

vNotes v1.1.0

User Manual

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Date: 18/04/2023

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1 Change Control

Date	Version	Description	Author
	1.1.0	- agentvnotes role is now automatically created if it does not exist. - Added explanations on how to block users from making their own vReports from vNotes. - Standard SuiteCRM Views are now only accessible by admin. - First name followed by last name is now used to mark who wrote the note (instead of username).	jfcc
2022/06/11	1.0.0	First released version	jfcc

2 Introduction

ValeDale vNotes is by itself a small, humble, package. However, by building on top of ValeDale Reports and ValeDale Forms&Views it becomes a very versatile package.

The main purpose of vNotes is to be able to add comments to any module. You can place the comment section anywhere you want.

3 Compatibility Matrix

You will require:

- SuiteCRM 71X

As we as ValeDale's following modules:

- Common
- vReports
- Forms&Views
- Selfreferencing fix (required for Forms&Views)

At installation vNotes will check that the right version of the ValeDale packages is installed.

4 Install and Upgrade vNotes

Go to module loader and install de vNotes package. You can upgrade to new version by following the same procedure.

vNotes will:

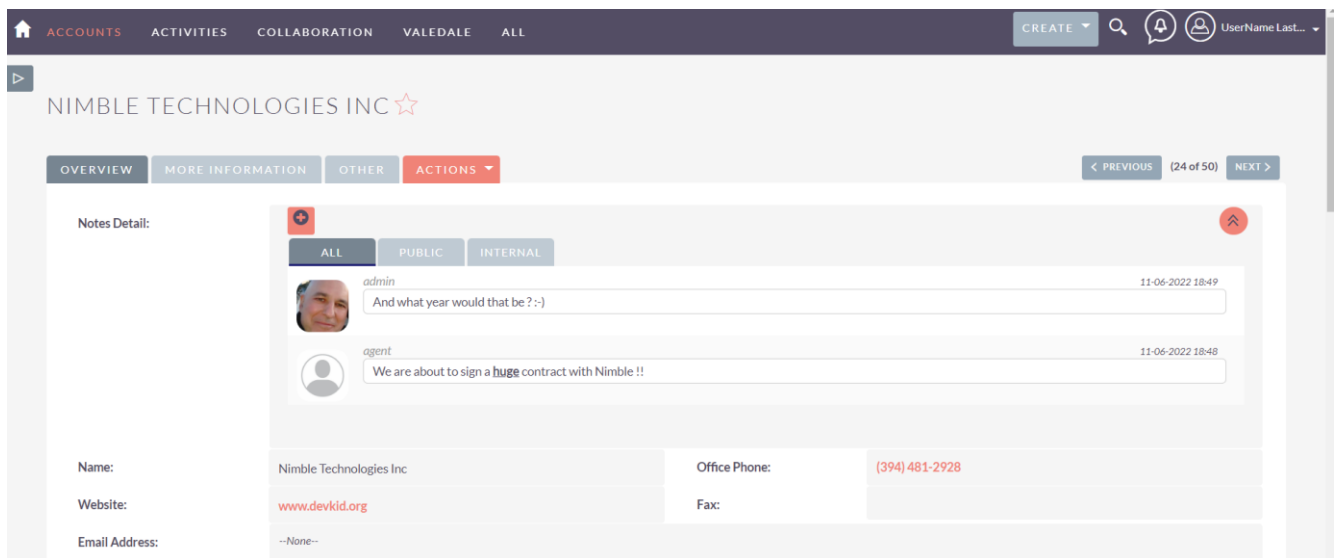
- Install the vNotes package itself
- Install the vNotes View, with corresponding Forms and Reports

5 Setting Up vNotes

Just after installing vNotes, you will notice that there is not a lot going on. There are some default SuiteCRM Views that you can disable in the usual way (or keep them for certain roles), but for vNotes to do their real work, you will have to follow some additional steps:

0. Set limitations to access vNotes out of context.
1. Add the special “vNotes” ValeDale View to the module you want.
2. Add the View-field created in the first step to the DetailView of your selected module using Studio.
3. Login and logout for the things to show up.

To encourage you to follow through, see below an example of what you can achieve. This is an example of vNotes added to the Detail View of Accounts.



The screenshot shows the ValeDale vNotes interface. At the top, there's a navigation bar with tabs: ACCOUNTS, ACTIVITIES, COLLABORATION, VALEDALÉ, and ALL. To the right of the tabs are buttons for CREATE, a search icon, and a user profile icon labeled 'UserName Last...'. Below the navigation bar, the main content area displays the details for 'NIMBLE TECHNOLOGIES INC'. There's a section for 'Notes Detail' with filters for ALL, PUBLIC, and INTERNAL. Two notes are listed: one from 'admin' with the text 'And what year would that be? :-)' and a timestamp of '11-06-2022 18:49', and another from 'agent' with the text 'We are about to sign a huge contract with Nimble !!' and a timestamp of '11-06-2022 18:48'. Below the notes, there's a form with fields for Name, Website, Email Address, Office Phone, and Fax. The Name field is filled with 'Nimble Technologies Inc', the Website field with 'www.devkid.org', the Office Phone field with '(394) 481-2928', and the Email Address field is empty.

5.1 Limiting access to vNotes out of context

By default, only admin users are able to access vNotes out of context (i.e. through the standard CRM Views). If for some reason you want to delete or manipulate them with the standard tools, an admin can do it.

vNotes should really be accessed within a specific context to really make sense.

Additionally, it is recommended that you block normal users from being able to make vReports (ValeDale Reports) from vNotes (this would make it again accessible to them).

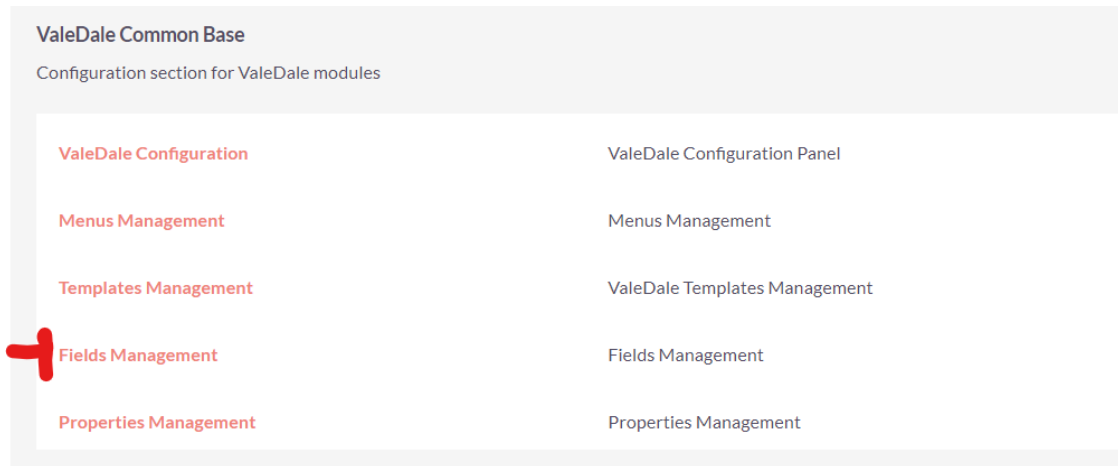
The way to do this would be to add the following lines in the config_override.php file (normally in the suitecrm home directory)

```
$sugar_config["vdeModulesPermissions"] = array(  
    "vdeForbiddenTables" => array(  
        "instance" => array("vde_vNotes"),  
    ));
```

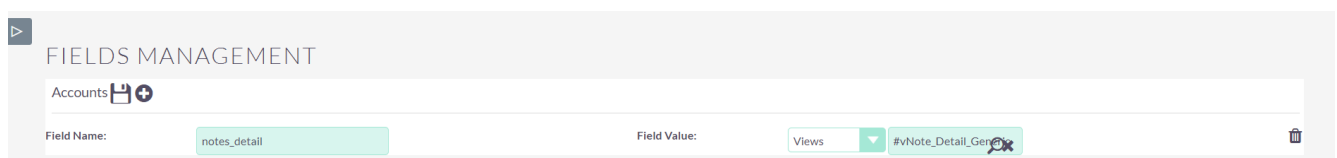
After this, admin users can still make vReports using the vNotes module.

5.2 Create a View-field for the target module

Go to the Administration page, and select under the ValeDale Common Base Options: Fields Management



- Go to the Module that you want (in the example below: Accounts)
- Click on the “+” icon to add a new field to the module
- Fill in a nice name for the new field (no spaces). This field will appear later in Studio, at Accounts
- Select the type of the field: in this case “Views” and the select: **#vNote_Detail_Generic** (this view will have been automatically added when you install the vNotes module).
- Save** by clicking on the “floppy” to the left of the “+” icon.



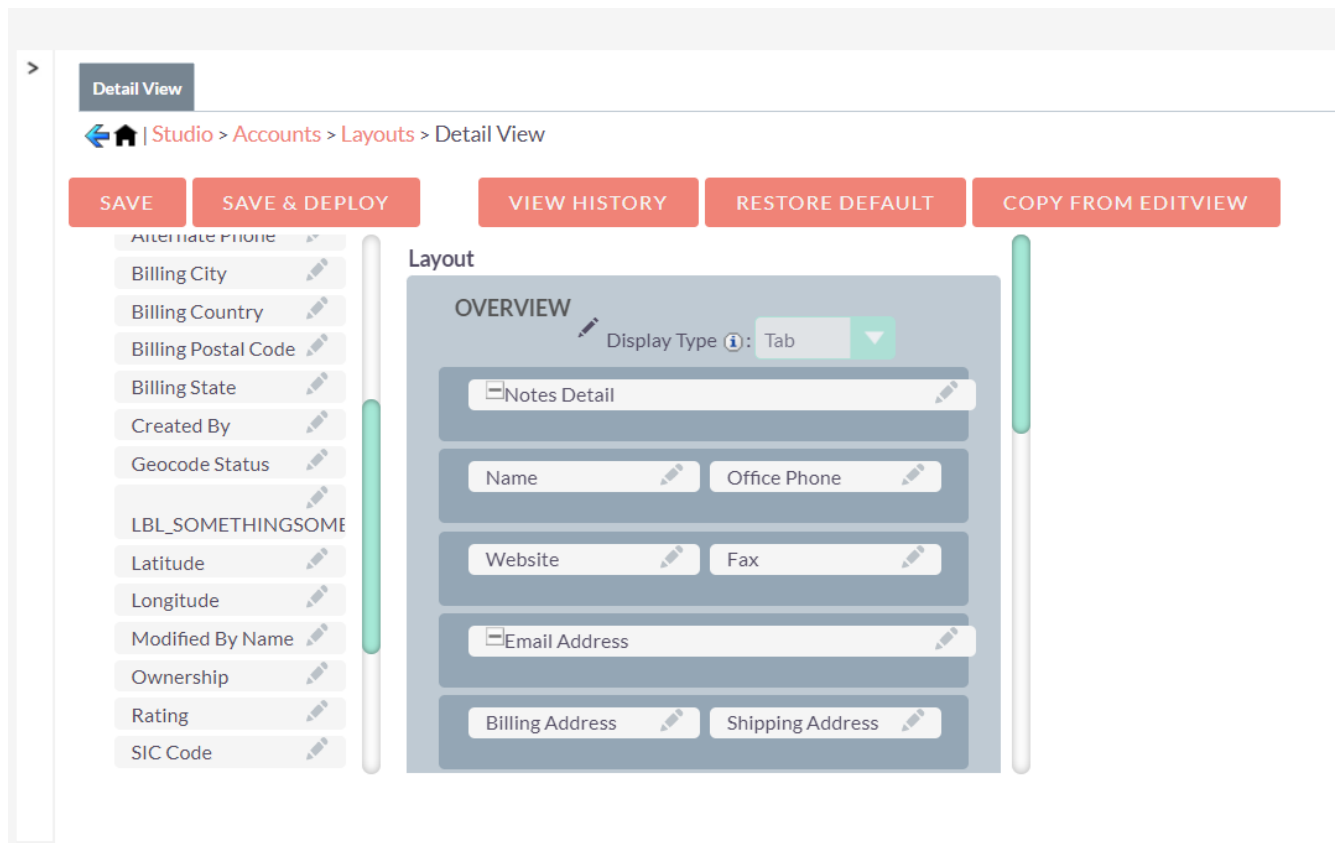
5.3 Add View-field to the Detail-layout using Studio

Go to Studio, select your module (Accounts) in the example, select Layouts and DetailView (this is the only View in which the field will show up).

You will see to the left a field (with the label “LBL_ the_name_you_chose”, in we follow the example, you would see “LBL_NOTES_DETAIL”).

Put the new field wherever you want it on the layout. In the example below, a new row was added at the top, the field was added to that row (and after a save & deploy) expanded to occupy the full width.

Remember to change the label to something nice as this will appear on the screen: click on the edit-pen to the right of the field and fill in something nice (spaces are now of course allowed).



Make sure to do a “Save & Deploy” after you change something in the layout using studio.

5.4 **Log-out and log-in**

When you add a new field using the Fields Management feature, you usually have to login and logout for the field actually to appear.

So, if the field does not appear, please do so.

6 Using vNotes

The use of vNotes should be quite intuitive. The only thing to take into account is that a new role is introduced. This role is automatically generated when you install vNoted, if it does not already exist:

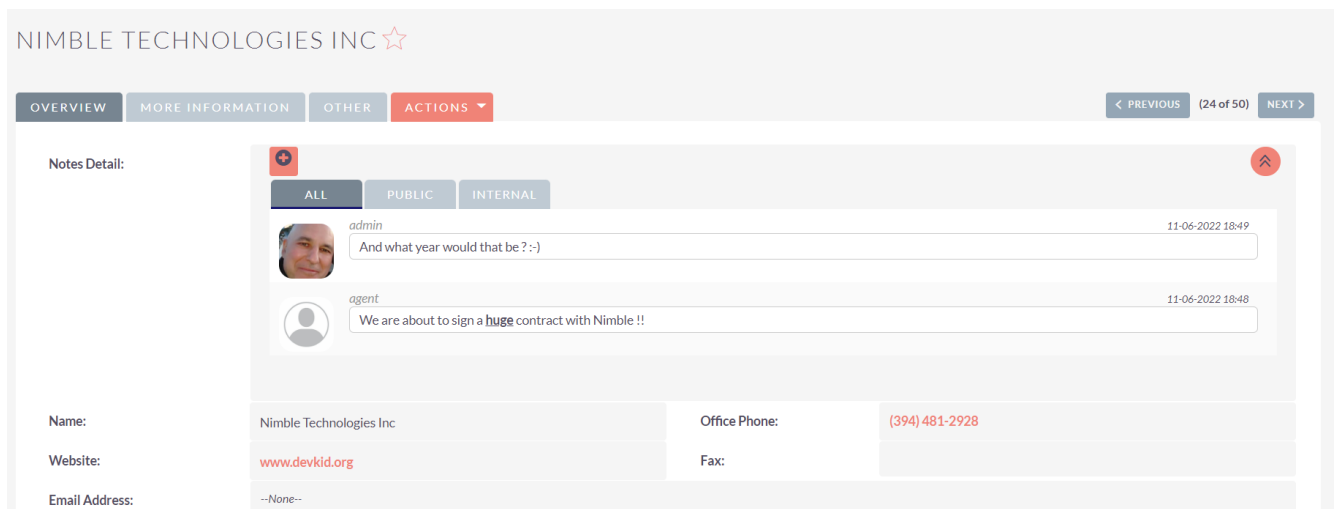
agentvnotes

Both id and name are set to the same value, but the system ONLY checks on the id. If you create your own role “agentnotes”, this will not work as it will get a random id.

All users that have this role assigned (they can have others too of course), will be able to add and see internal comments. The administrator will also have this capability.

Let’s see some examples to clarify how this works. We will follow the example as created in the previous chapter.

When you access the Detail View of Accounts, you will see up to a certain number of comments (a vNotes scroll-bar will appear to limit the space occupied). In the example below you can see what a user see with the max role rights.

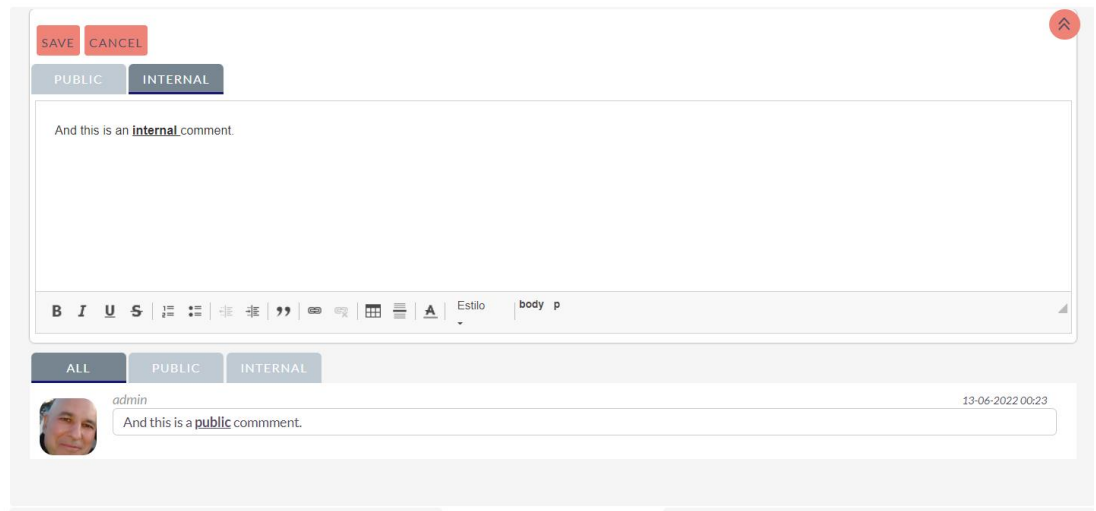


The screenshot displays the 'NIMBLE TECHNOLOGIES INC' account detail page. The top navigation bar includes tabs for 'OVERVIEW', 'MORE INFORMATION', 'OTHER', and 'ACTIONS'. Below the tabs, the 'Notes Detail:' section shows a list of vNotes. The first note is from 'admin' with the text 'And what year would that be ? :-)' dated 11-06-2022 18:49. The second note is from 'agent' with the text 'We are about to sign a huge contract with Nimble !!' dated 11-06-2022 18:48. Below the notes, the contact information is displayed in a table format:

Name:	Nimble Technologies Inc	Office Phone:	(394) 481-2928
Website:	www.devkid.org	Fax:	
Email Address:	--None--		

That same user will be able to add internal comments by clicking on the “+” (add-vNote) icon and selecting the “Internal” tab at input.

Notes Detail:



The result, after clicking save, is straightforward:

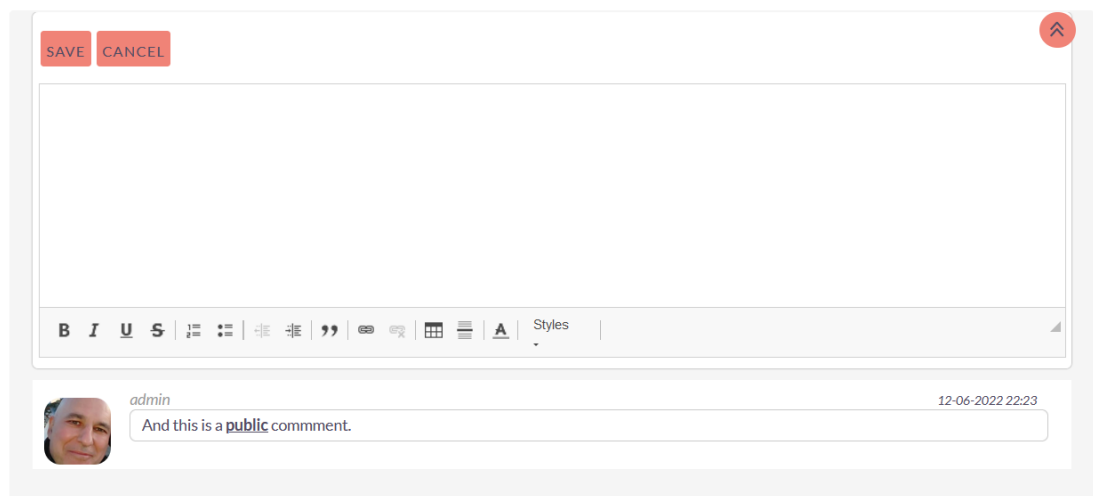
Notes Detail:



The user can click on the various “Visibility” tabs to “filter” by type of vNote.

For users that do not have the “extended” role, the visibility tabs will not appear, and all the comments will be “Public” by default.

Notes Detail:



The last thing to point out is the “blindners”-icon at the top right. This is used to collapse and expand the vNotes entry.

Notes Detail:	 		
Name:	Nimble Technologies Inc	Office Phone:	(394) 481-2928
Website:	www.devkid.org	Fax:	
Email Address:	--None--		

6.1 Quoting part of a vNote

vNote is not meant as a “forum” as we think that this would add a lot of complexity in its use and relatively little added value. It is really meant as a “one-thread” comment interaction. However, sometimes the “conversation” may split temporarily, so in this case, you can just quote the part of the vNote you want to react upon and include your own comment.




ALL PUBLIC INTERNAL



admin

28-06-2022 16:44

admin

28-06-2022 16:42

testo en more

bla bal



admin

28-06-2022 16:43

testo en more

Nieuu ists



admin

28-06-2022 16:42

testo en more

In order to do so, you can just copy and quote. The steps are straightforward:

- Click on add note
- Just do a simple browser select and copy of the section you want to quote.



admin

28-06-2022 16:44

admin

28-06-2022 16:42

testo en more

bla bal

- Select the quote element in the editor



- Paste the selection
- Hit return
- And de-select the quote editor.

ALLPUBLICINTERNAL



admin

28-06-2022 16:44

admin

28-06-2022 16:42

testo en more

bla bal

This is a reaction to a double quote.

11-07-2022 12:38