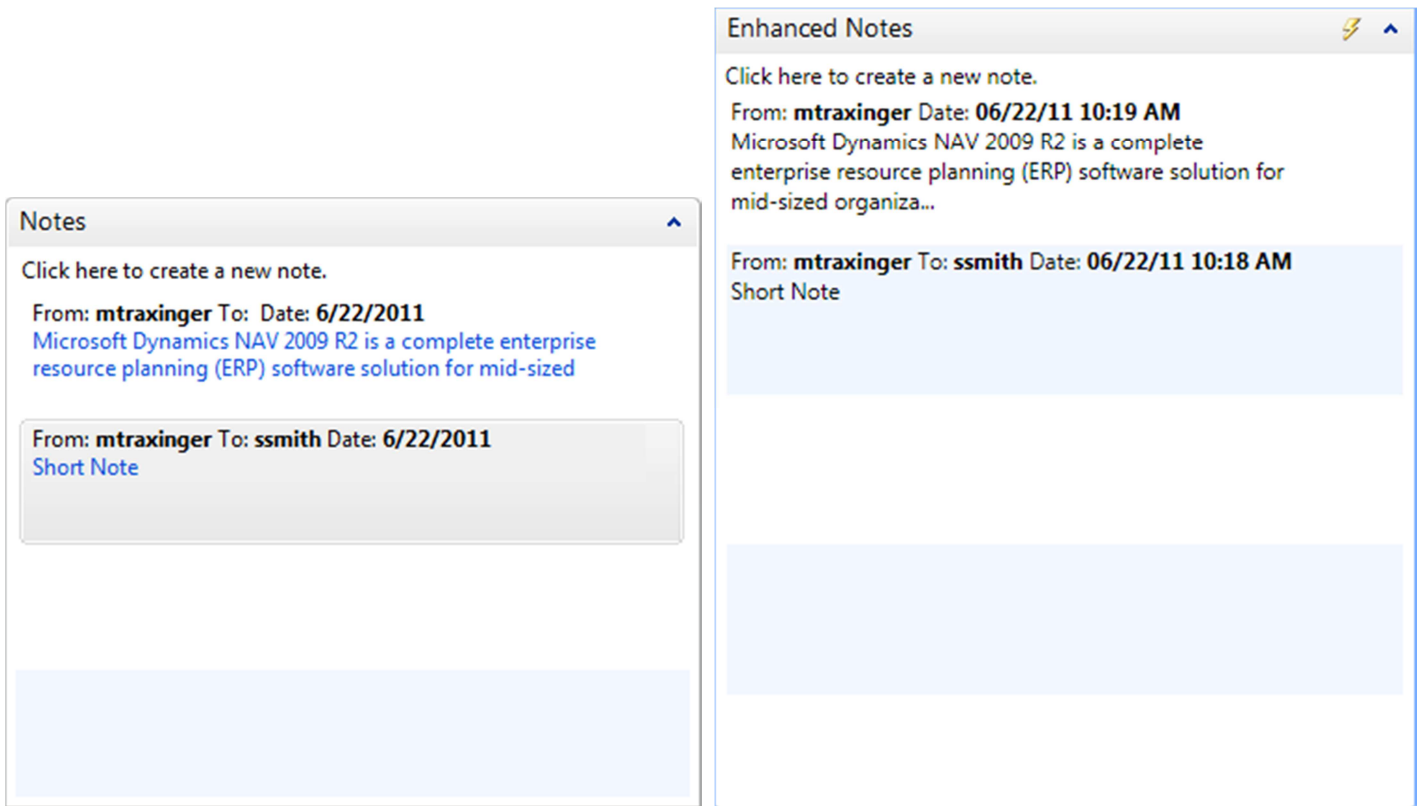
You can cut / copy / paste, redo / undo, use font styles and lists, and do most of the things a standard text editor allows. These notes will be saved as RTF notes and displayed the same way they are entered in the Enhanced Notes control. If you view them in the base notes control they will not have any formatting.



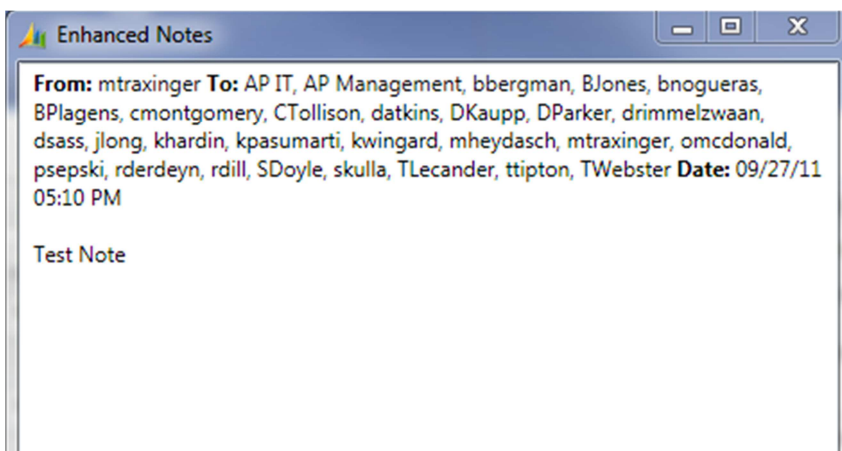
NAV Enhanced Notifications



The notes display between the two controls is also virtually identical. The only noticeable differences are the slight variation in color and the addition of the time stamp in the Enhanced Notes control.



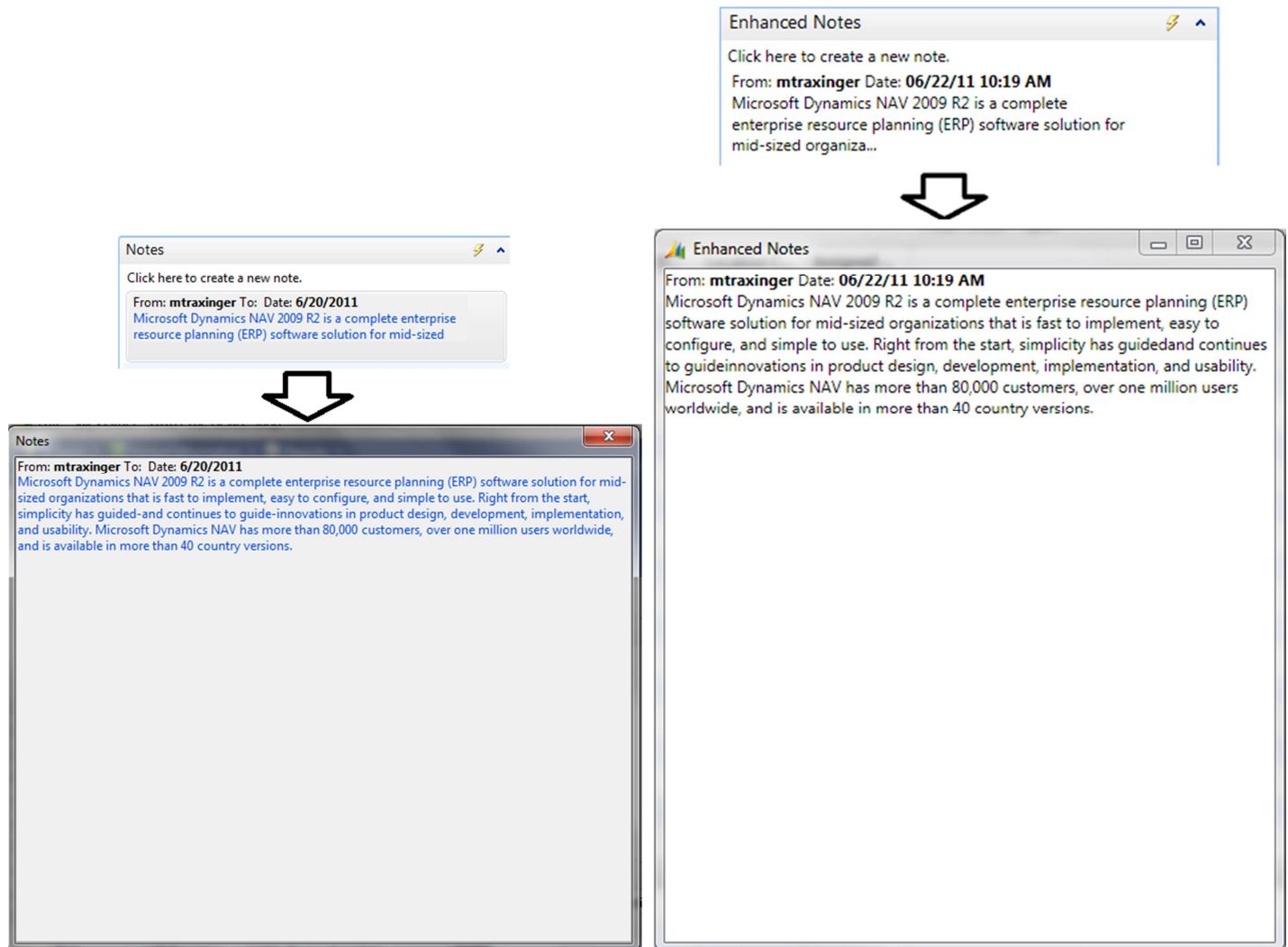
It is easy to tell if you have sent a note to more than one person. All of the names will be displayed in the "To" area in a single notes box.



NAV Enhanced Notifications



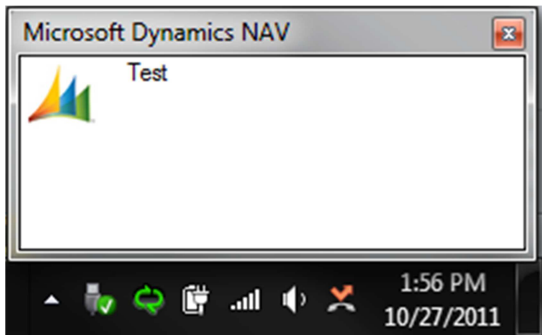
Longer notes are truncated in the list view, but like the base Notes control, double clicking the note will open it in a new window where the entire note can be seen.



NAV Enhanced Notifications

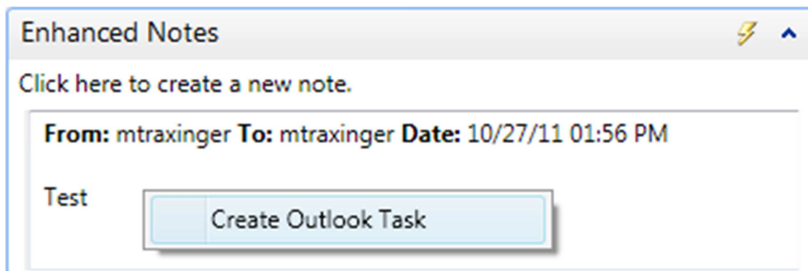


When the Notify checkbox is ticked, the users who are being notified will receive a popup message in the lower right hand corner, similar to Outlook.



For the popups to work, it is important to note that some page must be loaded in the NAV RTC that has an Enhanced Notes control on it. Due to NAV limitations it will not run in the background of the Role Center.

You can right click on any note and create a task in Outlook. This task will also be visible in the Outlook RTC Part if you have chosen to display them.



NAV Enhanced Notifications



In the Role Center you can sort on any of the available columns for the Enhanced Notes part. This makes it easier for users that receive lots of notifications to find the one they are looking for.

Enhanced Notes			
From	Date	Note	Page
mtraxinger	10/27/11 01:56 PM	Test	Sales Header: Order,2003
mtraxinger	09/27/11 05:16 PM	Popup note	Sales Header: Order,109005
khardin	09/24/11 07:17 AM	Greg Chapman's phone number is no longer valid.	Contact: CT200081
ssmith	09/22/11 09:16 AM	We will no longer produce Bicycles after January 1st, 2012	Item: 1000
mtraxinger	09/19/11 04:03 PM	Do NOT ship this order!!	Sales Header: Order,2001
acampbell	09/19/11 03:05 PM	The airport has CANCELLED all flights for the rest of the day!	Customer: 01905899
hmadsen	09/19/11 02:58 PM	Advanced Note: The London Postmaster did not deliver the	Purchase Header: Order,106009



Installation

1. Copy the contents of the “Enhanced Notes” folder to the RoleTailored Client\Add-ins folder in your NAV installation path. The default installation folder would be:

C:\Program Files (x86)\Microsoft Dynamics NAV\60\RoleTailored Client\Add-ins

2. Using the Add-in registration tool, which can be found at

<http://blogs.msdn.com/b/cabeln/archive/2009/06/08/registration-tool-for-dynamics-nav-roletailored-client-add-ins.aspx>

, register the NavEnhancedNotesAddin.dll file.

3. Import the Enhanced Notes Page object from the provided txt or fob file. You can change the ID number in the txt file so as not to overwrite any current objects you may have in the database.

Automatic Implementation

1. Export all Page objects as XML.
2. Run the Enhanced Notes install page (50001 by default).
3. Click Install and follow the on screen instructions.

Manual Implementation

Implementation for Document Pages

1. Design Page 42 – Sales Order, or another Page of your choice.
2. Add a new Fact Box to the Page and set the following properties based on the source table of the page:

Page 42 Sales Order - Page Designer

Name	Caption	Type	SubType	SourceExpr
<Prepmt. Include Tax>	<Prepmt. Include Tax>	Field		"Prepmt. Include Tax"
<Control1900000007>	<Control1900000007>	Container	FactBoxArea	
<Sales Hist. Sell-to FactBox>	<Sales Hist. Sell-to FactBox>	Part	Page	
<Customer Statistics FactBox>	<Customer Statistics FactBox>	Part	Page	
<Customer Details FactBox>	<Customer Details FactBox>	Part	Page	
<Sales Line FactBox>	<Sales Line FactBox>	Part	Page	
<Item Invoicing FactBox>	<Item Invoicing FactBox>	Part	Page	
<Approval FactBox>	<Approval FactBox>	Part	Page	
<Resource Details FactBox>	<Resource Details FactBox>	Part	Page	
<Item Warehouse FactBox>	<Item Warehouse FactBox>	Part	Page	
<Sales Hist. Bill-to FactBox>	<Sales Hist. Bill-to FactBox>	Part	Page	
<RecordLinks>	<RecordLinks>	Part	System	
EnhancedNotes	<EnhancedNotes>	Part	Page	

Shift + F4

EnhancedNotes - Properties

Property	Value
ID	1905767507
Name	EnhancedNotes
Visible	TRUE
Enabled	<TRUE>
Editable	<TRUE>
Caption	<EnhancedNotes>
CaptionML	<Undefined>
ToolTip	<>
ToolTipML	<Undefined>
Description	<>
SubFormView	<Undefined>
SubFormLink	Table No. =CONST(36),PK ...
ShowFilter	<Yes>
ProviderID	<0>
PartType	Page
PagePartID	Enhanced Notes
SystemPartID	<None>
ChartPartID	<Undefined>

Table Filter

Field	Type	Value
Table No.	CONST	36
PK Integer 1	FIELD	Document Type
PK Code 2	FIELD	No.
Page ID	CONST	42

Note: These properties are not necessary at this time, but in expectation that Document pages will eventually work like other page types in future versions of NAV

3. In the OnAfterGetRecord trigger, define a local RecordRef variable named RecRef.
4. Add the following code to the OnAfterGetRecord trigger:

```
RecRef.GETTABLE(Rec);
```

```
CurrPage.EnhancedNotes.FORM.LoadFromDocumentPage(RecRef, PAGE::"Sales Order", 'DOCUMENT');
```

5. Save and compile the Page.

Implementation for Non-Document Pages

Follow the steps under Implementation for Document Pages, but skip steps 3 and 4.

How to Setup the SubFormLink

The Enhanced Notes Fact Box runs on a “Generic” table. This table contains twenty fields of each of the major variable types (Text, Code, Integer, Number, Boolean, Date, and Time). The SubFormLink property is setup based on the Primary Key of the table used in the main page.

For example, the Sales Header table has a primary key of Document Type, No. The first field is an Option or Integer field, so it is mapped to the first integer field in the generic table, “PK Integer 1”. The second field is a Code field, so it is mapped to the second code field in the generic table, “PK Code 2”.

Because a key in NAV can only contain up to twenty fields, this generic table allow for links between it and any other table. If there is a table that has a primary key field that is not one of these types, both the table and code will have to be customized.

The last field in the SubFormLink should be the Page ID. This should be set to a constant and refer to the CardPageID property on the page you are implementing. This is so that we can create the link that takes you straight to the page the note references when double clicking it.

NAV Enhanced Notifications



Future Enhancements

- Rich notes, allowing for different types of text (Bold / Italic / Underline), colors, fonts, font sizes, hyperlinks, and more
- Tree-view notifications, similar to emails, with replies
- Email and / or Instant Messenger (specifically Lync / Office Communicator) integration
- Attachments
- Pop-ups telling you that you have received a new notification

Contact Information and Suggestions

Please check the posts in the download section on the Mibuso forums first.

Matt Traxinger

Navision.Programmer@gmail.com



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