# MODULE 2: USER INTERFACE

Module Overview

This module introduces the general concepts of the user interface design in Microsoft Dynamics® NAV 2013. With the user interface, you can focus, prioritize, and apply your expertise. Key data is visualized so that you better understand your business.

The user interface has different components, which are discussed in this module.
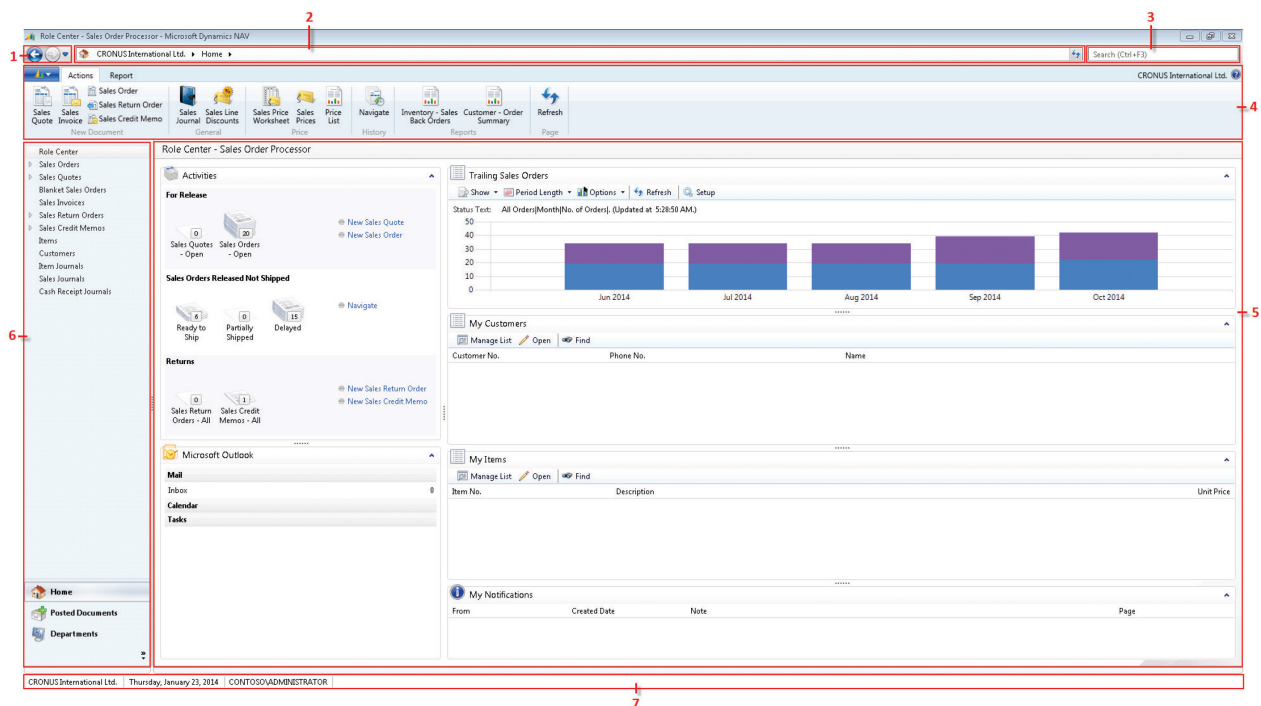
FIGURE 2.1: THE MICROSOFT DYNAMICS NAV 2013 USER INTERFACE

The Microsoft Dynamics NAV 2013 User Interface image shows the following components of the user interface:

1. **Back** and **Forward** buttons
2. Address bar
3. Search
4. Ribbon
5. Role Center page
6. Navigation pane
7. Status bar

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Objectives

The objectives are:

- Explain the **Back** and **Forward** button, the address bar, and search.
- Explain the concept of the ribbon.
- Explain the different components of the ribbon.
- Show how to use the ribbon.
- Explore the navigation pane.
- List the information that is available on the status bar.
- Explain how to use the list page.
- Explain how to use the card page.
- Explore the Role Center.

Back and Forward Button, Address Bar, Search

At the top the user interface, you can see the following components:

- **Back** and **Forward** buttons
- Address Bar
- Search

Back and Forward Button

Back and forward buttons on the controls of Microsoft Dynamics NAV to the left of the address bar enable you to move through pages that you have previously visited.

When you use these buttons, you can see the path in the address bar changing.

If you click the drop-down button, at the right side of the **Forward** button, you see the travel history. It shows you a list of previously visited pages, and it makes it easy to return to a specific one.

Address Bar

The address bar shows the path of your present page. You can also move within Microsoft Dynamics NAV 2013 by clicking the name or arrow buttons and making your selection.

At the right side of the address bar, you can find the refresh button.

📋 **Note:** *To update the active window, you can also use the keyboard shortcut F5.*


Search

You can find any page, report, or view present on the **Departments** page of your installation by using the **Search** field in the upper-right corner of the address bar.

When you start to type characters in the **Search** field, a drop-down list shows page names that contain the characters that you type. The drop-down list changes as you type more characters, and you can select the correct page from the list when it is displayed. The second column in the drop-down list shows the navigation paths to the found pages, and it is sorted by the structure of the **Departments** page.

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✺The Ribbon

A ribbon is a command bar that organizes a program's features into a series of tabs at the top of a window. Using a ribbon increases discoverability of features and functions, enables quicker learning of the program, and makes users feel more in control of their experience. A ribbon can replace both the traditional menu bar and toolbars.

In Microsoft Dynamics NAV 2013, the ribbon is available on most pages and visible by default.
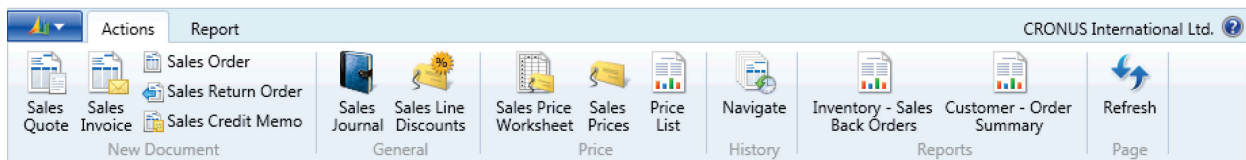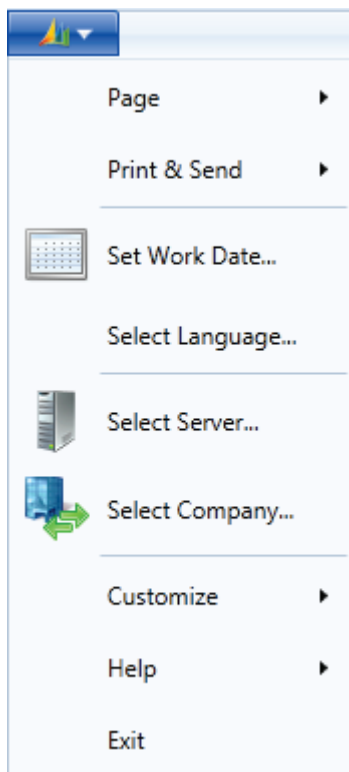

FIGURE 2.2: MICROSOFT DYNAMICS NAV 2013 RIBBON

Press CTRL+F1 to toggle between collapsing and expanding the ribbon. This creates more space for the current page to display. To move in the ribbon, you can either use the mouse or keyboard shortcuts. Press the ALT key to display keyboard shortcuts in the ribbon.

From all pages where the ribbon is visible, the ribbon can be customized to help you be more productive. The "User Personalization" module discusses this.

Microsoft Dynamics Application Menu

At the upper-left side of the ribbon, you can find the **Application** menu. If you click this button, you see a drop-down menu with several options.

FIGURE 2.3: MICROSOFT DYNAMICS APPLICATION MENU

Name	Description
Page	When you click on **Page,** you see a submenu with the following options: • **Open in New Window** – Opens the page in a new window. This means that you can toggle between the different pages. • **Copy Link to Page** – Copies the link of the active page to the clipboard. You can paste the link to, for example, Microsoft Word. From there, you can then run the page. These options are not available on the **Role Center** page.

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Name	Description
Print & Send	The **Print & Send** function has following options: • **Email as Attachment** – Creates an HTML file of the active page. The file is attached to a new email message. • **Microsoft Word** – Exports your data to Microsoft Word. • **Microsoft Excel** – Exports your data to Microsoft Excel. • **Print Page** – Prints the active page. These options are not available on the **Role Center** page.
Set Work Date	The default work date is the date that is specified in the **Date and Time** dialog box in Control Panel. To perform tasks such as completing transactions for a date that is not the current date, you may have to temporarily change the work date. Use this function to change the work date.
Select Language	Microsoft Dynamics NAV is multilanguage enabled. If other languages are installed, with this option, you can change the language that the application uses.
Select Server	Use this function to select the server. If you want to select a company that is stored in a different database, then you must select the server before you can open the company.
Select Company	You may have to change the company that you are working with. The companies that you work with can be stored in the same database or in different databases. Use this option to select a company. You can also open the **Select Company** window by selecting the company name in the status bar at the bottom of the program window or by pressing CTRL+O.
Customize	When you click **Customize**, you see a submenu with different customize options that you can use to change the layout of the user interface. The different customize options are explained in the "User Personalization" module.

Name	Description

Help	When you click **Help**, you see a submenu with the following options:
	
	• **Microsoft Dynamics NAV Help** – The goal of the Help for Microsoft Dynamics NAV is to provide the information you need quickly and efficiently.
	
	• **Page Notes** - You can set up Microsoft Dynamics NAV to work with Microsoft OneNote 2010. With this option, you can open the notes of the active page in Microsoft OneNote 2010.
	
	• **About this Page** – Use this function to see more information about a page. This function shows all the fields for the current record in the table on which the page is based. For example, if you open a sales order page, click **Help**, and then click **About This Page**, the **About This Page: Sales Order** window opens. The **About This Page** window shows the following FastTabs:
	
	   o Page Information
	   o **Table Fields**, sorted first by key fields, and then alphabetically
	   o Source Expressions
	   o FlowFilter Fields
	   o Filters
	
	• **About Microsoft Dynamics NAV** – Displays version, license, and copyright information about Microsoft Dynamics NAV.

Exit	Use this function to exit Microsoft Dynamics NAV 2013.

About Multilingual Functionality

Microsoft Dynamics NAV is multilingual enabled. This means that a localized version of Microsoft Dynamics NAV can present itself in different languages. The user can change the language that is used to display texts. The client prompts the user and restarts automatically for the language change to take effect.

Do not confuse the multilingual capability with localized versions. A localized version of Microsoft Dynamics NAV is one that is adapted to a local market. This means that all texts presented to the user are translated into the local language. However, it also means that functional areas are adapted to the requirements of the local market.

A multilingual version of Microsoft Dynamics NAV is a localized version that you can run in different languages while all other local adaptations remain the same. For example, you can run the Swiss version of Microsoft Dynamics NAV in German, French, and Italian. However, it is still a Swiss version of Microsoft Dynamics NAV in all other ways. It differs from, say, a French version of Microsoft Dynamics NAV.

Be aware of the difference between changing the language of Microsoft Dynamics NAV and changing the language of the data that is stored in Microsoft Dynamics NAV. You can address the first issue by enabling the multilingual features. These features let the user change the language of all the texts displayed by the application in captions for text boxes, on command buttons, in menus, and in various other features of the user interface.

Changing the texts that are stored as application data is not part of the multilingual capability. This is an application design issue. Examples of such texts are the names of items in the inventory or the comments for a customer. In other words, these types of texts are not translated.

In addition, the profiles are also multilingual. The profiles included in the North America (NA) version contain captions in the following four languages: en-US, en-CA, fr-CA and es-MX. All other local builds have bilingual profiles only. For example, the German build has en-US and de-DE. A user can personalize a caption or action group in one language. However, be aware that when the profile is viewed in another language, this caption is not translated as it is part of a personalization or a configuration. If the user wants the new caption to be in the new language, the user can rename the caption or action group. The profile is then bilingual.

Demonstration: Set the Work Date

Scenario: Phyllis, the accounting manager at CRONUS International Ltd., wants to use the general journal to enter some year-end transactions for fiscal year 2013.

To have the system suggest the posting date of 31 December, 2013, she changes the work date to 12/31/2013.

Demonstration Steps

1. Change the work date to 12/31/2013.

   a. Click the **Application** menu, and then click **Set Work Date**.

   b. In the **Work Date** field, enter 12/31/2013.

Or, you can change the work date as follows:

   a. Click the **Application** menu > **Set Work Date**.

   b. In the **Work Date** field, click the drop-down arrow.

   c. To change the year, click the year currently shown (for example, 2013).

   d. Select a year from the list, or click the forward or backward arrows to find a particular year.

   e. To change the month, click the month currently shown (for example, December) or click the forward or backward arrows to move from one year to the next.

   f. Select a date (for example, 31).

   g. Click **OK**.

Select a Server

In Microsoft Dynamics NAV, you may have to change the company that you are working with sometimes. The companies that you work with can be stored in the same database or in different databases. If the company is stored in a different database, you must select the server before you open the company.

To select a server and open a company, follow these steps:

1. Click the **Application** menu > **Select Server**.

2. In the **Server Address** field, enter the URL of the server to which you want to connect. Make sure that the URL follows this format: *servername*/DynamicsNAV, where *servername* is the name of the computer on which the service is installed.

3. Press TAB or click in the **Available Companies** field to continue.

4. In the **Available Companies** field, select the company that you want to open.

5. Click **OK**.

📑 *Note: Use the **Select Server** option with the current default to quickly restart the system.*
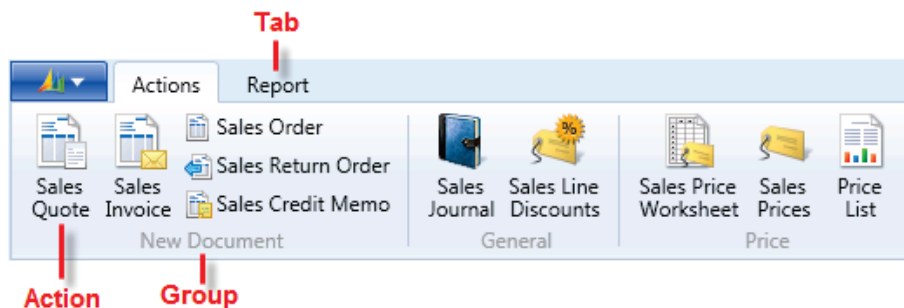
Select a Company

To select or change a company, follow these steps:

1. Click the **Application** menu> **Select Company**.
2. Click the drop-down arrow from the **Company** field, and select a company.
3. Click **OK**.

The Ribbon Structure

The ribbon consists of the following components:

- Tabs
- Groups
- Actions

FIGURE 2.4: RIBBON STRUCTURE

Tabs

The ribbon organizes a program's features into a series of tabs at the top of a window. In Microsoft Dynamics NAV 2013 the following tabs are generally used:

- **Home** - Contains the most frequently used actions, navigation options, and reports related to the active page. If available, it is always the first tab.

- **Actions –** Contains the full set of actions related to the active page.

- **Navigate –** Contains the full set of navigation options related to the active page. With these options, you can retrieve additional information on the records of the active pages, such as ledger entries and statistics.

- **Report –** Contains the full set of reports related to the active page. For example, the customer list page shows reports such as the **Customer – Top 10 List** on the **Report** tab of the ribbon.

Groups

Dividing commands into groups structures the commands into related sets. The group label explains the common purpose of its commands.

Examples of groups typically used in Microsoft Dynamics NAV 2013 are as follows:

- New
- Manage
- Process
- Report
- View
- Functions

Actions

The actions on the ribbon give you single-click access to functions and data.

📋 **Note:** *You can change the existing layout of the ribbon by creating new tabs and groups, or by adding or removing actions from existing groups and tabs.*

The "User Personalization" module of this course explains how to customize the ribbon.

The Navigation Pane

The navigation pane appears on the left side of the user interface. You use the navigation pane to switch between different menus, such as **Home** and **Departments**.

From the navigation pane, you can open list places. An example of a list place is the customer list. From a list place, you can open individual cards or documents. The 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.

At a minimum, the navigation pane contains the following menus:

- **Home**
- **Departments**

Depending on your user profile, various activity buttons may be available, such as the following:

- **Posted Documents** - The **Posted Documents** menu contains the posted documents that are most frequently used by your user role.

- **Other** - Your navigation pane may also contain custom-made activity buttons that are made especially for your user role.
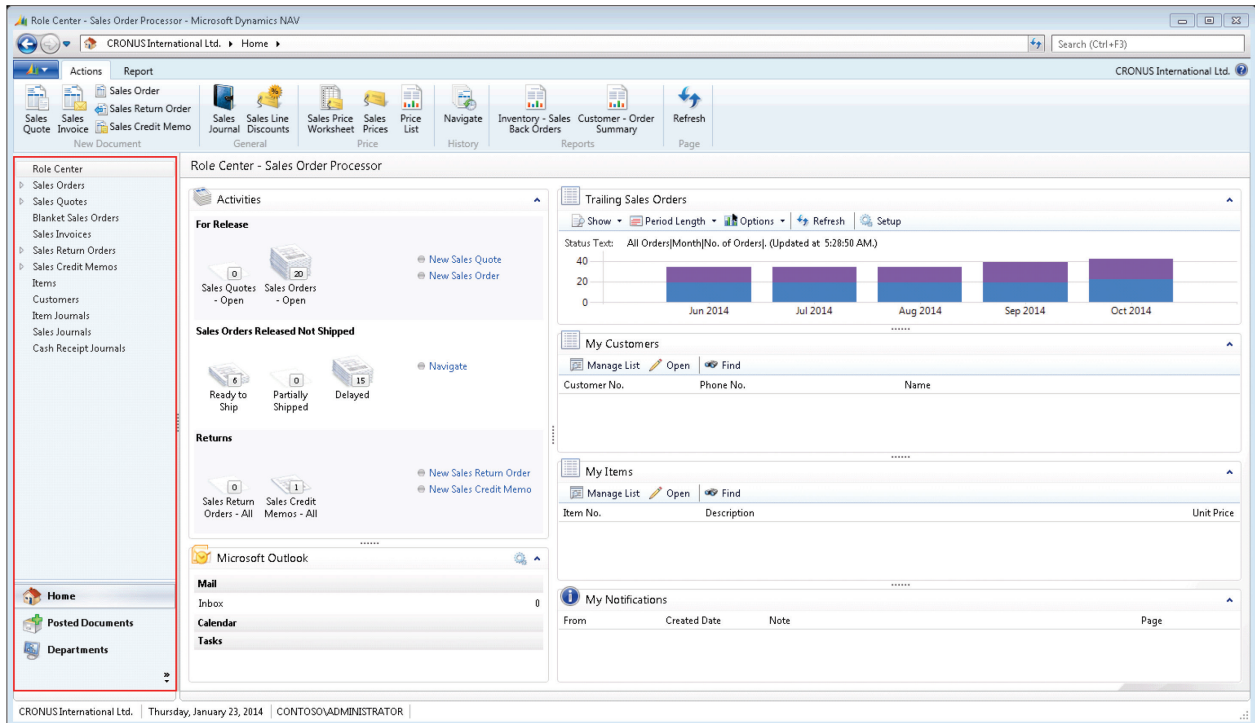

FIGURE 2.5: MICROSOFT DYNAMICS NAV 2013 USER INTERFACE WITH NAVIGATION PANE

The Home Menu

The **Home** menu is a default activity button in navigation pane of the Windows client that displays items that link to List Places. The **Home** menu is designed for your user role. It contains your Role Center, plus all the list places that are most frequently used in your role in addition to relevant views of list places.

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If you are running the CRONUS International Ltd. demo database, the default Role Center is the **Order Processor** Role Center.
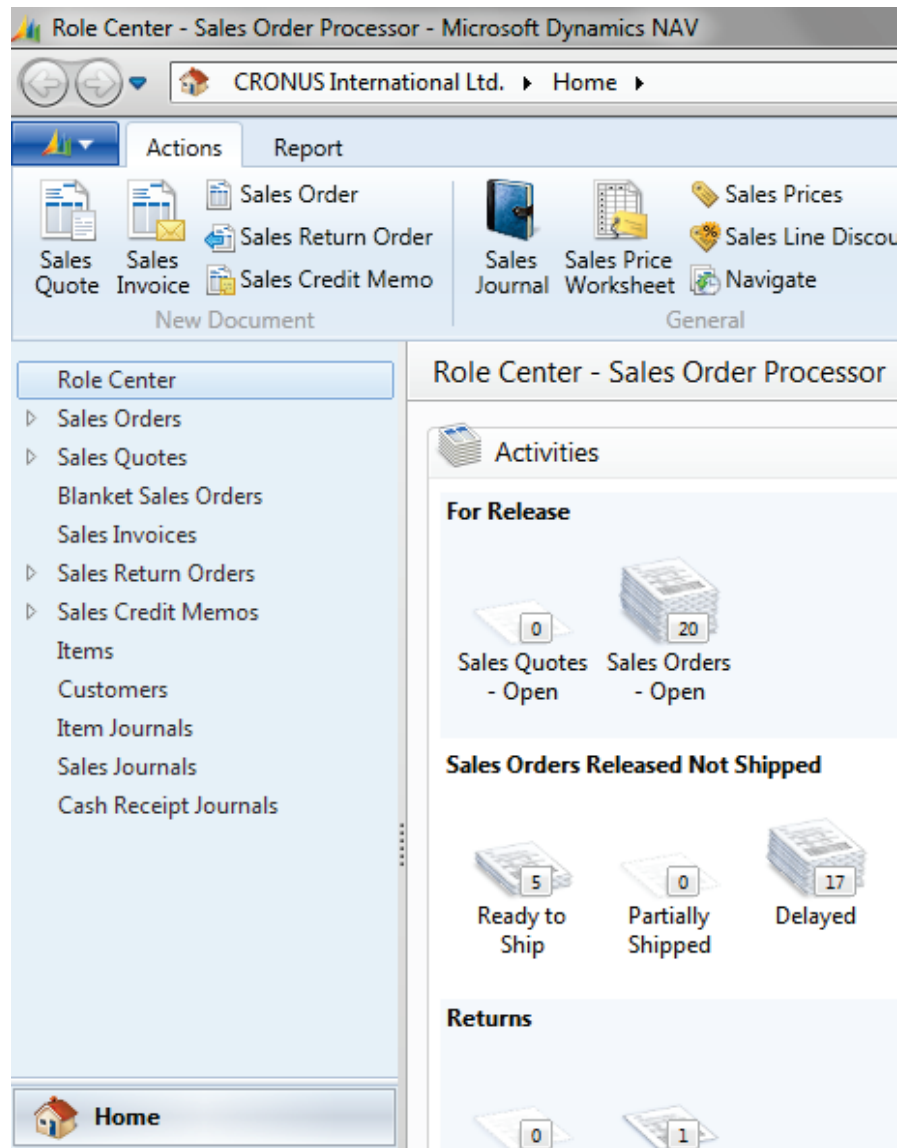
**FIGURE 2.6: THE SALES ORDER PROCESSOR HOME MENU**

You can customize the **Home** menu by adding and hiding items. The "User Personalization module" explains how to customize the navigation pane.

The Departments Page

From the **Departments** page, you can access all 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** activity button.

Every user is assigned a job-related profile by the administrator. Your profile gives you a Role Center and one or more activity buttons that you can use to access the tasks, lists, reports, and documents that you use most frequently. In addition, users typically have access to the **Departments** page.

From the **Departments** page, you can browse to everything in Microsoft Dynamics NAV to which you have access, including setup and configuration pages.
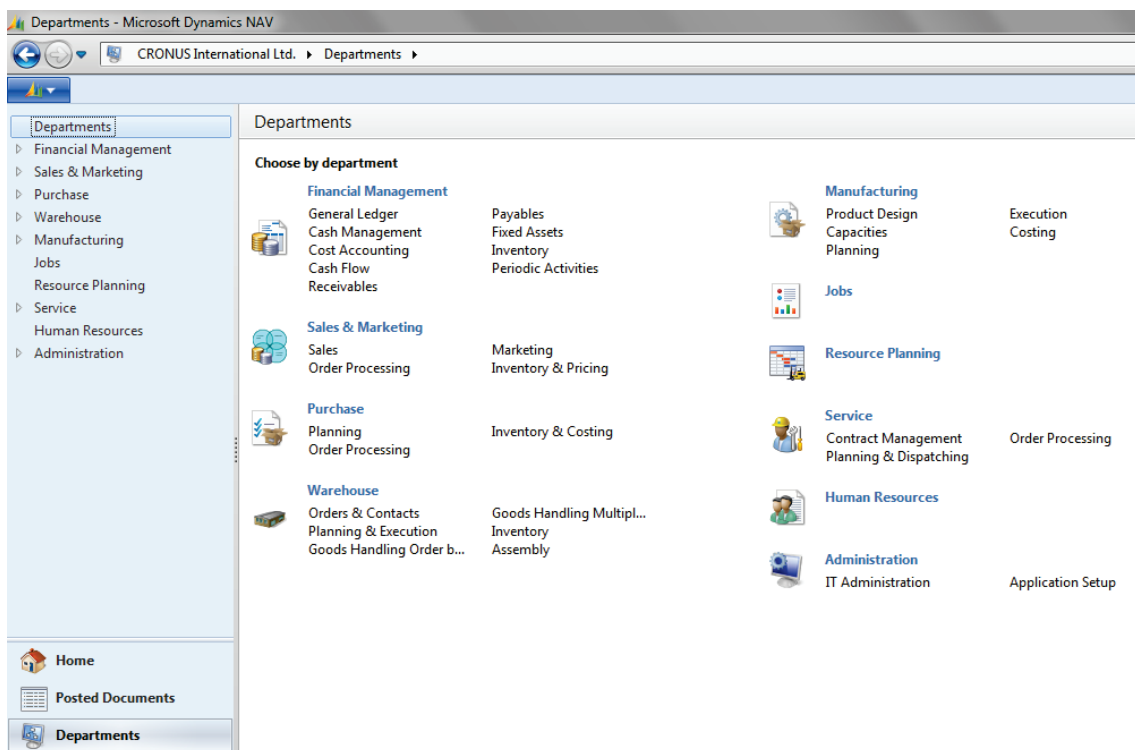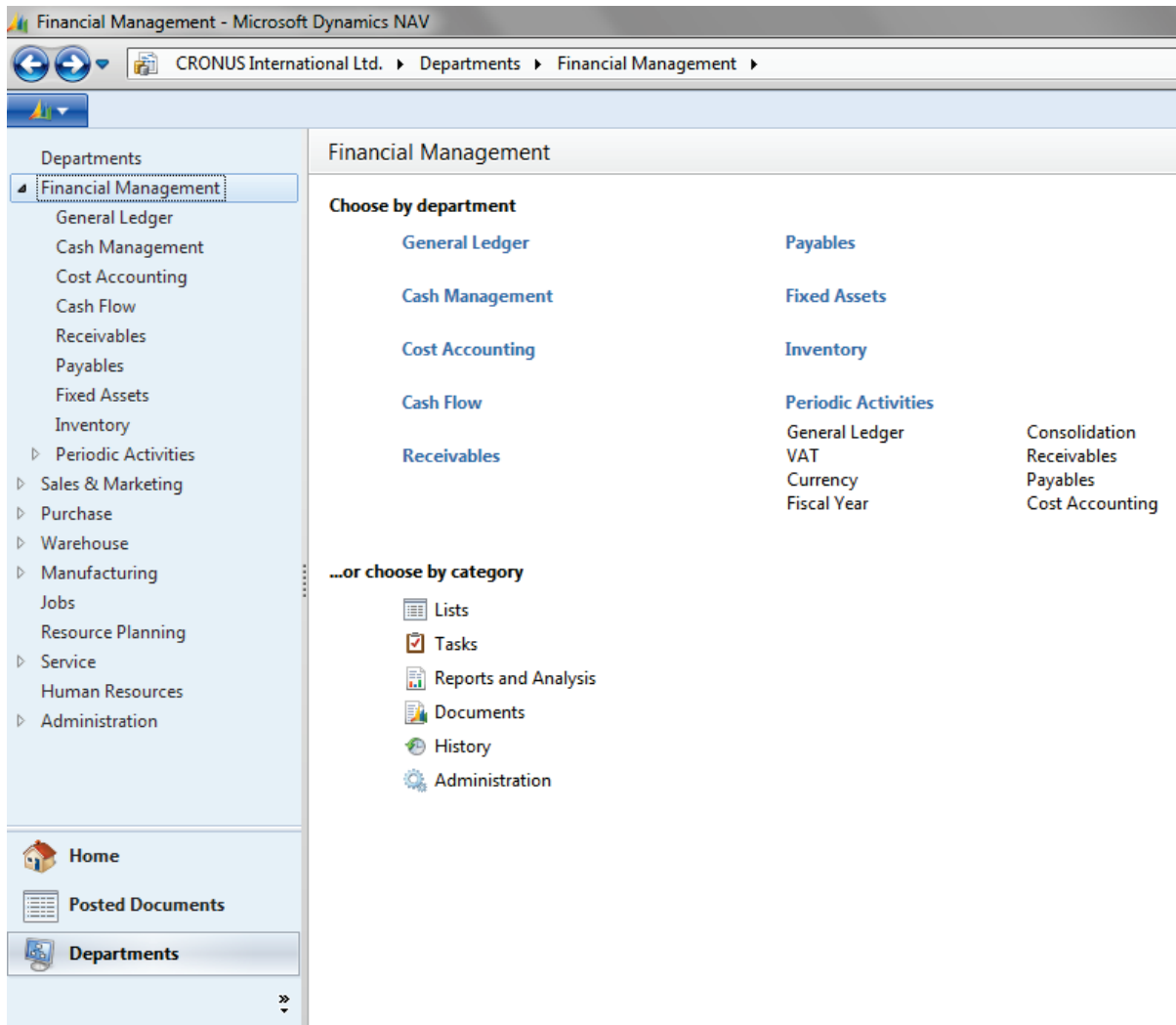

FIGURE 2.7: THE DEPARTMENTS PAGE

When you click a department, you have different navigation options available. You can browse to other departments. For example, from financial management, you can browse to general ledger.

You can also make a selection by one of the following categories:

- Lists

- Tasks

- Reports and Analysis

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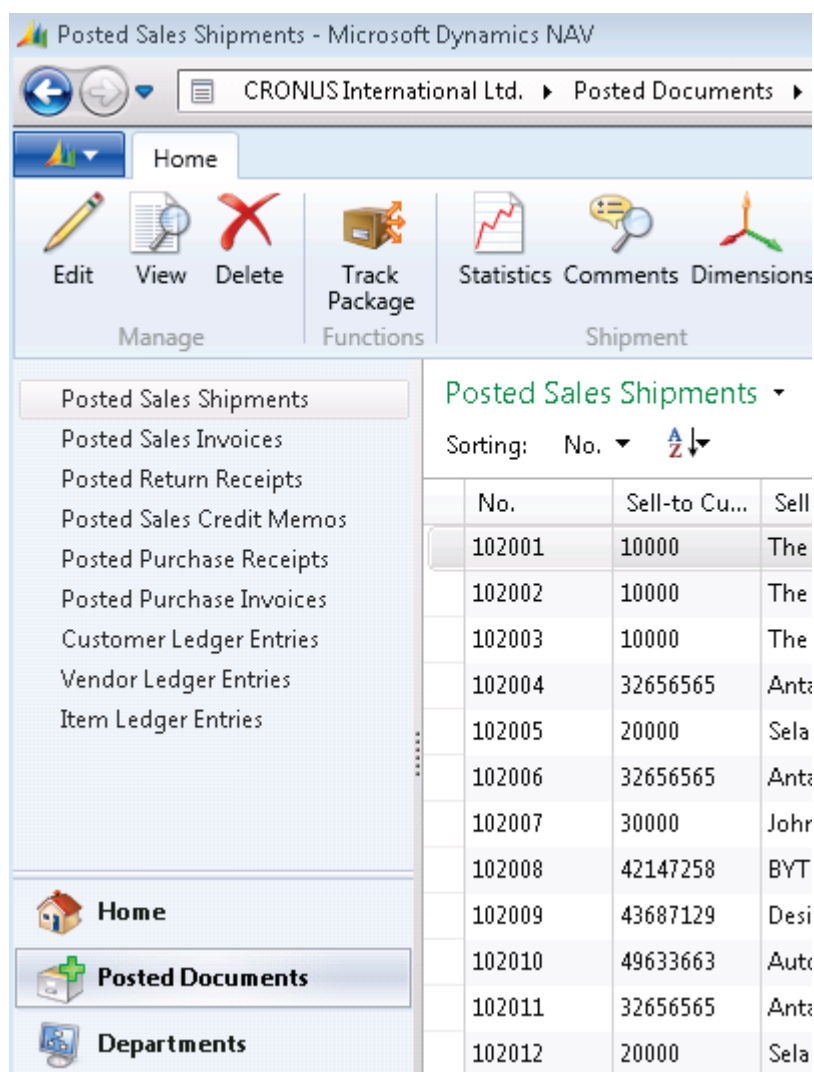- Documents

- History

- Administration

FIGURE 2.8: THE DEPARTMENTS PAGE – FINANCIAL MANAGAEMENT

> 📓 *Note: You can hide the **Departments** menu for a user or a profile. Refer to the "User Personalization" module for more information about how to hide the **Departments** menu.*

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Additional Navigation Pane Activity Buttons

In addition to the **Home** and **Departments** activity buttons, you can also reach several other navigation pane activity buttons. These additional buttons can be predefined in your user profile, but you can also create new activity buttons. An example of a regularly used additional button is the **Posted Documents** menu, in which you can find an overview of posted sales and purchase documents.

FIGURE 2.9: THE POSTED DOCUMENTS ACTIVITY BUTTON

**Note:** *The "User Personalization" module explains how to create new navigation pane buttons.*

The Status Bar

The status bar at the bottom of the program window shows the following information:

- The name of the active company
- The work date
- The current user ID

You can change the active company by double-clicking the company name in the status bar. This opens the **Select Company** window, where you can switch to another company name.

Similarly, you can change the work date by double-clicking the work date in the status bar. The **Set Work Date** window opens so you can change the work date.

| CRONUS International Ltd. | Thursday, January 23, 2014 | CONTOSO\ADMINISTRATOR | |
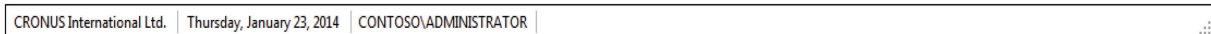
FIGURE 2.10: THE STATUS BAR

Pages

In Microsoft Dynamics NAV 2013, pages are the main way to display and organize data. Pages offer a visual experience closely aligned to Microsoft Office and Windows.

In the Windows client, every user has a Role Center page, customized to the individual needs and tasks that each user performs. Other types of pages, such as list pages might display lists of customers or sales orders, whereas others such as document pages, focus on user tasks.

The following page types are available:

- Card
- List
- Role Center
- Card Part
- List Part
- Document
- Worksheet
- Confirmation Dialog
- List Plus
- Navigate Page (Wizard)
- Standard Dialog

This lesson explains how to use two of the most used page types: the list page and the card page.

List Page

A list page displays content from a table in a list format. List pages can be displayed as list places (as part of the navigation layer) or in task pages.

Most records in the database are presented first in list places, one for each record type, such as Sales Orders, Items, Cash Receipt Journals, and Posted Sales Shipments. List places may be filtered by default configuration, such as Sales Orders, Partially Shipped, and you can set your own filters to limit the number of records shown.
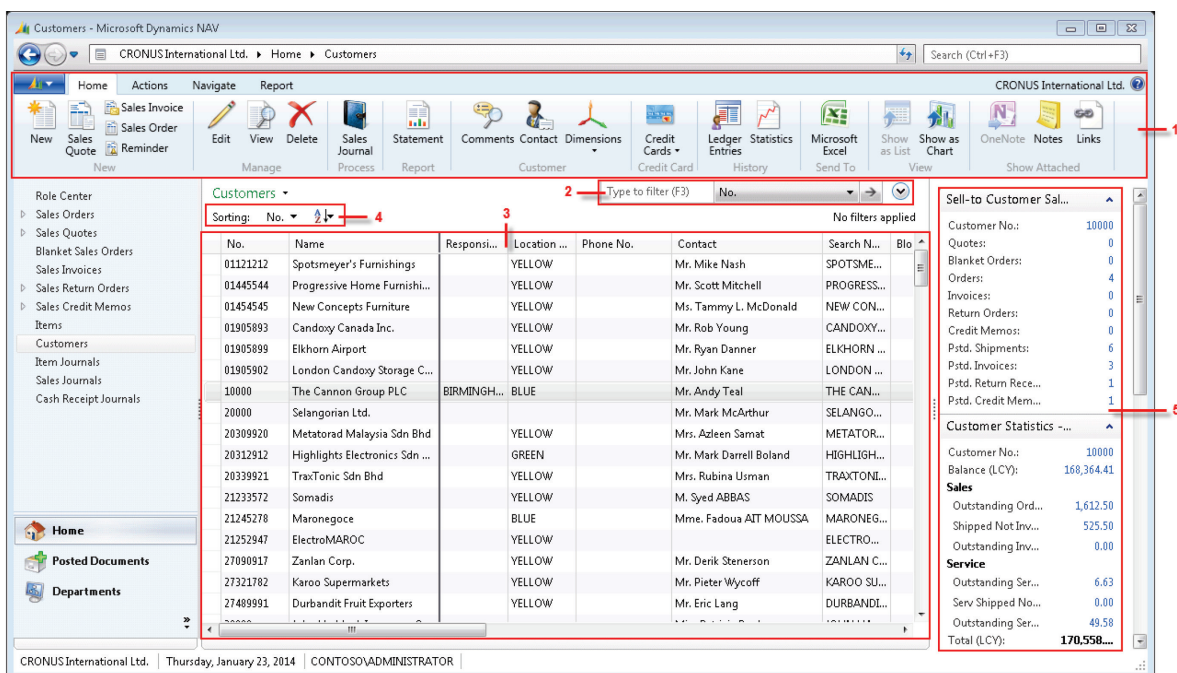

FIGURE 2.11: CUSTOMERS LIST PAGE

A list page has the following components:

1. Ribbon
2. Filter pane
3. List
4. Sorting pane
5. FactBox pane

If you double-click (or press ENTER) on a line in the list, the record opens in a new window in the default mode (Edit, View, or New) of that particular record, for example **View** mode if it is a posted document.

Filter Pane

You use filters to display certain accounts, customers, entries, or other records by specifying criteria for fields in a table. You can use the filter pane on a page to specify a single field filter.

If you want to filter on more than one field, then you must use the **Advanced Filter** function on the filter pane.

The filter pane in list pages can also be used to create Views at the navigation pane. When a filter is defined and you expect to use it again, you can streamline your work by using the **Save View As** function.

📑   **Note:** *The "Basic Functionalities" module explains how to filter information in Microsoft Dynamics NAV 2013.*

FactBox

FactBoxes on list places and task pages give you additional information about the selected record. This means that you can quickly find related information about, for example, an order or a customer. This helps you make solid business decisions in a timely manner.

For example, on the **Customers** list place, you can use the **Customer Sales History** FactBox for 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 other information so that you can drill-down to the document that you want.

You can specify which FactBoxes you want to display on a page. You can also show and hide FactBox fields. You can add FactBoxes from the list available, but you can only add various charts to what can be selected. The "User Personalization" module explains how to customize FactBoxes.

Card Page

You use a card page to view and edit one record or entity from a table. The card page displays selected fields from the table. An example of how to use a card page is for editing a customer.
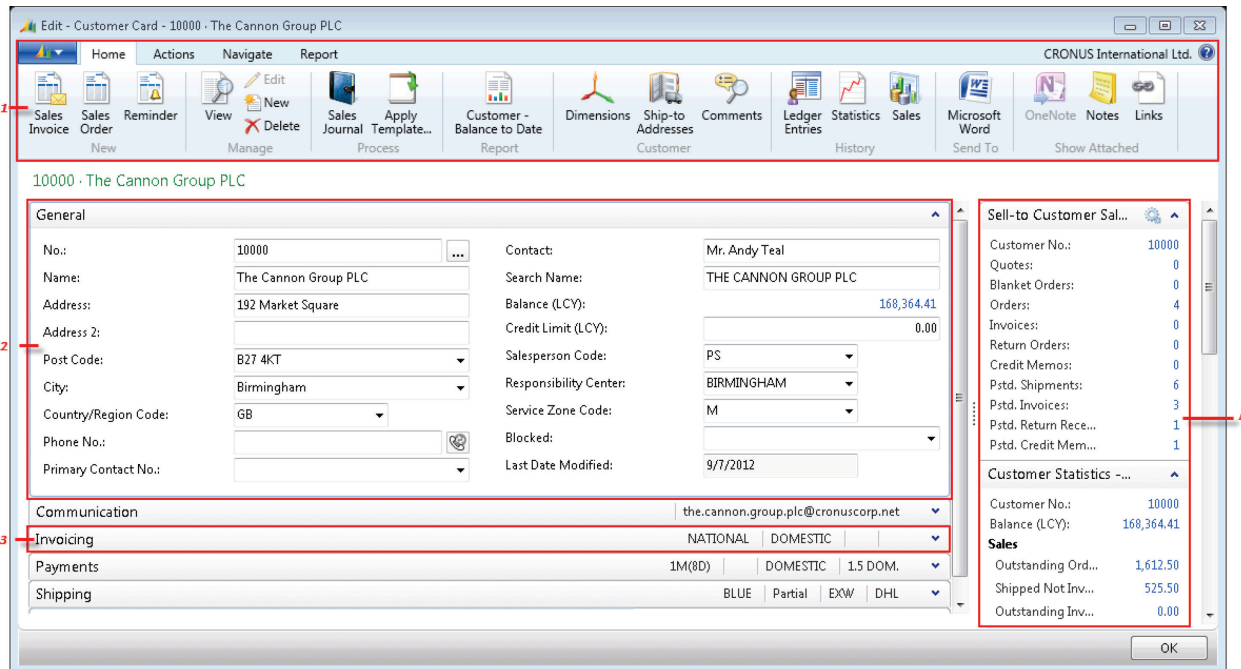

FIGURE 2.12: CUSTOMER CARD PAGE

A card page has the following components:

1. Ribbon
2. Expanded FastTab
3. Collapsed FastTab
4. FactBox pane

FastTab

FastTabs organize data in separate groups on a page. You can expand and collapse FastTabs so that you can control how much information you see at one time. To expand or collapse a FastTab, click the small arrow on the far right of the band.

You can promote fields from a FastTab to show on the FastTab header when the band is collapsed. This enables you to view important summary information without expanding the FastTab.

The "User Personalization" module explains how to promote fields and how to display or hide fields on a FastTab.

The Role Center

The Role Center is the central point for all information and actions that you perform in Microsoft Dynamics NAV 2013. It provides a quick overview of tasks and transactions related to your job role. Additionally, Microsoft® Outlook® is integrated within the interface. This provides flexibility in being able to work with Microsoft Dynamics 2013 and Outlook at the same time.

Microsoft Dynamics NAV provides several different Role Centers for users who have different jobs in a company. Your administrator assigns you a user profile and can customize the Role Center to make sure that it presents the information that you need for your job. Then you can make additional adjustments to make the user interface fit your work habits.

The Role Center can include the following parts:

- Activities
- Outlook
- Charts
- My Notifications
- Lists
- Online information

Activities

The **Activities** part contains stacks of documents. These are known as Cues. Select a Cue to open the corresponding list or journal.

The **Activities** part also shows the default activities that people can perform based on their job role. For example, the order processor activities that can be performed include creating a new sales order and creating a new sales quote.
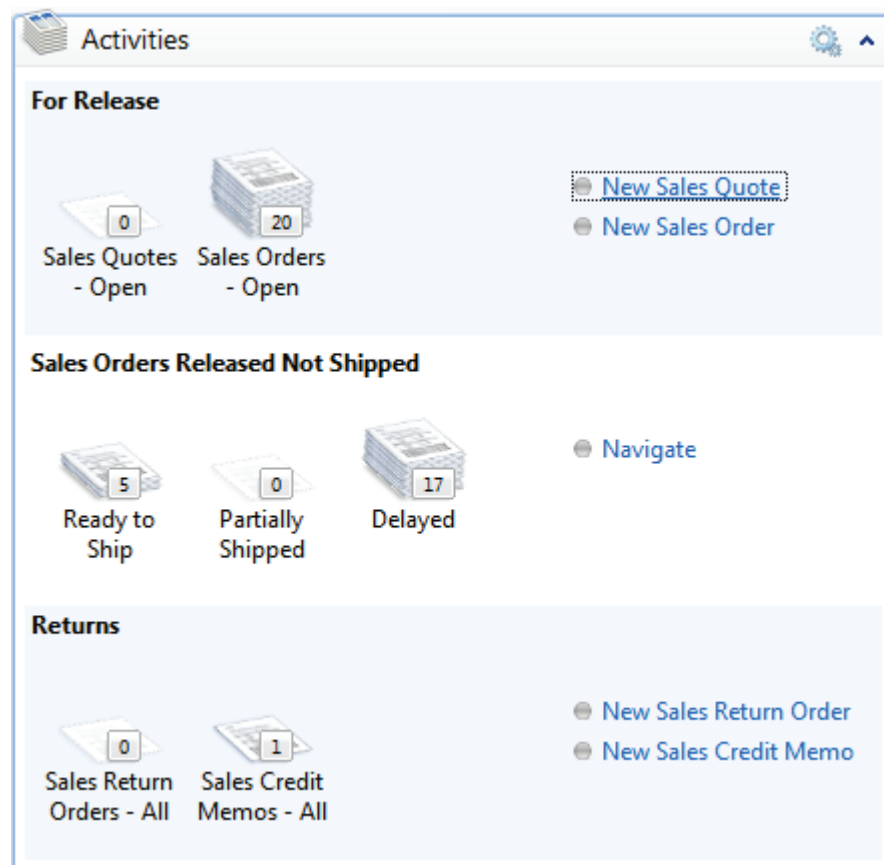
FIGURE 2.13: ORDER PROCESSOR ACTIVITIES PART

Outlook

The Outlook part provides an overview of your email messages, calendar, and Outlook tasks. You can click an item to open the corresponding folder, email message, or appointment in Outlook.
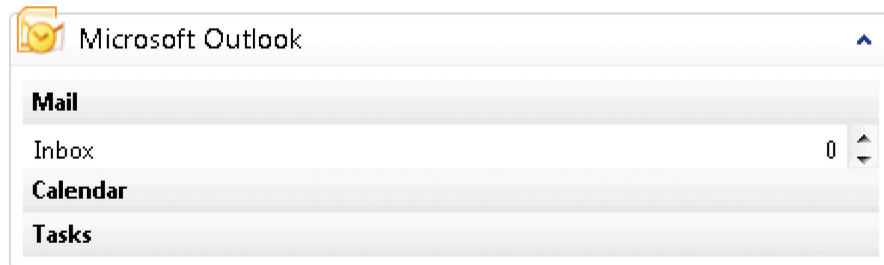

FIGURE 2.14: OUTLOOK PART

Charts

Your Role Center may contain one or more graphs that display information that is relevant to your work. Rest the pointer over a part of the chart to see the related data in text. If you click a part of a chart, you see a list of the records on which the part of the chart is based.
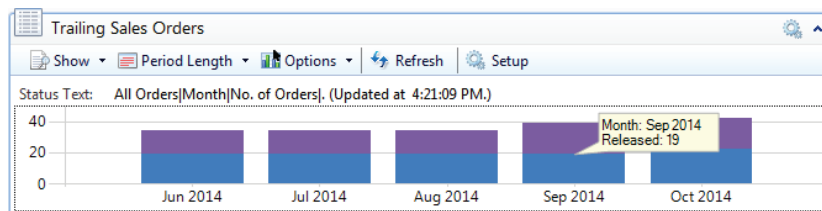

**FIGURE 2.15: TRAILING SALES ORDERS CHART PART**

📋   **Note:** The "User Personalization" module explains how to customize charts and chart parts.

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My Notifications

In the My Notifications part, you can see notes that your colleagues have sent to you. You can click a note to open the document that is related to the message.

From the **Actions** button, you have the following options:

- **Open Page** – Open the record that is related to the notification.
- **View Notification** – View the full text in a note.
- **Remove Notification** – Delete a notification.
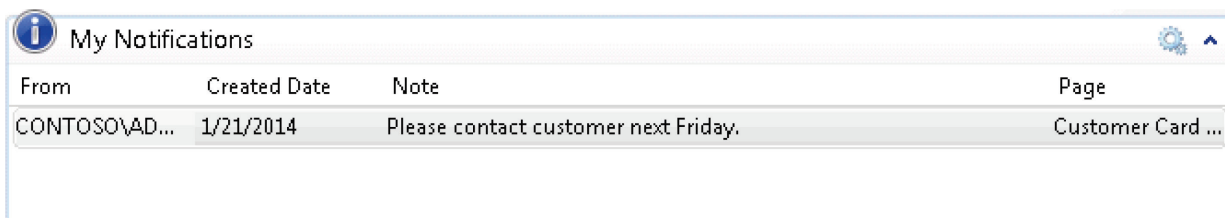
FIGURE 2.16: MY NOTIFICATIONS PART

On list places and tasks pages, you can add and use notes much like on a Role Center.

Lists

Your Role Center 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 **Open**, you can open the card for the customer, vendor, or item.
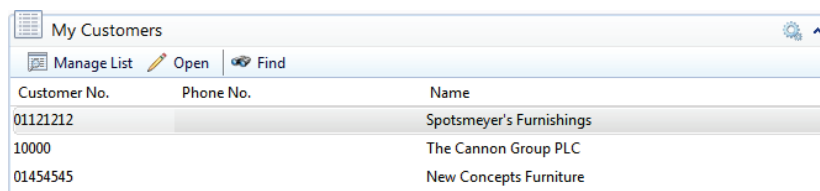
**FIGURE 2.17: MY CUSTOMERS LIST PART**

Your user profile defines which lists are available in your Role Center. For example, the order processor profile has the **My Customers** and **My Items** lists available, but it does not contain the **My Vendors** list.

Online Information

You can have live product and business information displayed as a continuous slide show on your Role Center with links that you can select to open a website and read the full content.

The content is automatically filtered according to your role or according to your logon to the Microsoft Dynamics Online Community service.
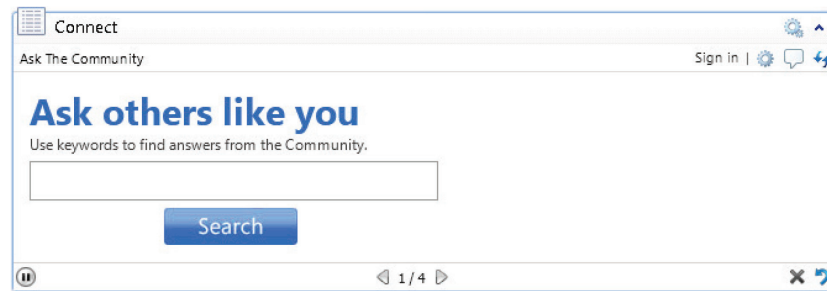
FIGURE 2.18: CONNECT PART

Default Role Center

Role Centers are associated with user profiles to provide only the information and activities that a profile is generally interested in. You can customize a Role Center to include or remove additional information and activities related to a profile.

If a user has no user profile assigned, then the default Role Center is applied for that user. You can also change the default Role Center that opens when you open the Windows client for Microsoft Dynamics NAV 2013.

Lab: Assign a Role Center

Scenario

You are the accounting manager at CRONUS International Ltd., and uses the default Role Center (Sales Order Processor). However, this Role Center is not aligned with your daily activities. Therefore you are advised to use the accounting manager profile.

Assign the accounting manager profile to your user account.

High Level Steps

1. Open your **User Personalization** card.
2. Assign the ACCOUNTING MANAGER profile.

Detailed Steps

1. Open your **User Personalization** card.

   a. In the **Search** box, enter **User Personalization**, and click the related link.

   b. Double-click the line with your user ID to open the **User Personalization** card.

> 📓 **Note:** *You can find your user account on the status bar.*

2. Assign the ACCOUNTING MANAGER profile.

   a. In the **Profile ID** field, click the drop-down, and select the ACCOUNTING MANAGER profile ID.

   b. Click **OK**.

> 📓 **Note:** *The new Role Center takes effect the next time that you start Microsoft Dynamics NAV 2013 with your Windows user account.*

Module Review

Module Review and Takeaways

The Microsoft Dynamics NAV 2013 user interface gives you a quick overview of the information relevant to your job and lets you focus on your own tasks. Having a general understanding of the different components, such as the Role Center, the ribbon, the navigation pane, and the pages, is important to start exploring the personalization options of the user interface.

Test Your Knowledge

Test your knowledge with the following questions.

1. What can you use the **Search** box for?

    ( ) To find any page, report, or view present on the Departments page.

    ( ) To find any page, report, or form present on the Departments page.

    ( ) To find any page or report present on the Departments page.

    ( ) To find any page, report, or view present on the Home page.

2. Name some of the advantages of the ribbon?

    _____

    _____

    _____

    _____

3. Which of the following statements about the navigation pane is true?

    ( ) You can remove the Home menu.

    ( ) You cannot remove the Departments menu.

    ( ) At a minimum, the navigation pane contains the Home and the Departments menu.

Test Your Knowledge Solutions

Module Review and Takeaways

1. What can you use the **Search** box for?

   (√) To find any page, report, or view present on the Departments page.

   ( ) To find any page, report, or form present on the Departments page.

   ( ) To find any page or report present on the Departments page.

   ( ) To find any page, report, or view present on the Home page.

2. Name some of the advantages of the ribbon?

   MODEL ANSWER:

   Using a ribbon increases discoverability of features and functions, enables quicker learning of the program, and makes users feel more in control of their experience. A ribbon can replace both the traditional menu bar and toolbars.

3. Which of the following statements about the navigation pane is true?

   (√) You can remove the Home menu.

   ( ) You cannot remove the Departments menu.

   ( ) At a minimum, the navigation pane contains the Home and the Departments menu.