MODULE 6: ROLETAILORED CLIENT FOR WINDOWS PERSONALIZATION

Module Overview

In the RoleTailored client for Windows, users can personalize their role center to meet their individual work requirements. They can save their personalization settings directly in the role center or create their own views or share other's views. The following are some examples of user personalization options:

- Re-sizing columns.
- Changing what appears in drop-down menus.
- Personalizing the navigation pane.
- Adding or removing FactBoxes.
- Showing/hiding/promoting fields on FastTabs.
- Organizing items in the ribbon.
- Saving queries or filters.
- Selecting columns in a list location.

Although personalization is typically done by the end-user, an administrator can also do it as part of a configuration procedure to provide the same user interface to all end-users. Personalization made by an administrator is stored in the profile, whereas personalization made by end-users is stored in the personalization tables.

Personalization can also be disabled for end-users.

Objectives

The objectives are:

- Explain the RoleTailored Design principle.
- Explain the difference between personalization and configuration.
- Explain how to customize the different parts of the RoleTailored client for Windows user interface.
- Explain how to customize pages.
- Show how to enable and disable personalization in the RoleTailored client for Windows.

RoleTailored Design

Design Principle

When you start the RoleTailored client for Windows, Microsoft Dynamics® NAV 2013 opens on the **Role Center** page:

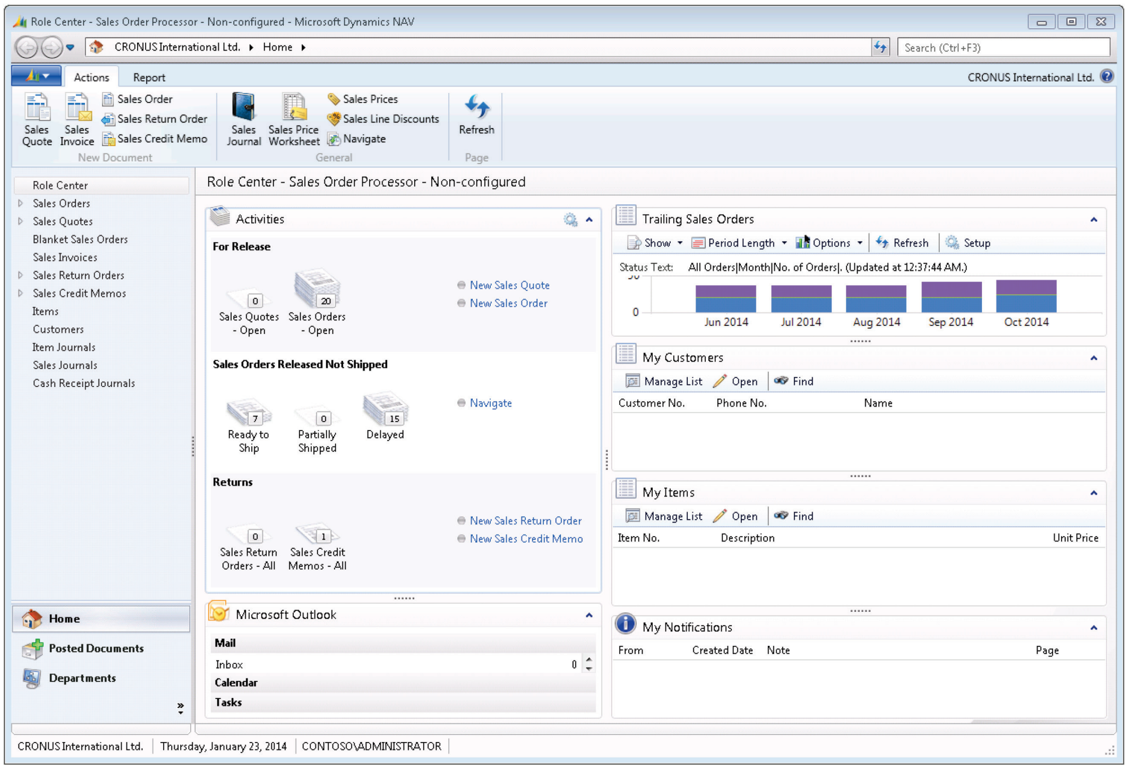


FIGURE 6.1: ROLE TAILORED CLIENT FOR WINDOWS USER INTERFACE

The RoleTailored client for Windows is a customizable user interface that supports the job functions of different work roles in your organization. The RoleTailored client is built around a navigation structure based on a user-centric design. The RoleTailored client is made up of several pages which contain different information and tasks. The pages are combined in the RoleTailored client and appear in a series of windows.

In the RoleTailored client, a user starts from a single navigational window called the role center that displays information pertinent to his or her role in the company. From the role center, the user can browse to additional information and open separate windows to perform tasks and view data. For each role that you support, you can create a role center that displays key information and tasks that are required by that role.

RoleTailored Client Windows

The RoleTailored client uses several windows to display information. Two of the key window types are the navigation window and task page window. The navigation window is the main window in which users find the information that they need to work with. The navigation window is used for the role center, List Places, and Departments, as described in this topic.

A task page window opens separately from the navigation window when the user selects an action from the navigation window or from other task page windows. It is common for a user to have more than one task page window open at a time.

Navigation Window

The Content Area illustration shows the parts of the navigation window:

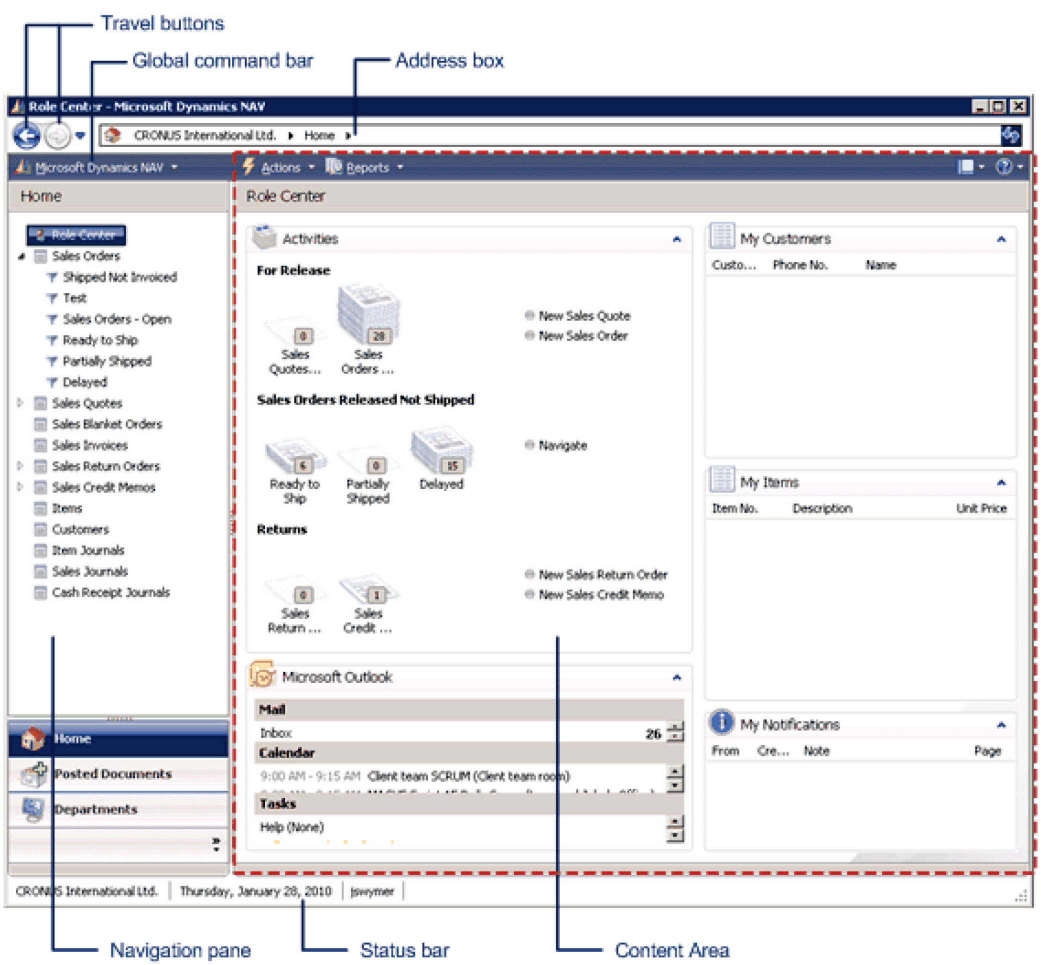


FIGURE 6.2: THE MICROSOFT DYNAMICS NAV 2013 ROLE CENTER

Navigation Pane

The navigation pane displays a menu that links different pages of the RoleTailored client. Menu items are arranged in a hierarchical structure that lets the user drill down through the different levels of menu items.

You use the navigation pane to link to the different List Places of the RoleTailored client. To create menu items in the navigation pane, you add actions to the **Role Center** page by using the Action Designer. You can include menu items under Activity buttons (such as the **Home** button). You can also add more buttons, such as **Posted Documents**, and include the menu items there. The **Departments** button and its menu items are generated automatically based on the Microsoft Dynamics NAV menu suite.

Address Box

The address box displays the location of the current page within the navigation hierarchy of the application. The address box updates when the user moves to a different page.

Note: *The address box is not configurable.*

Status Bar

The status bar displays information about the current state of the RoleTailored client session. This includes the name of the company, the date, and the user's name or ID.

For users who work with more than one company, the status bar provides access to all the companies that they work with. By clicking the company name, the user can open a drop-down list which shows the companies available to them. Users can switch between companies.

Note: *The status bar is not configurable.*

Content Area

The content area displays the content of a ***Role Center***, ***List***, or ***Department*** pages. These pages are discussed later in this module.

System Indicator

You can enable the **system indicator** when you are working with different instances of Microsoft Dynamics NAV 2013. For example, you can differentiate between a production environment and a test environment or see when you are in configuration mode. If you are working in configuration mode, then the system indicator is automatically displayed, and you cannot turn it off. If you are working in any other mode, then you must first set up the system indicator in the **Company Information** window. It is then shown according to your preferences on every page.

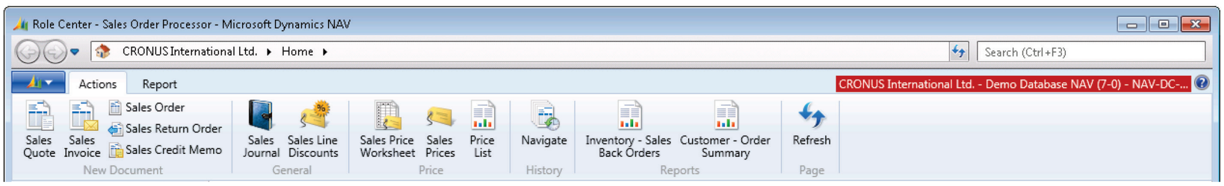


FIGURE 6.3: SYSTEM INDICATOR WINDOW

To enable the system indicator, follow these steps:

1. In the RoleTailored client for Windows, click **Departments > Administration > Application Setup > General > Company Information**.
2. Expand the **System Indicator** FastTab.
3. In the **System Indicator** field, select one of the following options.

System Indicator Type	Description
None	No text is shown. When you are in configuration mode, the Configuration status is always displayed. You cannot turn this text off.
Custom Text	Shows text that you enter in the **System Indicator Text** field.
Company Information	Shows text that you enter in the **Name** field.
Company	Shows the company name.

System Indicator Type	Description
Database	Shows the middle-tier host name and database name.
Company+Database	Shows the company name, the middle-tier host name, and the database name

4. In the **System Indicator Style** field, select from the **Standard** and **Accent1** through **Accent9** options to add a certain style to the system indicator.
5. In the **System Indicator Text** field, type your custom text. To show the text, you must select the **Custom Text** option in the **System Indicator** field.
6. Click **OK**, and then exit and open the RoleTailored client for Windows to see the changes.

Task Page Window

A task page window opens separately from the navigation window when a user clicks an action or command. A task page window typically shows a single object or element such as a task, list, or report. Common uses of task page windows include creating or editing sales orders, customer details, and items.

The Customer Card Page illustration shows a task window that displays a card page for editing customer information.

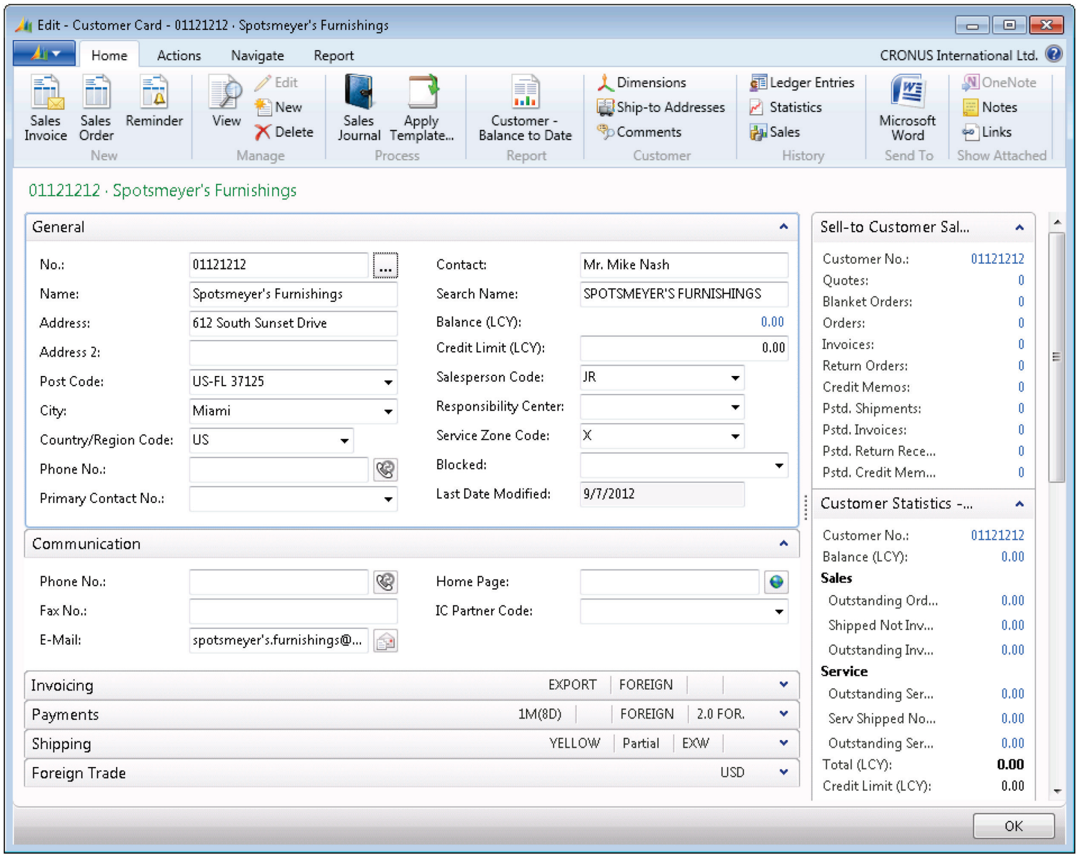


FIGURE 6.4: THE CUSTOMER CARD PAGE

Task page windows are similar in concept to the pop-up windows in Microsoft Office Outlook that show an email, contact, or a task. It is typical for users to have multiple task pages open at the same time. Similar to the navigation window, a task page window includes a command bar and ribbon. Unlike the navigation window, it does not include the navigation pane or status bar. The user can work with more than one task page window open at a time.

You create a task page window by creating a page and then linking the page to actions on other pages. The most common page types for task windows are **Card**, **Document**, and **List**.

RoleTailored Client Pages

Microsoft Dynamics NAV 2013 uses pages as the main way to display and organize data in the RoleTailored client. You can create pages to offer users a visual experience that is closely aligned to Microsoft Office and Windows. There are different page types that you use for different situations. The page type that you select depends on the application task that you want to support, the content that you want to display, and how you want to display it. For example, the Role Center page is the main page of the RoleTailored client and it displays when the RoleTailored client opens. The Role Center page resembles a home page that helps users focus on their most important daily activities. It gives an overview of the information relevant to user tasks on one page. Other types of pages, such as list pages, display lists of customers or sales orders, whereas other pages, such as Document task pages, focus on user tasks.

You can select from the following page types:

- Role center
- Card
- Card Part
- ConfirmationDialog
- DocumentPage
- List
- List Part
- Navigate
- StandardDialog
- Worksheet

For more information about the page types, see “Touring the RoleTailored Client Pages” in the online Help.

More information about how to create pages is covered in the course *C/SIDE Introduction in Microsoft Dynamics NAV 2013*.

Role Center

The role center is the main entry point into Microsoft Dynamics NAV 2013. The role center opens when the user starts the RoleTailored client. You design the role center based on the user's business role, taking into consideration the information and tasks relevant to the user during a typical work day.

The role center can contain the following parts:

- Activities - contains stacks of documents, which are known as "Cues". Click a Cue to open the corresponding list or journal.
- Microsoft Outlook - provides an overview of your email messages, calendar, and Microsoft Office Outlook tasks. You can click an item to open the corresponding folder, email, or appointment in Outlook.
- Charts - may contain one or more graphs that display information that is relevant to your work. To see the related data in text, you can pause your pointer over a part of the chart.
- Notifications - shows notes that your colleagues have sent to you. You can click a note to open the document related to the message.
- Lists - may contain one or more lists with customers, vendors, or items. You can decide which customers, vendors or items to include on the list. By selecting a line and clicking the **Open** command, you can open the card for the customer, vendor, or item.

You create a role center by using a **Role Center page**. The **Role Center page** opens in the navigation window. Usually, only a single navigation window is open at a time. From there, users can open any number of task windows.

List Places

A list place displays information from a table in a list format with rows and columns. Typically, list places are used to display data like sales orders or customers. Similar to the role center, List Places appears in the navigation window, including the navigation pane. List Places only open from the menu items in the navigation pane.

To create a List Place, you create a list type page and then include the list place in the navigation pane by adding actions to the **Role Center page** using the Action Designer to create the menu items in the navigation pane.

More information about how to create a List Place and how to add actions is covered in the course *C/SIDE Introduction in Microsoft Dynamics NAV 2013*.

Departments

The Departments item in the navigation pane of the RoleTailored client provides links to all the pages of the RoleTailored client. The links and pages under Departments are generated automatically based on the menu suite of the RoleTailored client user. To change Departments, you change the menu suite.

More information about how to change the menu suite is covered in the course *C/SIDE Introduction in Microsoft Dynamics NAV 2013*.

Profiles and role centers

A role center is a type of page on which you can place different parts. Each part is a container in which you can host other pages or predefined system parts, such as an Outlook part or parts for adding tasks, notifications, or notes.

Profiles are collections of Microsoft Dynamics NAV users who share the same role center. There are 21 role centers available in Microsoft Dynamics NAV.

Page Number	role center
9000	Warehouse WMS role center
9001	Accounting Manager role center
9002	Acc. Payables Coordinator RC
9003	Acc. Receivables Adm. RC
9004	Bookkeeper role center
9005	Sales Manager role center
9006	Order Processor role center
9007	Purchasing Agent role center
9008	Whse. Basic role center
9009	Whse. Worker WMS role center
9010	Production Planner role center
9011	Shop Supervisor Mfg Foundation
9012	Shop Supervisor role center
9013	Machine Operator role center
9014	Job Resource Manager RC
9015	Job Project Manager RC
9016	Service Dispatcher role center
9017	Service Technician role center
9018	Administrator role center
9019	CEO and President role center
9020	Small Business Owner RC

The following role centers are fully configured:

- 9004 - Bookkeeper role center
- 9005 - Sales Manager role center
- 9006 - Order Processor role center

In Microsoft Dynamics NAV 2013, each profile is linked to a **Role Center** page. You use the **User Personalization** window to link the user to a profile and explicitly assign a role to the user. When you start the RoleTailored client, Microsoft Dynamics NAV checks your user credentials, finds the profile assigned, and displays the corresponding role center. Users who are not explicitly assigned a profile in the **User Personalization** window are assigned the default profile. The default profile is the profile with the **Default Role Center** field set to **Yes**.

Configuration

In this lesson, you learn how you, as an administrator, can customize the RoleTailored client for Windows user interface for a specific user profile to provide a common identical user interface for a specific user role. The lesson also shows how you can disable personalization for end-users, so they cannot change the user interface. It also explains the different methods and startup parameters that you can use when you start the RoleTailored client for Windows.

Configuration and Personalization

Configuration and personalization are ways to customize the RoleTailored client for Windows to suit the daily requirements and tasks of groups of users or individual users.

- Configuration: Modifications that an administrator implements, such as presenting a custom home page to all users of a role center.
- Personalization: Modifications that an end-user makes, such as changing the user interface of a page to fit individual requirements and preferences.

For example, the Order Processor role center is configured to reflect the tasks and priorities of an order processor. In the RoleTailored client, the profile that is used appears in the header of the role center’s main content area. An administrator can then customize this role center to meet the needs of a specific role in a specific company. The Order Processor role center can then be additionally personalized on a single computer to meet the needs of a person who is performing the job as an order processor. This person can personalize the role center by saving queries, adding filters, and showing or hiding fields.

Configuration

An administrator, SUPER user, or Microsoft Certified Partner performs configuration tasks. This person configures the role center for a specific role and then assigns users to the role center. For example, when Susan, an order processor, uses the RoleTailored client, she sees the Order Processor role center. This is customized to help her perform her daily tasks. In configuring Susan's role center, the administrator has added or removed UI elements, including items in the navigation pane, page parts, and FactBoxes.

All role centers can be used as is or can be reconfigured by an administrator or SUPER user. You can configure the following elements in role centers:

- Navigation pane
- FactBoxes
- Home parts
- Lists
- Views
- Task pages
- Ribbon items and groups
- Fields (show, hide, or promote)
- Report menus

Personalization

End-users perform all personalization tasks. Apart from what can be done as configuration, users can also do the following:

- Resize columns.
- Change the contents of drop-down menus.
- Customize the navigation pane.
- Add or remove FactBoxes.
- Organize items in the **Quick Access** pane.
- Save queries or filters.
- Select columns in a List Place.

Accessing the Customization Functions

Depending on your active window in Microsoft Dynamics NAV 2013, the customization functions can be accessed in several ways:

- Through the application menu: In the application menu, click the **Customize** menu and select the item to customize. From this menu, you can select all customizable parts of the user interface (the ribbon, the navigation pane, the page, and the charts in the pages). In the **Departments** window, you only have the option to customize the navigation pane.
- Through the shortcut menu (on the ribbon and the navigation pane): When you right-click the ribbon or the navigation pane, you can click the **Customize Ribbon** or **Customize navigation pane** option from the shortcut menu.

The Customization Functions in the Application Menu figure shows the customization functions in the application menu:

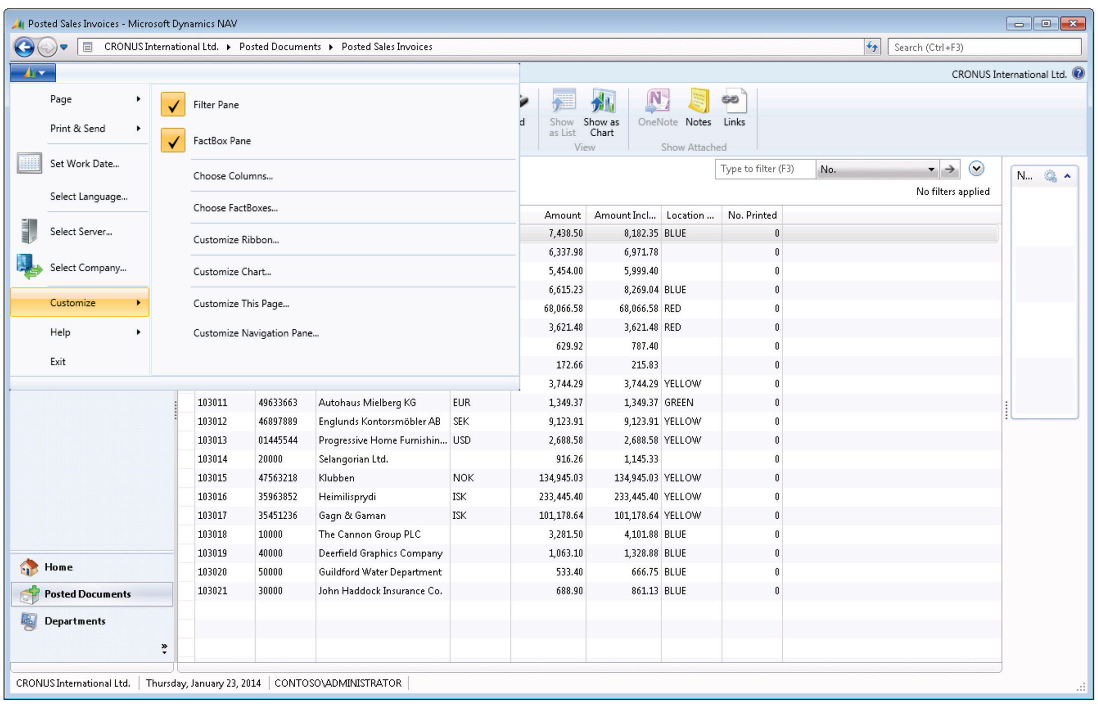


FIGURE 6.5: CUSTOMIZATION FUNCTIONS IN THE APPLICATION MENU

When you select a customization function, a customization dialog box for the corresponding part appears. The customization dialog boxes are illustrated in the next lessons.

Start the RoleTailored Client for Windows in Configuration Mode

The difference between configuration and personalization is that configuring a role center changes the user interface for all users who have the same profile, whereas personalizing a role center only changes the user interface for a single user.

Configuration tasks are typically performed by an administrator, SUPER user, or Microsoft Partner. This person configures the Microsoft Dynamics NAV user interface (role center) to suit a specific role and then assigns users to the role center.

To configure a role center, you must do the following:

- Make sure you own the corresponding role center.
- Start the RoleTailored client for Windows in configuration mode.

Note: *This process cannot be done if the RoleTailored client for Windows is deployed using ClickOnce, because this does not support passing in command line parameters.*

Verify and Take Ownership of a Profile

To verify ownership of a profile, follow these steps:

1. Open the RoleTailored client, and then either search for or open the **Profiles** page.
2. Double-click the profile that you want to change to open the corresponding profile card.
3. Check whether the **Owner ID** field contains your user ID. If not, click the **AssistEdit (...)** button to open the **Users** window, select your User ID, and then click **OK** to close the **Users** window.
4. Click **OK** to close the **Profile Card** window.

Start the RoleTailored Client for Windows in Configuration Mode

If you are the owner of the profile, you can open the RoleTailored client for Windows in configuration mode for that profile. Changes that you make to a role center in configuration mode apply to all users associated with the profile. You can undo changes for any user interface element by using the **Restore Defaults** button in any dialog box.

To open the RoleTailored client for Windows in Configuration mode, follow these steps:

1. At the command prompt, locate the root folder of the RoleTailored client for Windows. For example:

```
cd C:\Program Files\Microsoft Dynamics NAV\70\RoleTailored Client
```

2. Type the following command:

```
Microsoft.Dynamics.Nav.Client.exe -configure -profile: "profileid"
```

Replace **profileid** with the name of the profile that you want to configure.

For example, to configure the Accounting Manager profile, use this command to open the RoleTailored client for Windows in configuration mode:

```
Microsoft.Dynamics.Nav.Client.exe -configure -profile:"Accounting
Manager"
```

Demonstration: Configure the Ribbon

The ribbon in the RoleTailored client is a dynamic pane that changes according to the page that is currently loaded. The ribbon for the Order Processor role center reflects actions that are appropriate for a person in the order processor role. The next demonstration shows how to promote an action to the Process group for the Order Processor profile.

Demonstration Steps

1. Verify ownership of the profile.
   a. Open the RoleTailored client, and then either search for or open the **Profiles** page.
   b. Double-click **ORDER PROCESSOR** to open the Sales Order Processor profile card.
   c. In the **Owner ID** field, click the **AssistEdit** button, and then select your User ID.
   d. Click **OK** to close the window.

2. Start RoleTailored client for Windows in Configuration mode.
   a. Open a command prompt.
   b. Change to the directory that contains the RoleTailored client for Windows executable. For example, type the following command:

```
cd C:\Program Files (x86)\Microsoft Dynamics NAV\70\RoleTailored
Client
```

c. Open the RoleTailored client for Windows in configuration mode by typing the following command:

```
Microsoft.Dynamics.Nav.Client.exe -configure -profile:"order
processor"
```

The Windows client opens in configuration mode.

3. Configure the ribbon.
    a. In the RoleTailored client for Windows, click **Home** to locate the home page of the Order Processor role center.
    b. In the navigation pane, click **Sales Orders** to open the Sales Order page.
    c. In the Application menu, click **Customize > Customize Ribbon**.
    d. In the **Available actions** list, select **Microsoft Dynamics NAV > Help** > **Page Notes**.
    e. Under **Show actions in this order**, expand **Home**, select **Process**, and then click **Add** to move **Page Notes** to the **Process** group.
    f. Click **OK** to save and close the window.

4. Close the RoleTailored client for Windows.
    a. Close Microsoft Dynamics NAV 2013.

Demonstration: Configure the FactBox Pane

FactBoxes are smaller windows that contain information related to the current main window. They appear on the rightmost side of the page. The following steps show how to add FactBoxes to the **FactBox** pane. The FactBoxes that are available vary according to what is linked to the page.

Demonstration Steps

1. Verify ownership of the profile.
    a. Open the RoleTailored client, and then either search for or open the **Profiles** page.
    b. Double-click **ORDER PROCESSOR** to open the **Sales Order** Processor profile card.
    c. In the **Owner ID** field, click the **AssistEdit** button, and then select your User ID.
    d. Click **OK** to close the window.

2. Start RoleTailored client for Windows in Configuration mode.
   a. Open a command prompt.
   b. Change to the directory that contains the RoleTailored client for Windows executable. For example, type the following command:

```
cd C:\Program Files (x86)\Microsoft Dynamics NAV\70\RoleTailored Client
```

   c. Open the RoleTailored client for Windows in configuration mode by typing the following command:

```
Microsoft.Dynamics.Nav.Client.exe -configure -profile:"order processor"
```

The Windows client opens in configuration mode.

3. Configure the **FactBox** pane.
   a. In the **Home** navigation pane, click **Sales Orders** to open the **Sales Order** page.
   b. In the Application menu, click **Customize > Choose FactBoxes**.
   c. From the **Available FactBoxes** pane, select **Links**, and then click **Add**.
   d. Click **OK** to save and close the window.

4. Close the RoleTailored client for Windows.
   a. Close Microsoft Dynamics NAV 2013.

Disable RoleTailored Client Personalization

You can use personalization to customize the RoleTailored client for Windows by hiding or displaying elements such as actions, fields, FactBoxes, and FastTabs. To personalize the RoleTailored client for Windows, in the role center and on pages, click **Customize**. On FastTabs and page parts, click **Actions**. By default, personalization is enabled. You can disable personalization for RoleTailored client users in the following ways:

- Modify the profile in the RoleTailored client. When you disable personalization for the profile, personalization is disabled in the RoleTailored client for Windows of all users who are assigned to that profile. To disable personalization for a role center, you must disable personalization for a profile.
- Use the **disablepersonalization** parameter when you start the RoleTailored client for Windows at the command prompt.

When you disable personalization, all menu items that are associated with personalization no longer appear. If a user has personalized the RoleTailored client, then the personalization settings in the user's RoleTailored client for Windows are ignored.

Other Command-Line Parameters

In the previous paragraphs, you have seen how to start the RoleTailored client for Windows from a command prompt to configure a role center and to disable personalization. In addition to the **configure and disable personalization** parameters, there are several other parameters that can be very useful for administrators.

By adding command-line parameters, you can also do the following:

- Configure a profile.
- Disable Personalization.
- Start the RoleTailored client for Windows using a profile other than the default profile.
- Start the RoleTailored client for Windows using a language other than the default language.
- Start the RoleTailored client for Windows using client settings other than the default client settings.
- Start the RoleTailored client for Windows and open the specified page.
- Start the RoleTailored client for Windows and open the specified report.

Note: *Command-line parameters are not supported when the RoleTailored client for Windows is deployed using ClickOnce.*

To start the RoleTailored client for Windows at a command prompt, follow these steps:

1. Open a command prompt window.
2. Locate the RoleTailored client for Windows directory. The default location is as follows:

```
C:\Program Files (x86)\Microsoft Dynamics NAV\70\RoleTailored Client
```

3. Enter the following command:

```
Microsoft.Dynamics.Nav.Client.exe
```

You can use the following parameters when you start the RoleTailored client for Windows at a command prompt.

Parameter	Description
-?	Displays this list of parameters.
-configure	Starts the RoleTailored client for Windows in configuration mode. You use configuration mode to configure a profile. To specify which profile to configure, add the -profile parameter. Example: This command starts the RoleTailored client for Windows in configuration mode for editing the Accounting Manager profile: Microsoft.Dynamics.Nav.Client.exe -configure -profile:"Accounting Manager"
-debug	Starts the RoleTailored client for Windows in debug mode. Example: This command starts the RoleTailored client for Windows in debug mode and runs the **Session Management** page so that you can select a session to debug: Microsoft.Dynamics.Nav.Client.exe –debug "DynamicsNAV://localhost:7046/DynamicsNAV/CRONUS International Ltd./runpage?page=9506"
-disablepersonalization	Disables personalization in the RoleTailored client for Windows. Personalization lets users customize their role center and pages by showing or hiding elements such as actions, FactBoxes, FastTabs, and fields. Example: This command starts the RoleTailored client for Windows with personalization disabled for the Accounting Manager profile: Microsoft.Dynamics.Nav.Client.exe –disablepersonalization -profile:"Accounting Manager"
-language:*id*	Starts the RoleTailored client for Windows by using the specified language. Examples: This command starts the RoleTailored client for Windows with locale ID 1033: Microsoft.Dynamics.Nav.Client.exe -language:1033 This command starts the RoleTailored client for Windows for the culture named de-DE: Microsoft.Dynamics.Nav.Client.exe -language:de-DE

Parameter	Description
-profile:*id*	Starts the RoleTailored client for Windows with the specified profile. Example: This command starts the RoleTailored client for Windows with the Accounting Manager profile: Microsoft.Dynamics.Nav.Client.exe -profile:"Accounting Manager"
-settings: *file*	Starts the RoleTailored client for Windows with the specified settings file. Example: This command starts the RoleTailored client for Windows with a version of the ClientUserSettings.config file that is not at the default location: Microsoft.Dynamics.Nav.Client.exe -settings:"C:\AuxClientSettings\ClientUserSettings.config"
URL	Opens the RoleTailored client for Windows to a particular page or with a particular report. Examples: This command starts the RoleTailored client for Windows and opens to page 21, **Customer Card**: Microsoft.Dynamics.Nav.Client.exe "DynamicsNAV://<*Server/ServerInstance*>/Company/RunPage?Page=21" This command starts the RoleTailored client for Windows and opens the request page for report 101, **Customer List**: Microsoft.Dynamics.Nav.Client.exe "DynamicsNAV://<*Server/ServerInstance*>/Company/RunReport?Report=101" This command runs the same report, assuming the default server, server instance, and company. This version runs from a browser instead of at a command prompt: DynamicsNAV:////RunReport?Report=101 If you specify a server and server instance, then you must also specify a company. You can specify a company without specifying a server and server instance: Microsoft.Dynamics.Nav.Client.exe "DynamicsNAV:///Company/RunReport?Report=101"
-failurestacktrace	Sends the stack trace for the RoleTailored client for Windows to the Clipboard.

Starting the RoleTailored Client for Windows in a Browser or the Run Window

You can also start the RoleTailored client for Windows from the address bar in a browser or from the **Run** window with the same options. To start the RoleTailored client for Windows from a browser, type the following:

```
DynamicsNAV://<Server/ServerInstance>/<Company>/
```

Note: *This process cannot be done when the RoleTailored client for Windows is deployed using ClickOnce.*

For example, to open the CRONUS International Ltd. company, you would enter the following:

```
DynamicsNAV://localhost/DynamicsNAV/CRONUS%20International%20Ltd./
```

Customize the Navigation Pane

The navigation pane contains one or more activity buttons that are defined for your role and a link to the **Departments** window. The menus in the navigation pane contain links to lists. From the lists, you access task pages, reports, and documents. This lesson shows how to customize the navigation pane.

The Customize Navigation Pane Dialog Box

You can customize the navigation pane through the **Customize Navigation Pane** dialog box. To open the dialog box, click the application menu, then click **Customize > Customize Navigation Pane**. The **Customize Navigation Pane** dialog box appears.

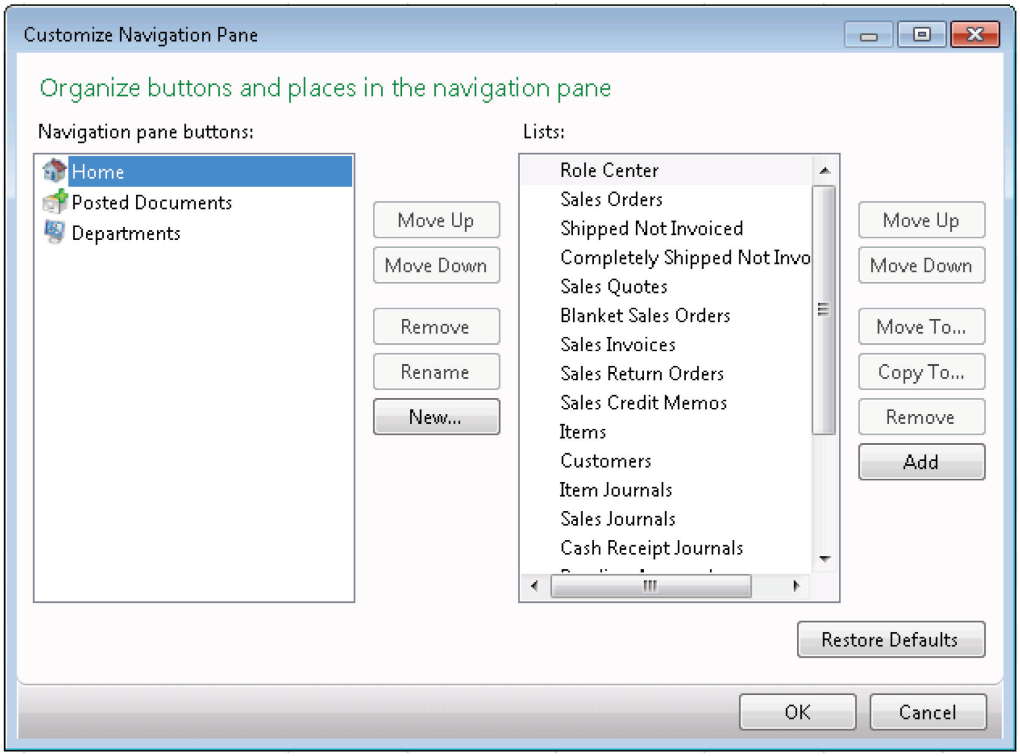


FIGURE 6.6: CUSTOMIZE NAVIGATION PANE WINDOW

You can use the **Customize Navigation Pane** dialog box to do the following:

- Rename or rearrange activity buttons in the navigation pane.
- Create new or remove existing activity buttons.
- Add a link to an activity button in the navigation pane.
- Move or copy a link from one menu to another.
- Rearrange the lists in a menu.
- Undo navigation pane customizations by restoring the default settings.

Rename, Remove, or Rearrange Buttons in the Navigation Pane

You cannot move, rename, or remove the **Home** or **Departments** buttons. **Home** is always the first button and **Departments** is always last button. However, you can move, rename, or remove other activity buttons in your navigation pane.

To move, rename, or remove buttons in the navigation pane, follow these steps:

1. Open the **Customize Navigation Pane** dialog box.
2. In the **Navigation pane buttons** list, select the button that you want to customize.
3. To remove, rename, or move a button (up or down) click **Remove**, **Rename**, **Move Up**, or **Move Down** in the middle of the window.

When you click **Rename**, a dialog box appears where you can change the name and the icon of the menu button. The **Rename** "**Posted Documents**" Dialog Box figure shows the Rename "Posted Documents" dialog box where you can change the name of the **Posted Documents** button.

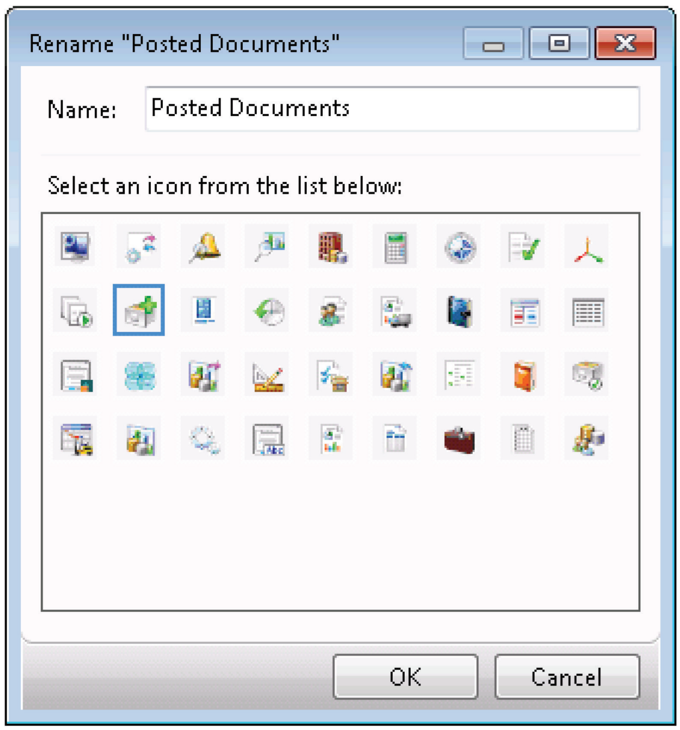


FIGURE 6.7: RENAME "POSTED DOCUMENTS" WINDOW

To change the name, enter the new name in the **Name** field. To change the icon, select an icon from the list and then click **OK** to close the **Rename** dialog box.

Create a New Activity Button

To create a new activity button, follow these steps:

1. Open the **Customize Navigation Pane** dialog box.
2. Click **New**.
3. In the **New Activity Button** dialog box, type a name in the **Name** field.

4. Select the icon that you want to use for the new activity button.
5. Click **OK**.

After you created a new activity button, you must restart the RoleTailored client to see the new activity button.

Note: *If you do not add links to the activity button, the activity button is not visible when you restart the RoleTailored client.*

Add a Link to a New Activity Button

If you have permission to view a list, such as the **Sales Order** list, you can add a link to an activity button.

1. Open the **Customize Navigation Pane** dialog box.
2. In the **Navigation pane buttons** list, select the activity button to which you want to add a link.
3. Click **Add.**
4. In the **Add List** dialog box, browse to the link that you want to add.
5. Click **OK**.

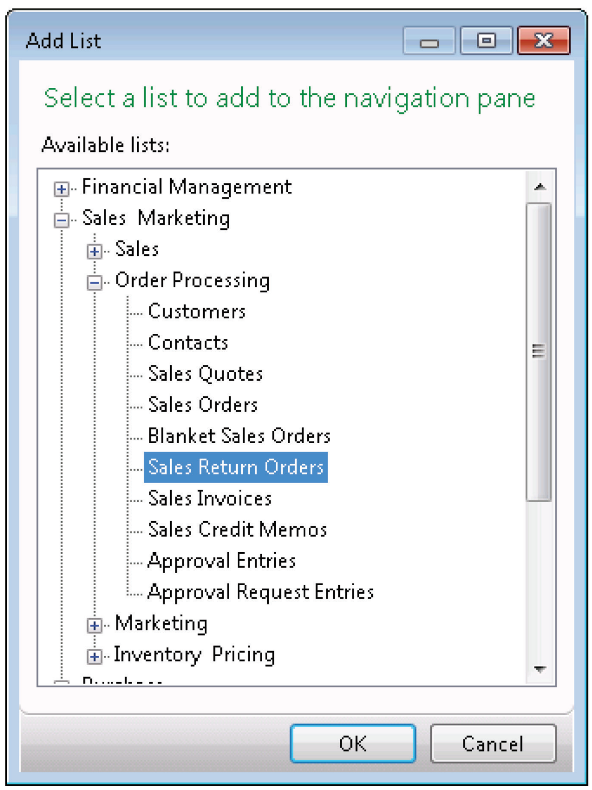


FIGURE 6.8: ADD A LIST TO AN ACTIVITY BUTTON

You can use the buttons in the **Customize Navigation Pane** dialog box to change the order of the lists or to remove existing lists.

Move or Copy a List Between Activity Buttons

If you want to move or copy a list from one activity button to another, follow these steps:

1. Open the **Customize Navigation Pane** dialog box.
2. In the **Navigation pane buttons** list, select the menu where the link currently appears.
3. In the **Lists** list, select the link that you want to copy or move.
4. To move or copy the link to a new activity button, click **Move To** or **Copy To**.
5. In the **Move List** or **Copy List** dialog box, select the activity button to which you want to add the link.
6. Click **OK**.

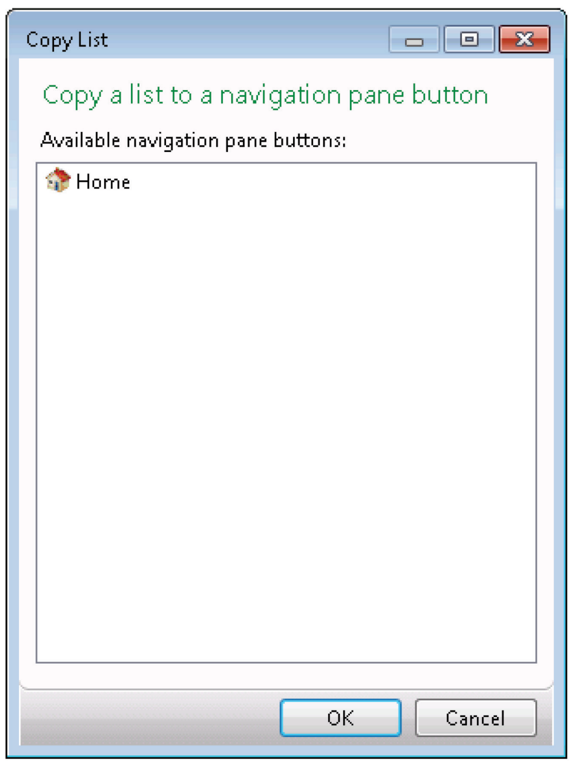


FIGURE 6.9: COPY A LIST TO ANOTHER MENU

Note: *You cannot move links from the* ***Departments*** *menu to other activity buttons. You can only copy items from the* ***Departments*** *menu.*

You cannot move or copy links to the ***Departments*** *menu.*

*Links from the **Home** menu can be moved or copied to any menu other than the **Departments** menu.*

*Links from menus other than **Home** and **Departments** can be moved or copied to any menu other than the Departments menu.*

You can use the buttons in the **Customize Navigation Pane** dialog box to change the order of the lists or to remove existing lists.

Your changes appear in the navigation pane when you restart Microsoft Dynamics NAV.

Undo Customizations

If you want to cancel all the changes that you have made (and saved) to the navigation pane, you can do this in the **Customize Navigation Pane** dialog box. This restores the navigation pane that your administrator defined for you.

To undo customizations, follow these steps:

1. Open the **Customize Navigation Pane** dialog box.
2. Click **Restore Defaults.**
3. Click **OK**.

Customize Pages

Apart from the navigation pane, other elements of the RoleTailored client for Windows user interface can also be customized. Customizing pages lets you personalize various aspects of the user interface. The following are changes that you can make:

- Show or hide the **Filter** and **FactBox** panes.
- Customize the ribbon.
- Customize the **FactBox** pane.
- Customize FastTabs on a card page.

This lesson shows how to make the customizations.

The Customize This Page Dialog Box

All these customizations can be made by using the **Customize This Page** function in the application menu. When you click **Customize > Customize This Page** in the application menu, the **Customize** dialog box for the active page appears. The content of the **Customize** dialog box can be different, depending on the page type.

The Customizing a role center Page figure shows the customization dialog box for a **Role Center** page:

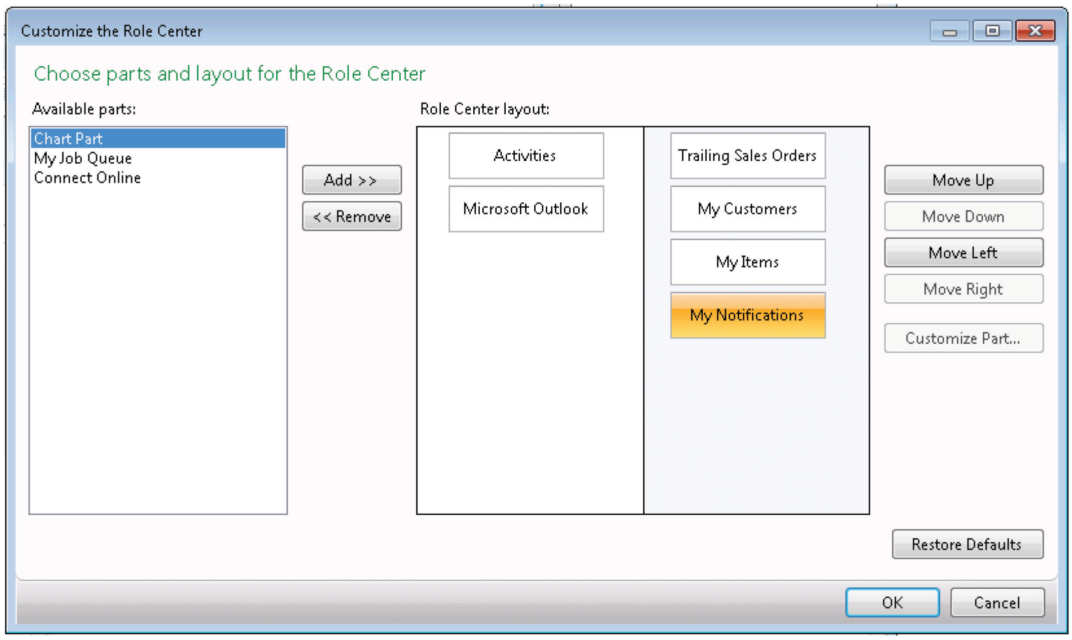


FIGURE 6.10: CUSTOMIZING A ROLE CENTER PAGE

You can use the **Customize the Role Center** dialog box to add available parts to the page (or remove existing parts). Also, you can define the layout of the **Role Center** page by moving parts up, down, left and right. Finally, you can customize the individual parts of the role center by selecting a part and then clicking **Customize Part**. For example, you can use the **Customize Part** function to do the following:

- Change sorting criteria for the page part.
- Show or hide additional fields and cues in the page part.
- Configure the content of chart parts.
- Configure the content of the Microsoft Outlook part.

When you select the **Customize This Page** function on a list page, the customization dialog box resembles the Customize Posted Sales Shipments Dialog Box figure.

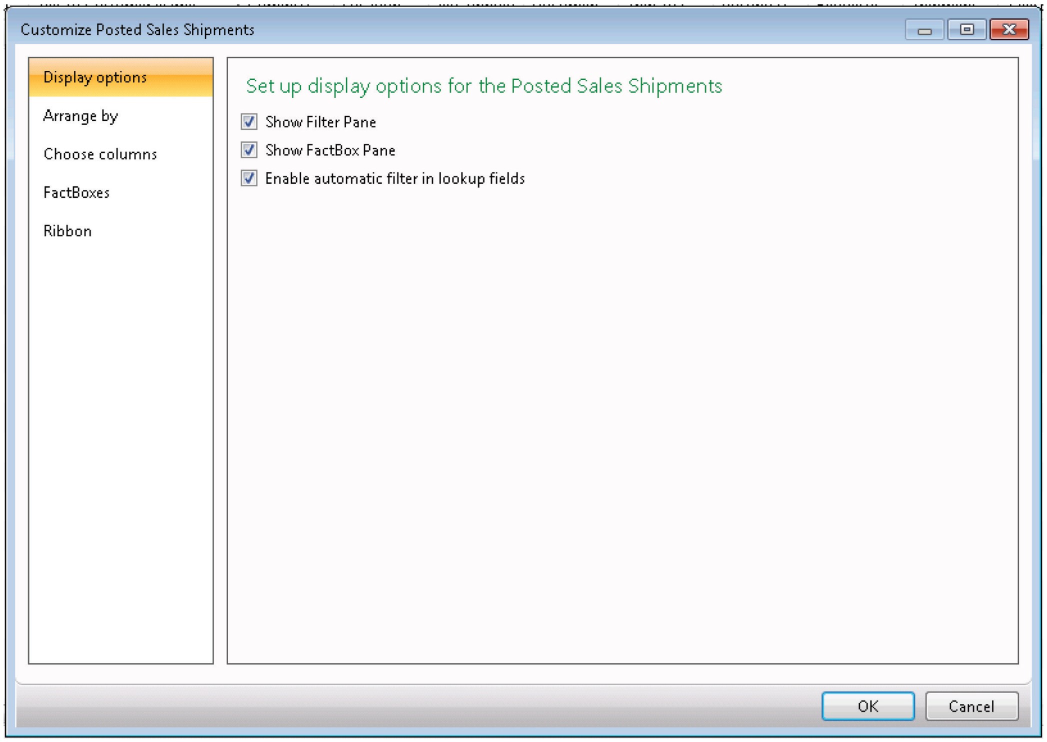


FIGURE 6.11: CUSTOMIZE POSTED SALES SHIPMENTS WINDOW

The **Display options** pane lets you show or hide the **Filter** and **FastBox** panes. In the **Arrange by** pane, you can define the sorting criteria for the list. On the **Choose columns** pane, you can change the fields that will appear to the end-user. The **FactBoxes** pane lets you define the FactBoxes to show on the page (and to configure for example chart parts). Finally, on the **Ribbon pane**, you can define the actions to show on the page.

If you customize a card page, the customization page resembles the following figure:

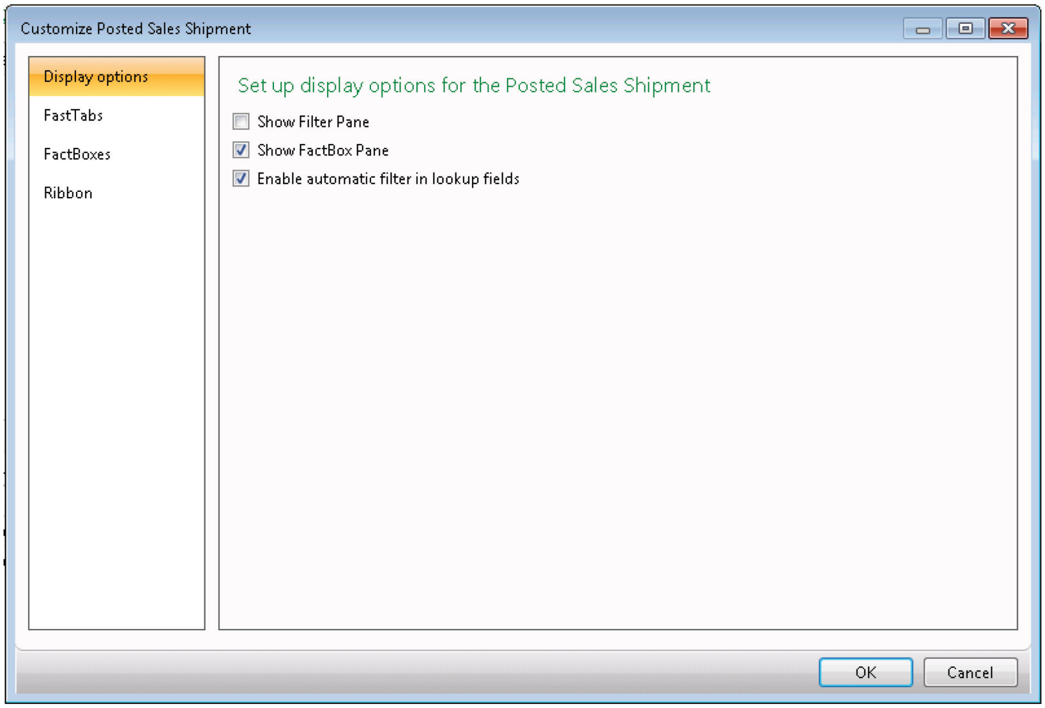


FIGURE 6.12: THE CUSTOMIZE POSTED SALES SHIPMENT WINDOW

The customization dialog box for card pages has more or less the same options as that for list pages. On the **FastTabs** pane, you can select the FastTabs to show on the card page and the order of the FastTabs. In addition, you can define the fields to show on each FastTab and the importance of the fields. For more information, see "Customize FastTabs" later in this module.

Show or Hide Filter and FactBox Panes

In Microsoft Dynamics NAV, you can select among different panes that provide easy access to related information. Examples of these panes are the **FactBox** pane (showing additional related information) and the **Filter** pane (letting you set or remove filters).

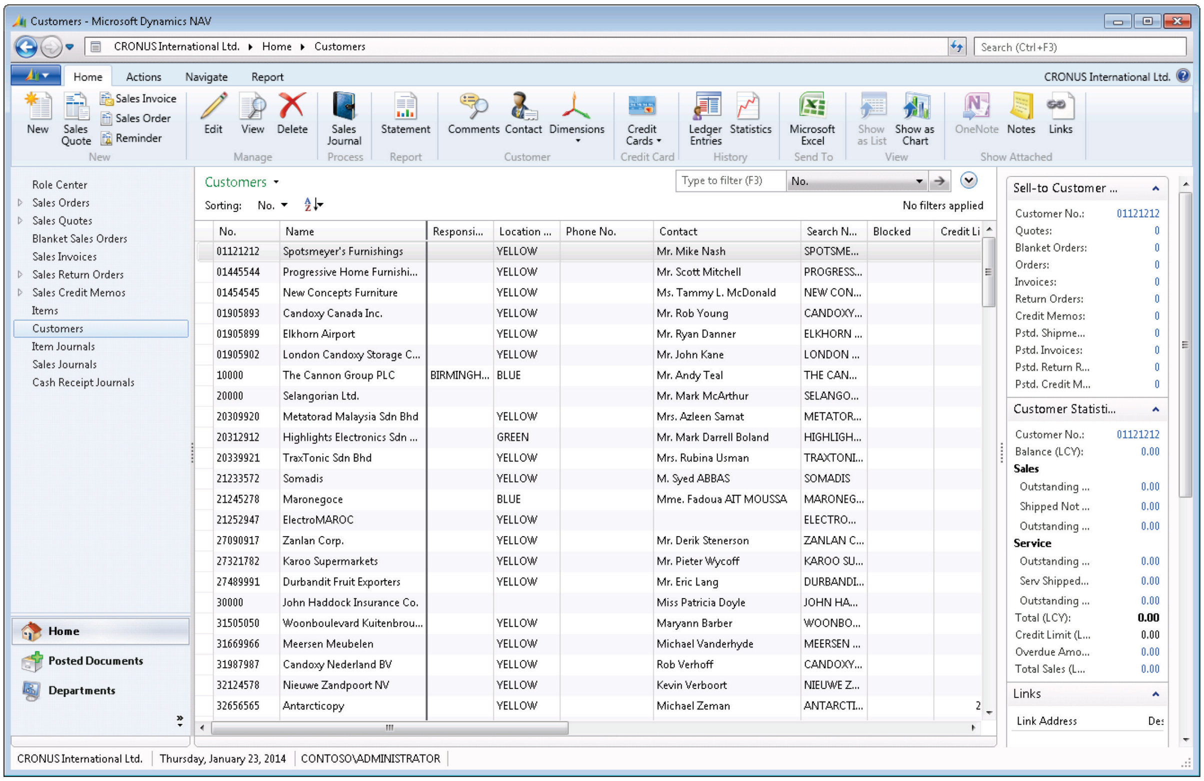


FIGURE 6.13: LIST PAGE WITH FACTBOX AND FILTER PANE

In the list page with FactBox and Filter Pane figure, the **Filter** pane appears above the list of customers, whereas the **FactBox** pane (containing three FactBoxes with related information for the selected customer) appears at the right side of the customer list.

Both panes can be shown or hidden directly from the **Customize** menu that opens when you click **Customize** in the application menu. However, they can also be shown or hidden by using the **Customize** dialog box.

Note: *Panes on a role center can only be hidden by using the* ***Customize*** *dialog box.*

To show or hide the **FactBox** and **Filter** panes using the **Customize** menu, follow these steps:

1. On the page that you want to customize, click **Customize > Customize This Page** in the application menu.
2. On the **Display options** pane, select the **Show FactBox Pane** option, the **Show Filter Pane** option, or both to display the corresponding FactBoxes. (To hide the panes, clear the check boxes.)
3. Click **OK** to close the customization dialog box.

When you close the customization dialog box, the page is updated.

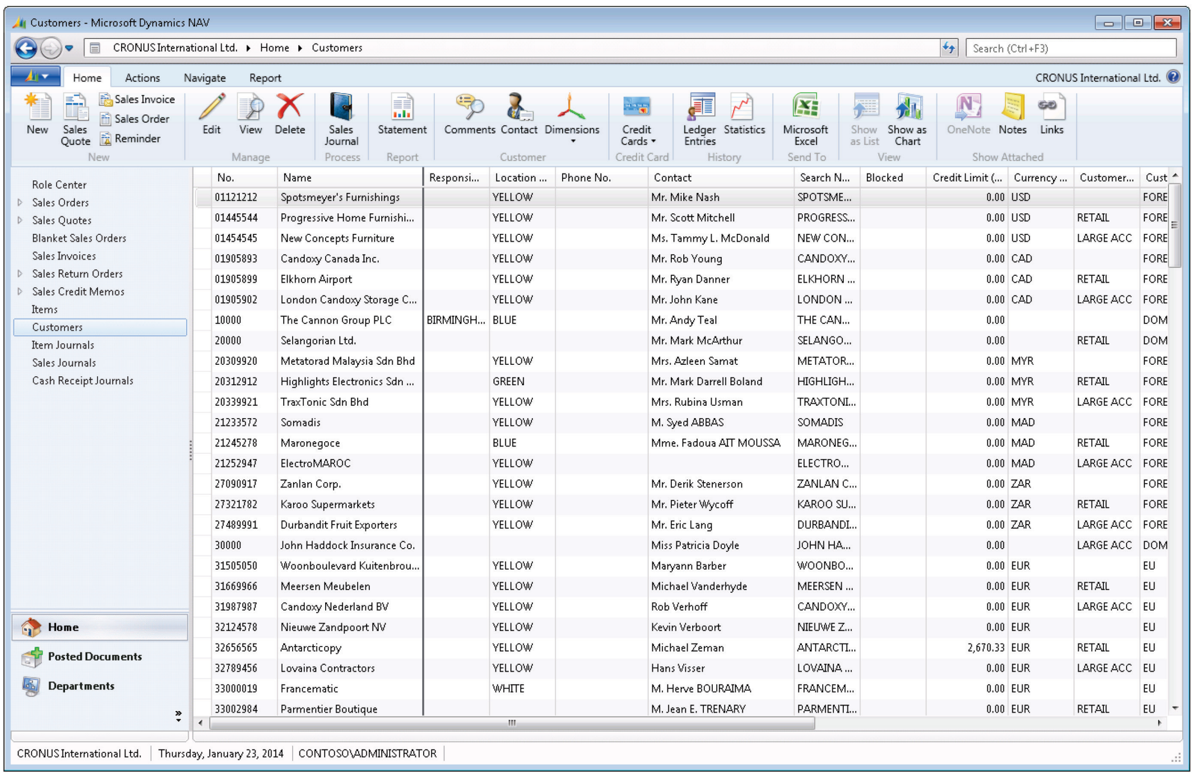


FIGURE 6.14: THE CUSTOMER LIST WITHOUT FACTBOX AND FILTER PANES

When you close the menu, the page or place updates with your changes.

Customize the Ribbon

The ribbon provides access to frequently used actions that relate to the selected information. The ribbon can contain different tabs. The actions in the ribbon are divided into groups, for example, New, Process, and Reports.

The Actions, Tabs, and Groups in the Ribbon illustrates:

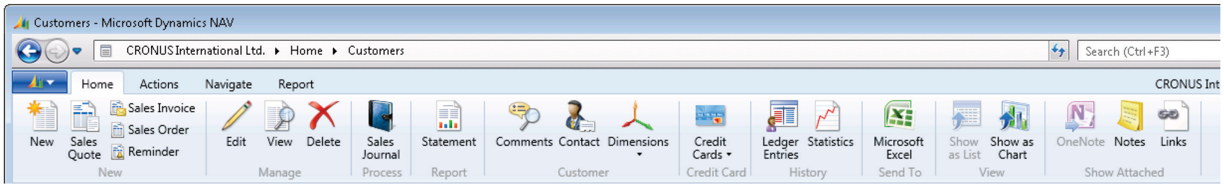


FIGURE 6.15: ACTIONS, TABS AND GROUPS IN THE RIBBON

In Microsoft Dynamics NAV, you can add new commands, new groups and new tabs to the ribbon (or you can remove and rearrange existing actions), so you can gain fast and easy access to relevant actions.

To customize the ribbon, click **Customize > Customize Ribbon** in the application menu. Or you can right-click the ribbon then click **Customize Ribbon** in the shortcut menu.

The Customizing the Ribbon for the Customer List figure shows the **Customize Ribbon** dialog box for the Customers List page.

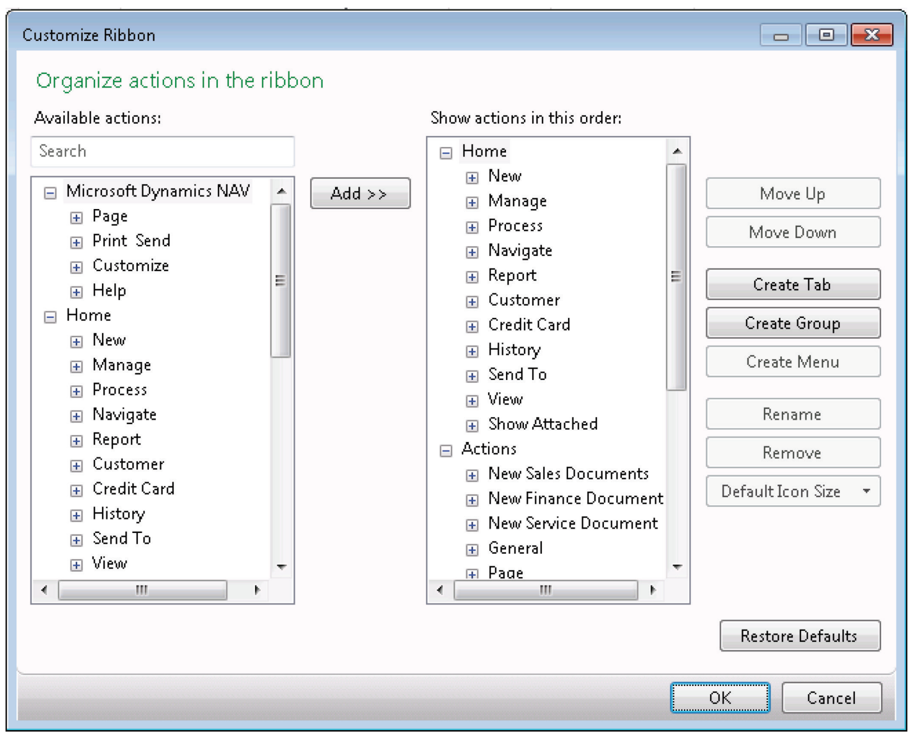


FIGURE 6.16: CUSTOMIZING THE RIBBON FOR THE CUSTOMER LIST

In the **Show actions in this order** list, you see the different tabs, groups, menus, and actions in the ribbon. You can see that there are four tabs: **Home**, **Actions**, **Navigate**, and **Report**. Each tab can contain different groups. For example, the **Home** tab contains seven groups: New, Manage, Process, Navigate, Report, View, and Show Attached. Each group can contain several menus and actions. For example, if you click the New group (on the **Home** tab), you see five actions in the group: **New**, **Sales Quote**, **Sales Invoice**, **Sales Order**, and **Reminder**.

Note: *In a group, you can also create a menu. A menu is a group of related actions. An example of a menu is the* ***Dimensions*** *menu, in the Customer group on the* ***Navigate*** *tab of the* ***Customer List*** *page.*

Note: *Empty tabs, groups, and menus are not visible in the ribbon. To make a tab visible, you must include at least one action in the group. You cannot add actions directly to a tab.*

Add or Remove a Tab

To create a new tab in the ribbon, follow these steps:

1. Open the page for which you want to change the ribbon.
2. Open the **Customize Ribbon** dialog box.
3. Click **Create Tab**.
4. Type a name for the new tab.

To remove a tab, proceed as follows

1. Open the page for which you want to change the ribbon.
2. Open the **Customize Ribbon** dialog box.
3. In the **Show actions in this order** list, select the tab to remove.
4. Click **Remove**.

The whole tab including all underlying groups, menus, and actions, is removed.

Add or Remove a Group

To create a new group in the ribbon, follow these steps:

1. Open the page for which you want to change the ribbon.
2. Open the **Customize Ribbon** dialog box.
3. Select the tab for which you want to create a group.
4. Click **Create Group**.
5. Type a name for the new group.

To remove a group, follow these steps:

1. Open the page for which you want to change the ribbon.
2. Open the **Customize Ribbon** dialog box.
3. In the **Show actions in this order** list, select the group to remove.
4. Click **Remove**.

The whole group, including all underlying menus and actions, is removed.

Add or Remove Actions

To add an action to a group in the ribbon, follow these steps:

1. Open the page for which you want to change the ribbon.
2. Open the **Customize Ribbon** dialog box.
3. In the **Show actions in this order** list, browse to the tab and select the group to which you want to add an action.
4. In the **Available actions** list, select the action that you want to add.
5. Click **Add**.

To remove an action in the ribbon, follow these steps:

1. Open the page for which you want to change the ribbon.
2. Open the **Customize Ribbon** dialog box.
3. In the **Show actions in this order** list, select the action to remove.
4. Click **Remove**.

Note: *You can also add or remove whole tabs and groups from the* ***Available actions*** *list.*

Change the size of an Action icon

Actions have a label and an icon. The icon for an action is defined during development. However, you can change the size of the icon by using the **Default Icon Size** button in the **Customize Ribbon** dialog box.

This button has the options of displaying an action icon as default size, small, or large.

When small or large is selected, the label of the button changes.

To change the size of an action icon, follow these steps:

1. Open the page for which you want to change the ribbon.
2. Open the **Customize Ribbon** dialog box.
3. In the **Show actions in this order** list, select the action for which you want to change the icon.
4. Click the sizing button to determine the appropriate icon size.
5. Click **OK**.

Note: *When you customize the ribbon from the* ***Customize Ribbon*** *window, some actions may not have the sizing button available.*

Actions that are added to the ***Home*** *tab by the developer in C/SIDE cannot have their icons customized.*

Restoring Default Settings

You can cancel all the changes that you have made (and saved) to the ribbon. This restores the default setting that was defined by your administrator for this particular page or list. To restore the default settings, click **Restore Defaults** and then click **OK**.

Expand and Collapse the Ribbon

By default, the ribbon is expanded and shows all groups in the selected tab. However, you can collapse the ribbon so only the tabs are shown in the interface.

The Collapsed Ribbon figure shows the collapsed ribbon for the **Posted Sales Shipment** list.

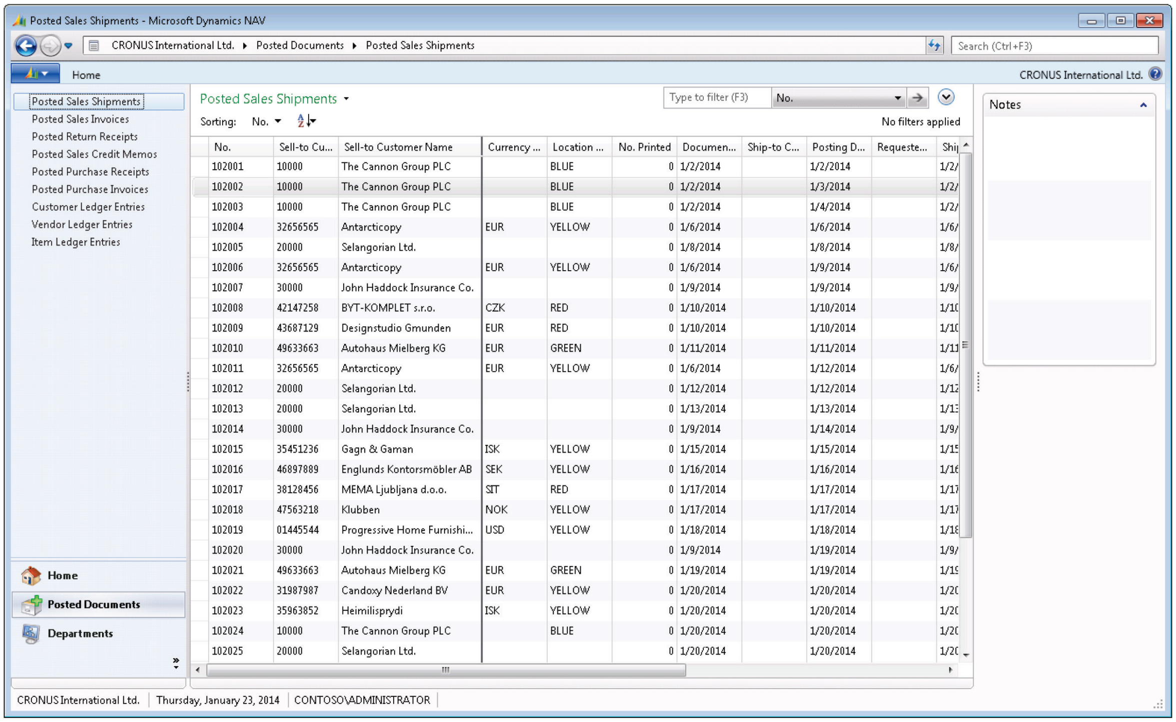


FIGURE 6.17: COLLAPSED RIBBON

To collapse the ribbon, right-click the ribbon and then click **Collapse Ribbon**. When collapsed, the ribbon can be expanded again by right-clicking the collapsed ribbon and clicking **Expand Ribbon**.

The collapse state of the ribbon applies by page: you can collapse the ribbon in the **Customer Card** page without having it collapsed in the **Item Card** page.

When the ribbon is collapsed, you can click the tab names to see the underlying groups and actions.

Customize the FactBox Pane

A FactBox is an area that is located on the right side of a page and displays data related to information about an item on the page. For example, on a list page that shows sales orders, you can use a FactBox to show additional fields of a selected sales order in the list.

The **FactBox** pane is a pane that is located at the right side of the content pane and that is used to display the FactBoxes included in a page. In the section "Add or Remove Filter and FactBox Panes" you have seen how you can enable or disable the whole **FactBox** pane by using the **Customize This Page** action. This section shows how you can add or remove FactBoxes in the **FactBox** pane.

To open the **Customize** dialog box to select FactBoxes, click **Customize > Customize This Page** on the application menu and then select **FactBoxes**.

The FactBoxes Customization Pane figure shows the FactBox customization pane for the **Customer List** page.

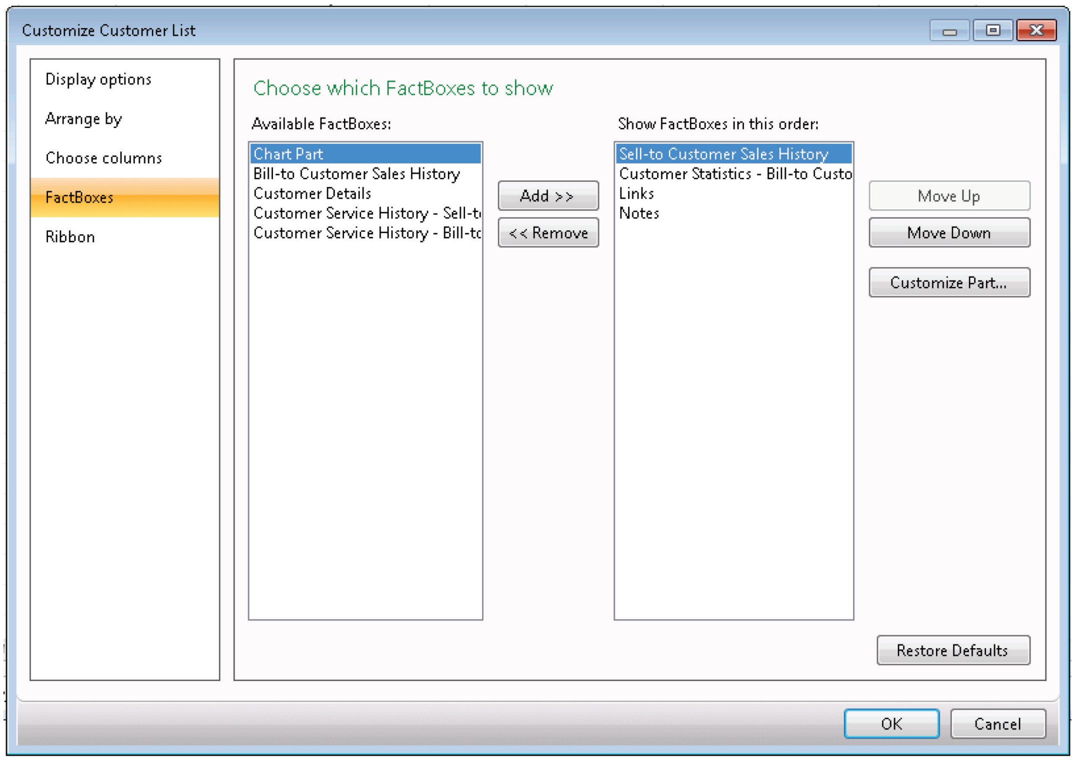


FIGURE 6.18: FACTBOXES CUSTOMIZATION PANE

In this pane you can select and customize the FactBoxes that appear.

Note: *You can directly open the **FactBoxes** pane of the **Customize** dialog box by clicking **Customize** > **Choose FactBoxes** in the application menu.*

Add and Remove FactBoxes

To remove a FactBox from the FactBox pane, follow these steps:

1. Open the **Customize** dialog box for the page.
2. Select the **FactBoxes** pane.
3. Select the FactBox to remove in the **Show FactBoxes in this order** list.
4. Click **Remove**.
5. Click **OK**.

To add a FactBox to the **FactBox** pane, follow these steps:

1. Open the **Customize** dialog box for the page.
2. Select the **FactBoxes** pane.
3. In the **Available FactBoxes** list, select the FactBoxes to add.
4. Click **Add**.
5. Click **OK**.

Change the Order of the FactBoxes

You can use the Customize dialog box to change the order of the FactBoxes in the FactBox pane. To do this, select the FactBox that you want to move in the Show FactBoxes in this order list and then click Move Up or Move Down to move the FactBox in the correct order. Repeat this procedure until the FactBox is where you want it.

Customize a FactBox

To customize the information that is shown in a FactBox, click the **Actions** icon in the FactBox title bar and then click **Customize**. The **Customize** dialog box for the selected FactBox appears.

The Select the Fields to Show in a FactBox figure shows the customization dialog box for the **Sell-to Customer Sales History** FactBox on the **Customer List** page.

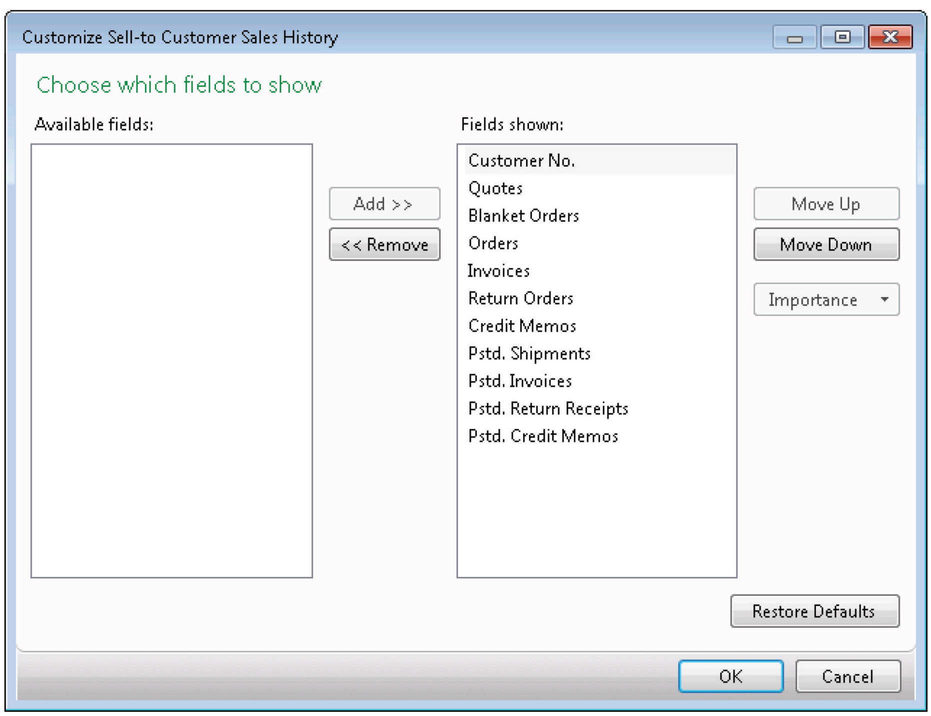


FIGURE 6.19: SELECT THE FIELDS TO SHOW IN A FACTBOX

In this window, you can select the fields or columns that appear. To add a field, select the field in the **Available Fields** list and then click **Add**. You can then change the order of the fields by clicking **Move Up** or **Move Down**.

To remove a field, select the field in the **Fields shown** list and then click **Remove**.

Customize FastTabs

You can arrange your FastTabs on a card page so that they support your typical working flow in the best possible way. For example, you can change the order of the FastTabs, show and hide fields, or make less important fields only appear when they are required. You can also promote fields on a FastTab, so the fields show on the FastTab when it is collapsed. This topic gives you a quick summary of the information on the FastTab.

To customize the FastTabs on a card page, click **Customize > Customize This Page** and then select the **FastTabs** pane.

The FastTabs Customization Dialog Box figure shows the FastTabs customization dialog box for the **Customer Card** page:

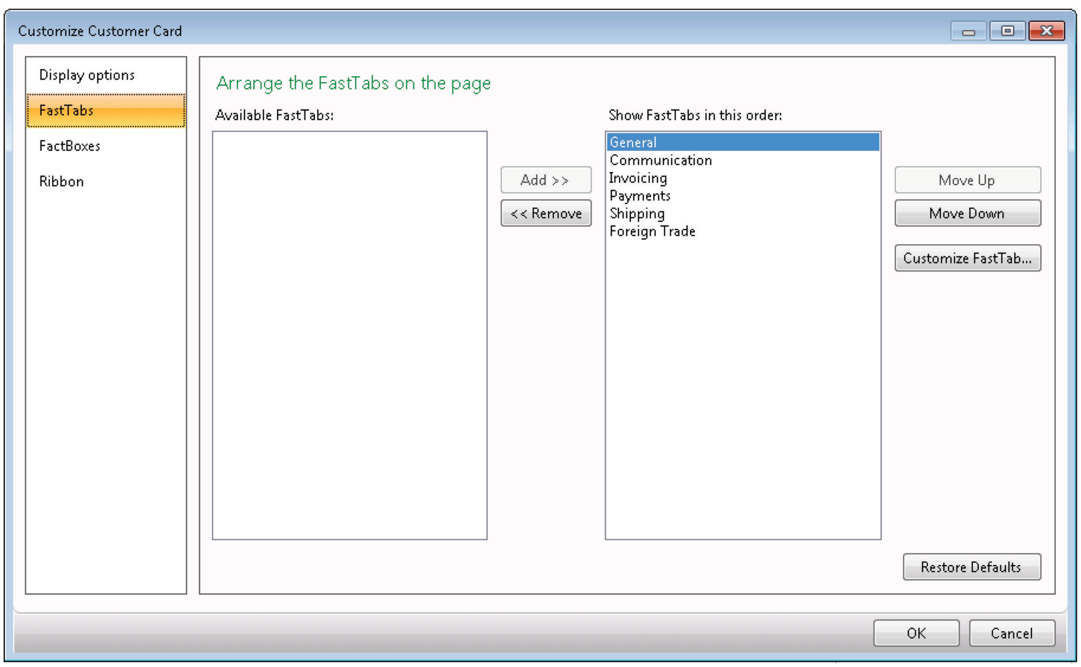


FIGURE 6.20: FASTTABS CUSTOMIZATION DIALOG BOX

You can add FastTabs by selecting a FastTab in the **Available FastTabs** list and clicking **Add**. To remove a FastTab, select the FastTab In the **Show FastTabs in this order** list and then click **Remove**.

To change the display order of the FastTabs, select the FastTab in the **Show FastTabs in this order** list and then click **Move Up** or **Move Down**.

To define the fields shown on a FastTab, select the FastTab in the **Show FastTabs in this order** list and then click **Customize FastTab**. Now you can select the fields to show on the FastTab. You can also change the priority of each field by using the **Importance** button.

The FastTab Customization Dialog Box figure shows the FastTab customization dialog box for the **Foreign Trade** FastTab of the **Customer Card** page.

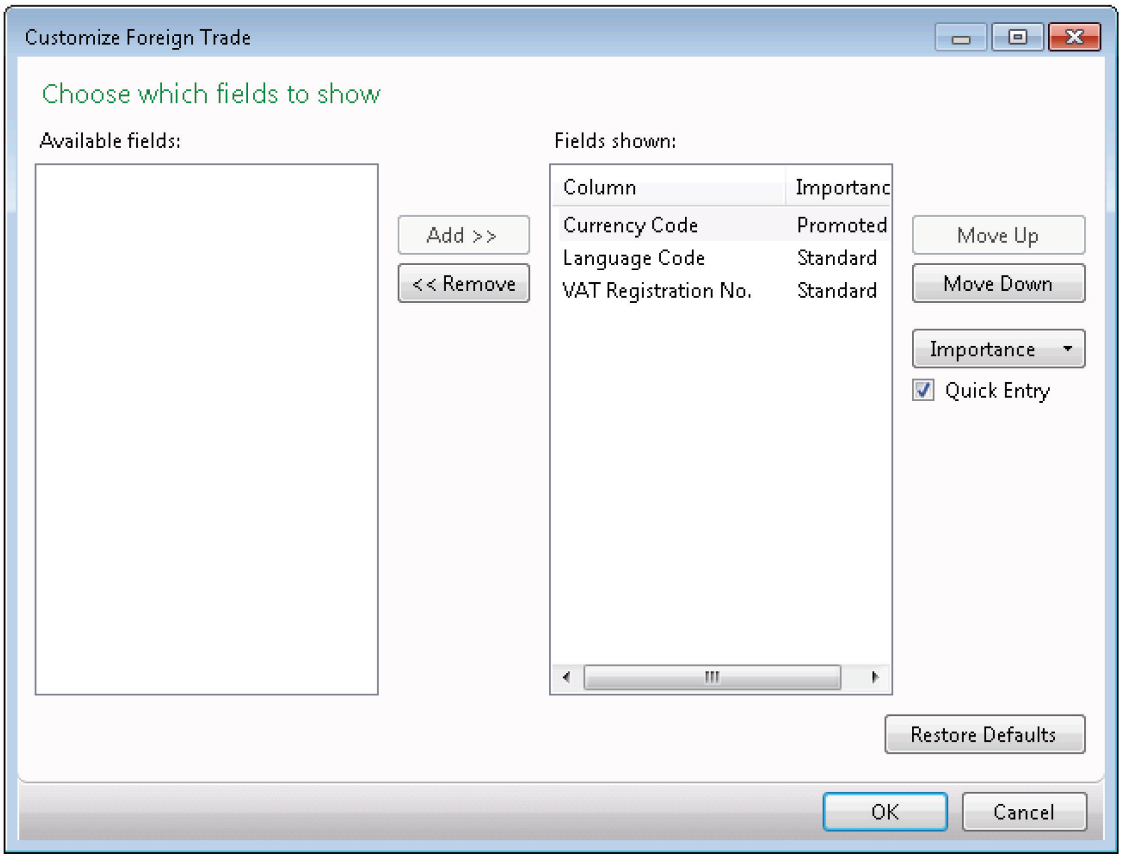


FIGURE 6.21: FASTTAB CUSTOMIZATION DIALOG BOX

There are three priority levels for fields:

Importance Level	Description
Promoted	The fields appear on the **Collapsed** FastTab. This is used for very important fields.
Standard	Regularly used fields appear when you expand the FastTab.
Additional	Additional fields are hidden until you click the drop-down arrow in the lower-right corner of the expanded FastTab.

Lab 6.1: RoleTailored Client for Windows Personalization

Scenario

Tim wants to make end-user documentation for specific processes in the company. He makes sure that all users who have a specific profile have the same user interface, so the documentation matches the user interface on screen.

To start, Tim configures the role center for the Sales Order Processor profile. He removes the My Items List, and he adds the Connect Online and the My Job Queue parts.

Exercise 1: Configure the Sales Order Processor role center

Exercise Scenario

Tim configures the role center for the Sales Order Processor profile. He removes the My Items List, and he adds the Connect Online and the My Job Queue parts.

Task 1: Verify Ownership

High Level Steps

1. Verify ownership of the profile.

Detailed Steps

1. Verify ownership of the profile.
   a. Open the RoleTailored client for Windows, and then either search for or open the **Profiles** page.
   b. Double-click **ORDER PROCESSOR** to open the **Sales Order Processor** profile card.
   c. In the **Owner ID** field, click the **AssistEdit** button and then select your CONTOSO\ADMINISTRATOR.
   d. Click **OK** to close the window.

Task 2: Start in Configuration Mode

High Level Steps

1. Start RoleTailored client for Windows in configuration mode.

Detailed Steps

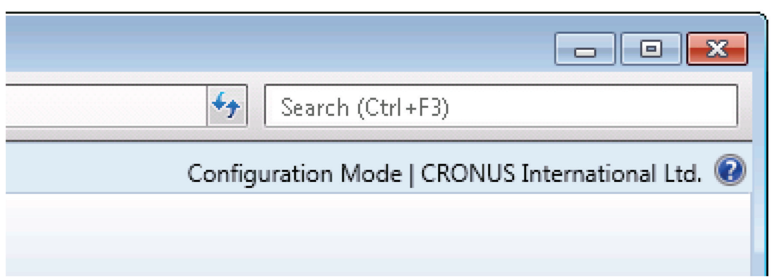
1. Start RoleTailored client for Windows in configuration mode.
   a. Open a command prompt.
   b. Change to the directory that contains the RoleTailored client for Windows executable. For example, type the following command:

```
cd C:\Program Files (x86)\Microsoft Dynamics NAV\70\RoleTailored Client
```

   c. Open the RoleTailored client for Windows in configuration mode by typing the following command:

```
Microsoft.Dynamics.Nav.Client.exe -configure -profile:"order processor"
```

The RoleTailored client for Windows opens in configuration mode. You can check this in the upper-right corner:



Task 3: Customize the Role Center page

High Level Steps

1. Customize the Role Center page.
2. Add Connect Online part.
3. Add My Job Queue part.
4. Remove My Items part.
5. Close the customization dialog box.

Detailed Steps

1. Customize the Role Center page.
   a. On the **Sales Order Processor Role Center page**, click **Customize > Customize This Page** in the application menu.

2. Add Connect Online part.
   a. In the **Customize the Role Center** dialog box, in the **Role Center layout** list, select the **Microsoft Outlook** part.
   b. In the **Available parts** list, select **Connect Online**.
   c. Click **Add**.

3. Add My Job Queue part.
   a. In the **Customize the Role Center** dialog box, in the **Role Center layout** list, select the **My Notifications** part.
   b. In the **Available parts** list, select **My Job Queue**.
   c. Click **Add**.
   d. Click **Move Up** to place the My Job Queue part above the My Notifications part.

4. Remove My Items part.
   a. In the **Customize the Role Center** dialog box, in the **Role Center layout** list, select the **My Items** part.
   b. Click **Remove**.

5. Close the customization dialog box.
   a. Click **OK** to close the **Customize the Role Center** dialog box.

Task 4: Close the RoleTailored Client for Windows

High Level Steps

1. Close the RoleTailored client for Windows.

Detailed Steps

1. Close the RoleTailored client for Windows.
   a. Click **Exit** in the application menu to close the RoleTailored client for Windows and exit the configuration mode.

Module Review

Module Review and Takeaways

The navigation pane can be customized in many ways by using the **Customize Navigation Pane** dialog box.

These navigation pane customizations allow the user to personalize the interface as follows:

- Rename or rearrange buttons in the navigation pane.
- Create a new menu button.
- Add a link to a menu in the navigation pane.
- Move or copying a link from one menu to a another.
- Rearrange the order of the menu.
- Restore the default settings.

Customizing pages enables a user to personalize various aspects of the RoleTailored client for Windows user interface. The following are changes that you can make to the Microsoft Dynamics NAV 2013 user interface:

- Customize the ribbon.
- Customize the **FactBox** pane.
- Customize the FactBoxes.
- Add or remove **Filter** and **FactBox** panes.
- Customize FastTabs.

Test Your Knowledge

Test your knowledge with the following questions.

1. What is the true about personalization and configuration?

   ( ) Configuration applies to all users who have a specific profile, and personalization applies to a single user.

   ( ) Configuration is performed by administrators and personalization can only be done by end-users.

   ( ) Personalization is always possible. It cannot be disabled.

   ( ) Personalization lets you change fonts and configuration lets you change the color scheme in the user interface.

2. Which command can you use to start the RoleTailored client for Windows in Configuration mode for the IT Administrator profile?

   ( ) Microsoft.Dynamics.Nav.Client.exe -configure 9018

   ( ) Microsoft.Dynamics.Nav.Client.exe -configure –profile:9018

   ( ) Microsoft.Dynamics.Nav.Client.exe -configure –profile:"IT Administrator"

   ( ) Microsoft.Dynamics.Nav.Client.exe -configure "IT Administrator"

Test Your Knowledge Solutions

Module Review and Takeaways

1. What is the true about personalization and configuration?

   (√) Configuration applies to all users who have a specific profile, and personalization applies to a single user.

   ( ) Configuration is performed by administrators and personalization can only be done by end-users.

   ( ) Personalization is always possible. It cannot be disabled.

   ( ) Personalization lets you change fonts and configuration lets you change the color scheme in the user interface.

2. Which command can you use to start the RoleTailored client for Windows in Configuration mode for the IT Administrator profile?

   ( ) Microsoft.Dynamics.Nav.Client.exe -configure 9018

   ( ) Microsoft.Dynamics.Nav.Client.exe -configure –profile:9018

   (√) Microsoft.Dynamics.Nav.Client.exe -configure –profile:"IT Administrator"

   ( ) Microsoft.Dynamics.Nav.Client.exe -configure "IT Administrator"