Introduction to the Microsoft Dynamics NAV 2009 RTC Interface

Overview

This document is an enhancement of some Microsoft’s RTC introductory materials with screenshots added for clarification and some of the superfluous information removed.

Versions

NAV 2009 R2 Role Tailored Client

Content Includes

- Database Behavior
- Selecting a Server
- Selecting a Company
- Setting the Work Date
- Description of the Role Center Parts
- Description of the List Places Parts
- Customization of Various Components of Role Tailored Client
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Database Behavior

Be aware that entered data is written (committed) directly to the database; therefore, no Save action is required. Any entered and unposted data can be edited or deleted from the database. Posted data cannot be deleted as they are considered binding financial transactions.

Selecting a Server

To select a server and open a company:

1. Click on Microsoft Dynamics NAV button > Select Server.

2. In the Server name field, enter the URL of the server that you want to connect. Be sure that the URL follows this format:

   Server name/DynamicsNAV, where server name is the name of the computer on which the service is installed.
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3. In the Companies field, select the company that you want to open.
4. Click OK.

Note that after you have selected the Server the first time you open Microsoft Dynamics NAV, the last database and company you were using will automatically open the next time you open NAV.

**Selecting a Company**

To select or change a company:

1. Click on Microsoft Dynamics NAV button > Select Company.
2. Click the drop-down arrow from the Company field and select a company.
3. Click OK.

Alternatively, you can change the work date using this approach:

1. Click on Microsoft Dynamics NAV button > Set Work Date.
2. In the Work Date field, click on the drop-down arrow.
3. To change the year, click on the year currently shown (for example, 2010).
4. Select a year from the list or click on the forward or backward arrows to find a particular year.
5. To change the month, click on the month currently shown (for example, September) or click on the forward or backward arrows to move from one year to the next.
6. Click on a month (for example, January).
7. Select a date (for example, 1).
8. Click OK.

You can also open the Set Work Date window by clicking the date in the status bar at the bottom of the program window.

Regardless of whether the work date comes from the system or is one you have set up, you can quickly enter it in all date fields by entering "w".

If you have defined a work date, you can still insert the system date in date fields by entering "t" (which stands for today's date). The program will only remember the work date for as long as you have the company open. If you open a different company, or when you open the company again the next day, you will have to set the work date again if you still need to use one that is not the system date.

The Role Center Parts

The Role Center is the central point for all information and actions that you will be performing in Microsoft Dynamics 2009. It provides a quick overview of tasks and transactions related to your job role. Furthermore, Microsoft® Outlook® is integrated within the interface. This provides flexibility in being able to work with Microsoft Dynamics 2009 and Outlook at the same time. The following screenshot and table shows the several buttons, links, and menus in the Role Center that allow you to navigate within Microsoft Dynamics NAV 2009.

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<thead>
<tr>
<th>Name</th>
<th>Description</th>
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<tr>
<td>1.</td>
<td>Action menu Located in the menu bar. It provides access to the transactions seen in the Role Center, tasks and history.</td>
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<tr>
<td>2.</td>
<td>Reports menu Provides access to reports.</td>
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<tr>
<td>3.</td>
<td>Address bar Shows the path of your present action. You can also navigate within Microsoft Dynamics NAV 2009 by clicking on the name or arrow buttons and making your selection.</td>
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<tr>
<td>4.</td>
<td>Microsoft Dynamics NAV button Click on this button to set your work date, select a language, server or company.</td>
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<tr>
<td>5.</td>
<td>Back and Forward button Allows you to navigate the pages that you have already visited.</td>
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<tr>
<td>6.</td>
<td>Customize button Allows you to customize Actions, Reports, the page that you are presently viewing, and the navigation pane.</td>
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<tr>
<td>7.</td>
<td>Refresh button Refreshes the information in your Role Center.</td>
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<tr>
<td>8.</td>
<td>Help button Provides access to Microsoft Dynamics NAV Help and the license information.</td>
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<tr>
<td>9.</td>
<td>My Customers Part Provides a list of customers. This list can be updated by clicking on the Action button &gt; Manage List.</td>
</tr>
<tr>
<td>10.</td>
<td>My Items Part Provides a list of items that you frequently use. This list can be updated by clicking on the Action button &gt; Manage List.</td>
</tr>
<tr>
<td>11.</td>
<td>My Notifications Part Provides a list of your notifications. From the Action button , you have the option of viewing, deleting, or removing a notification.</td>
</tr>
<tr>
<td>12.</td>
<td>Microsoft Outlook Part Integrates with Microsoft Outlook. By default, your mail, calendar, and tasks are shown. This can be customized by clicking the actions icon.</td>
</tr>
<tr>
<td>13.</td>
<td>Departments Button Click on the Departments button to access parts of the application that are not included in your personalized menus.</td>
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<tr>
<td></td>
<td>Every user is assigned a job-related profile by their administrator. Your profile provides you with a Role Center and one or more menus that provide access to the tasks, lists, reports, and documents that you need most often. In addition, all users have access to the Departments menu.</td>
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<tr>
<td></td>
<td>From the Departments menu, you can navigate to everything in the application that you have access to, including setup and configuration windows.</td>
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<tr>
<td>14.</td>
<td>Home button Access the icons in the Activities part by clicking on the buttons on the left side of the pane.</td>
</tr>
<tr>
<td>15.</td>
<td>Posted Documents Shows a list of posted documents.</td>
</tr>
<tr>
<td>16.</td>
<td>Cue Represents the number of documents that you have in a stack. Click on a cue to access that stack.</td>
</tr>
<tr>
<td>17.</td>
<td>Navigation Pane Use the Microsoft Dynamics NAV Navigation Pane to open list places. From a list place, you can open individual cards or documents. The Microsoft Dynamics NAV Navigation Pane displays one menu at a time; use the activity buttons at the bottom of the pane to change from one menu to another. As a</td>
</tr>
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</table>
minimum, the Navigation Pane contains the following menus:
- **Home** - is for your user role and contains your Role Center plus all of the list places that are most commonly used in your role.
- **Departments** - access all of the areas of the application for which you have permissions. If you find a useful link in Departments, you can copy it to your Role Center or Home menu.

Depending on your user profile, various activity buttons may be available, such as:
- **Posted Documents** - the Posted Documents menu contains the posted documents that are most often used by your user role.
- **Other** - Your Navigation Pane may also contain other custom-made menus that have been made especially for your user role.

You can rearrange the order of items in a menu, add or remove menu items, and create a new menu.

<table>
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<tr>
<th>18. Activities Part</th>
<th>Shows the default activities that a person can perform, which are based on their job role. For example, the activities that can be performed include creating a new sales order and creating a new sales quote or credit memo.</th>
</tr>
</thead>
<tbody>
<tr>
<td>19. Status Bar</td>
<td>Located at the bottom of the user interface. It shows the company name, date, and user.</td>
</tr>
<tr>
<td>20. Search</td>
<td>In the Search field, you can search for pages, report views, and any other item in Microsoft Dynamics NAV. The Search field is located in the upper-right corner of the Role Center. Move to the Search field by pressing Ctrl+F3. The Search function is an addition to the Navigation Pane to help you navigate faster. Press ENTER or click the first column to move to the page that is listed. The second column displays the navigation path for the page if you want to navigate from the Departments pages. As you type text into a field or column, the Filter-As-You-Type function will list one or more possible matches. This allows you to stop short of typing the whole word or phrase that you are looking for.</td>
</tr>
</tbody>
</table>
The Search function helps you find any page, report, or a view. If you do not know the exact location or type of function that you are looking for, the Search function helps make it simpler to find.

NOTE about the Action button: the appears as you mouse over the title bars of Actions, My Customers, My Items, My Notifications, etc.

The List Places Parts

List places are pages that contain a list plus additional information related to the list. If you double-click a line on the list, the entity will open in the default mode (Edit, View, or New) that has been set up for you. Depending on the rights that you have been granted, you may be able to open the entity in another mode from the Actions menu.

Similar to the Role Center, the List Places has several buttons, links, and menus shown in the following table—that allow you to navigate within Microsoft Dynamics NAV 2009.
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<td>Action Pane</td>
<td>Just below the menu bar, this pane presents your most-used tasks and menu items, where you can access them with one click, instead of having to look through menus to find them. Note that the actions that are available depend on the transaction that you are using. The Action Pane is divided into several groups (New, Process, and Reports).</td>
</tr>
<tr>
<td>Filter Pane</td>
<td>Allows you to view and sort information based on the criteria that you have selected. To view the Filter Pane, click on the table name for the list. For example, Customers and the Filter Pane will appear.</td>
</tr>
<tr>
<td>Factbox</td>
<td>FactBoxes on list places and task pages provide you with additional information. This means that you can quickly find related information depending on the transaction that you are viewing. Information about an order, customer, invoice, item, or vendor, for example may be shown. This helps you to make solid business decisions in a timely manner. For example, on the Customers list place, you can use the Customer Sales History FactBox to get a quick overview of a customer’s sales statistics without opening the customer card. The FactBox includes a count and links to sales orders, quotes, invoices, and so on, so you can drill down to the document you need.</td>
</tr>
</tbody>
</table>
Customizing Microsoft Dynamics NAV 2009 RTC

Changing a User's Profile

The default profile (Sales Order Processor) in the Role Center is for illustrative purposes only. This means that it can be changed to meet the needs of a particular user.

To change an individual user's profile:

1. Click on Departments > Administration > Application Setup > Role Tailored Client > Lists > User Personalization.
2. Double-click the user that you want to change the profile for.
3. Select the Profile ID.
4. Click OK.
5. Restart Microsoft Dynamics NAV 2009 by closing and opening it; the selected profile appears.
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Customizing the Role Center

The Role Center is like your personal home page in Microsoft Dynamics NAV. Microsoft has designed a number of different role centers for users with different jobs in a company. An administrator assigns you a role and he or she can customize the Role Center to ensure that it presents the information needed for your job. Then, you can make additional adjustments to make the user interface fit your work habits.

You can make the following changes in your Role Center:

- Customize the Navigation Pane
- Customize the Action Pane
- Customize the FactBox Pane
- Add or Remove Panes
- Customize Fast Tabs
Customizing the Navigation Pane

The navigation pane contains one or more menus that have been defined based on your role. The menus in the navigation pane contain links to lists. You access task pages, reports, and documents from the lists.

Adding and Arranging a Navigation Pane Button

1. On the menu bar, click the Customize button.

2. Click Customize Navigation Pane.
3. Click New.
4. In the Name field, enter Favorites.
5. Select an icon from the list.

6. Click OK.
7. You can use the Move Down button move the button down if you wish.
8. Click the Add button on the right to add Lists to the menu button.

![Customize Navigation Pane]

9. Expand the area from which you are interested in adding lists to your button by clicking the + sign. Click the list you want and click OK. Repeat to add all the lists that you want on your button.
10. Click OK on the Customize Navigation Pane page.
11. Restart the program by clicking Yes to the following message.

Note the new menu button does not appear until you have added Lists to the button. Also, note that you cannot rename, move, or remove the Home and Departments buttons.
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Removing a Navigation Pane Button

1. On the menu bar, click the Customize button.
2. Click Customize Navigation Pane.
3. Click the Favorites icon.
4. Click the Remove button.
5. Click OK.
6. Restart the program by clicking Yes.

Restoring Defaults

If you wish to have the default Navigation Pane Menu settings restored back, perform the following steps:

1. On the menu bar, click the Customize button.
2. Click Customize Navigation Pane.
3. Click Restore Defaults.
4. Click OK.
5. Restart the program by clicking Yes.

Customizing This Page Functionality

The Customizing This Page functionality allows a user to add or remove information shown in the Role Center.

1. On the menu bar, click the Customize button.
2. Click Customize This Page.
3. Click on one of the available parts and then click add.
4. You can use the Move Up, Move Down, Move Left and Move Right to move the parts around. In the example below My Notifications is moved to the left and the Chart Part is moved to the right.

5. Click Customize Part on the right to customize the part. Customize the part based on the options available for that part. In the example below, the Chart Part is added and the Sales and Profit per KeyAcc is selected.

6. Click OK. The Chart Part is then added.
Adding a Link to a Menu in the Navigation Pane

There may be situations where you will be asked to perform other functions outside of your job role. For example, you may need to fill in for a colleague who is sick or on vacation. For this exercise, you will add a link for the released production order.

1. On the menu bar, click the Customize button.
2. Click Customize Navigation Pane.
3. Click Add.
4. From the Available Lists, click the plus sign beside Manufacturing→Execution.
5. Select Released Prod. Orders.
6. Click OK.
7. Click OK.
8. To restart the program, click Yes.

The Released Production Orders link appears in the Navigation Pane. You can click the link to view the information. To return to the home page, click Home, the Role Center button, or the back button.
Customizing My Customers Pane

You can add information in the My Customers, My Vendors, My Items panes.

1. From the My Customers pane, click the Actions button (thunderbolt icon). The icon will appear when you mouse over the title bar of My Customers.

2. Click Manage Lists.
3. Click the drop-down arrow below Customer No. and select Spotsmeyer's Furnishings.

4. Click OK.
5. Additional column(s) may be added by clicking the thunderbolt and selecting Choose Columns. Click on the available column that you want to add and click the Add button in the middle of the page.
6. You can move the position of the columns by clicking the Move Up and Move Down buttons.
7. Click on OK to close.

8. From the My Customers pane, you can double-click on Spotsmeyer's Furnishings to view and edit the Customer Card.
9. Click ESC to close.

My Notifications

Actions that need your attention will appear in the My Notifications pane. Otherwise, this pane will be empty. If you have notifications, you can view, delete, and remove a notification using the Actions button in the My Notification pane.
Removing a Pane

You may find that there is too much information in your home page. Microsoft Dynamics NAV 2009 allows you to remove a pane (for example, Activities, My Customers, and My Items) so you can tailor the information that you want to see. In this exercise, you will remove the My Notifications pane.

1. From My Notifications pane, click the Actions button (thunderbolt icon). You may move your cursor beside the expand/collapse button to view it.
2. Click Remove.

Enhanced Splitter

The Enhanced Splitter is used to modify the size of the boxes in the Role Center. This means that the Role Center can be adjusted to personalize the layout according to the user’s needs. Follow these steps to customize the Role Center boxes:

1. Open the Role Center.
2. Point the mouse to the splitter field. Drag the splitter so that the shapes of the boxes are arranged in the order that you prefer.
Customize List Page

Similar to the Role Center, the List Places can be customized to show information that is relevant to you. Use the following procedure to add a Factbox to an existing sales order.

1. From a List Page, click the Customize button.
2. Click Choose Factboxes.
3. Click the Available Factbox that you want to add and click the Add button.
4. Click OK.
Adding Columns to List Places

You can also add more information in the List Places. Follow these steps to add an available column to the List Page.

1. From a List Page, click the Customize button.
2. Click Choose columns.
3. Click on the column in Available columns that you want to add and click the Add button.
4. Click OK.

Freezing Pane on List Places

You may freeze panes on List Places.

1. From a List Page, click the Customize button.
2. Click Choose columns.
3. In the Show Columns in this Order column, place your cursor on the column where you want to freeze the pane.
4. Click Freeze Pane. The Freeze pane marker will be inserted. You can use Move Up or Move Down to move if misplaced.
5. Click OK. The pane is now frozen and you can scroll to the right while the frozen columns remain in the pane.
Customizing the Action Pane

The Action Pane may be customized on both List Places and on card type pages. Items from the Actions, Related Information and Reports buttons may be added to the Action Pane.

1. From a List Page, click the Customize button.
2. Click Customize Action Pane.
3. Click on the Group on the left that you want to add an action to and click the Add button on the far right.

4. The Add Action box will pop up. Click the plus sign beside Actions, Reports or Related Information to expand the list. Select the Action you want to add and click OK.
5. You can then use the Change Size, Move Up and Move down buttons to further customize.

6. Click OK. The action is then added to the Action Pane.
Customizing FastTabs

1. On a card or document type page, click the Customize button.
2. Select Customize this Page.
3. Click FastTabs on the left.

4. To remove a button, place your cursor on the FastTab in the Show FastTabs in this order column and click Remove in the center of the page.
5. To add an available FastTab, place your cursor on the FastTab in the Available FastTabs column and click Add in the center of the page.
6. To change the order of the FastTabs use the Move Up and Move Down buttons.
7. To customize the fields on the FastTab, click the Customize FastTab button.
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a. Use the Add and Remove buttons in the middle of the page to add or remove fields from the FastTab.
b. Use the Move Up and Move Down buttons on the right of the page to control the order of the fields.
c. Use the Importance Button to control if the field is Promoted, Standard or Additional.

If promoted, then the information is visible when the FastTab is collapsed.

If Standard, then the field is visible when the FastTab is expanded.

If Additional, then information shows if Show more fields is clicked.

8. Click OK.