2 Getting Started: Navigation and General Options

One of the core principles of Microsoft Dynamics AX is to grant a familiar look and feel to people, who are used to Microsoft software. However, business software has to adapt to business processes, which may be quite complex.

2.1 User Interface and Common Tasks

Before we start to go through business processes and case studies, we want to take a look at the general functionality in this chapter.

2.1.1 Logon and Authentication

Microsoft Dynamics AX logon is Active Directory based, applying Windows authentication. You do not need to log on to Dynamics AX with separate credentials as a result. After selecting the Dynamics AX icon on the Windows desktop or in the Start menu, you are automatically connecting to the Dynamics application using your Windows account.

The Dynamics AX user-ID, company (legal entity) and language derive from your user options, which you can change within the client. In Dynamics AX 2012 R2/R3, data partitions (see section 10.1.1) apply additionally – the appropriate default partition is specified in the user management or in the client configuration.

![Figure 2-1: Icon for Microsoft Dynamics AX on the Windows desktop](image)

Sometimes you want to use different user accounts within Dynamics AX – e.g. if you have to check user permissions. In this case, you have to make sure that the user you want to apply is set up in Active Directory administration. In order to start Dynamics AX with a user which is different from your current Windows account, choose the option “Run as different user” in the pop-up menu (available if pressing the Shift key while doing a right-hand click) of the Dynamics AX icon.

If you want to close your session and to logoff from Dynamics AX, proceed the same way as you do in any other Windows program: Push the shortcut key Alt+F4, choose the command File/Exit or click the button on the top right-hand corner of the Dynamics AX workspace. If you have opened several workspace windows, you are logging off when closing the last workspace.
2.1.2  User Interface

The Dynamics AX workspace is the first page visible when accessing Microsoft Dynamics AX. The content of the workspace is depending both on the system configuration and on your permissions and individual settings.

Figure 2-2: Dynamics AX workspace, showing an area page in the content pane

The workspace of Microsoft Dynamics AX 2012 consists of following areas as shown in Figure 2-2:

- Title bar [1]
- Address bar [2]
- Command bar and jewel menu [3]
- Status bar [4]
- Favorites [5]
- Navigation pane [6]
- Content pane [7]

2.1.2.1 Title Bar

The title bar shows the name of the application (“Microsoft Dynamics AX”), the name of the organization holding the Dynamics AX license, the server name, the session ID, and the current company.

In Dynamics AX 2012 R2/R3, the title bar additionally shows the current data partition if the Dynamics AX database contains multiple partitions.
2.1 User Interface and Common Tasks

2.1.2.2 Address Bar

The address bar (breadcrumb bar) provides navigation options known from the Windows Explorer and present-day Internet browsers. It shows a “breadcrumb” trail of the pages which you have opened in the content pane, enabling you to go back and forward by clicking the travel buttons **Forward** and **Back**.

The address field shows the path of the current page and allows navigation to other companies, modules and pages.

![Navigating Dynamics AX in the address bar](image)

If the Enterprise search (see section 2.1.6) is enabled in Dynamics AX, a search box shows on the right-hand side of the address bar. This search box provides access not only to Dynamics AX data but also to the Dynamics AX help content.

2.1.2.3 Command Bar and Jewel Menu

The jewel menu contains commands, which are available globally within Dynamics AX. This includes common Windows commands like **Copy** and **Paste** as well as specific Dynamics AX commands like **Filter** and **Document handling**. Depending on the content page, some commands are not active. If a particular command is also accessible through a shortcut key, it shows on the right-hand side of the applicable option.

![The jewel menu in Dynamics AX](image)
In the command bar, there are following buttons on the right:

- **Windows** – For switching between forms.
- **View** – For changing workspace settings.
- **Help** – For showing the online help.

The options for changing workspace settings are not only available in the **View** button, but also in the jewel menu (choosing the command **File/View** there).

### 2.1.2.4 Status Bar

The status bar at the bottom of the Dynamics AX workspace contains the document handling button, a short help text on the active element (field or menu item) and several other fields. If you want to change the elements included in the status bar, choose appropriate settings in your user options (see section 2.3.1). If all elements are displayed in the status bar of the workspace window, it shows following fields:

- **Document handling** – See section 10.5.1
- **Help text**
- **Notifications** – Alerts and workflow status
- **Currency** – Controls currency of displayed amounts
- **Application object model**
- **Application object layer**
- **Current company**
- **Current partition** – Data partition in Dynamics AX 2012 R2/R3
- **Caps Lock status**
- **Num Lock status**
- **Current user**
- **Session date**
- **Session time**
- **AOS name** – Server name
- **Operation progress indicator** – Shows database activity

![Figure 2-5: The status bar in the Dynamics AX workspace (all elements displayed)](image)

The status bar does not only display information, it also offers additional functionality started by clicking following status bar fields:

- **Notifications** – Opens the notifications form.
- **Currency** – Opens the currency converter, which gives you the possibility to show currency amounts in different currencies.
- **Current company** – Switch between companies (legal entities).
- **Session date** – Default for the posting date in the current session.
In detail forms, the status bar looks a little different from the way it looks in the Dynamics AX workspace by additionally providing the option to scroll between records and to switch between the view mode and the edit mode. More details are available in the section on master detail forms below.

2.1.2.5 Navigation Pane

The navigation pane on the left hand side of the workspace provides access to all list pages and forms. List pages and detail forms are the place for working in the modules of Dynamics AX as described in section 2.1.3 and 2.1.5 of this book.

If you want to hide the navigation pane, click the button View/Navigation Pane in the command bar. If you just want to prevent the navigation pane to show completely all the time, activate automatic collapsing to a left-hand sidebar by pushing the shortcut key Alt+Shift+F1 (or by clicking the button View / Auto-Hide Navigation or the arrow [<] in the top right corner of the navigation pane). If the Auto-Hide feature is enabled, the navigation pane shows completely whenever moving the mouse pointer to the navigation sidebar.

2.1.2.6 Favorites

Whereas the module buttons with the related menu items in the navigation pane show a uniform structure, the favorites pane (see section 2.1.3) allows arranging menu items the way preferred for personal use. Therefore, the favorites pane is used for easily accessing list pages, forms, inquiries and reports needed frequently. The functionality of favorites in Dynamics AX is similar to the favorites in Microsoft Outlook or in the Internet Explorer.

2.1.2.7 Content Pane

The content pane shown in the center of the Dynamics AX workspace contains following types of pages:

- **List pages** – See description below
- **Area pages** – See section 2.1.3
- **Role centers** – See section 2.1.4

2.1.2.8 Workspace

If requiring a second Dynamics AX workspace, open a new workspace within the current session by pushing the shortcut key Ctrl+W or clicking the button Windows/New workspace in the command bar. Clicking the button New Workspace in the dialog box displayed when changing the company account is another way for opening a new workspace.

2.1.2.9 List Page

A list page like the customer page shown in Figure 2-6 provides a list of records of a particular table. List pages are available for viewing records, in addition
providing the option to complete daily tasks on these records by clicking the appropriate button in the action pane.

Figure 2-6: List page Customers (Auto-Hide Navigation enabled)

List pages show a common structure, but some elements and functions depend on the table displayed. This structure includes following basic elements:

- **Action pane** [1] – Contains the action buttons (similar to the Microsoft Office ribbon). You may distinguish buttons for executing activities related to the selected record (like placing an order) on the one hand and buttons for opening related detail forms (displaying more information) on the other hand. The number and functionality of buttons is depending on the particular page. Depending on available actions, buttons show on several tabs (e.g. the action pane tabs Customer or Sell in Figure 2-6).

- **Filter pane** [2] – Allows entering filter criteria (see section 2.1.6).

- **Grid** [3] – Displays the list of records.

- **Grid check boxes** [4] – Enable selecting multiple or – if selecting the checkbox in the header line – all records.

- **Scroll bar** [5] – Available to scroll through the records. A pop-up menu accessed by right-hand clicking on the scroll bar supports scrolling. Alternatively, push the shortcut keys \textit{PgUp}, \textit{PgDn}, \textit{Ctrl+Home} and \textit{Ctrl+End}. 
FactBoxes [6] – Show a summary of additional information referring to the selected record (e.g. the primary address of a selected customer).

Preview pane [7] – Below the grid, showing more detailed information on the selected record (e.g. additional fields of the customer record).

If you do not want to show all elements, hide the FactBoxes and the preview pane through the appropriate option in the button View of the command bar. A general setting for activating or deactivating the FactBox pane and the preview pane is available in the system administration menu (System administration> Setup> System> Client performance options).

List pages do not automatically refresh, if data displayed on the screen change in the database (e.g. if somebody is working on the records concerned). After editing a record in a detail form, refresh the related list page by pushing the F5 key (or by clicking the button Refresh on the right-hand side of the breadcrumb bar).

2.1.2.10 Detail Form for Master Data

Unlike list pages, which are there for viewing a list of records, detail forms are there for inserting and modifying individual records. By double-clicking a record in a list page, Dynamics AX opens the related detail form.

Figure 2-7: Elements of a detail form on the example of the customer detail form

Alternatively, access a detail form by clicking the button Edit on the first tab of the action pane in a list page.
Whereas list pages display within the Dynamics AX workspace, detail forms open separate windows which you may move or resize on your Windows desktop.

Detail forms got a common structure similar to list pages, with some elements and functions depending on the particular form. Figure 2-7 shows the customer detail form (accessible through the list page Accounts receivable> Common> Customers> All customers) as an example for the structure of detail forms.

The common structure of detail forms includes the following basic elements:

- **Title bar** [1] – Showing the form name, the current company (if selected in the users options) and the identification of the record. For illustration, the example in Figure 2-7 shows the number and name of customer “20002” in the company account “AGB”.
- **Command bar** [2] – Including jewel menu, View and Help button.
- **Action pane** [3]
- **FactBoxes** [4]
- **Action pane strips** [5] – Providing access to actions in case there are only a few options available. On the one hand, there are action pane strips related to fast tabs as shown in Figure 2-7. On the other hand, there are action pane strips replacing the full action pane on the top of forms, which only contain a few actions – e.g. in the customer groups form (Accounts receivable> Setup> Customers> Customer groups).
- **Fast tabs** [6] – Grouping fields according to their functional area. In comparison to regular tabs, fast tabs additionally show summary fields displaying core data directly on the tab. In Figure 2-7, the fast tab Invoice and delivery for example shows the delivery terms “EXW”. You may expand fast tabs by clicking the particular tab. A right-hand click on a tab provides the option to expand or collapse all tabs at the same time.
- **Status bar** [7] – Containing options to move between records (in addition to the options in the status bar of the workspace). Apart from the button Ctrl+Home ◄, Ctrl+PgUp ◄, Ctrl+PgDn ►, Ctrl+End ► for switching the selected record (e.g. moving to another customer in Figure 2-7), there is the button Grid View for viewing a list of records.

Another option available in the status bar is to switch between the view mode and the edit mode clicking the button Edit.

Section 2.1.5 later in this book contains more information on editing records, working with fast tabs and other options available in list pages and detail forms.

**2.1.2.11 Grid View**

The grid view in detail forms is an option for managing a list of records. Compared to list pages, which are read-only, the grid view additionally enables editing records.
2.1 User Interface and Common Tasks

In detail forms, switch to the grid view by clicking the button Grid View in the status bar. In a list page, directly access the grid view of the detail form by clicking the button Edit in grid on the first tab of the action pane.

After selecting a record in the grid view, you can view the details of this record in the related details view by clicking the button Details View in the status bar.

2.1.2.12 Detail Form for Transaction Data

In addition to the detail forms for master data described above, Dynamics AX also contains detail forms for transaction data like the sales order form (see Figure 2-8). You can access a transaction detail form from the related list page (e.g. the sales order list page Sales and marketing> Common> Sales orders> All sales orders) similar to accessing a master data detail form in a master data list page. When accessing transaction detail forms, the fast tab Lines expands providing the option to enter lines immediately.

![Figure 2-8: Sales order form as an example of a transaction detail form](image)

In the action pane strip [3] of the Lines tab there are buttons for executing actions on the selected line – for example deleting a line by clicking the button Remove. The action pane [1] at the top of the form is there to perform actions at header level – for example deleting a complete order by clicking the button Delete.

If you want to edit details not available in the line grid, expand the fast tab Line details [4]. In order to structure the field display, the line details fast tab contains several sub-tabs at the bottom.

If you want to view header data, expand the Header tab. In addition, clicking the button Header view [2] in the action pane grants access to all fields of the header record. In the header view, the button Line view in the action pane takes you back to the lines.
2.1.2.13 Setup Forms

In comparison to detail forms for master data and transactions, setup forms show a simple layout. Dynamics AX 2012 contains the following kinds of setup forms:

- **Simple list** – Editable grid with an action pane strip, e.g. the customer groups (Accounts receivable> Setup> Customers> Customer groups).
- **Simple list & Details** – Two pane form showing the list of records on the left side and editable detail fields on the right side, e.g. the terms of payment (Accounts receivable> Setup> Payment> Terms of payment).
- **Parameter form** – Showing a table of contents (similar to the tab structure) on the left and related fields on the right, e.g. the accounts receivable parameters (Accounts receivable> Setup> Accounts receivable parameters).

2.1.2.14 New in Dynamics AX 2012 and in AX 2012 R2

Based on the new design principles for the user interface (initially available in Dynamics AX 2009 list pages), the Dynamics AX client has completely changed in Dynamics AX 2012. List pages and detail forms with FactBoxes, fast tabs and action panes now completely replace the forms available in Dynamics AX 2009.

Compared with the initial version of Dynamics AX 2012, the R2 version in addition includes options for accessing and viewing data partitions.

2.1.3 Navigation

There are four ways for accessing pages and forms in Microsoft Dynamics AX:

- Navigation pane
- Area pages
- Address bar
- Favorites pane

2.1.3.1 Navigation Pane

Whereas the favorites pane usually contains a limited number of menu items which you want to use frequently, the other options (navigation pane, area pages and address bar) show all items for which you have appropriate permissions.

For adapting the navigation pane, click the button *View* in the command bar. Apart from hiding or showing the favorites and the navigation pane, optionally hide or move particular module buttons through the *Navigation Pane Options*.

If all areas of the workspace are available and shown, the Dynamics AX application window consists of following navigation items as shown in Figure 2-9:

- Module buttons [1]
- Menu items [2]
- Common tasks [3]
- Journals [4]
- Inquiries [5]
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