RoleTailoring
Microsoft Dynamics® NAV

A comprehensive guide to setting up Role Centers and profiles in

Microsoft Dynamics NAV 2015 and earlier versions

Foreword by Niels-Erik Hansen, Roletailors.com

Peik Bech-Andersen

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Bech-Andersen Consult ApS

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Foreword

In the autumn of 2008 Microsoft Dynamics NAV 2009 was launched introducing the RoleTailored Client to the market for the very first time. The initiative of changing the former Navision product from a functional rich ERP application platform into a more user centric business solution didn't just pop out of the blue. Torben Wind, one of the original founders of Navision Software, was the architect behind the RoleTailored Client supported by a great team of Navision professionals and sponsored by Microsoft CEO, Satya Nadella, who was the Corporate Vice President for Microsoft Dynamics until 2007.

The constant development of IT technologies enabled the team to leverage on a three tier platform separating the business logic from the presentation layer and the RoleTailored User Experienced was born.

For the end users a lot of potential benefits was revealed, for example; an instant overview over essential job tasks, fewer clicks and navigation, faster access to relevant information and closer integration with other Microsoft applications and services.

Now in 2015 the release of Microsoft Dynamics NAV 2016 has just hit the market and the RoleTailored User Experience is providing an even stronger platform for helping the end users in doing a better job. The Web Client is stronger than ever, the use of tablets and phones are second to none in the market and the opportunity to help users take advantage of other Microsoft applications has again increased. The outcome is – and has been from the very beginning – to save time on general operational processes, provide a higher quality in operational excellence, generate satisfied customers and more loyal and happy employees.

In my role at the Microsoft Development Center Copenhagen, I was responsible for the business part of the scope for Microsoft Dynamics 2009. After establishing Roletailors.com in 2009 together with former Dynamics NAV UX Manager, Sisser Wichmann, I have trained more than 800 consultants, developers and sales people around the World. The purpose was to help them understand the RoleTailored Client and what this can actually do for the customers and especially their users. We also worked directly with customers on both smaller and bigger projects – all focused on bringing value from the Dynamics NAV solution to the company.

Today, the majority of the Dynamics NAV partners are still not embracing the essence of the RoleTailored Client and the opportunity to provide even better solutions to their customers.

I am strongly convinced that this new book from Peik will bring more focus on this and hopefully encourage partners to gain more insight in the world of RoleTailoring.

Let's make winners out of users!

Niels-Erik Hansen
Co-founder, Roletailors.com
Nordic Lead, Quattro Business Solutions

About the Author

Peik Bech-Andersen is a solution architect and senior developer at Columbus NSC in Denmark, implementing solutions all-over the world and specializing in advanced manufacturing combined with master data replication and intercompany solutions.

He first saw Navision in 1984 at the beta testing program of PcPlus. He started implementing manufacturing solutions in 1983 on IBM S/36 systems. Since the Dynamics NAV manufacturing module was released, he has implemented at least 50 manufacturing solutions in all kinds of different businesses. Starting as an accountant in a production company and moving on to implementing systems, he has backgrounds in accounting, development, and implementation.

As a Microsoft Certified Trainer, he has conducted courses over the last 10 years on topics such as Dynamics NAV programming, installation, finance, trade, warehouse management, and manufacturing. During these 10 years, he has conducted around 150 courses with at least 800 participants in 14 countries. He maintains a blog at Mibuso.com where he writes on the topics of programming, installation, and application—usually topics that arise during courses or customer implementations.

He is the author of the following:

- "Manufacturing with Microsoft Dynamics NAV": About the manufacturing module in Microsoft Dynamics NAV, launched in 2014.
- "Upgrading Microsoft Dynamics NAV Manufacturing to 2015": Describing improvements in the manufacturing module Microsoft Dynamics® NAV from version 2013 to 2015.
- Twenty-six "How-to-videos" released by Microsoft for Microsoft Dynamics NAV 2013 R2 about the MiniApp, published in 2013 and 2014.

He has been appointed Lead MCT (Microsoft Certified Trainer) for the Dynamics NAV 2013 version, reviewing course material for Microsoft and educating all other MCTs in the new version, as well as Beta Tester as part of the "Sicily" Beta testing team evaluating the next version of Dynamics NAV.

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Blog: http://www.mibuso.com/blogs/peik

Acknowledgements

After my first book: Manufacturing with Microsoft Dynamics NAV and the small follow-up Upgrading Manufacturing Microsoft Dynamics NAV, many people have approached me with subjects for new books and thank you for that. It was usually areas they felt needed elaborating due to lack of relevant documentation. The areas included Warehouse Management, Service Management, Relationship Management and even Report Development. But when the opportunity to conduct a pre-conference workshop at NAV TechDays 2015 on RoleTailoring came up, it was a no-brainer to write a book about this subject.

Therefore, thank you to my customers, to all my colleagues and to my poor blog readers, who have all been exposed to my crusade about RoleTailoring.

Once again my beloved wife Britta has shown endless patience and support and accepted long periods of me neglecting her and the house-work. Thank you for your love and support.

My family has probably given up on me by now. I hope to be able to redeem the communication with them all, now that this latest project is finished. So thank you for your patience.

I would like to thank my three diligent reviewers: Arend-Jan Kauffmann, Steen Fisker and Henrik Dorph-Jensen for their great work and comments about the technical aspects of Dynamics NAV.

Special thanks goes to Niels-Erik Hansen from Roletailors.com the support and the forewords.

My customer WindowMaster A/S deserve all my thanks for letting me share details of their system.

My printing company Toptryk Grafisk ApS and the diligent proofreaders at Scribendi, Inc. has again made a great job og proofreading, setting up the cover page and printing the book on time.

"Start by doing what's necessary; then do what's possible; and suddenly you are doing the impossible"

Francis of Assisi

About the Reviewers

Arend-Jan Kauffmann has over 13 years of experience with Microsoft Dynamics NAV and over 25 years of experience in the IT industry. He is one of the founding partners of Xperit Group where his current role is Development Manager. He has a strong focus on architecture, integration, Microsoft Azure, Office 365, .Net development and of course C/AL development.

Besides this, Arend-Jan co-founded the Dutch Dynamics Community, a community for all Dutch Dynamics professionals to share knowledge. He also maintains a blog (www.kauffmann.nl) with in-depth technical topics. He has been awarded as Dynamics NAV MVP since 2013.

Steen Fisker started his career in IT during the early eighties as a bookkeeper for a company importing toys from Asia. The company used a Commodore PC with a Danish bookkeeping program programmed in Basic.

After the education as a Bachelor of Commerce he taught subjects like EDP and accounting. He entered the Navision world in December 1990. During the following years he worked as a Navision Consultant in both Danish and International projects till 2000 when he was hired by Maersk Oil Qatar with the responsibility for all EDP onshore and offshore in Qatar.

In February 2010 he returned to Denmark and started his own company and has worked as a freelance Navision Consultant since then on several projects. During the years from 2010 to 2012 he obtained his Microsoft Certifications as a MCP on Dynamics Nav, SQL Server, and SharePoint.

Henrik Dorph-Jensen's first experience with Navision was in 1995 when his boss at Philips Denmark selected him to manage the transition from the company's old mainframe ERP system to Navigator. Having no previous IT experience, it was his structured approach and process feel that qualified him for the task.

Since then he has worked with NAV initially as a super user within the company but since 2004 as a consultant. After a couple of year as an independent consultant working for smaller businesses, he then spent 7 years in Qatar working with Maersk Oil, implementing, supporting, maintaining, and managing Dynamics NAV.

In 2013, he joined Columbus NSC where he is now working as a Microsoft Dynamics NAV consultant.

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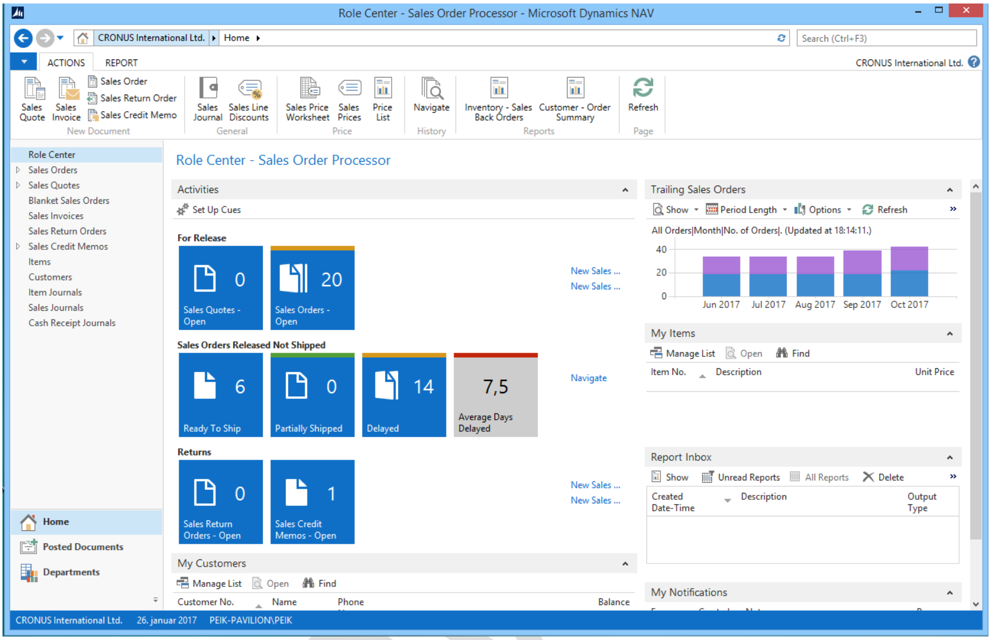
General



It has been six years since Microsoft introduced the RoleTailored client with Dynamics NAV 2009. The general idea was to introduce a user interface dedicated to each individual type of employee. In the previous menu system, tasks, functions, and menu items were stored in one big dynamic menu system. Now, individual “menus” are created for each type of employee, depending on the role in the company that they fill.

This is done by creating a number of profiles which are based on the Role Centers for each type of employee. The general idea behind the profiles is that functionality should be inherited from the Role Center but can be changed for each profile. In short, two profiles can be based on the same Role Center but can be configured differently. The user will always be assigned to a profile and not a Role Center.

Information should be available as close to the main Role Center page as possible. This means that all the information the user needs to perform daily routines is available on the startup screen. In addition, pending and overdue tasks should be highlighted on the same startup screen. Getting the information is not enough; all functionality needed to handle the tasks must be available as well.

One window gives the user access to all functionality, covering the following:

- Daily routines
- Periodic routines
- Reporting
- Statistics

Any function should be a maximum of 1–3 clicks or key strokes away, depending on how often it is used. Statistics could include charts that can reside directly in the Role Center presenting the needed information immediately upon starting the client.

There has been some previous criticism of the RoleTailored client. It was not possible to process large amounts of data in the RoleTailored client using only the keyboard and the shortcut keys. Entering data in documents or in journals often required a mouse and many unnecessary steps.

The criticism was more or less justified. It was always possible to use shortcut keys in the RoleTailored client, but it did not help that most of these keys changed from the classic client to the RoleTailored client, then some of them changed again from the 2009 to the 2009 SP1, yet again in the 2009 R2, and the latest in 2013. Let us just hope that the shortcut keys have now stabilized and will stay where they landed.

The criticism came mostly from the departments that process most transactions, such as finance and sales. They would often disregard the RoleTailored client and continue working in the Classic client. This is no longer an option from Dynamics NAV 2013 and forward.

Probably therefore, Microsoft introduced a new and very important feature in the RoleTailored client: Quick Entry. Quick Entry enables the consultant, the super user—or the users themselves—to decide which field should come next when pressing the **Enter** key. This means that it is now possible to create a full sales order with one line by entering data in six to seven fields without once touching the mouse. We had this functionality in the text-based 3.56A back in 1990 and a limited version in the Classic client (NextControl), but now it is back. So now, even the finance department will be a customer of the RoleTailored client.

Dynamics NAV 2013 R2 introduced some additional features which can enrich the Role Center, and this could narrow the gap between a BI system and the Role Center in Dynamics NAV. More about that later.

Dynamics NAV 2015 introduced configurable cues on the Role Centers, giving “Traffic Light” colors on the cues depending on their present state. This enhanced the BI feeling even more.

Still today, however, the function of the Role Center is highly underestimated. We still see that the task of assigning profiles to the users resides along with assigning permissions to the users, and those are two entirely different matters. If the users must fight their way through an unsuitable Role Center throughout the implementation phase referring them to find the functionality in the Department menu, they will become increasingly frustrated using the system.

Therefore, create the Role Centers or use the existing ones, customize them so they are close to the users’ demands for functionality, appoint a super user to perform future configurations of each role, and lastly, teach the users to personalize their own clients.

If time does not permit the full configuration process, then at least assign the users the standard profiles most suitable for their function. This will give them more knowledge about the Role Center in the configuration process.

In order to show all aspects of the Role Centers and profiles, I will go through all the different parts of implementing Role Centers, how to build a new one, how to configure and personalize the profiles, and lastly how to implement all the above in a real-life scenario.

To make this scenario as close to the real world as possible, the implementation will be performed as a case study, emulating the needs of a small/medium-sized company including the usual profiles:

- President
- Accounting
- Sales
- Purchase

- Inventory

I am even going to include a couple of more specialized profiles:

- Employee Portal
- Customer Portal
- The Web Client
- The MiniApp
- Surveillance Role Center

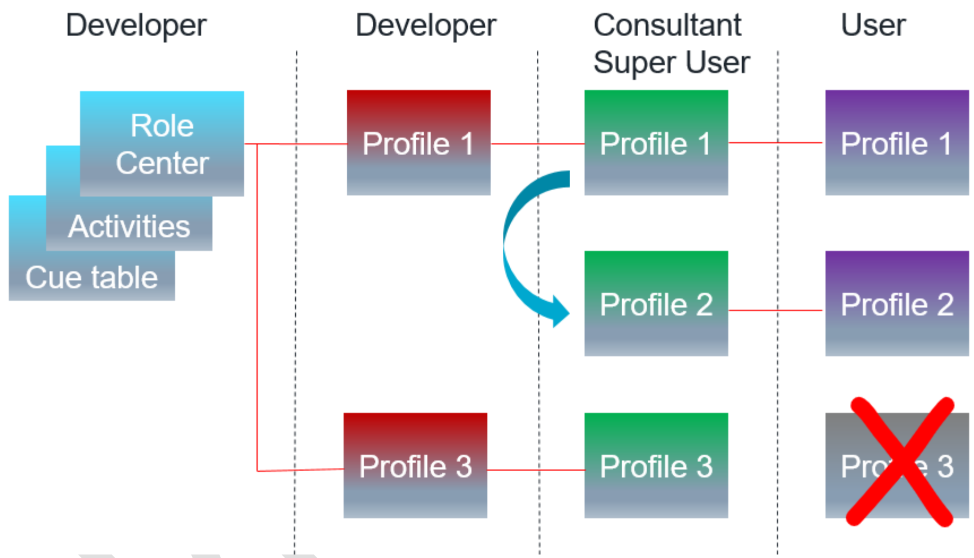
My ambition with this book is to show the possibilities that exist, to point out best practices, and to offer advice on how to implement the solution for all users in such a way that it will seem to be a natural path toward success.

Once again a number of companies have chosen to support this book. Please pay them a visit in Appendix B:

The Lifecycle of a Role Center

Role Centers vs. profiles

There is some confusion over what Role Centers are and what profiles are, as well as why we need both. The short answer is that the Role Center consists of a number of objects developed in the Development Environment, also called C/Side, and the profile is the link between the profile assigned to the user and the Role Center. Each profile will be given the functionality of the Role Center and can then be configured for individuality.



The profiles all derive from the same Role Center. Later they were configured so that they now appear differently.

The Role Center

It is important that the Role Center contain all the different pages needed for all the different groups of users. Not all of them have to be visible, but it is necessary to include them at this stage so they can be selected in the configuration or personalization processes.

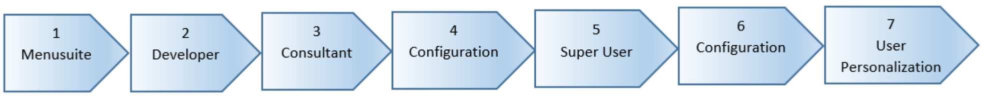
After the development of the Role Center, one or more profiles are built based on the Role Center. After this, each profile can be configured to fit different needs for different groups of users. Read more about the configuration process in the upcoming chapter **Configuring Profiles**.

This enables an enormous amount of flexibility for the client. There are three levels where changes can be implemented:

1) Across all the profiles related to a Role Center (developing pages)
2) Across all employees assigned to a profile (configuring profiles)
3) Individually for each user (personalizing clients)

The implementation process

The process of developing and implementing the Role Centers and profiles consists of a number of steps:



1) **MenuSuite:** All objects added to the menu suite function as a base for adding new functionality to the profile in the configuration or the personalization processes.
2) **Developer:** The developer creates the base of the Role Center with the maximum number of page parts available to the users.
3) **Implementation consultant:** The implementation consultant helps the customer to create one or more profiles based on the developed Role Center. In Dynamics NAV 2013, the implementation consultant must now be set as "owner" of the profile. In later versions, this is not necessary.
4) **Configuration:** Each profile is configured by removing unused reports, functions, and pages and adding the necessary reports, functions, and pages to the profile.
5) **Super user**: The super user takes over responsibility for the profile. In Dynamics NAV 2013, this is done by assigning the user as "owner" of the profile. In later versions, this is not necessary.
6) **Configuration:** Now the super user can maintain the profile adding new or removing unused functionality on the profile. All changes are done for all users assigned to this profile.
7) **User personalization**: The user can change the setup of his/her individual client if given permission. This will not affect any other clients.

Enabling personalization for all users can prove to be a support nightmare, since each user might have a unique client, containing reports, functions, or pages that were not part of the original implementation. In this case, it is recommended to introduce tools to take over the user's screen in order to provide adequate support.

Assigning profiles

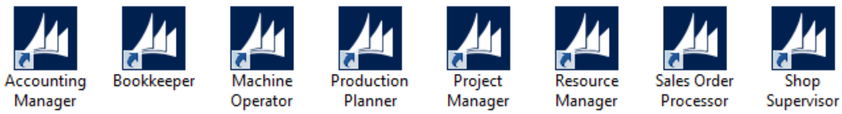
To identify the profile for an employee, the system checks three places.

They can

- Be assigned in the shortcut using the **–profile** parameter. This will override all others.
- Be assigned in the user personalization table. This is the normal place to assign a profile to a user.
- Use the profile assigned as the default profile.

During the implementation process, it is recommended to install an extra functionality to the Profile List page as described in **Appendix A: Small changes that can make your life easier**. This way, the developers, consultants, and super users do not have to use different shortcuts or change the user personalization to work with the different profiles. For users having the need of switching profiles during a normal workday, creating multiple shortcuts for the user will make everything easier.

The **–profile** parameter refers to the desired profile name and adding the **–configure** parameter will start the client in configuration mode.



Each of these shortcuts can point to a specific profile. An example of the destination of the shortcut could look like this:

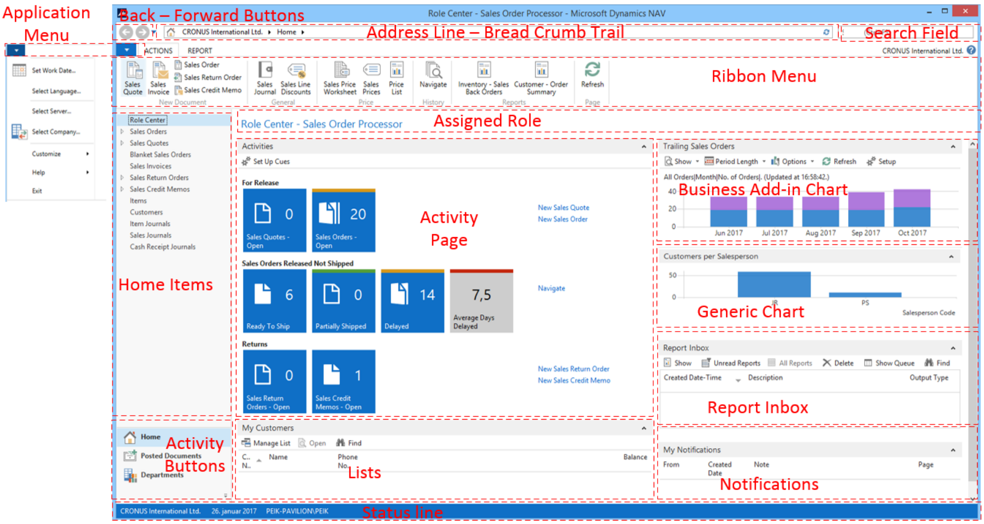
```
"C:\Program Files (x86)\Microsoft Dynamics NAV\80\RoleTailored Client\Microsoft.Dynamics.Nav.Client.exe" -profile:"MACHINE OPERATOR"
```

When starting up the client with the **–profile** parameter, it is the permissions of the user running the shortcut that count. It is possible to run the shortcut as another user by right clicking the shortcut with the shift key pressed and selecting “run as a different user.”

Up until Dynamics NAV 2013, the user had to be owner of the profile to start a profile in configuration mode. In later versions, this is no longer a requirement.

The Role Center

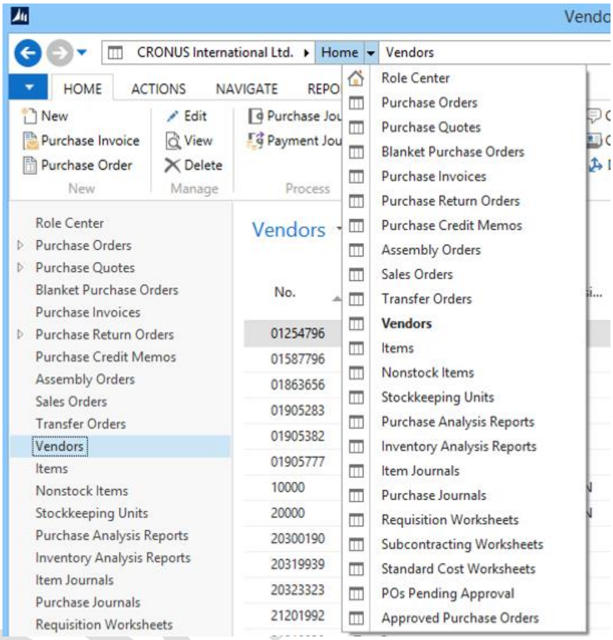
Let us start by looking at the Role Center page in general:



Starting in the upper left corner and going clockwise, here is a short description of the parts of the Role Center:

Application Menu:	This holds some of the system functions, like set work date and select language, server, and company. The functions to set work date and select company are also available on the status line by clicking on the date or the company. The items on the application menu will change depending on the page from which it is called.
Back–forward Buttons:	As on a web browser, it is possible to navigate to the previous or next visited page. However, the backspace button on the keyboard cannot be used the same way as on a browser.
Address Line:	The address line will show the path taken to get to the present page. However, it also has another function. It is possible to click on each triangle and

activate the menu items that were present at that stage.



Search Line: The search field will search through all objects that are present in the Role Center and the menu suite. This includes all available lists, tasks, reports, activities, and menus. All search results are visible, even items in areas the user does not normally have access to. However, it is not possible to access a page without adequate permissions.

Ribbon Menu: The ribbon menu is a dynamic menu consisting of all functionality assigned to the active page, in this case the Role Center. The ribbon menu will change depending on the available space on the page, so make sure not to show too many items on each page. It is possible to assign items to a ribbon menu without showing them. That way, the users themselves can activate extra functionality. It is possible to add extra items from the Departments page by right clicking a task or a report and adding it directly to the ribbon menu.

Home Items:

The home item consists of lists from different origins. Only pages of the type list can exist in the home items area. The lists include the following:

- Lists assigned to the role center by the designer
- The home items will also include all cues on the activities page as filtered lists
- Filtered lists assigned to the profile during customization or personalization of the page
- Lists assigned to the profile during customization or personalization of the page. The user can assign lists either from the Departments page or in the Customize Navigation Pane function.

Activity Buttons:

Activity buttons are a way to group the home item lists into different categories. The developer, the consultant, or the user can add activity buttons to the profile during the development, customization, or personalization processes of the Role Center page.

The Departments button is a system-generated activity button. The Departments page is where the users can access all objects that exist in the menu suite. It is possible to use customization or personalization to remove the Departments Activity button and thereby prevent the users from accessing the functionality, which is not part of the Role Center. This will also remove the functionality from the search function.

⚠ Removing the Departments Activity button during the configuration process can be a bit tricky. The only way to restore the Departments Activity button is to click the Restore Defaults button, which will remove all changes made to the navigation pane.

Assigned Role:	This is just for information. However, for a consultant, this is an important information. This was introduced in Dynamics NAV 2013.
Activities Page:	An activities page is part of every role center. This page consists of stacks of documents relevant to the role. The documents are usually in different states or statuses. Each stack, called a cue, derives either from a flowfield, a normal field, or a global variable. Clicking the cue will show the filtered view from which the flowfield derives. A cue can easily replace many reports. Example could include the following: • The production planner requests a report to show which production orders are ready to produce. • The department head requests a report to show which timesheets that are ready for approval. • The head of the purchase department might want to show which purchase orders need his/her approval. • The warehouse manager requests a report to show slow moving items. I have had considerable success using cues instead of developing reports.
Business Add-in Chart:	Dynamics NAV 2013 introduced business add-in charts. These charts do not originate from the generic charts. Since they are based on add-ins (programmable components), they include extra functionality. So clicking on a column will show the dataset, which is the base of the calculation of the

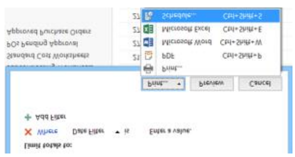
column. It might also be possible to change the filters, dimensions, or measures.

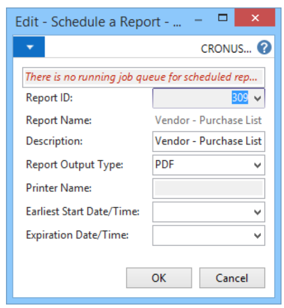
My Customers List: The lists (My Customers, My Vendors, or My Items) are user-managed lists. This means that the users can decide for themselves which customers to include in the list. There is only a limited amount of functionality assigned to the My Customers page, so if there are more than 4–5 customers and there are ways to set the filter showing the customers, it is probably better to use a filtered list in the home items.

However, My Customers, My Vendors, and My Items have one very important function from Dynamics NAV 2013. The customers in My Customers also function as a filter in a filtered view.

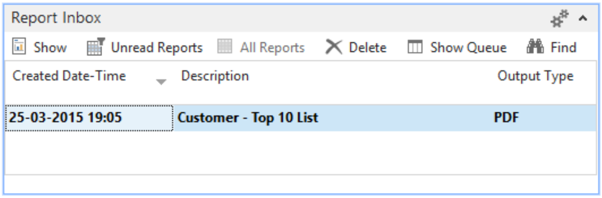
Generic Charts: The users can make charts themselves using the generic chart designer. The designer came to be in Dynamics NAV 2013, but it was also possible to create charts in Dynamics NAV 2009. The chart had to be created in an XML file and then imported to Dynamics NAV.

Report Inbox: In Dynamics NAV 2015, it is possible to schedule any print to be printed later.





Any report that has been scheduled as “saved to pdf” will appear in the report inbox. The result can be opened and printed from here.

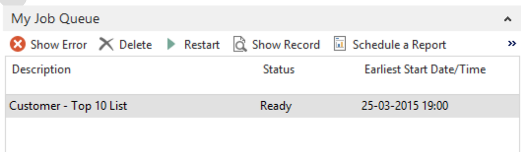


Notifications: It is possible to attach notes to almost any record in Dynamics NAV. It is also possible to assign the note to any user of the system, and the note is shown as a notification on his/her Role Center. Notifications also include messages from sales or the purchase background-posting functionality.

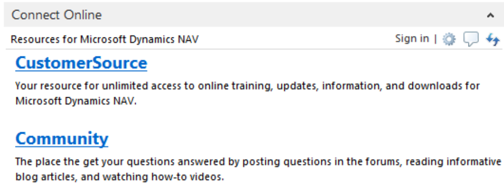
Status Line: The status line holds information on the active work date, the active company, and the active user. It is possible to change the work date and the company merely by clicking on the date or the company name in the status line.

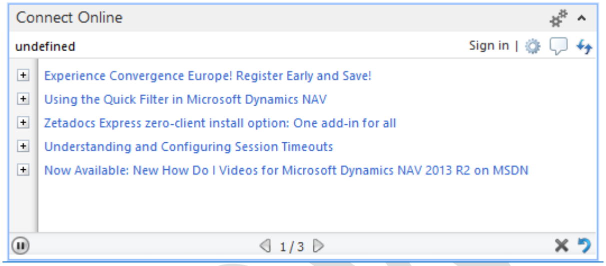
Additional page parts available include the following:

My Job Queue: Shows all queued jobs, like background postings or scheduled reports.



Connect: Connect is a live RSS stream from Customer Source showing news from Microsoft.





Looking closely at the Role Centers for the different profiles, it is clear that the differences between the profiles are

- Which Activities page and which cues and activities have been included. Each cue represents a number of documents all in the same state. These documents must be crucial to the daily tasks of the employee assigned to this role. The cues are again divided into groups called cue groups. The Activities page also consists of a number of actions related to each cue group.
- Which lists have been included in the home items section of the Role Center.
- Which activity buttons exist in each profile, and which lists, actions, and reports are included.

To see the differences between the different Role Centers, please refer to the **Profiles** chapter at the end of the book.

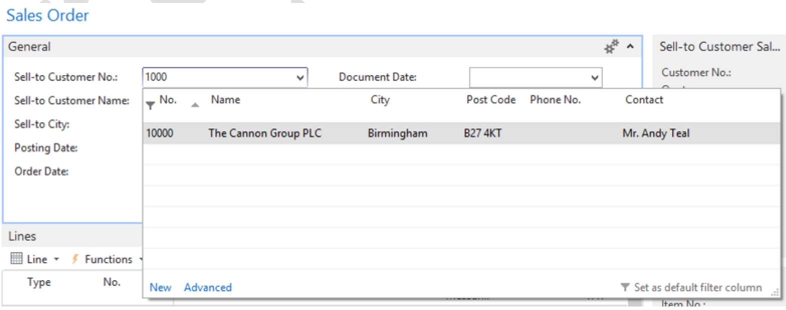
Microsoft Dynamics NAV Keyboard Shortcuts

As mentioned previously, the shortcuts in Dynamics NAV have led a difficult life. From the classic client to the first version of the RoleTailored client, most shortcuts were changed. They were then revised numerous times, and it is therefore not possible to make one list of shortcuts covering all versions. I have included the Dynamics NAV 2015 shortcuts for the RoleTailored client.

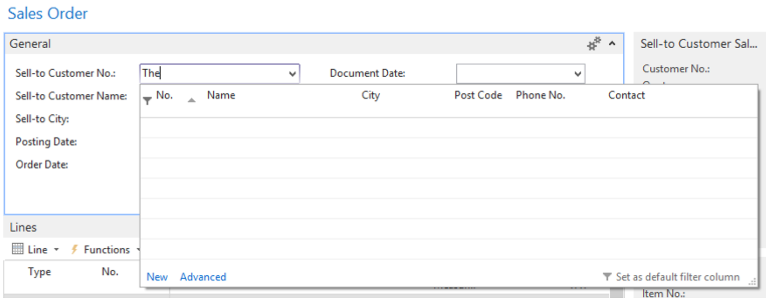
For a long time, it was not possible to perform many tasks in the RoleTailored client using only the keyboard and shortcuts. This has improved significantly from Dynamics NAV 2013, but there are still places where it is necessary to grab the mouse, and that will always ruin the flow. Some of the shortcuts I find most useful include the following:

QuickEntry: This is the most important feature; even if it is not really a shortcut key, it still add significant value to the data entry process. With QuickEntry you can decide for yourself which fields to land in when entering data in a document or a journal. This can speed up the process of entering data into the system enormously.

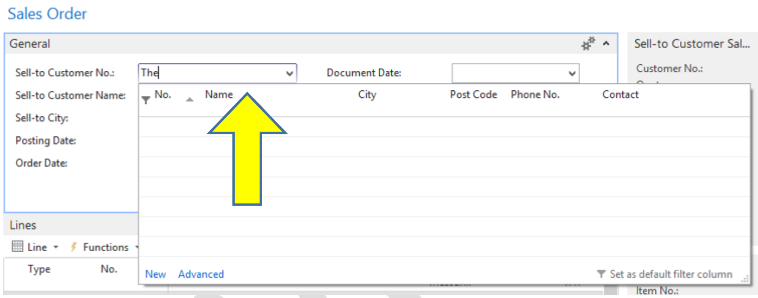
Data Entry: Wherever data are entered into a field, a lookup box appears in the field. Entering a number in the customer number field will show all customers that fill the search criteria.



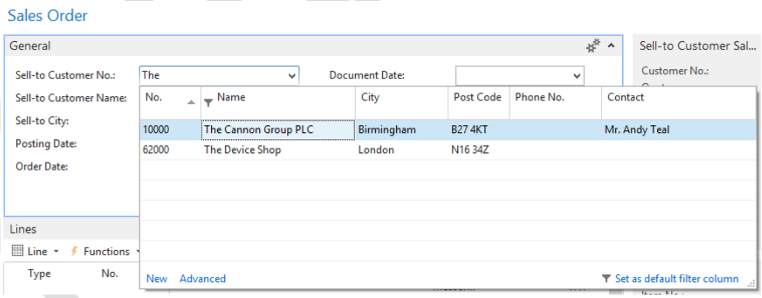
However, there are many other ways to search in this window. If, for example, you enter the customer name instead, then the list looks like this:



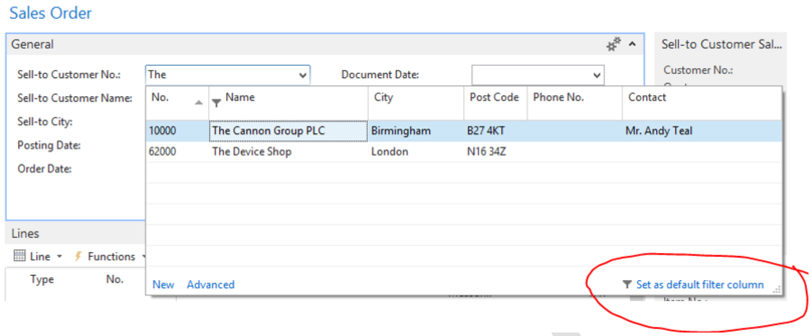
Now, click here (or you can click Arrow-Down and Arrow-Right):



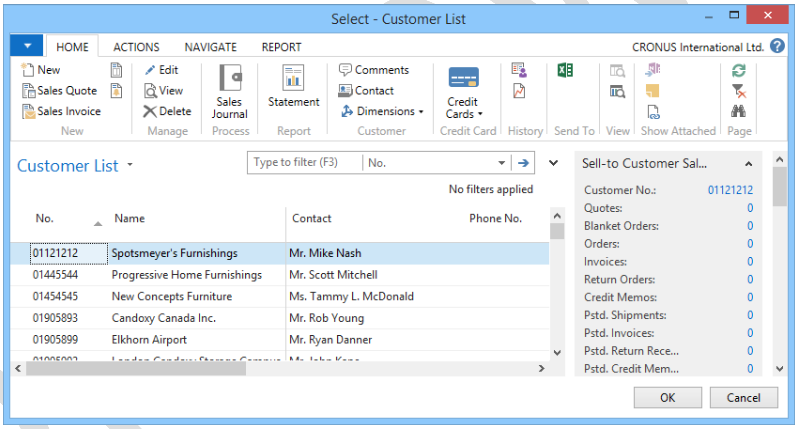
...and the customers appear:



If you always want the Name column to be the default, then click here:



If you need to add a new customer, click the New action on the left side of the box, and to go the advanced list for more advanced searching, click Advanced, and the customer list window opens:



Shift+F12: Go to the Role Center.

Ctrl+F4: Select from the advanced list. I use this very often in combination with Ctrl+Shift+E, which will open a card page in edit mode.

Ctrl+Enter: This selects and closes the window. It can also be used just to close the window.

F6: Jumps to the next frame or card part.

Ctrl+Alt+F1: About this page/report: shows the data behind the page or the report. This is like the old Zoom function in the classic client.

Learning this shortcut is necessary because it is the only way to get information of a record in a FactBox or from the lines fasttab in a document page.

Some systems occupy the Ctrl+Alt+F1 shortcut key. In that case user Ctrl+Windows+Alt+F1 instead—it is actually possible.

Ctrl+E: And of course, when everything goes wrong, you can always send the information on the active page to Excel for reconciling or further calculation.

Some partners take advantage of the fact that the mouse mat is always at hand (!) and make the mouse mat into an advertisement for the partner with all shortcuts and maybe even the phone number or the mail address to the support phone.

Microsoft Dynamics NAV Windows client	Action
Right Arrow	Move to the next field or character
Left Arrow	Move to the previous field or character
Up Arrow	Move to the field above in the same column
Down Arrow	Move to the field below in the same column
Delete	Clear selected text
Esc	Close the window or undo the data entry
End	Move to the last field on a line
Home	Move to the first field on a line
Tab	Move to the next field on non-line FastTabs
Enter	Move to the next editable field
F1	Open Help
F2	Edit
F3	Select **Type** to filter (field filter)
F4, or Alt+Arrow Down	Drop-down or look up to select
F5	Refresh the active window
F6	Go to the next frame
F7	Display statistics
F8	Copy the field above
F9	Post
F10, Alt	Select the menu bar and display access keys
F12	Select the navigation pane
Shift+F1	View error message
Shift+F3	Select Show Results (FlowFilter)
Shift+F4	Open a lookup window (from an ellipsis button)
Shift+F6	Go to the previous frame
Shift+F7	Open the related card
Shift+F8	Drop-down or look up to view
Shift+F9	Post and print
Shift+F10	Display a shortcut menu
Shift+F11	Apply entries, get source documents, or get warehouse documents
Shift+F12	Open the Role Center from the navigation pane
Shift+Tab	Move to the previous field
Shift+left-click	On multiple column headers, the columns will all be sorted in the same ascending or descending direction.
Shift+double-click	If sorting on multiple column headers using Shift+left-click, use Shift+double-click on the first column that was clicked on, and this will toggle the

	ascending/descending direction of all the columns included in the sorting.
Left-click	Left-click on a column header to sort a column ascending, then left-click again to toggle between ascending and descending.
Ctrl+F1	Collapse or expand the ribbon
Ctrl+F2 or Ctrl+N	Create a new document
Ctrl+F3	Select Search pages
Ctrl+F4	Look up to the related list
Ctrl+F7	View entries
Ctrl+F9	Release document
Ctrl+F10	Select the ribbon and display key tips
Ctrl+F11	Reconcile or split lines
Ctrl+F12	Select the address bar
Ctrl+C	Copy
Ctrl+G	Go to
Ctrl+E	Export to Microsoft Office Excel
Ctrl+L	Show links
Ctrl+N or Ctrl+F2	Create a new record
Ctrl+O	Open the company
Ctrl+P	Print
Ctrl+T	Select sorting
Ctrl+V	Paste
Ctrl+W	Export to Microsoft Office Word
Ctrl+X	Cut
Ctrl+Z	Undo
Ctrl+Page Down	Display next document or card in a list
Ctrl+Page Up	Display previous document or card in a list
Ctrl+Up Arrow	Move up while the selected line stays selected
Ctrl+Down Arrow	Move down while the selected line stays selected
Ctrl+Left Arrow	Move to the first field on a line
Ctrl+Right Arrow	Move to the last field on a line
Ctrl+Alt+F1	Open the About this Page/Report window (Zoom)
Ctrl+Delete	Delete the selected line
Ctrl+Home	Move to the first line in a list
Ctrl+End	Move to the last line in a list

Ctrl+Enter	Save and close window (equivalent to choosing the OK button)
Ctrl+Insert	Insert new line
Ctrl+Shift+F3	Select Limit totals to (table filter)
Ctrl+Shift+A	Clear all filters
Ctrl+Shift+C	Copy rows
Ctrl+Shift+D	Show dimensions
Ctrl+Shift+E	Edit list
Ctrl+Shift+R	View list
Ctrl+Shift+Q	Collapse/expand a line in a hierarchy
Ctrl+Shift+V	Paste rows
Ctrl+Shift+W	Open a list place in a separate window
Ctrl+Shift+Enter	Save and close the window and open a new window
Alt	Display access keys in the ribbon
Alt+F2	Toggle to display/hide FactBoxes
Alt+F3	Filter to the value in the field
Alt+F4	Close window or close program
Alt+F6	Collapse or expand the active frame
Alt+F12	Optimize space for the current page
Alt+Left Arrow	Go to the previous window in the navigation history
Alt+Right Arrow	Go to the next window in the navigation history
Alt+Enter	Move to the field below without opening the drop-down menu
Alt+Tab	Toggle between open windows

The list of shortcuts from the Microsoft website shows all the available shortcuts, and it can be a bit difficult to find the most valuable. Therefore, when you feel annoyed that you cannot jump from one area to another without using the mouse, check this list, because there might be a shortcut for exactly what you need.

Developing New Role Centers

Content of the Role Center

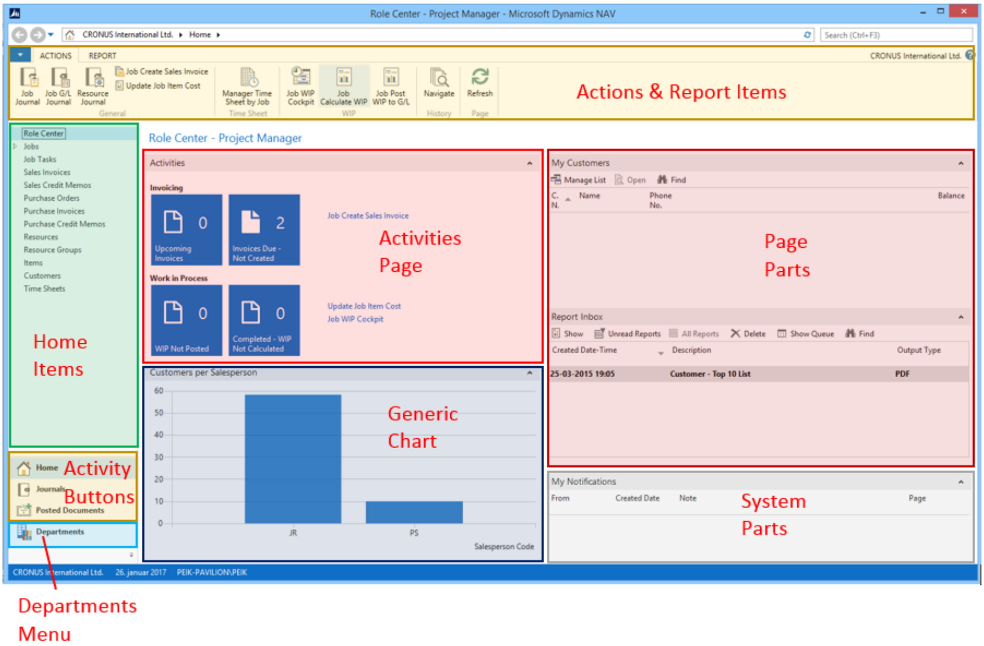
A well-made Role Center can be the difference between success and failure in presenting the RoleTailored client to the users. It is important to consider all the processes that should be covered when designing a new Role Center. Considerations include the following:

- What information does the user need immediately when starting the client?
- Which actions will this information trigger?
- Which actions are included in the daily routines?
- Are there any periodic routines that need to be included?
- Which reports should be available?

An example could be a project manager and what his/her requirements would be:

- Every day, the PM needs to see the status of all resources:
    - Free capacity
    - Time sheets ready for approval
    - Job tasks due
    - Hours reported ready for invoicing
- Every week, the PM needs to report the status of all projects:
    - Progress Report
    - Delays
    - Change Orders
    - WIP (Work-in-progress) Status
- Master data that must be available:
    - Jobs
    - Customers
    - Items
    - Vendors

This means that the PM should have all this information and functionality available 0–3 clicks away from the Role Center. Below are the different parts of the Role Center available to place either information or functionality:



The standard Project Manager Role Center does not exactly cover all the demands described above, but it can be used as inspiration for a new and better Role Center for the PM.

One thing to consider is that it is always possible to add more lists to the Home menu, as well as more actions and reports to the ribbon later, but it is not possible to add any other pages to the Role Center page than those defined by the developers. Therefore, in designing the new Role Center, all the required pages must be included from the start. Another limitation is that it is possible to choose the cues to show in the activities page, and it is possible to change the values of the values triggering the different colors on each cue, but it is not possible for the user to add extra user-defined cues. Therefore, all necessary cues must be defined at design time.

As previously mentioned, a Role Center consists of a number of objects:

- A Role Center page
- A cue table
- An activities page

These are the minimum number of new objects that are needed. Besides these, a number of generic page parts can be used for the Role Center as well.

The page parts can include

- All activities pages
- My Customers/Vendors/Items Lists
- Business chart pages
- My Job Queue
- Report Inbox
- Connect Online

The system parts can include

- The Outlook part
- The My Notifications part

The Chart Parts can include

- Any generic chart

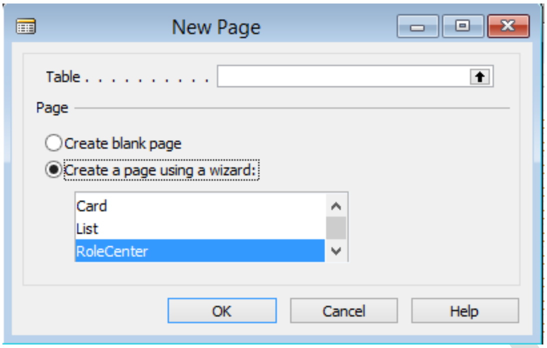
Besides these, the Role Center consists of a number of actions and reports. It is not important to include all actions and reports necessary, since they can be added later when customizing the roles. The only limitation is that it is not possible to change the icon, and the customized actions will appear as a circle .

Therefore, adding most of the functionality for the roles is preferable. For a project manager, this should include sections for WIP calculations, price adjustments, and all other periodic tasks.

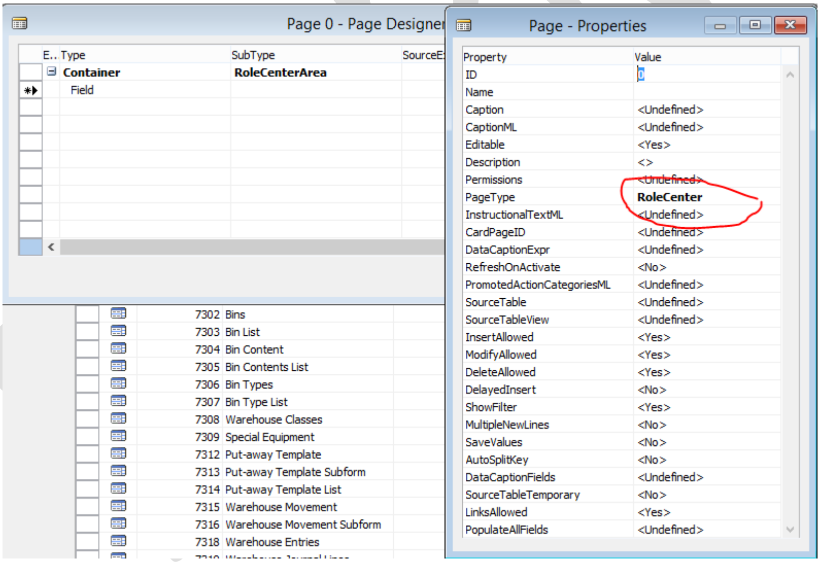
This chapter describes the process of creating a new Role Center for the PM from the bottom, with all the requirements described previously. This also includes all the thoughts and considerations necessary for making a working environment fit for a busy PM.

Creating a new Role Center

The first thing to do is to create a new Role Center Page for the new PM Role Center. This is the easy part:



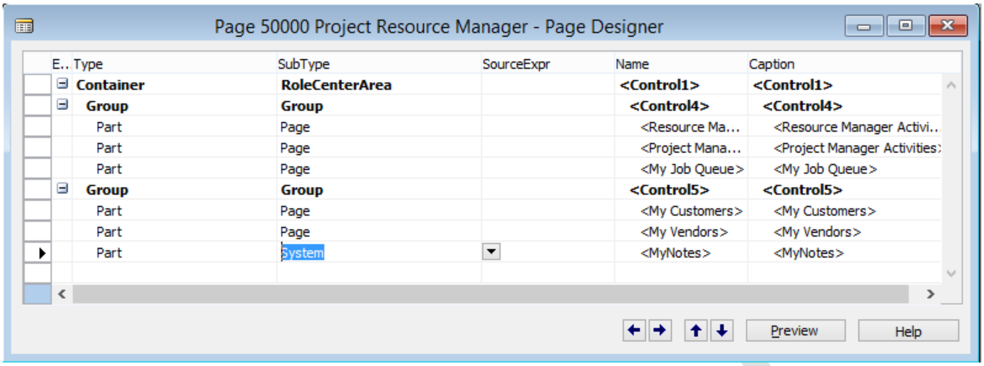
A Role Center page does not have a source table, so therefore the field is left blank. The wizard pointing to Role Center will create the page ready for use as a Role Center page. However, this is not rocket science because all that the wizard will do is create the page and set one property:



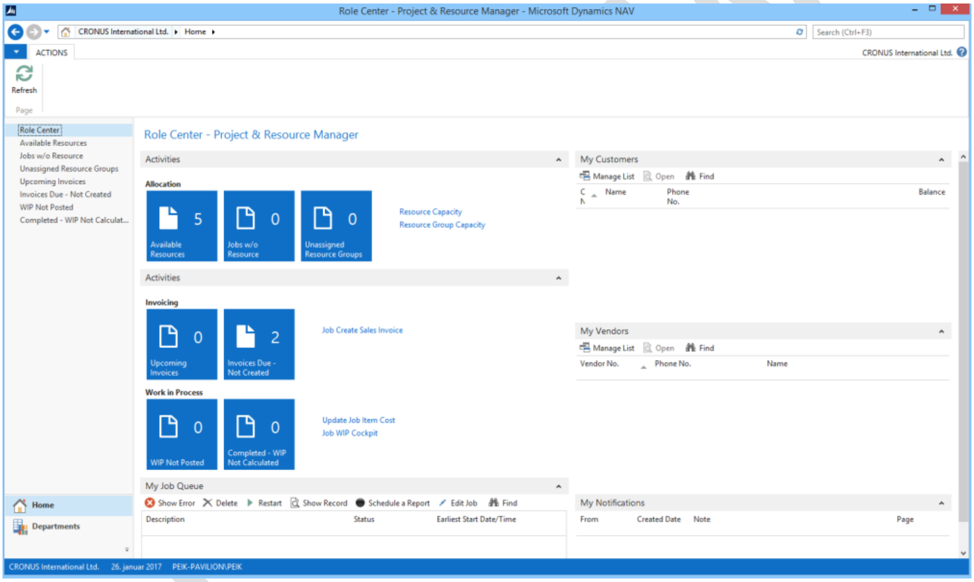
…so, if the page was created as a blank page and not as a Role Center page, it is no big thing to catch up.

Role Center columns

The Role Center container can contain a number of page, system, or chart parts divided into columns with groups.

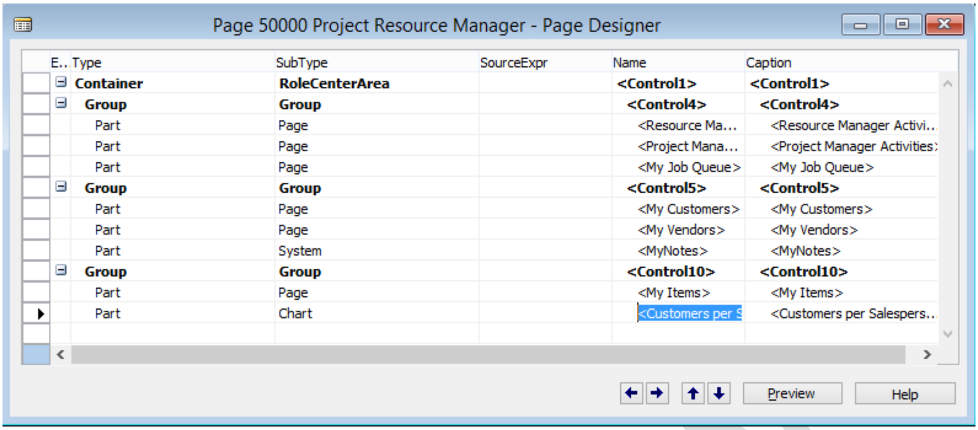


It will look like this when used in a Role Center:

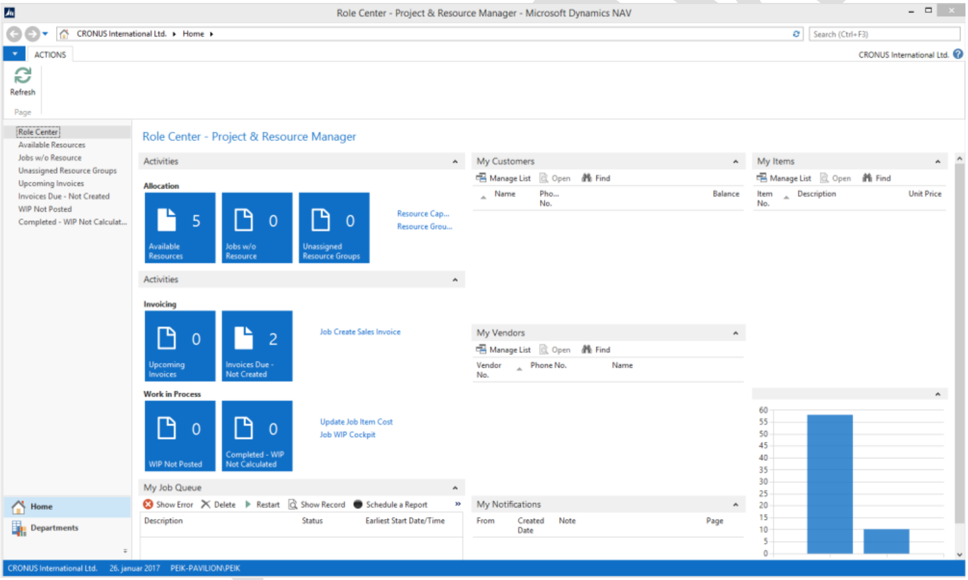


Notice that a number of Home Items has been created automatically. These are the “filtered views” from all the cues on all activities pages attached to the Role Center page.

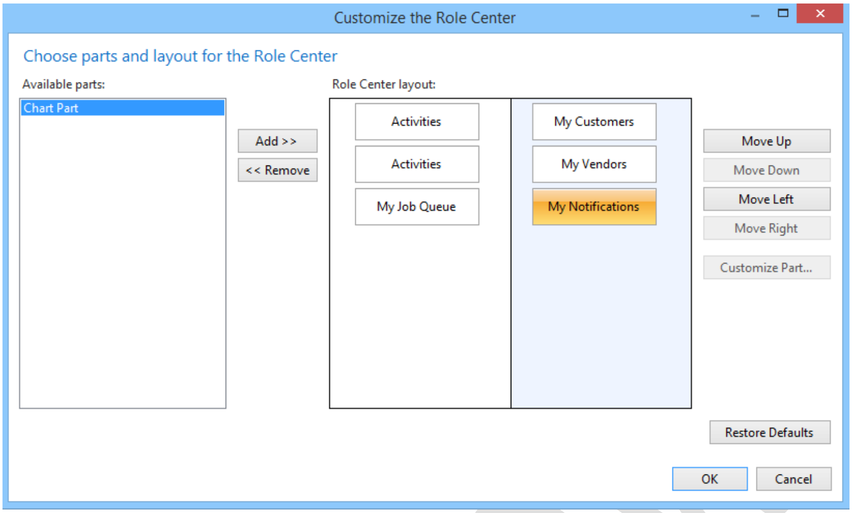
It is tempting to try to divide the Role Center into three columns, seeing that it is possible. Here, we’ve added My Items and a chart in the third column:



It actually looks ok:



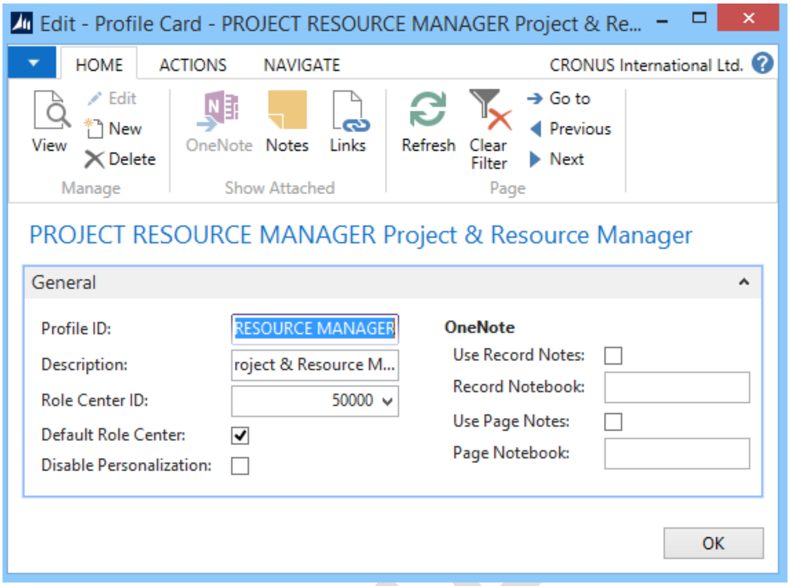
However, the problem shows up when the user tries to customize the page:



None of the columns except the first and second are shown, and it is not possible to customize them. If customization has been disabled for the profile, then it is not a problem; otherwise, this limitation must be taken into consideration. There is also another consideration: the screen resolution. In this case, the screen resolution is 1600 x 900, and already the columns are being compressed, so imagine displaying this Role Center in a 1024 x 768 resolution. The solution is to keep the parts but to make them not visible. This way the users themselves can decide which part to show on the Role Center. Lastly, the activities page takes a lot of space because of the actions attached to each cue-group. If the action page is limited to show only two cues per line and no actions, the three columns could be a possibility. Any actions removed from the cue-groups can be added to the ribbon on the Role Center.

Creating the new profile

In order to test the new Role Center, it is necessary to create a new profile to be able to assign the Role Center to users. The profiles can be found in the Departments menu/Administration/Application Setup/RoleTailored Client:



In creating the new profile, a number of fields define the characteristics of the profile:

Profile ID:	Unique ID up to 30 characters.
Description:	Description of the profile. The description can be up to 250 characters.
Role Center ID:	Points to the Role Center object the profile should be based on.
Default Role Center:	The default profile is the default Role Center for all users who have not been assigned a profile in the user personalization table.
OneNote	The OneNote integration is always set up for each role and consists of notes attached either to a single record or to a page. Please refer to **Appendix A: Integrating OneNote with Dynamics NAV** for a full guide to integrating OneNote and Dynamics NAV.
Use Record Notes:	Enable record notes for this profile.

Record Notebook:	The path to the folder where the record notebooks will be stored. It is preferable to use an urn (\\server\folder) to ensure that all users have access to the notes. Using a "c:\folder" will work only in a single-user environment.
Use Page Notes:	Enable page notes for this profile.
Page Notebook:	The path to the folder where the page notebooks will be stored.

It is possible to create any number of profiles based on the same Role Center. Each profile can then be configured individually to meet different demands with different groups of users. Please refer to the upcoming chapter **Configuring Profiles** for more information. For example, all bookkeepers can share the same Role Center, and the configuration can then divide the bookkeepers into vendor payments, customer payments, payroll, or any other groups that need special functionality.

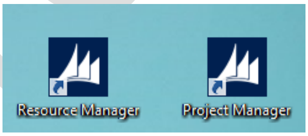
Assembling the parts for the Role Center

In order to assemble the different parts for the Role Center page, it is important to know all the possibilities there are in the existing Role Center pages. This way, it is possible to reuse existing functionality. This could include cues, whole activities pages, or other goodies for the new Role Center. Looking at the profiles in Dynamics NAV, two profiles that can contribute to my new PM profile could be the Resource Manager and the Project Manager:

Profiles ▾

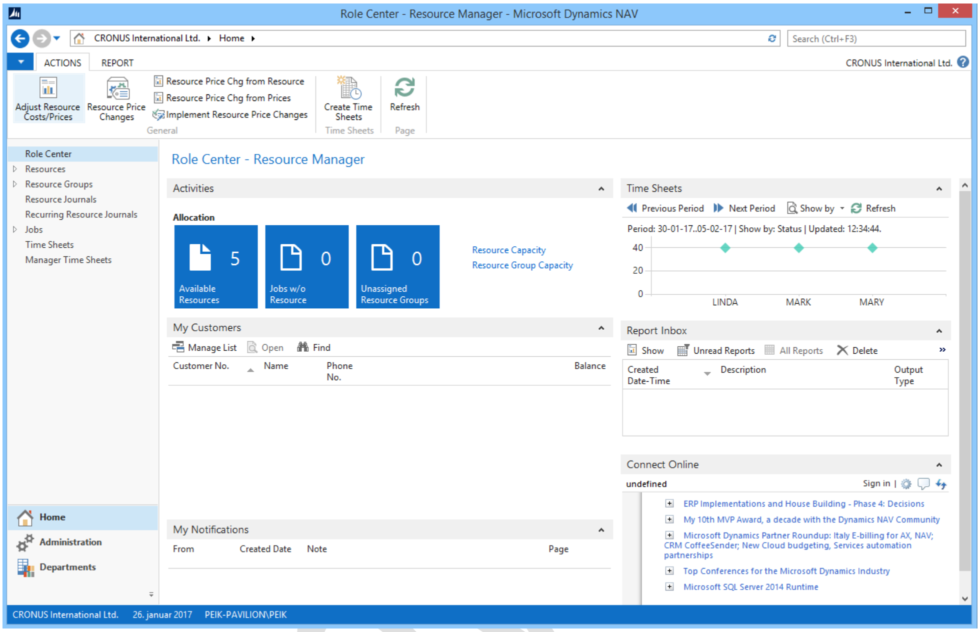
Profile ID	Description	Role Center ID	Defa... Role...	Disa... Pers...	Use Rec...	Record Notebook	Use Pag...	Page Notebook
ACCOUNT...	Accounting Manager	9001	☐	☐	☐		☐	
AP COOR...	Accounts Payable Coordinator	9002	☐	☐	☐		☐	
AR ADMIN...	Accounts Receivable Administrator	9003	☐	☐	☐		☐	
BOOKKEEP...	Bookkeeper	9004	☐	☐	☐		☐	
DISPATCH...	Dispatcher - Customer Service	9016	☐	☐	☐		☐	
IT MANAG...	IT Manager	9018	☐	☐	☐		☐	
MACHINE ...	Machine Operator - Manufacturi...	9013	☐	☐	☐		☐	
ORDER PR...	Sales Order Processor	9006	☐	☐	☐		☐	
ORDER PR...	Sales Order Processor - Non-conf...	9006	☐	☐	☐		☐	
OUTBOUN...	Outbound Technician - Custome...	9017	☐	☐	☐		☐	
PRESIDENT	President	9019	☐	☐	☐		☐	
PRESIDEN...	President - Small Business	9020	☐	☐	☐		☐	
PRODUCTI...	Production Planner	9010	☐	☐	☐		☐	
PROJECT ...	Project Manager	9015	☐	☐	☐		☐	
PURCHASI...	Purchasing Agent	9007	☐	☐	☐		☐	
RAPIDSTA...	RapidStart Services Implementer	9021	☐	☐	☐		☐	
RESOURCE...	Resource Manager	9014	☐	☐	☐		☐	
SALES MA...	Sales Manager	9005	☐	☐	☐		☐	
SHIPPING ...	Shipping and Receiving - Order-b...	9008	☐	☐	☐		☐	
SHIPPING ...	Shipping and Receiving - Wareho...	9000	☐	☐	☐		☐	
SHOP SUP...	Shop Supervisor - Manufacturing ...	9012	☐	☐	☐		☐	
SHOP SUP...	Shop Supervisor - Manufacturing ...	9011	☐	☐	☐		☐	
SMALL BU...	Small Business	9022	☐	☐	☐		☐	
SMALL BU...	Small Business for tablet users	9022	☐	☐	☐		☐	
WAREHOU...	Warehouse Worker - Warehouse ...	9009	☐	☐	☐		☐	

To see what the two profiles look like, it is possible to create two new shortcuts on the desktop, as described in Chapter two: **The Lifecycle of a Role Center**.

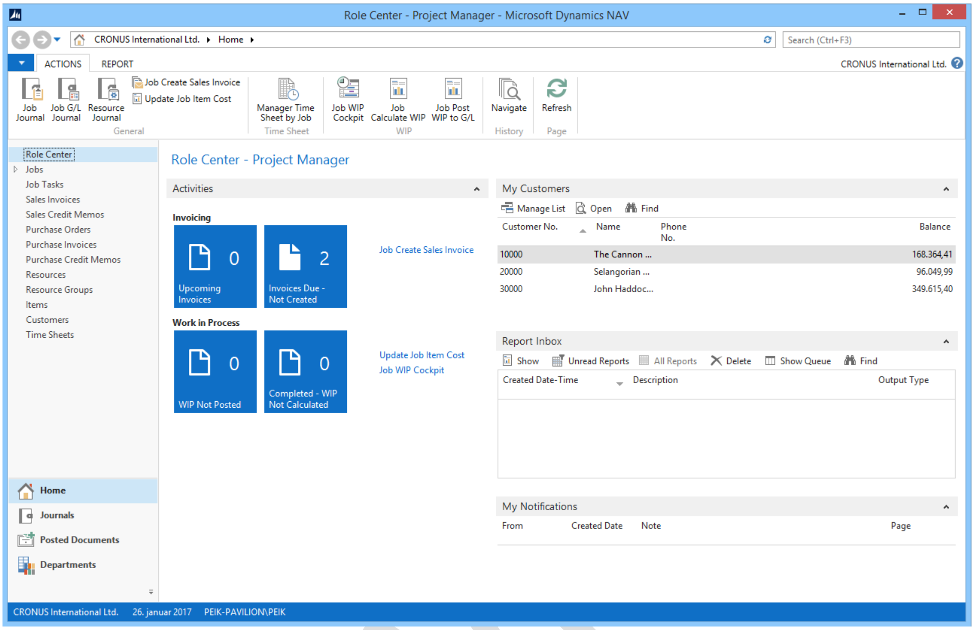


Another way is to implement the change described in **Appendix A: Managing profiles directly from the profile list**.

Now, clicking on the Resource Manager shortcut, or opening the profile from the profile list, will start up Dynamics NAV displaying the **Resource Manager** profile, regardless of which profile has been assigned to the user:



…and looking at the **Project Manager** profile:

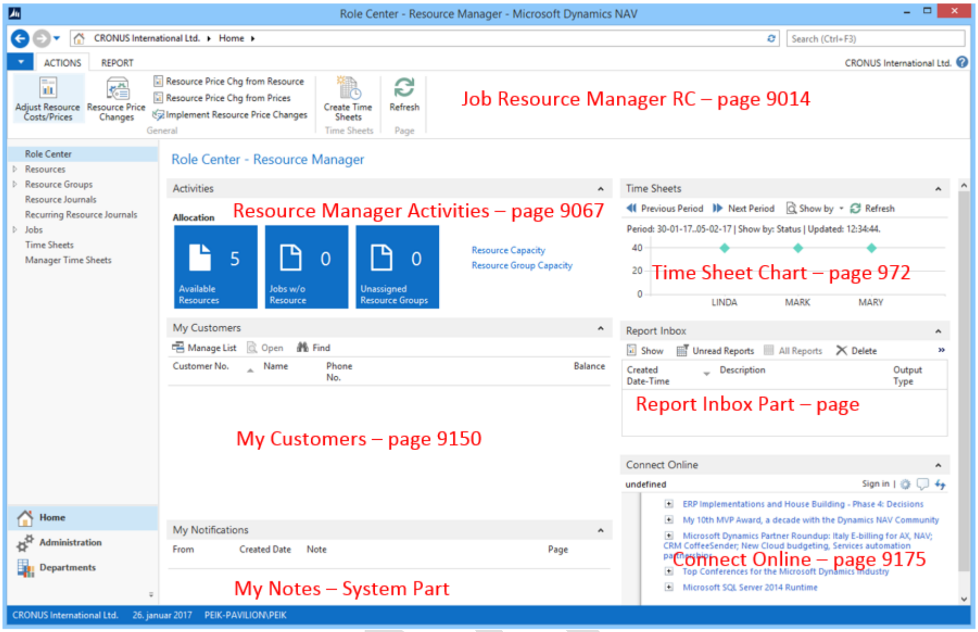


The first this to do on each Role Center is to find the page numbers of each page part used. This can be done by moving the cursor to the page and pressing Ctrl+Alt+F1. Use F6 and Shift+F6 to move the focus around on the Role Center page.

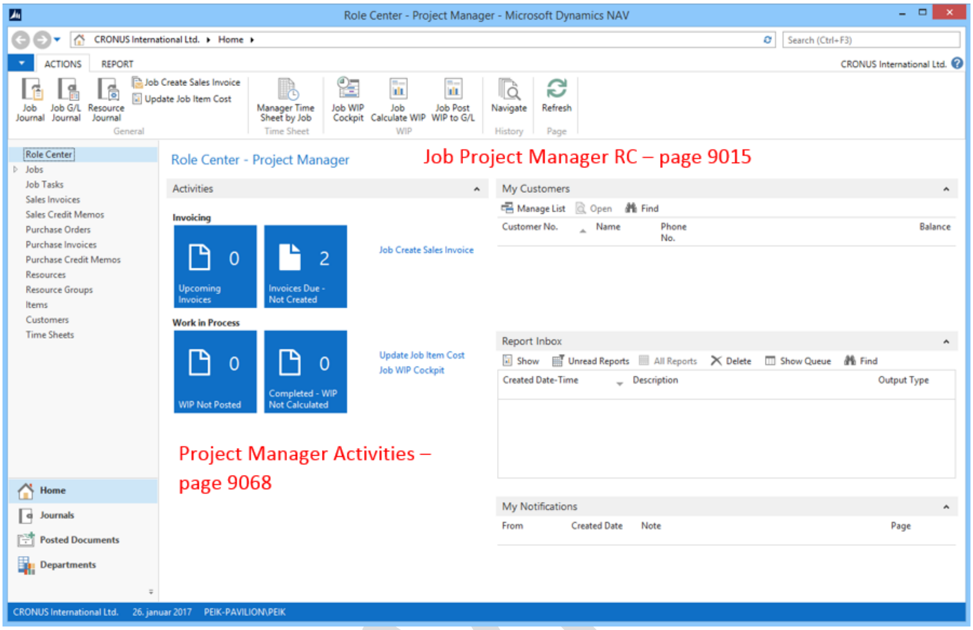
⚠ Using the “About this page” is not an option here because it will only show the Role Center page number and not the individual pages’ page numbers.

ℹ Some systems already use the Ctrl+Alt+F1 shortcut for other purposes. In that case, Ctrl+Windows+Alt+F1 can be used instead.

The page numbers of the Resource Manager Role Center are shown here:



On the Project Manager Role Center, the page numbers are shown here:



Already, here it is obvious that there are many goodies to reuse in the new Role Center:

From the **Resource Manager** Role Center:

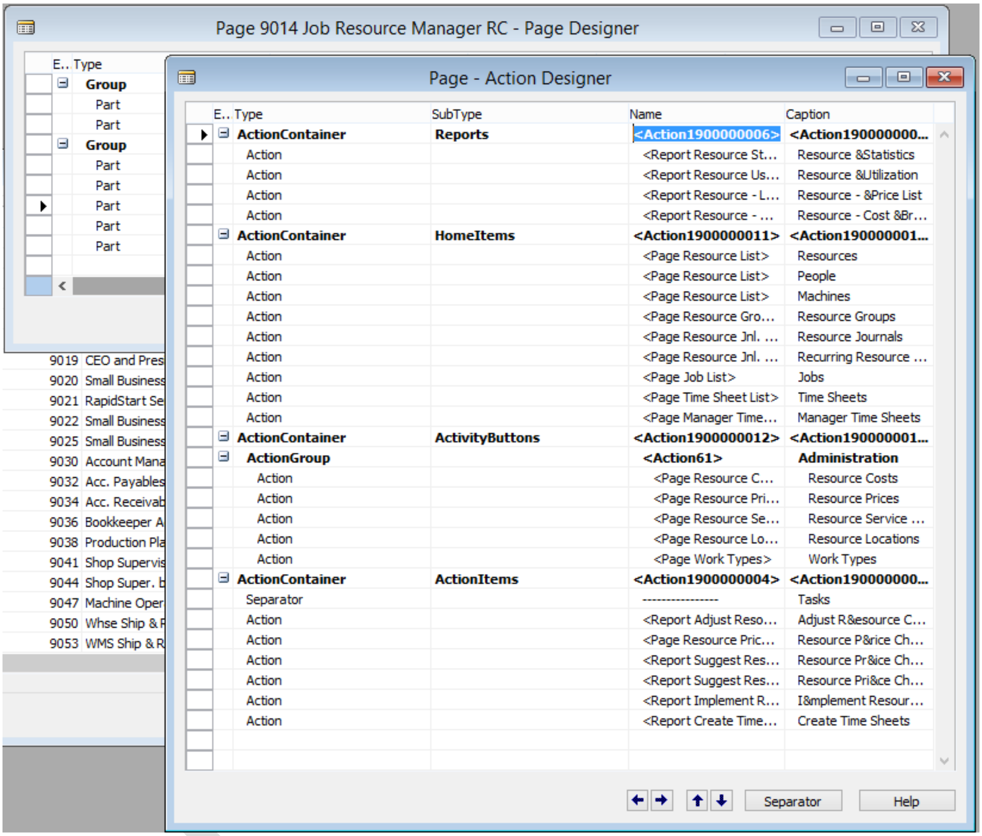
- Activities
- My Customers
- Time Sheet Chart from the **Resource Manager** Role Center
- Report Inbox
- My Notifications
- My Job Queue (hidden but can made visible in the "Customize this Page")
- The Home Items
- And of course all the reports and the actions

…and from the Project Manager:

- Activities
- Activity buttons
- Some Home Items
- And of course all the reports and the actions

Already, I have saved myself a lot of work, because I do not have to create new cues and activities pages.

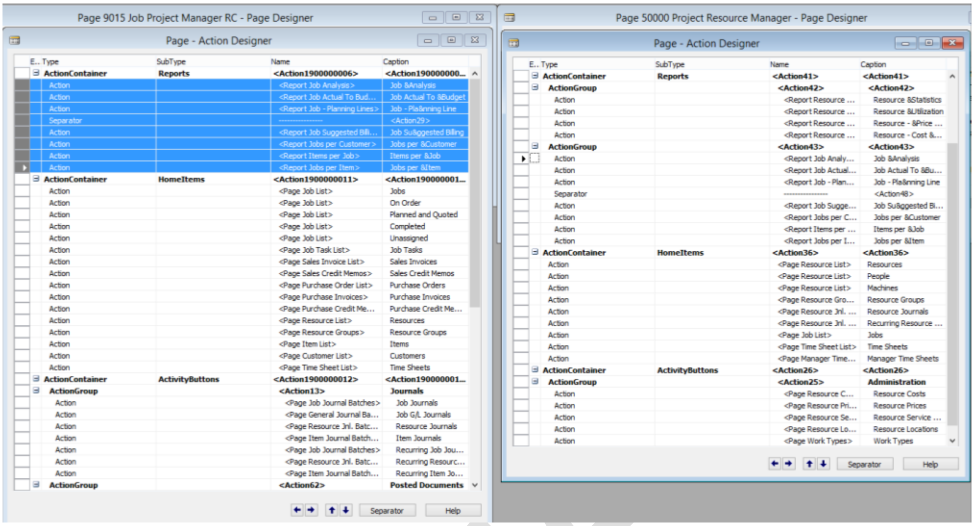
The good thing is that it is possible to copy/paste directly from the original pages, especially since the actions can be a little tedious to create again:



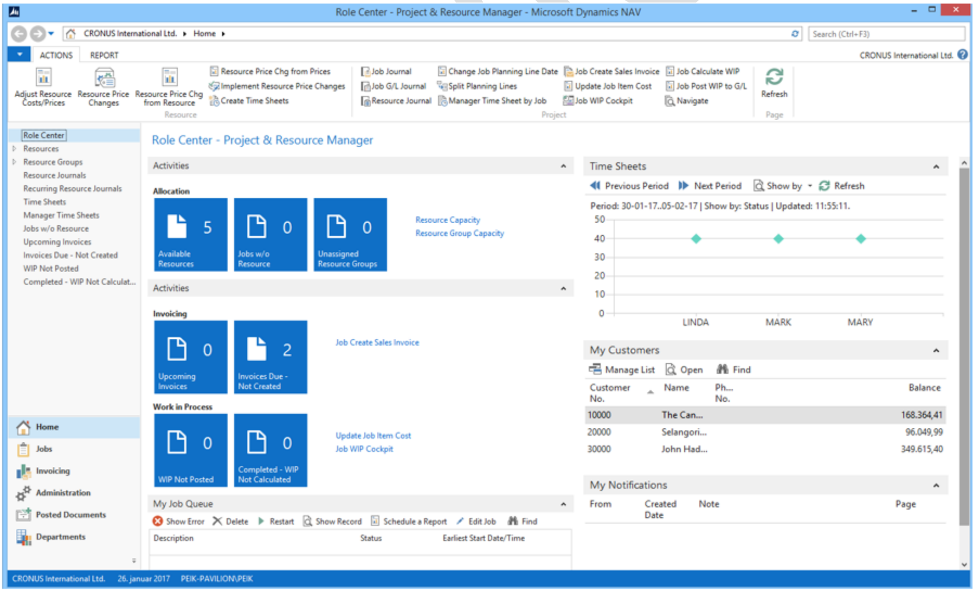
All actions have been designed so the copy/paste functionality will include all necessary variables and properties.

Merging the actions from the two objects, first all actions from the **Resource Manager** Role Center are copied to the actions of the new Role Center. Then the actions from the Project Manager are merged into to the actions of the new Role

Center using action groups to separate the two sets of actions.



Now the joint Role Center looks like this:



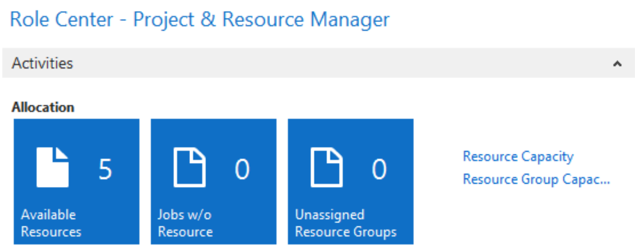
…and there has been no programming yet. Adding extra functionality from here requires access to the development environment and license to a few extra tables and pages.

Adding or changing the cues

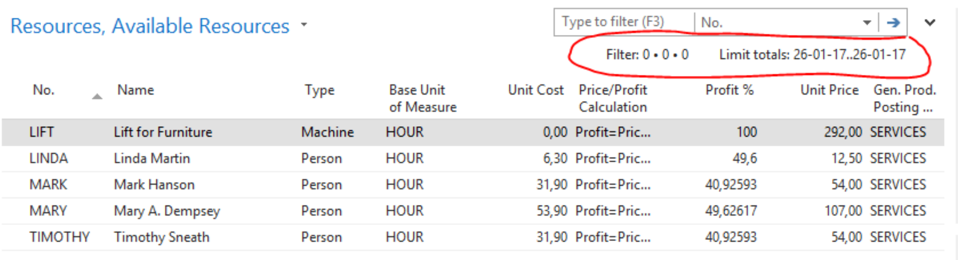
The cues in the activities pages shows a number. This number can be

- A number of documents in a specific state (Released, Open, Delayed, etc.)
- Master data (customers/vendors/item/jobs/resources) in a specific state
- Amounts
- Quantities

...or any other measurable unit. The cues are based on the Flowfields in a table. In Dynamics NAV 2015, the cues have been extended to also include other fields and global variables.

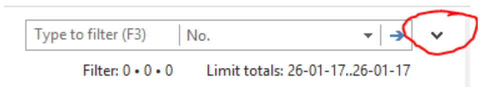


Looking at the example above, the filters of the cues are visible when opening the view by clicking the cue.

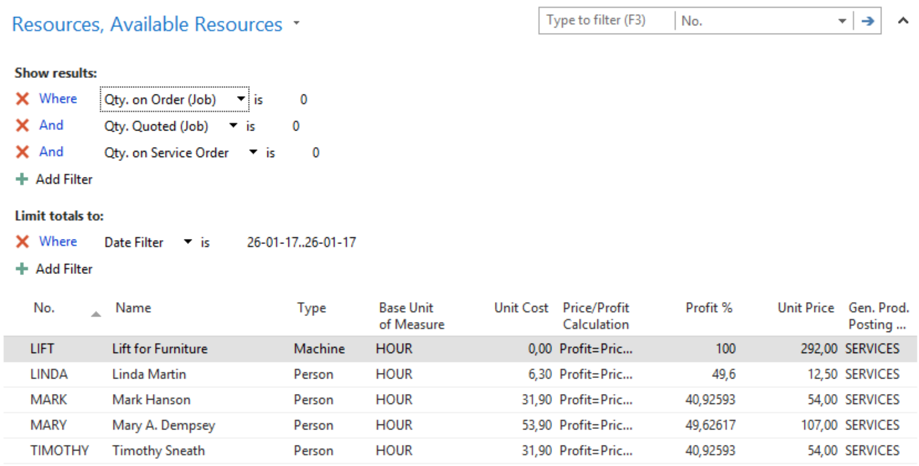


No.	Name	Type	Base Unit of Measure	Unit Cost	Price/Profit Calculation	Profit %	Unit Price	Gen. Prod. Posting ...
LIFT	Lift for Furniture	Machine	HOUR	0,00	Profit=Pric...	100	292,00	SERVICES
LINDA	Linda Martin	Person	HOUR	6,30	Profit=Pric...	49,6	12,50	SERVICES
MARK	Mark Hanson	Person	HOUR	31,90	Profit=Pric...	40,92593	54,00	SERVICES
MARY	Mary A. Dempsey	Person	HOUR	53,90	Profit=Pric...	49,62617	107,00	SERVICES
TIMOTHY	Timothy Sneath	Person	HOUR	31,90	Profit=Pric...	40,92593	54,00	SERVICES

Expand the filters using the small V to the right of the filterbox:



The filters are shown in full:



No.	Name	Type	Base Unit of Measure	Unit Cost	Price/Profit Calculation	Profit %	Unit Price	Gen. Prod. Posting ...
LIFT	Lift for Furniture	Machine	HOUR	0,00	Profit=Pric...	100	292,00	SERVICES
LINDA	Linda Martin	Person	HOUR	6,30	Profit=Pric...	49,6	12,50	SERVICES
MARK	Mark Hanson	Person	HOUR	31,90	Profit=Pric...	40,92593	54,00	SERVICES
MARY	Mary A. Dempsey	Person	HOUR	53,90	Profit=Pric...	49,62617	107,00	SERVICES
TIMOTHY	Timothy Sneath	Person	HOUR	31,90	Profit=Pric...	40,92593	54,00	SERVICES

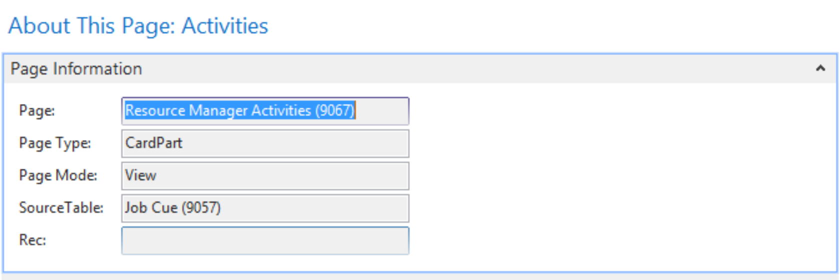
So this cue shows all resources where

- Qty. on Order (Job) is Zero
- Qty. Quoted (Job) is Zero
- Qty. on Service Order is Zero

In the period of 26-01-2015 to 26-01-2015.

In plain language, this means that this cue counts the number of resources not booked for a job—neither an actual nor a quoted job—and it is not booked for a service job either in this period.

To understand how it calculated the information, it is necessary to look at the cue table. The cue table can be found using the "About this page" function on the activities page.



The source table in this case is the “Job Cue” – Table 9057:

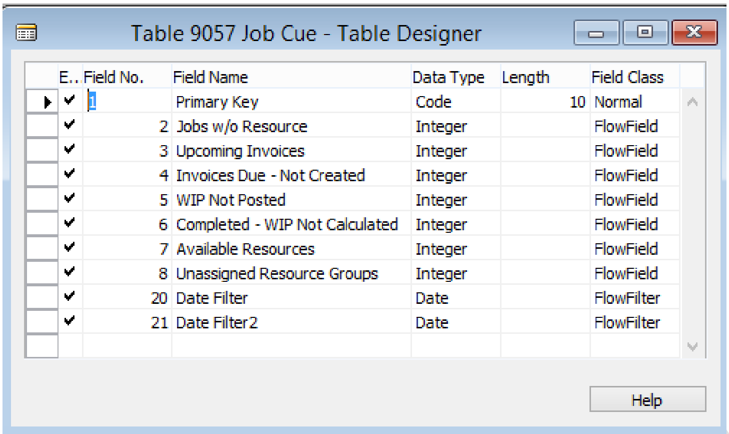


Table 9057 Job Cue - Table Designer

E..	Field No.	Field Name	Data Type	Length	Field Class
✔	1	Primary Key	Code	10	Normal
✔	2	Jobs w/o Resource	Integer		FlowField
✔	3	Upcoming Invoices	Integer		FlowField
✔	4	Invoices Due - Not Created	Integer		FlowField
✔	5	WIP Not Posted	Integer		FlowField
✔	6	Completed - WIP Not Calculated	Integer		FlowField
✔	7	Available Resources	Integer		FlowField
✔	8	Unassigned Resource Groups	Integer		FlowField
✔	20	Date Filter	Date		FlowFilter
✔	21	Date Filter2	Date		FlowFilter

Help

Looking at this table, it is obvious that the Job Cue table is being used for both the Resource Manager and the Project Manager Activities page. It is therefore possible to minimize the space used on the two activities pages by making just one new activities page with all the activities on one page.

It is possible to change the columns shown in the design window. They will be reset when the form is closed, but it might be useful to get a quick overview of some of the properties of a table.

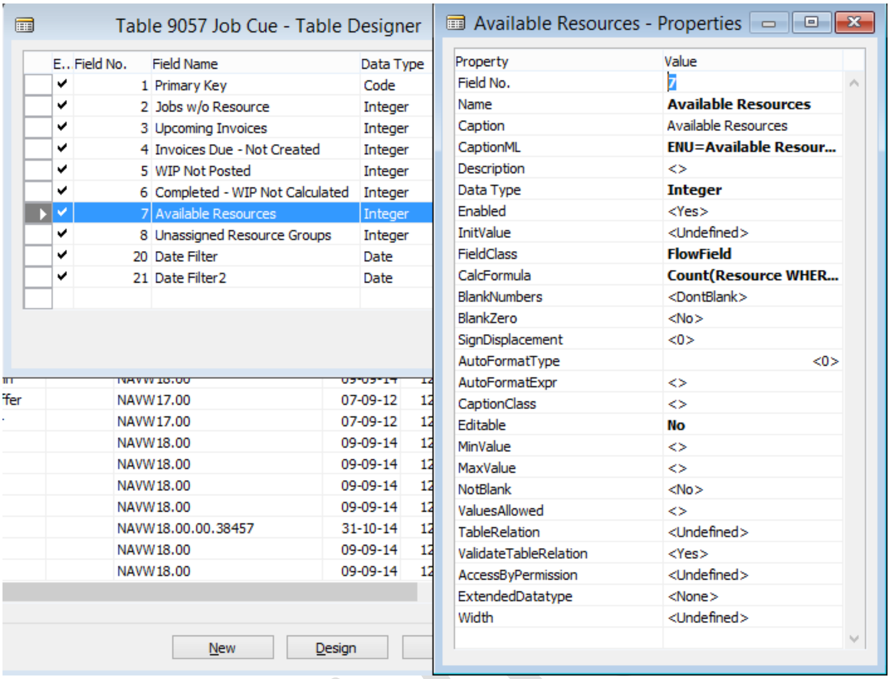
Other than that, there are a few special characteristics making this table a cue table:

- The primary key is named Primary Key; it is Code(10), and it is always blank.
- There are a number of Flowfields as either Integer or Decimal.
- There can be one or more Flowfilters used for the calculations of the Flowfields.

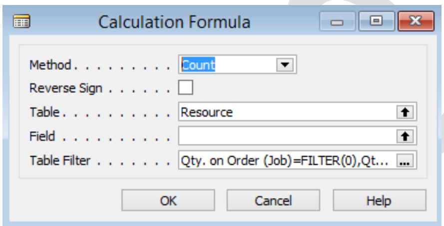
Using Flowfields like this, some functionality is given automatically:

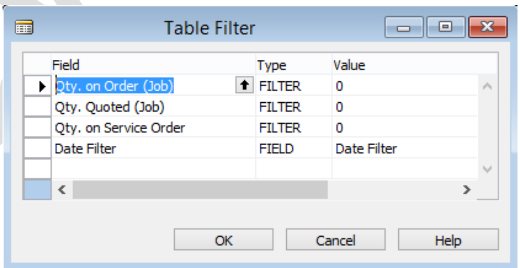
- The calculations
- The Drilldown functionality
- The page used for Drilldown

Looking at the properties of the “Available Resources” field:



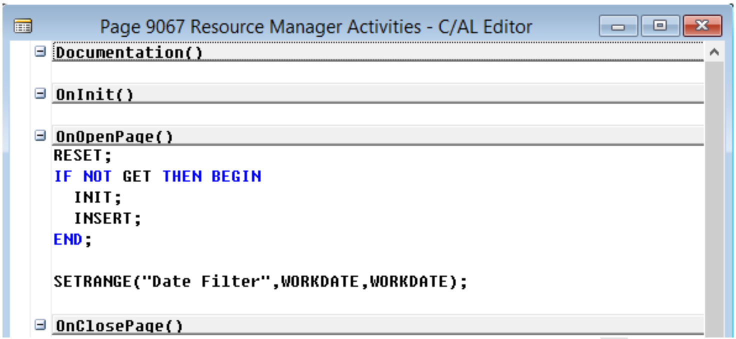
…and further down on the Calculation Formula and the table filter:





…it is clear that this is where the filters are set. However, there is still one mystery: How does the Date Filter get its value?

The answer lies in the initialization of the activities page (9067):



The first code looks a little bit strange, but it is necessary for the cues to work. What is does is this:

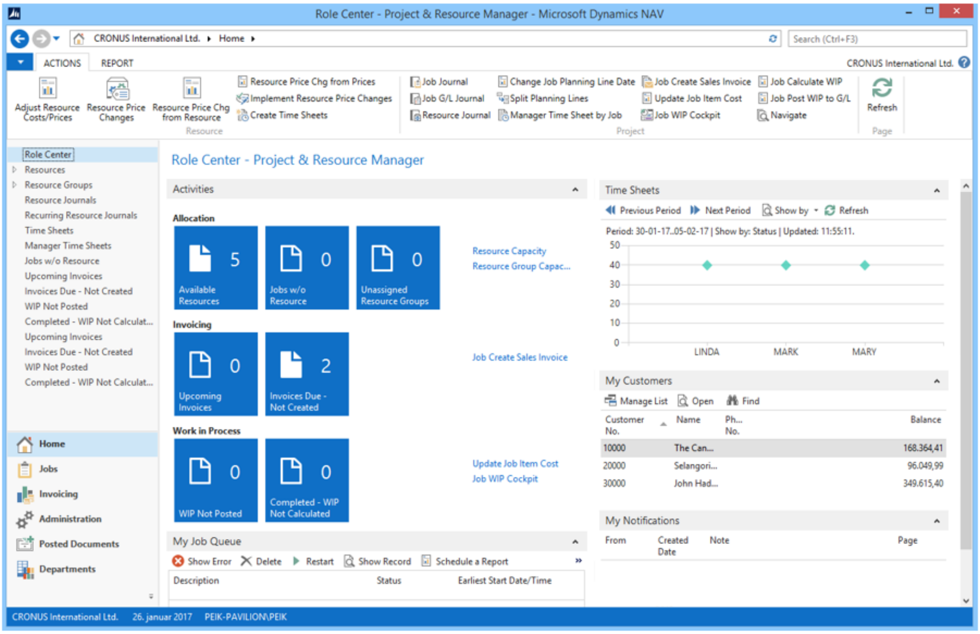
1) Removes all filters
2) Tries to find the record with a blank primary key
3) If it cannot find the blank record it creates a record with a blank primary key

The explanation for this is that a flowfield cannot be calculated without a record. It does not matter which record, hence the blank primary key.

The SETRANGE command is the one setting the Date Filter with the working date.

Since the fields are Flowfields, and they are placed on a visible page, the field is automatically calculated. All filters that are set in the OnOpenPage trigger will be taken into consideration in the calculation.

Having copied the content of the Resource Manager Activities page and the Project Manager Activities page into one new Resource & Project Manager Activities page and added the page to the new Role Center, it now looks like this:



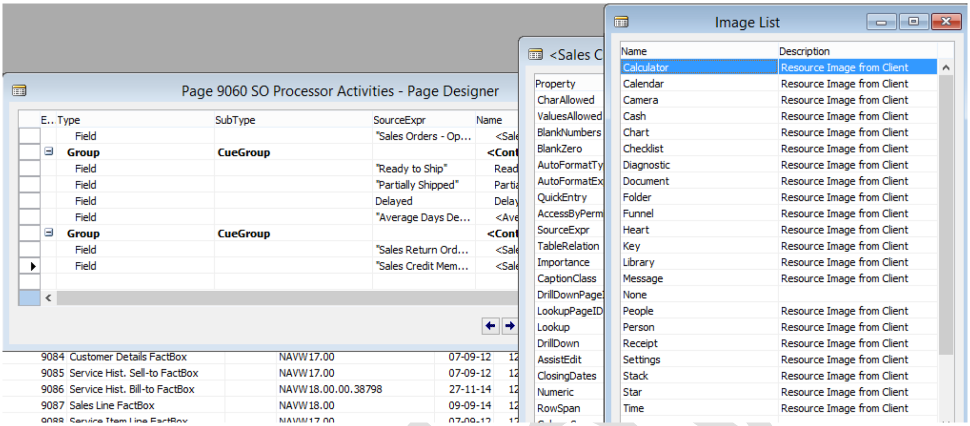
Pimping the cues

Using different icons for the cues

It is now time to set up the images for the cues and the values for the “traffic Light” colors.

This part is only available in Dynamics NAV 2015.

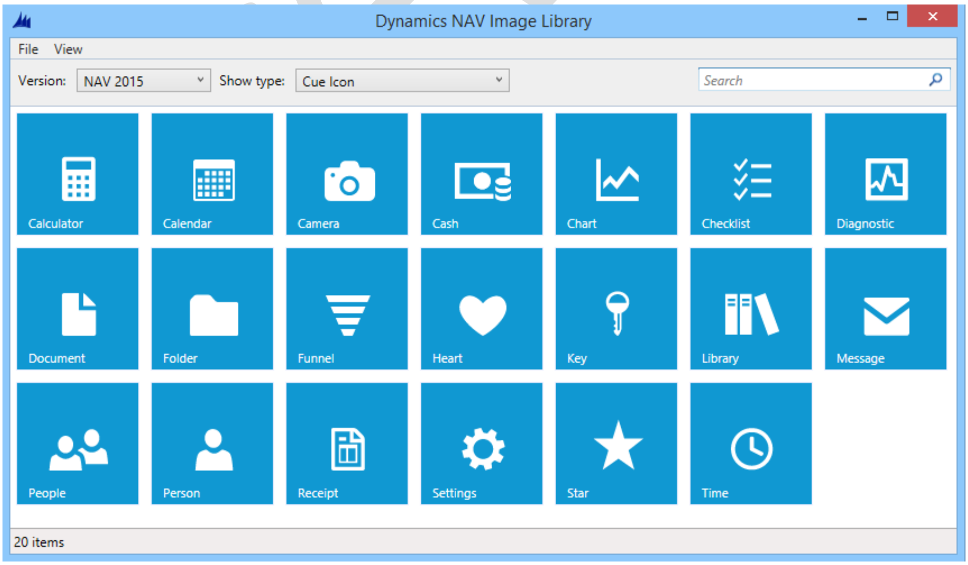
A new property in Dynamics NAV 2015 allows the developer to change the tile image:



Looking at these values only gives an indication of what the icons will look like. To get the full picture, Dynamics NAV MVP Arend-Jan Kauffmann from Xperit made a small application for you.

You can read about it on his blog, and the Mibuso download link is there as well:

http://kauffmann.nl/index.php/2014/10/15/dynamics-nav-2015-image-library/



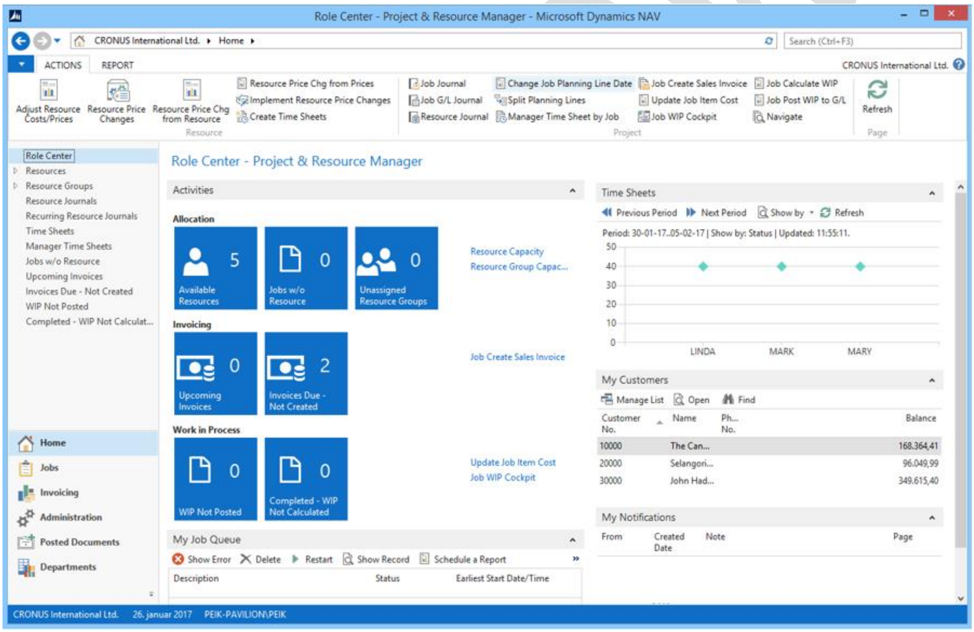
The application shows a comprehensive list of all images and icons for all

- Actions
- Department menus
- Navigation groups
- Tiles
- Cue Icons

… for each version from 2009 to 2015.

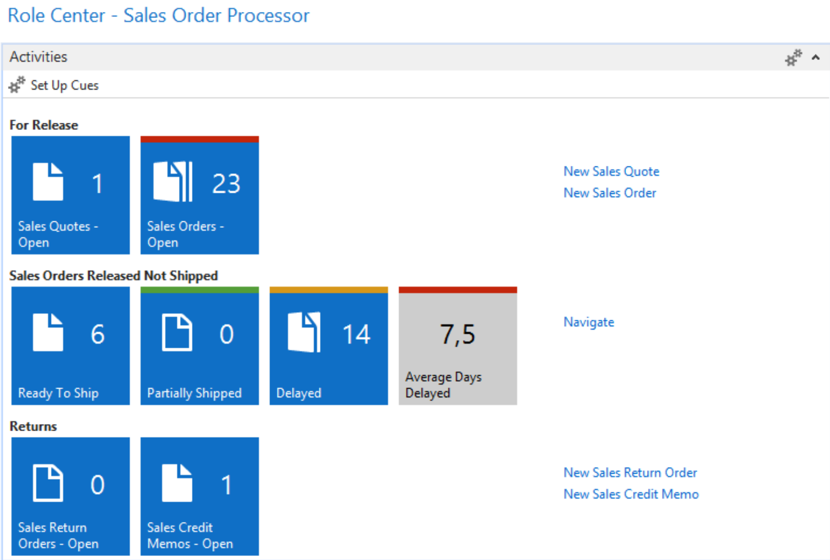
Here we can apply the Cash icon to the invoices cues, the Person icon to the resources cues, and the People icon to the resources group cue.

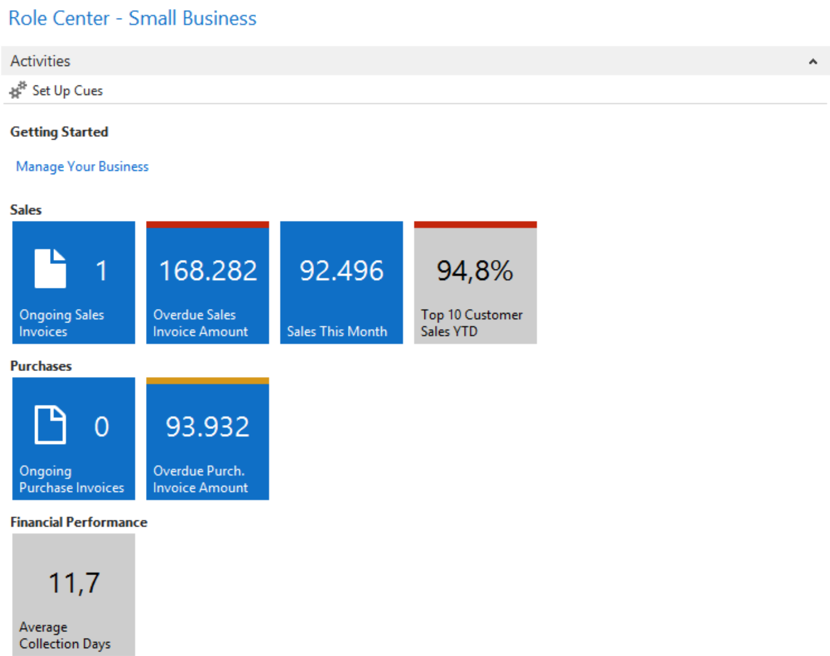
That makes it look like this:



Expressive tiles

In order to help increase readability on the Role Center, the tiles have been enhanced with a color bar along its upper border. The expressive tiles can be seen on the Order Processor Role Center or the Small Business Role Center, displaying red, yellow, or green depending on the value of the cue. However, the functionality is available for all Role Centers.



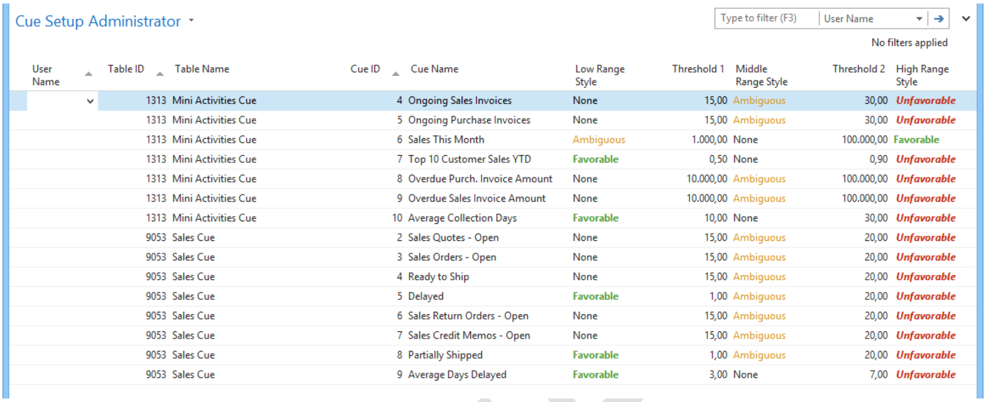


Since the cues calculate different types of values—some are number of documents, some amounts and again some are days—it is difficult to set up standard rules for when a cue should show the red, the yellow, or the green bar.

The values can even be different depending on which user is looking at them. It is therefore possible to set up the values on different levels.

Setting up expressive tiles

The Cue setup page has been hidden in the **Departments/Application Setup/General** menu instead of the more logical **Departments/Application Setup/RoleTailored Client** menu:



Cue Setup Administrator

Type to filter (F3) | User Name

No filters applied

User Name	Table ID	Table Name	Cue ID	Cue Name	Low Range Style	Threshold 1	Middle Range Style	Threshold 2	High Range Style
	1313	Mini Activities Cue	4	Ongoing Sales Invoices	None	15,00	Ambiguous	30,00	Unfavorable
	1313	Mini Activities Cue	5	Ongoing Purchase Invoices	None	15,00	Ambiguous	30,00	Unfavorable
	1313	Mini Activities Cue	6	Sales This Month	Ambiguous	1.000,00	None	100.000,00	Favorable
	1313	Mini Activities Cue	7	Top 10 Customer Sales YTD	Favorable	0,50	None	0,90	Unfavorable
	1313	Mini Activities Cue	8	Overdue Purch. Invoice Amount	None	10.000,00	Ambiguous	100.000,00	Unfavorable
	1313	Mini Activities Cue	9	Overdue Sales Invoice Amount	None	10.000,00	Ambiguous	100.000,00	Unfavorable
	1313	Mini Activities Cue	10	Average Collection Days	Favorable	10,00	None	30,00	Unfavorable
	9053	Sales Cue	2	Sales Quotes - Open	None	15,00	Ambiguous	20,00	Unfavorable
	9053	Sales Cue	3	Sales Orders - Open	None	15,00	Ambiguous	20,00	Unfavorable
	9053	Sales Cue	4	Ready to Ship	None	15,00	Ambiguous	20,00	Unfavorable
	9053	Sales Cue	5	Delayed	Favorable	1,00	Ambiguous	20,00	Unfavorable
	9053	Sales Cue	6	Sales Return Orders - Open	None	15,00	Ambiguous	20,00	Unfavorable
	9053	Sales Cue	7	Sales Credit Memos - Open	None	15,00	Ambiguous	20,00	Unfavorable
	9053	Sales Cue	8	Partially Shipped	Favorable	1,00	Ambiguous	20,00	Unfavorable
	9053	Sales Cue	9	Average Days Delayed	Favorable	3,00	None	7,00	Unfavorable

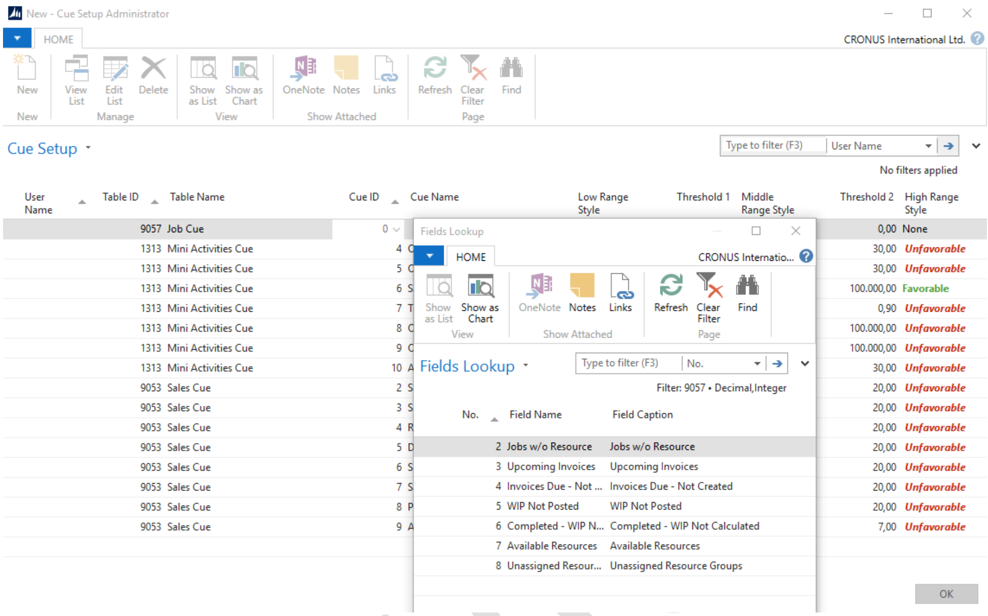
Here, it is obvious that only two Role Centers use the new Expressive Tiles functionality, but it is possible to add new ones here. If the user ID is left blank, the Expressive Tiles will apply to all users. With the user ID, it will only be available for the individual user.

The Cue setup page:

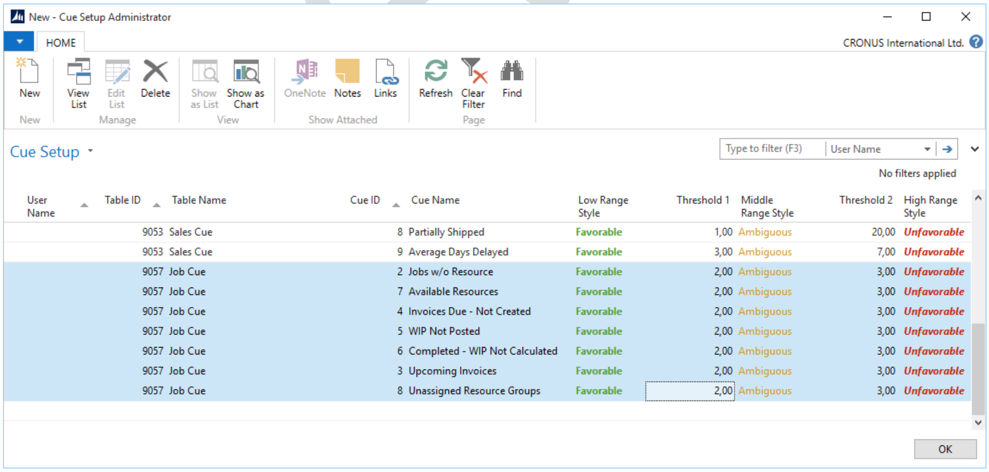
Cue Name:	This will automatically be generated depending on which activities page it is placed.
Low Style Range:	What color should be shown if the value of the cue is below Threshold 1?
Middle Style Range:	What color should be shown if the value of the cue is above Threshold 1 but below Threshold 2?
High Style Range:	What color should be shown if the value of the cue is above Threshold 2?
Personalized:	This will be set automatically if any of the properties are set. Removing the mark will remove all personalizations.

So how do I add Expressive Tiles functionality to the new Role Center?

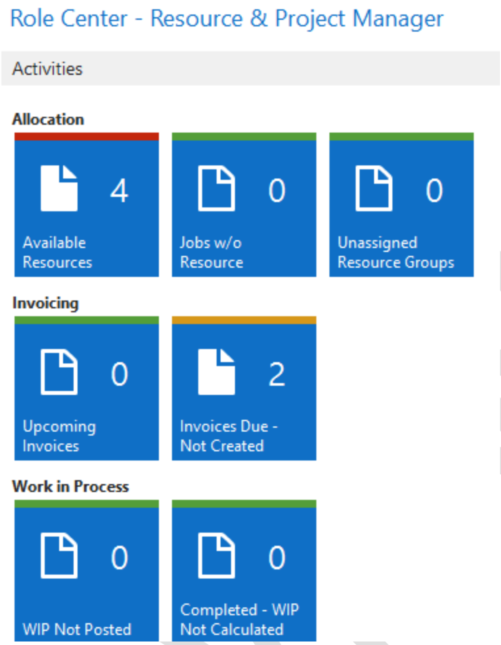
Just add the lines to the **Cue Setup** for Table 9057:



Entering the **Table ID**, the drill-down in the **Cue ID** will show all the cues on the activity page.



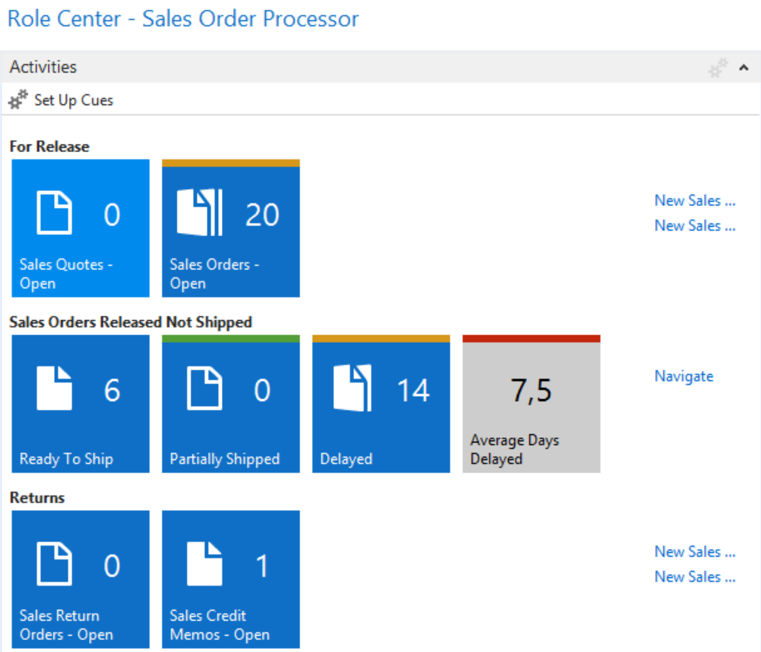
Entering values for the four tiles, the tiles on the Role Center looks like this:



Adding the **Set Up Cues** action on the activity page

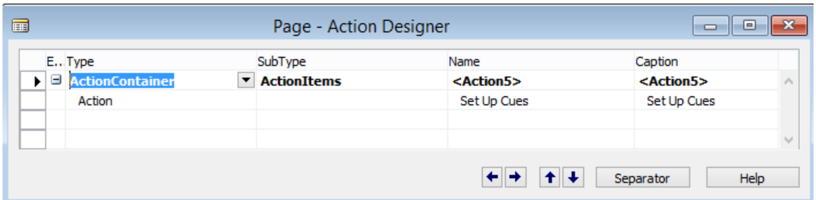
Implementing "Traffic Light" colors on the cues is not as simple as changing the icons on the cues, but it can make a big difference for the readability of the Role Center.

The way to find out how the functionality works is to go fishing in the other Role Centers, and the "Traffic Light" can be found on the Order Processor Role Center page (9006):

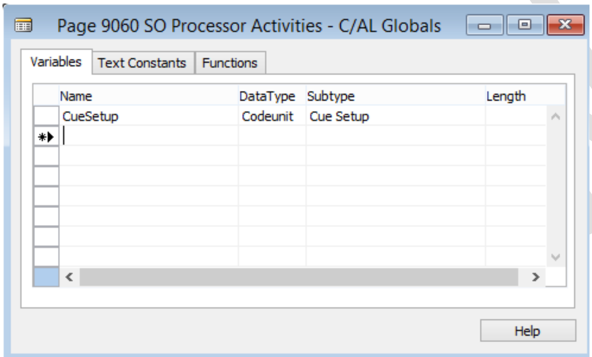


The "Traffic Light" colors are applied on top of each cue automatically as soon as the setup has been performed. The setup page can be placed as a page action.

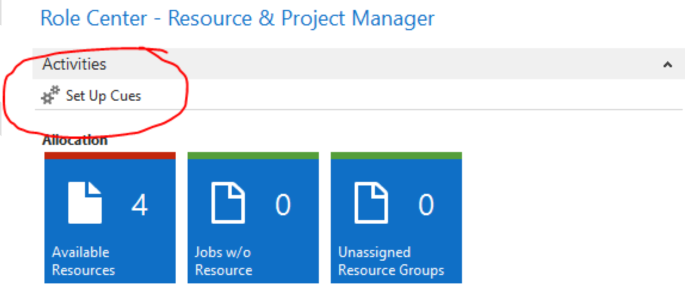
Looking at the Activities page (9060):



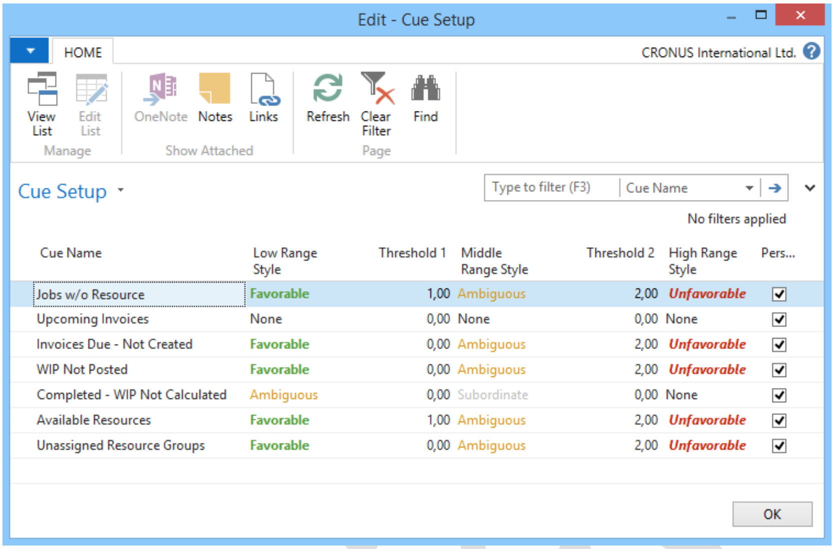
Copy this action to the new activities page together with one global variable:



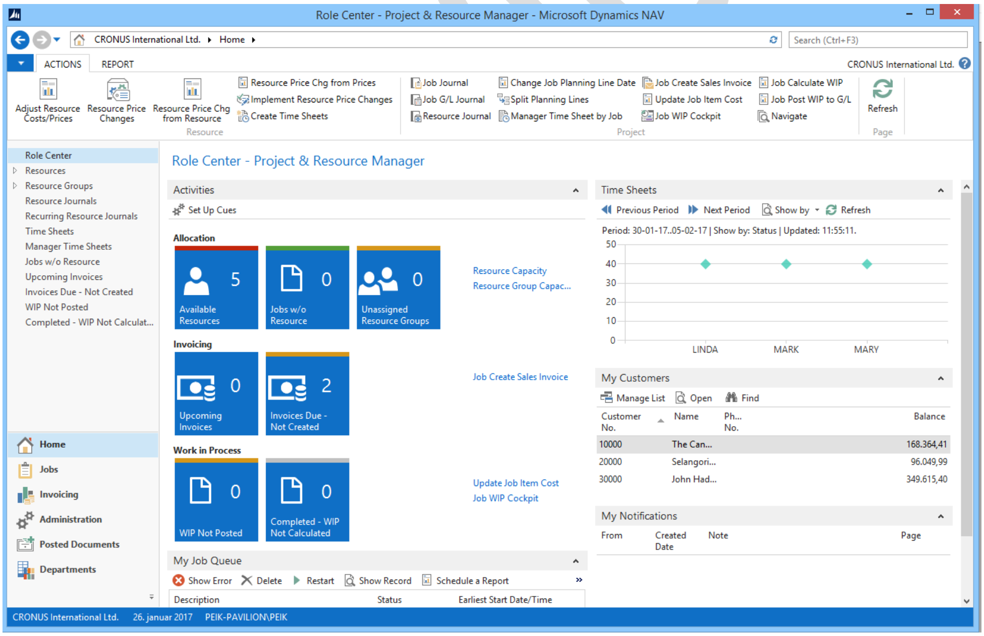
This is all. Now, the “Set Up Cues” action appears on the Role Center:



A quick setup and the cues change colors:



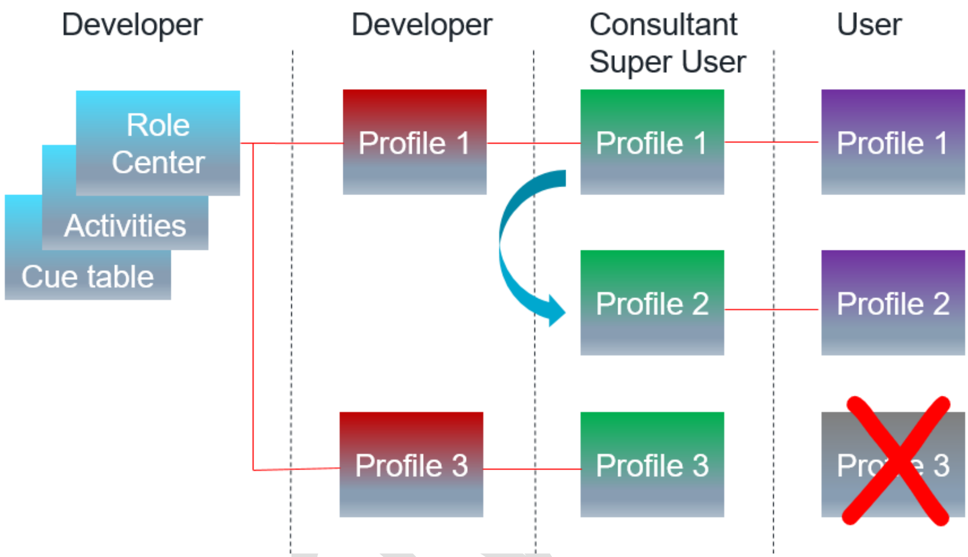
Now the Role Center look like this:



Configuring Profiles

Why configure?

It seems a little overkill to introduce Role Centers, configured profiles, and personalization, but there are good reasons for it.



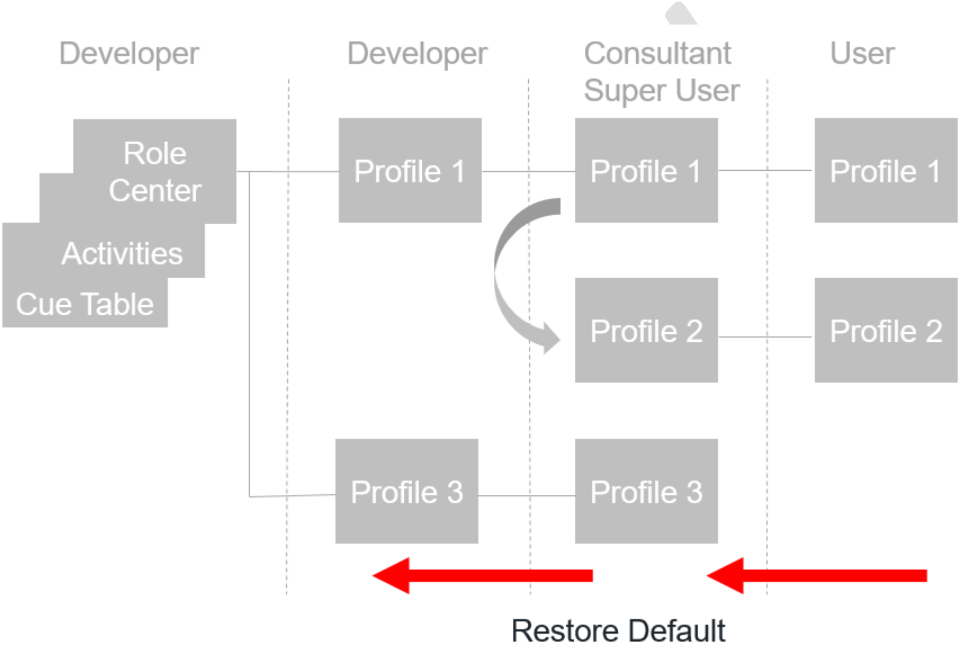
This way, it is possible to make changes to a profile on four different levels:

- Changes to each object in the development environment will affect all users, regardless of Role Center and profile.
- Changes to a Role Center in the development environment will affect all users assigned to profiles utilizing the Role Center.
- Changes to the profile in configuration mode will apply to all users assigned to this profile and nobody else.
- Personalization of the client will only affect the users themselves.

Any changes made in configuration mode or personalizing the client are stored in the database, and there are therefore no problems with recompiling the objects or losing the Zup-file, as in previous versions. The configuration mode is also the way to prepare a profile to be used as a web-client. The web-client will include any configuration made, but it will not include any personalization.

Configuring a profile is irreversible. If any functionality is removed, there is no undo button. It is possible to continue configuring adding the lost functionality back on, but why risk that? Therefore, it is recommended to copy the profile into a new profile before configuring it. Copying a profile will copy all configurations as well.

Any use of the “Restore Default” will reverse all changes back to the developed edition when working in configuration mode.



If the Departments menu has been removed in configuration mode, the only way to restore it is by using the “Restore Default” button in customizing the Navigation Pane. Therefore, always keep two copies of the profiles: one with the Departments menu and one without.

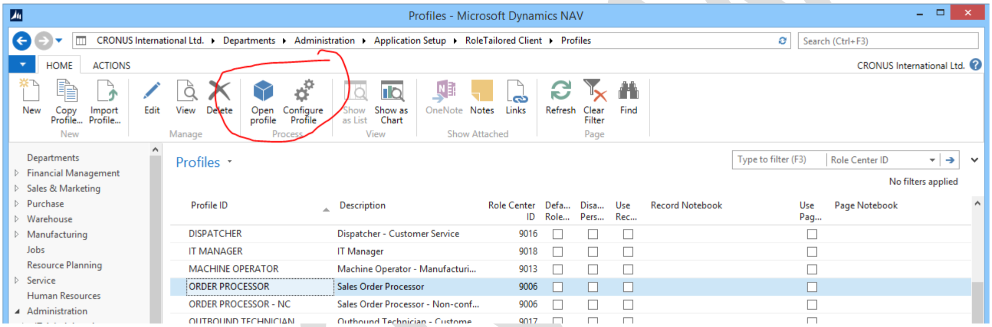
Starting in configuration mode

Starting the RoleTailored Client in configuration mode can be a little tedious. I am going to show a few ways here, but if you are going to configure many different profiles, I recommend looking at Appendix A in the chapter **Managing profiles directly from the Profile List** because that is the absolute easiest way. That way, all you have to do is to find the profile and click the configure action.

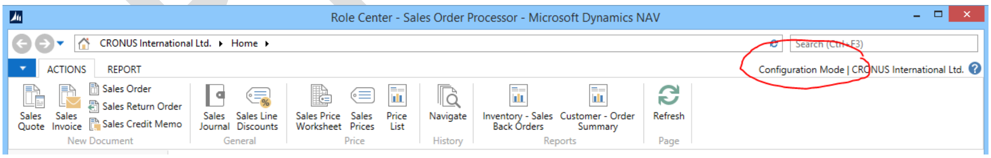
The bottom line is that you need to start the RoleTailored Client again with a special parameter. This can be done in numerous ways:

- Create a copy of the Dynamics NAV shortcut as described in Chapter three: **Microsoft Dynamics NAV Keyboard Shortcuts**.
- Open a Command prompt or create a CMD file with these lines:
    - CD c:\Program Files (x86)\Microsoft Dynamics NAV\80\RoleTailored Client
    - Microsoft.Dynamics.Nav.Client.exe -configure

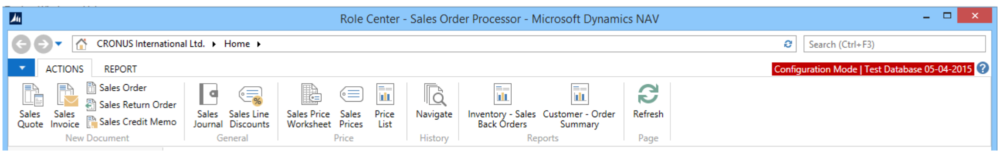
I already went to Appendix A, so my profile list will show a couple of additional actions:



When the RoleTailored Client is started in configuration mode, the text **Configuration Mode** is shown next to the company name. If any system-indicators have been set in the Company Information, the Configuration Mode text will be highlighted as well.



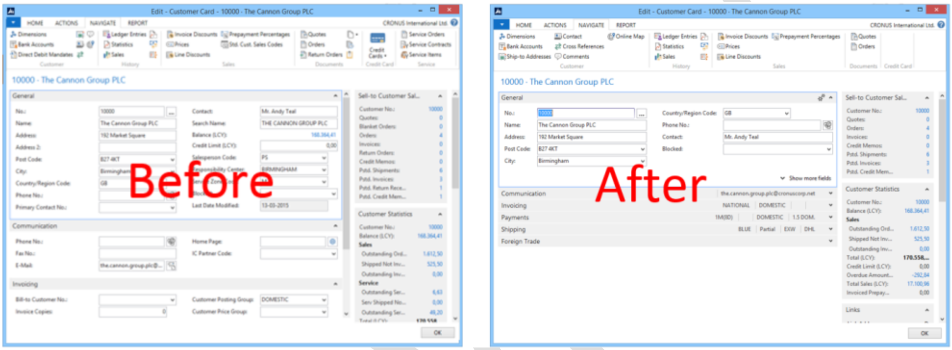
…and with System-Indicators:



⚠ Starting the RoleTailored Client in configuration mode should only be done if you specifically want to change the configuration of a profile. Any changes made to the layout such as expanding/collapsing FastTabs, hiding fields, or anything else will be implemented for all users assigned to the role.

Customizing Pages

One powerful feature of the RoleTailored client is the ability to customize pages. Customizing a page means to remove unused or unwanted functionality, add extra functionality, or change the position or visibility of each item.



On the role centers, it is possible to add functionality from the Departments menu, while on all other pages it is only possible to add the functionality that the developers enabled on that page. The functionality of customizing role centers and pages is the same whether personalizing the client for one user or configuring it for all users assigned to the same role.

⚠ In earlier versions, all customizations to the form were reset if the form was recompiled or if the object was overwritten. This is not the case with pages in the RoleTailored client. All changes are kept in the database, and the client will try to merge changes made in design, with changes made during configuration of the role and personalizations made by the user.

Thank you for downloading the preview. If you enjoyed the preview, the full book can be purchased at: http//b-a.dk

Appendix A: Small changes that can make your life easier

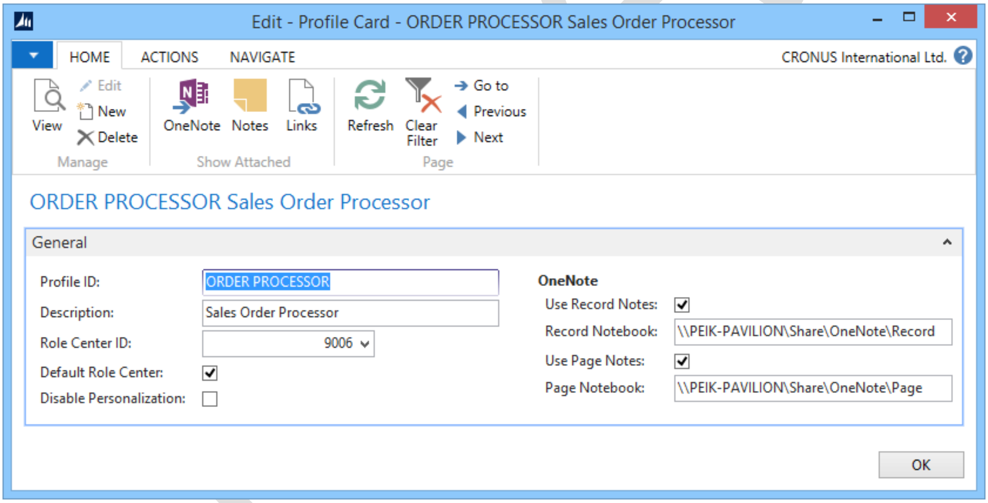
Integrating OneNote with Dynamics NAV

OneNote

Like so many other people, I have had OneNote for a while, and I try to use it to keep notes from meetings and conferences, but it has never been a big aha-experience. Therefore, when it was announced that Dynamics NAV 2013 was going to integrate to OneNote, I did not think much about it.

Conducting courses on Dynamics NAV, I had to show the features, and gradually I became fonder of the functionality.

The OneNote integration is placed on each profile, which I think is very odd, but that means that there can be different OneNote folders for each profile.



There are two different types of OneNote integration: Record and Page. It took me a while to figure out what the difference was.

Record OneNote relates to each record in a table—for example, Customer 10000 in the customer table. All notes in OneNote will then be related to the customer.

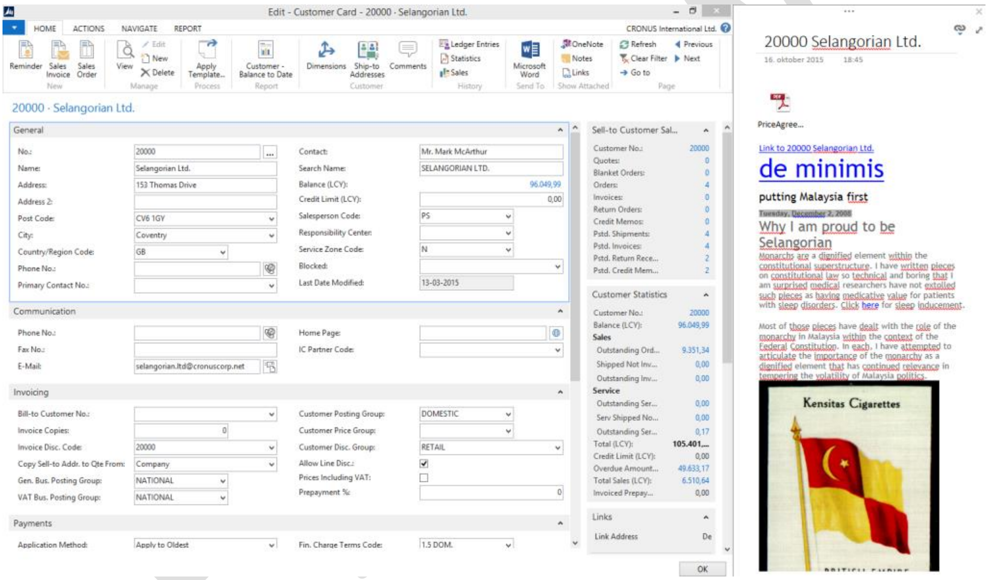
Page OneNote relates to the individual page— for example, page 30 Item Card. Here it is possible to add information on how to create new items, which, again, could be a company manual defining the company procedures and processes.

Referring to the OneNote with a UNC reference (\\Server\Share) will secure that everybody will be able to read the notes.

Record Notes

It is possible to add all sorts of information in OneNote:

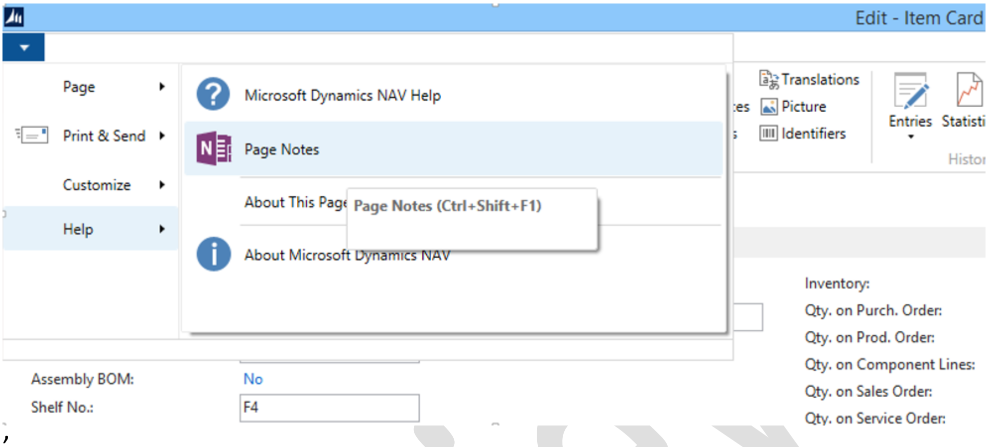
- Images
- Files
- Links
- Text
- Anything that is binary



When clicking on the OneNote icon, a new window opens on the right side of the Dynamics NAV window. Now all sorts of information can be entered by merely copying and pasting into it.

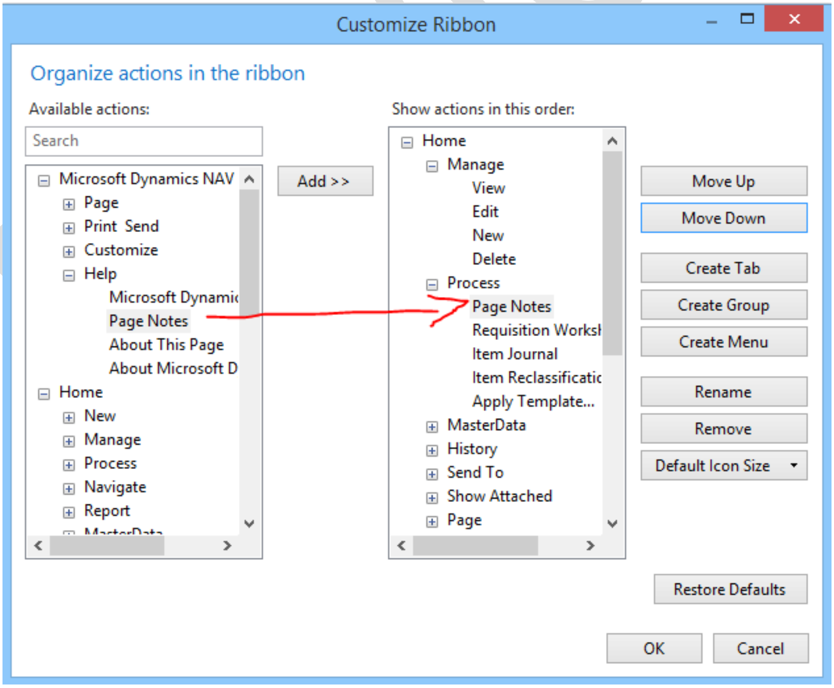
Page Notes

The page notes are a bit more hidden:

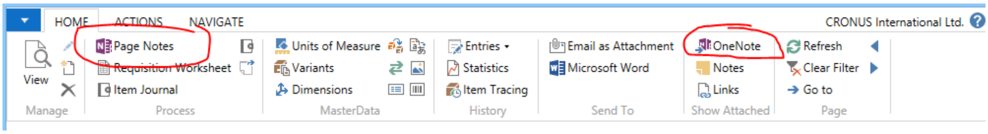


,

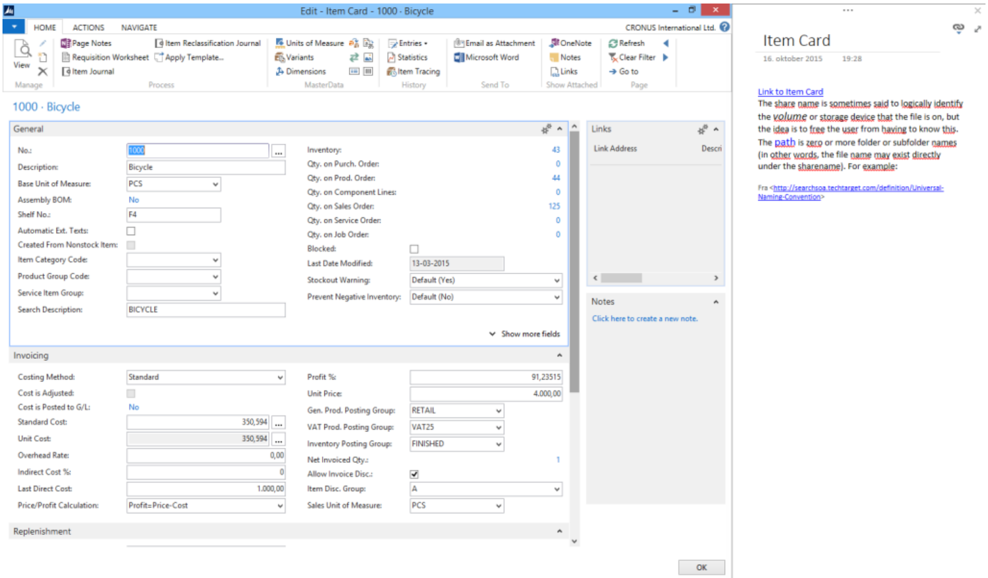
However, it is possible to add them to the Ribbon like everything else:



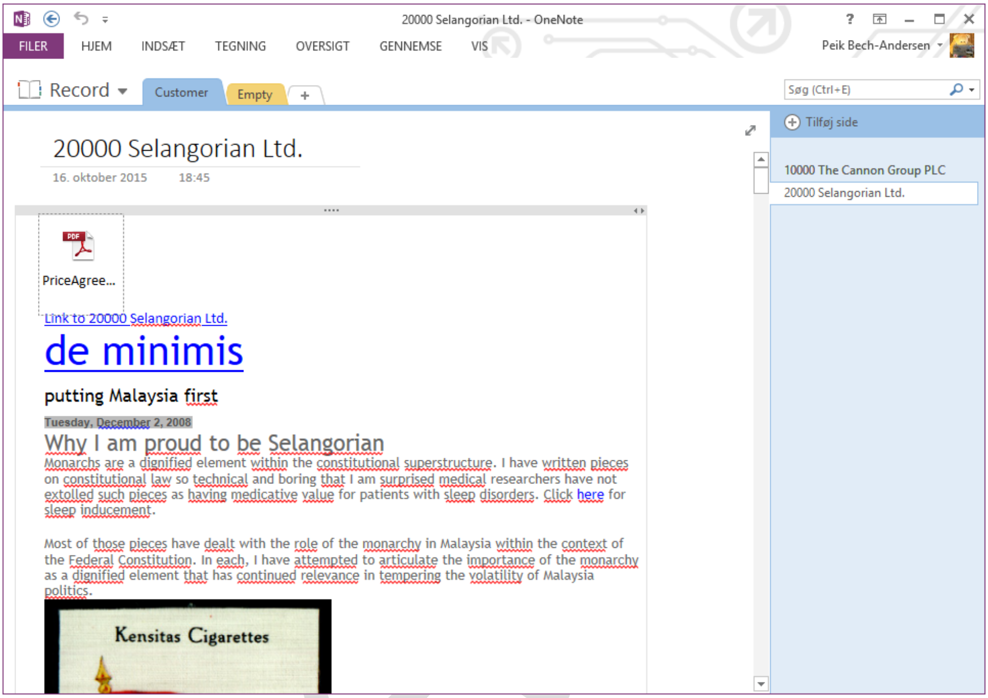
Now OneNote appears in two places:



And it is possible to access it directly.

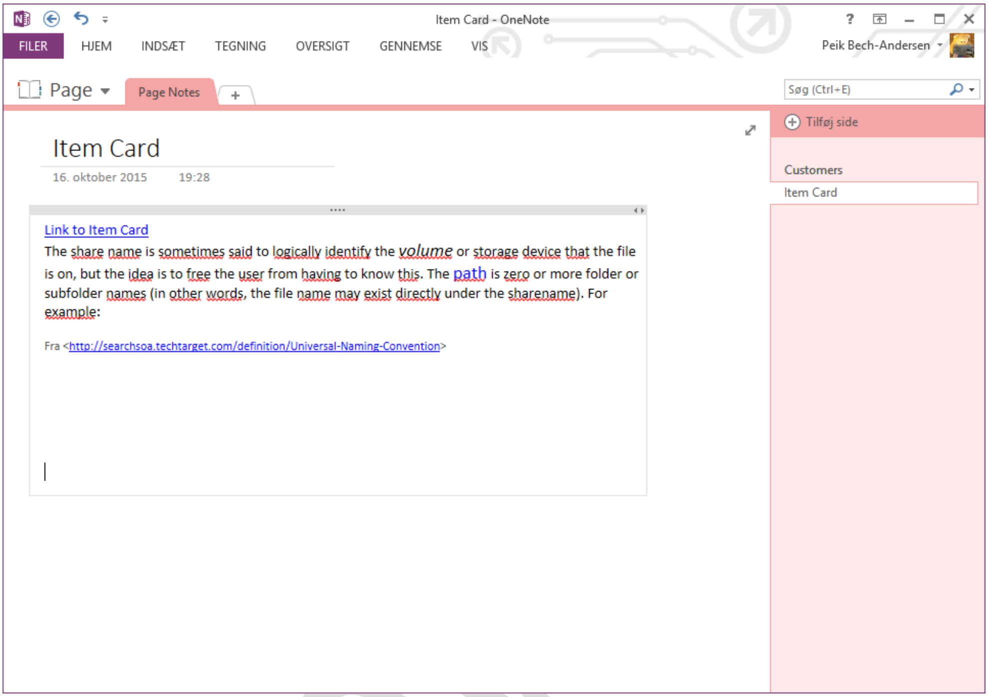


All notes will be saved on the share in separate files in the share and in OneNote, it is possible to see all notes:



On the right side there will be a tab for each customer, vendor, item, or whatever record has been referred to.

There is a separate Notebook for Records and Pages:



Managing Profiles Directly from the Profile List

I used to open profiles by creating shortcuts for each active profile at the customers, but it became a bit tedious to have to create shortcuts every time it was necessary to configure a new profile.

In one of my courses in Jutland, a creative student provided a simple solution for this:

Why not open the profile directly from the profile list?

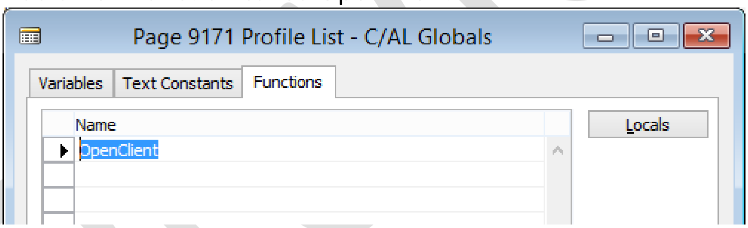
So he designed this simple solution:

In the Development environment, go to the Profile List page (9171) and perform the following:

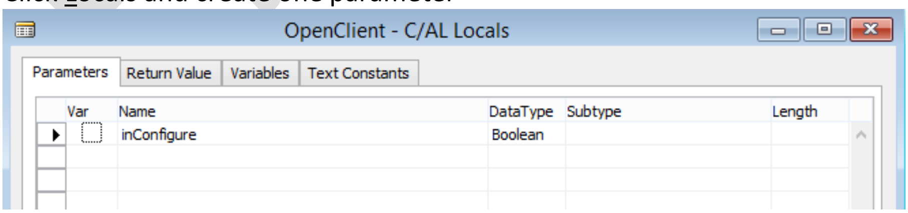
1) Design the page

2) Click View/C/AL Globals

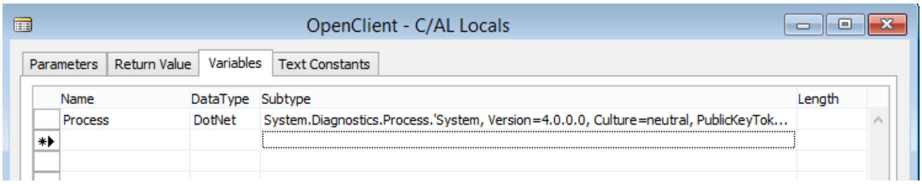
3) Add a new function called OpenClient



4) Click Locals and create one parameter

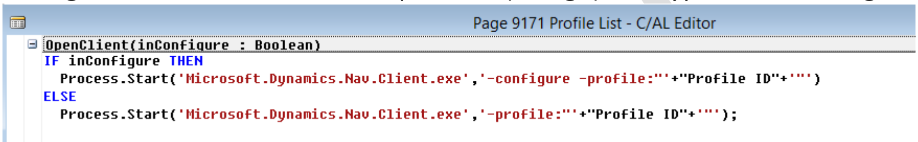


5) And one local variable



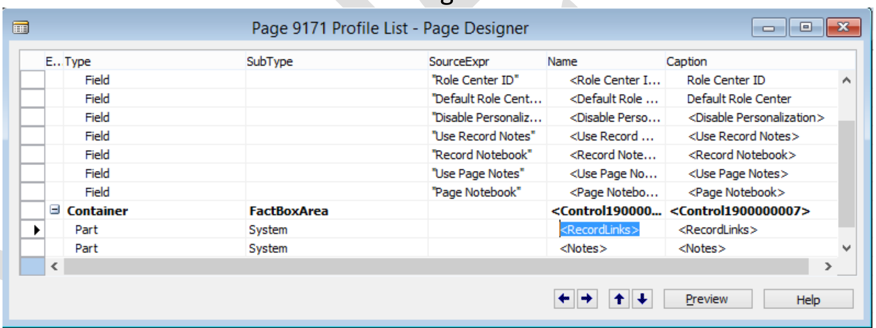
The full Subtype must be:
System.Diagnostics.Process.'System, Version=4.0.0.0, Culture=neutral, PublicKeyToken=b77a5c561934e089'

6) Now go back to the function and press F9 (Design) and type the following:



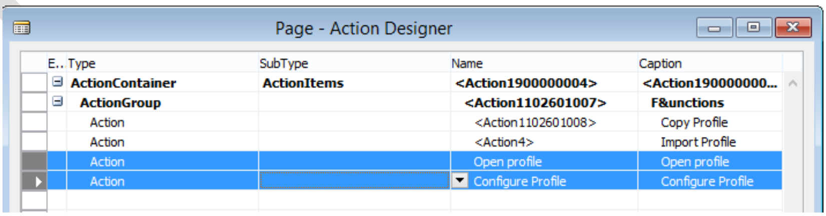

```
OpenClient(inConfigure : Boolean)
IF inConfigure THEN
  Process.Start('Microsoft.Dynamics.Nav.Client.exe','-configure -profile:"'+"Profile ID"+'"')
ELSE
  Process.Start('Microsoft.Dynamics.Nav.Client.exe','-profile:"'+"Profile ID"+'"');
```

7) Now it is necessary to create two new actions on the Profile List:
   a. Go back to the Profile List in design mode:



E..	Type	SubType	SourceExpr	Name	Caption
	Field		"Role Center ID"	<Role Center I...	Role Center ID
	Field		"Default Role Cent...	<Default Role ...	Default Role Center
	Field		"Disable Personaliz...	<Disable Perso...	<Disable Personalization>
	Field		"Use Record Notes"	<Use Record ...	<Use Record Notes>
	Field		"Record Notebook"	<Record Note...	<Record Notebook>
	Field		"Use Page Notes"	<Use Page No...	<Use Page Notes>
	Field		"Page Notebook"	<Page Notebo...	<Page Notebook>
⊟	**Container**	**FactBoxArea**		**<Control190000...**	**<Control1900000007>**
	Part	System		<RecordLinks>	<RecordLinks>
	Part	System		<Notes>	<Notes>

   b. Click View/Page Actions
   c. Add two new actions:



E..	Type	SubType	Name	Caption
⊟	**ActionContainer**	**ActionItems**	**<Action1900000004>**	**<Action190000000...**
⊟	**ActionGroup**		**<Action1102601007>**	**F&unctions**
	Action		<Action1102601008>	Copy Profile
	Action		<Action4>	Import Profile
	Action		Open profile	Open profile
	Action		Configure Profile	Configure Profile

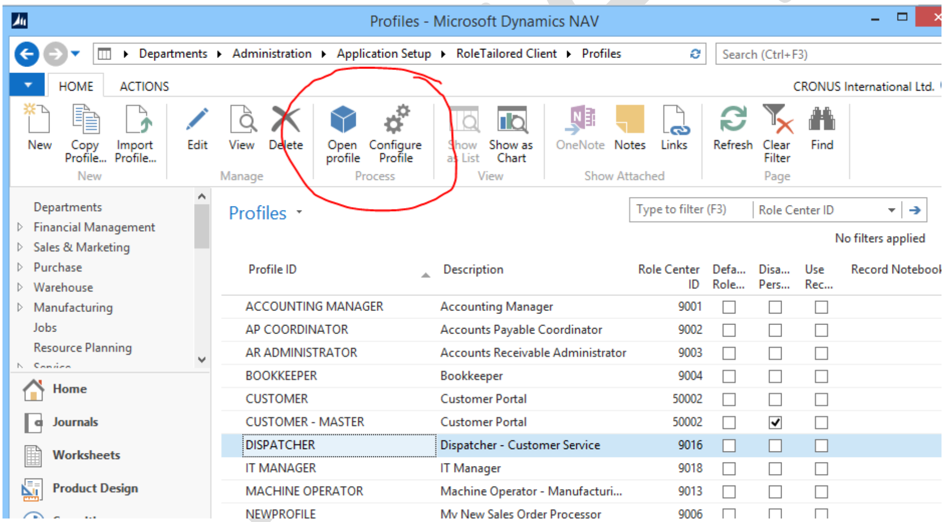
   d. On the "Open Profile" action, press F9 and type:
      OpenClient(FALSE);
   e. Go back to the actions and switch to the "Configure Profile" action, press F9, and type:
      OpenClient(TRUE);

With a little documentation, it could look like this:

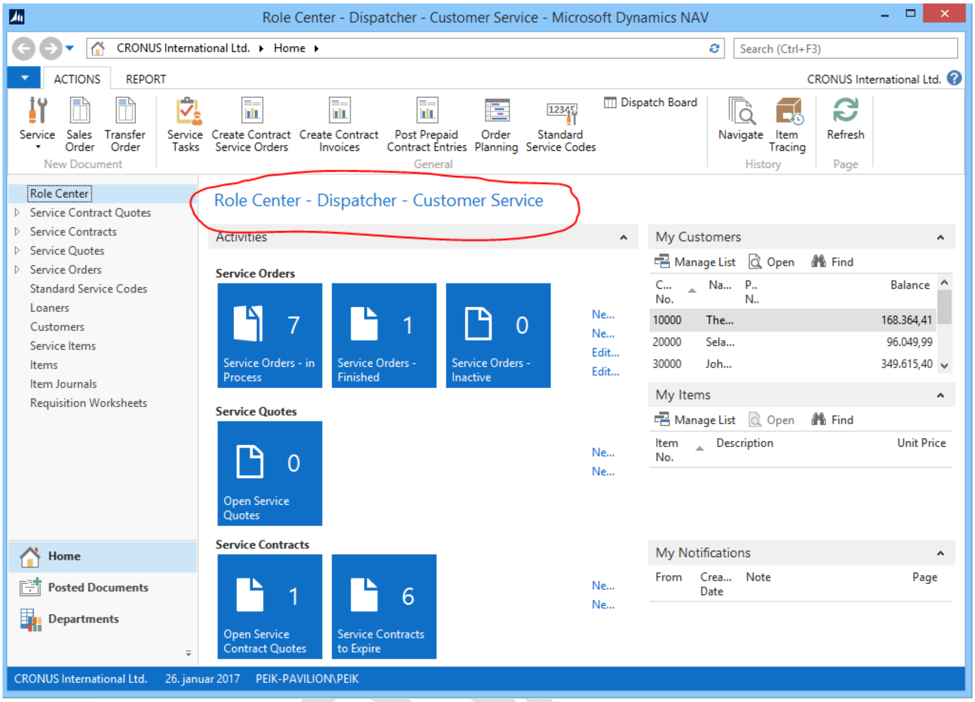
```
Page 9171 Profile List - C/AL Editor

Open profile - OnAction()
// PBA START
OpenClient(FALSE);
// PBA END

Configure Profile - OnAction()
// PBA START
OpenClient(TRUE);
// PBA END

OpenClient(inConfigure : Boolean)
// PBA START
IF inConfigure THEN
  Process.Start('Microsoft.Dynamics.Nav.Client.exe','-configure -profile:"'+"Profile ID"+'"')
ELSE
  Process.Start('Microsoft.Dynamics.Nav.Client.exe','-profile:"'+"Profile ID"+'"');
// PBA END
```

8) Press Esc until prompted to save the object

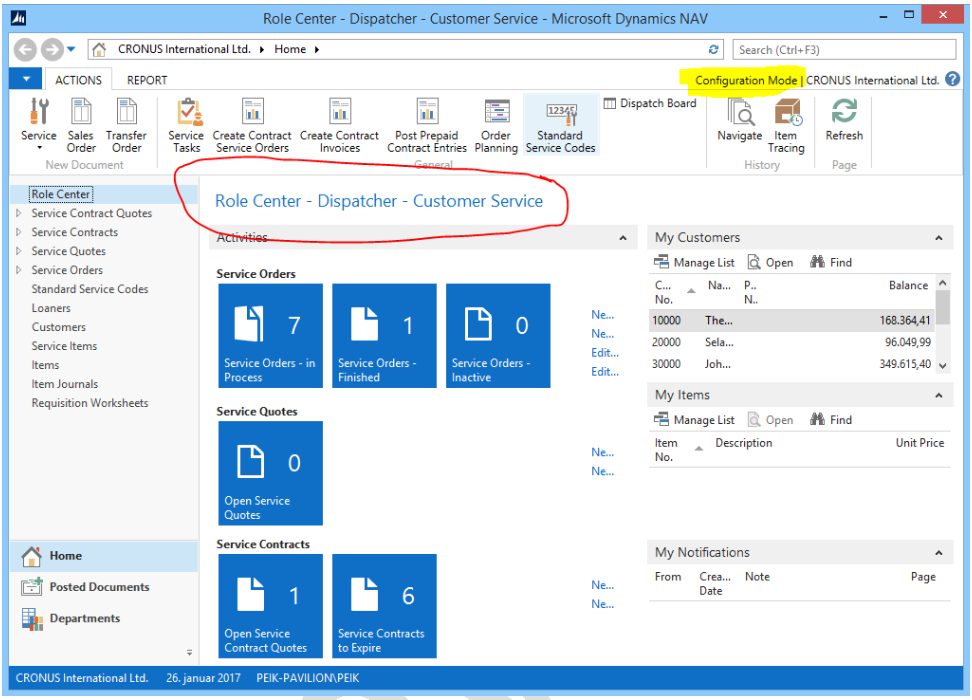
From now on, all you need to do to open or configure a profile is to open the Profile List, find the **Dispatcher** profile, and click Open Profile:



…and the **Dispatcher** profile opens:



...or to open it in configuration mode:



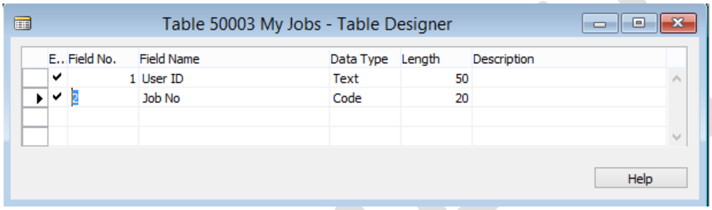
I used the property Image **WorkCenter** for the Open Profile action and the property Image **Setup** for the Configure Profile action.

My Jobs Functionality

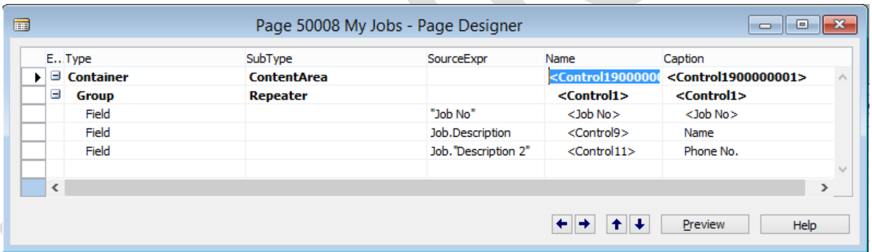
For companies working with jobs a lot, it could be beneficiary to have the same functionality as in My Customers or My Items, and it is quite fast to make:

1) Find the My Customers table and page
2) Copy them to the My Job table and page
3) Change Customer to Job every place it is found in the objects
4) Add the My Jobs page to the **Project Manager** Role Center

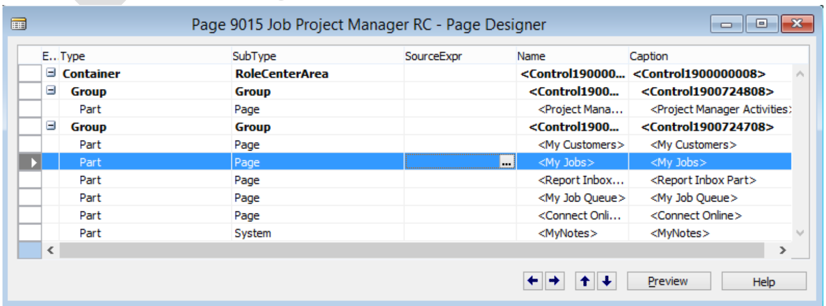
The table:



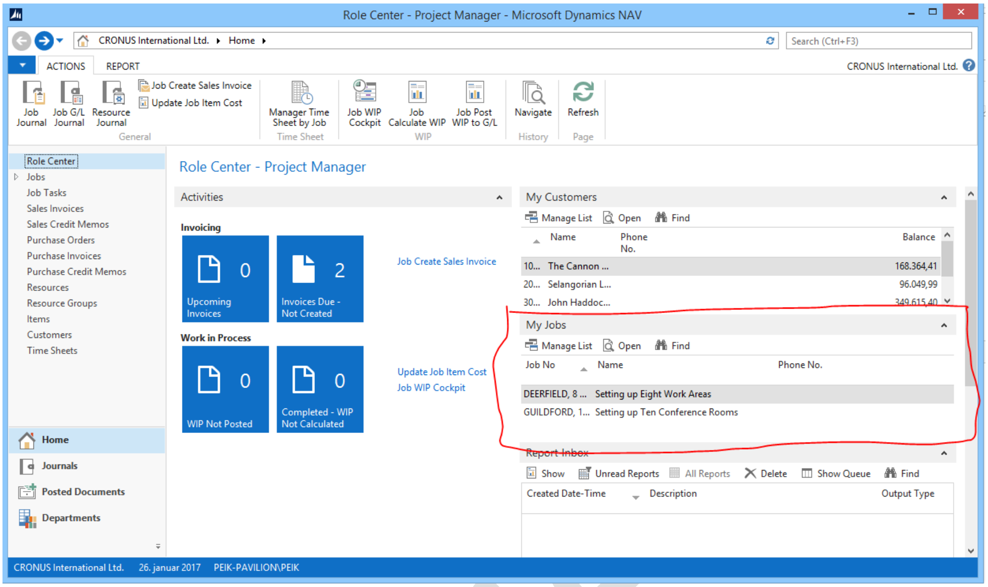
The page:



The Role Center page:



Here is the result:


Role Center - Project Manager - Microsoft Dynamics NAV
CRONUS International Ltd. ▸ Home ▸
Search (Ctrl+F3)
ACTIONS
REPORT
CRONUS International Ltd.
Job Journal
Job G/L Journal
Resource Journal
Job Create Sales Invoice
Update Job Item Cost
General
Manager Time Sheet by Job
Time Sheet
Job WIP Cockpit
Job Calculate WIP
Job Post WIP to G/L
WIP
Navigate
History
Refresh
Page
Role Center
Jobs
Job Tasks
Sales Invoices
Sales Credit Memos
Purchase Orders
Purchase Invoices
Purchase Credit Memos
Resources
Resource Groups
Items
Customers
Time Sheets
Home
Journals
Posted Documents
Departments
Role Center - Project Manager
Activities
Invoicing
0 Upcoming Invoices
2 Invoices Due - Not Created
Job Create Sales Invoice
Work in Process
0 WIP Not Posted
0 Completed - WIP Not Calculated
Update Job Item Cost
Job WIP Cockpit
My Customers
Manage List
Open
Find
Name
Phone No.
Balance
10... The Cannon ... 168.364,41
20... Selangorian L... 96.049,99
30... John Haddoc... 349.615,40
My Jobs
Manage List
Open
Find
Job No
Name
Phone No.
DEERFIELD, 8 ... Setting up Eight Work Areas
GUILDFORD, 1... Setting up Ten Conference Rooms
Report Inbox
Show
Unread Reports
All Reports
Delete
Show Queue
Find
Created Date-Time
Description
Output Type
CRONUS International Ltd. 26. januar 2017 PEIK-PAVILION\PEIK

How to Make A Custom Filter Finding My Resource No.

In Dynamics NAV, it is possible to use a number of custom filters:

%ME	Returns the User ID of the user that is logged on.
%USER	Does the same.
%COMPANY	Returns the company name as in the company identifier from Companies and not the company name from Company Information.
%MYCUSTOMERS	Returns a filter with all the customer numbers from the customers on the My Customers page.
%MYVENDORS	Returns a filter with all the vendor numbers from the vendors on the My Vendors page.
%MYITEMS	Returns a filter with all the item numbers from the items on the My Items page.

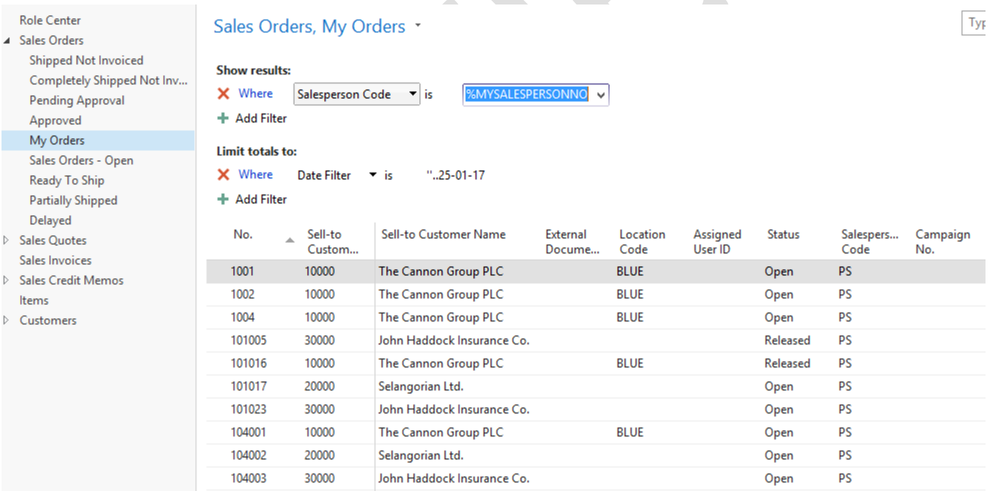
How is it possible to create new custom filters? In codeunit 41 TextManagement, we can find this function:

```
MakeTextFilter(VAR TextFilterText : Text) : Integer
Position := 1;
Length := STRLEN(TextFilterText);
ReadCharacter(' ',TextFilterText,Position,Length);
IF FindText(PartOfText,TextFilterText,Position,Length) THEN
  CASE PartOfText OF
    COPYSTR('ME',1,STRLEN(PartOfText)),COPYSTR(MeText,1,STRLEN(PartOfText)):
      BEGIN
        Position := Position + STRLEN(PartOfText);
        TextFilterText := USERID;
      END;
    COPYSTR('USER',1,STRLEN(PartOfText)),COPYSTR(UserText,1,STRLEN(PartOfText)):
      BEGIN
        Position := Position + STRLEN(PartOfText);
        TextFilterText := USERID;
      END;
    COPYSTR('COMPANY',1,STRLEN(PartOfText)),COPYSTR(CompanyText,1,STRLEN(PartOfText)):
      BEGIN
        Position := Position + STRLEN(PartOfText);
        TextFilterText := COMPANYNAME;
      END;
    COPYSTR('MYCUSTOMERS',1,STRLEN(PartOfText)),COPYSTR(MyCustomersText,1,STRLEN(PartOfText)):
      BEGIN
        Position := Position + STRLEN(PartOfText);
        GetMyFilterText(TextFilterText,DATABASE::"My Customer");
      END;
    COPYSTR('MYITEMS',1,STRLEN(PartOfText)),COPYSTR(MyItemsText,1,STRLEN(PartOfText)):
      BEGIN
        Position := Position + STRLEN(PartOfText);
        GetMyFilterText(TextFilterText,DATABASE::"My Item");
      END;
    COPYSTR('MYVENDORS',1,STRLEN(PartOfText)),COPYSTR(MyVendorsText,1,STRLEN(PartOfText)):
      BEGIN
        Position := Position + STRLEN(PartOfText);
        GetMyFilterText(TextFilterText,DATABASE::"My Vendor");
      END;
    ELSE
      EXIT(Position);
  END;
EXIT(0);
```

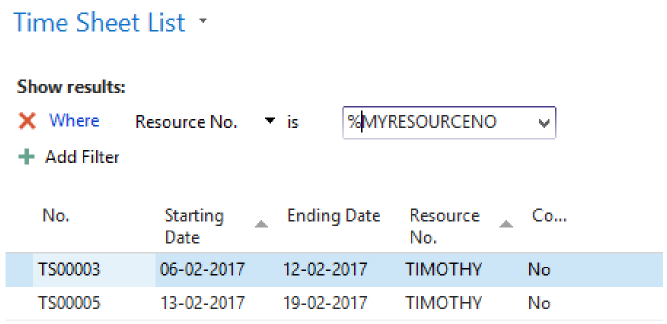
So if I want to create %MYRESOURCENO or %MYSALESPERSONCODE, I can add this code:

```
      Position := Position + STRLEN(PartOfText);
      GetMyFilterText(TextFilterText,DATABASE::"My Vendor");
    END;
  //>>BUILD1.00
  COPYSTR('MYRESOURCENO',1,STRLEN(PartOfText)),COPYSTR(MyVendorsText,1,STRLEN(PartOfText)):
    BEGIN
      Position := Position + STRLEN(PartOfText);
      Resource.SETRANGE("Time Sheet Owner User ID",USERID);
      IF Resource.FINDFIRST THEN
        TextFilterText:=Resource."No.";
    END;
  COPYSTR('MYSALESPERSONNO',1,STRLEN(PartOfText)),COPYSTR(MyVendorsText,1,STRLEN(PartOfText)):
    BEGIN
      Position := Position + STRLEN(PartOfText);
      if UserSetup.get(USERID) then begin
      IF (UserSetup."Salespers./Purch. Code"<>'') THEN
        TextFilterText:=UserSetup."Salespers./Purch. Code";
      END;
    END;
  //<<BUILD1.00
  ELSE
    EXIT(Position);
```

Now it is possible to use the new filter in saved filtered views:

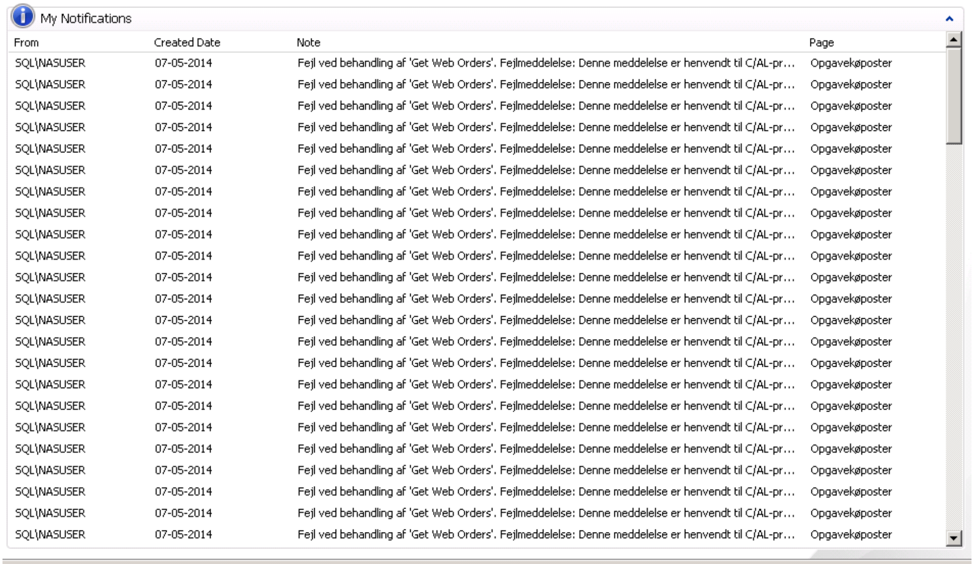


Or %MYRESOURCENO:



Bulk Deletion of Notifications in Dynamics NAV

Have you ever experienced this:

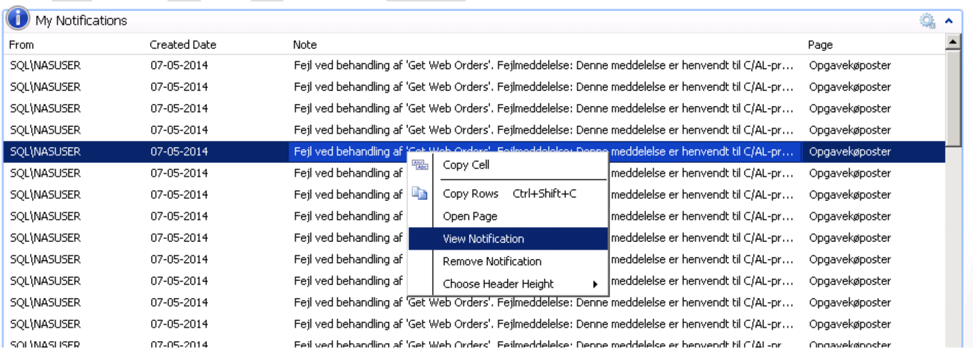


My Notifications

From	Created Date	Note	Page
SQL\NASUSER	07-05-2014	Fejl ved behandling af 'Get Web Orders'. Fejlmeddelelse: Denne meddelelse er henvendt til C/AL-pr…	Opgavekøposter
SQL\NASUSER	07-05-2014	Fejl ved behandling af 'Get Web Orders'. Fejlmeddelelse: Denne meddelelse er henvendt til C/AL-pr…	Opgavekøposter
SQL\NASUSER	07-05-2014	Fejl ved behandling af 'Get Web Orders'. Fejlmeddelelse: Denne meddelelse er henvendt til C/AL-pr…	Opgavekøposter
SQL\NASUSER	07-05-2014	Fejl ved behandling af 'Get Web Orders'. Fejlmeddelelse: Denne meddelelse er henvendt til C/AL-pr…	Opgavekøposter
SQL\NASUSER	07-05-2014	Fejl ved behandling af 'Get Web Orders'. Fejlmeddelelse: Denne meddelelse er henvendt til C/AL-pr…	Opgavekøposter
SQL\NASUSER	07-05-2014	Fejl ved behandling af 'Get Web Orders'. Fejlmeddelelse: Denne meddelelse er henvendt til C/AL-pr…	Opgavekøposter
SQL\NASUSER	07-05-2014	Fejl ved behandling af 'Get Web Orders'. Fejlmeddelelse: Denne meddelelse er henvendt til C/AL-pr…	Opgavekøposter
SQL\NASUSER	07-05-2014	Fejl ved behandling af 'Get Web Orders'. Fejlmeddelelse: Denne meddelelse er henvendt til C/AL-pr…	Opgavekøposter
SQL\NASUSER	07-05-2014	Fejl ved behandling af 'Get Web Orders'. Fejlmeddelelse: Denne meddelelse er henvendt til C/AL-pr…	Opgavekøposter
SQL\NASUSER	07-05-2014	Fejl ved behandling af 'Get Web Orders'. Fejlmeddelelse: Denne meddelelse er henvendt til C/AL-pr…	Opgavekøposter
SQL\NASUSER	07-05-2014	Fejl ved behandling af 'Get Web Orders'. Fejlmeddelelse: Denne meddelelse er henvendt til C/AL-pr…	Opgavekøposter
SQL\NASUSER	07-05-2014	Fejl ved behandling af 'Get Web Orders'. Fejlmeddelelse: Denne meddelelse er henvendt til C/AL-pr…	Opgavekøposter
SQL\NASUSER	07-05-2014	Fejl ved behandling af 'Get Web Orders'. Fejlmeddelelse: Denne meddelelse er henvendt til C/AL-pr…	Opgavekøposter
SQL\NASUSER	07-05-2014	Fejl ved behandling af 'Get Web Orders'. Fejlmeddelelse: Denne meddelelse er henvendt til C/AL-pr…	Opgavekøposter
SQL\NASUSER	07-05-2014	Fejl ved behandling af 'Get Web Orders'. Fejlmeddelelse: Denne meddelelse er henvendt til C/AL-pr…	Opgavekøposter
SQL\NASUSER	07-05-2014	Fejl ved behandling af 'Get Web Orders'. Fejlmeddelelse: Denne meddelelse er henvendt til C/AL-pr…	Opgavekøposter
SQL\NASUSER	07-05-2014	Fejl ved behandling af 'Get Web Orders'. Fejlmeddelelse: Denne meddelelse er henvendt til C/AL-pr…	Opgavekøposter
SQL\NASUSER	07-05-2014	Fejl ved behandling af 'Get Web Orders'. Fejlmeddelelse: Denne meddelelse er henvendt til C/AL-pr…	Opgavekøposter
SQL\NASUSER	07-05-2014	Fejl ved behandling af 'Get Web Orders'. Fejlmeddelelse: Denne meddelelse er henvendt til C/AL-pr…	Opgavekøposter
SQL\NASUSER	07-05-2014	Fejl ved behandling af 'Get Web Orders'. Fejlmeddelelse: Denne meddelelse er henvendt til C/AL-pr…	Opgavekøposter
SQL\NASUSER	07-05-2014	Fejl ved behandling af 'Get Web Orders'. Fejlmeddelelse: Denne meddelelse er henvendt til C/AL-pr…	Opgavekøposter
SQL\NASUSER	07-05-2014	Fejl ved behandling af 'Get Web Orders'. Fejlmeddelelse: Denne meddelelse er henvendt til C/AL-pr…	Opgavekøposter
SQL\NASUSER	07-05-2014	Fejl ved behandling af 'Get Web Orders'. Fejlmeddelelse: Denne meddelelse er henvendt til C/AL-pr…	Opgavekøposter

For some reason, the NAS has not worked properly and the Notification page on the Role Center is flooded with messages. The next thing is to fix the problem with the NAS and delete the notifications—and you cannot select all and delete.

You have to select them individually and remove the notifications:



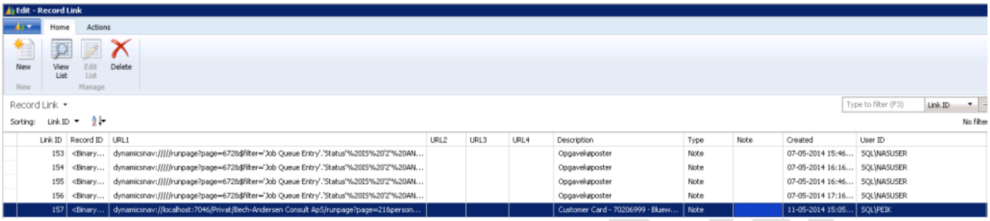
My Notifications

From	Created Date	Note	Page
SQL\NASUSER	07-05-2014	Fejl ved behandling af 'Get Web Orders'. Fejlmeddelelse: Denne meddelelse er henvendt til C/AL-pr…	Opgavekøposter
SQL\NASUSER	07-05-2014	Fejl ved behandling af 'Get Web Orders'. Fejlmeddelelse: Denne meddelelse er henvendt til C/AL-pr…	Opgavekøposter
SQL\NASUSER	07-05-2014	Fejl ved behandling af 'Get Web Orders'. Fejlmeddelelse: Denne meddelelse er henvendt til C/AL-pr…	Opgavekøposter
SQL\NASUSER	07-05-2014	Fejl ved behandling af 'Get Web Orders'. Fejlmeddelelse: Denne meddelelse er henvendt til C/AL-pr…	Opgavekøposter
SQL\NASUSER	07-05-2014	Fejl ved behandling af 'Get Web Orders'. Fejlmeddelelse: Denne meddelelse er henvendt til C/AL-pr…	Opgavekøposter
SQL\NASUSER	07-05-2014	Fejl ved behandling af … meddelelse er henvendt til C/AL-pr…	Opgavekøposter
SQL\NASUSER	07-05-2014	Fejl ved behandling af … meddelelse er henvendt til C/AL-pr…	Opgavekøposter
SQL\NASUSER	07-05-2014	Fejl ved behandling af … meddelelse er henvendt til C/AL-pr…	Opgavekøposter
SQL\NASUSER	07-05-2014	Fejl ved behandling af … meddelelse er henvendt til C/AL-pr…	Opgavekøposter
SQL\NASUSER	07-05-2014	Fejl ved behandling af … meddelelse er henvendt til C/AL-pr…	Opgavekøposter
SQL\NASUSER	07-05-2014	Fejl ved behandling af … meddelelse er henvendt til C/AL-pr…	Opgavekøposter
SQL\NASUSER	07-05-2014	Fejl ved behandling af 'Get Web Orders'. Fejlmeddelelse: Denne meddelelse er henvendt til C/AL-pr…	Opgavekøposter
SQL\NASUSER	07-05-2014	Fejl ved behandling af 'Get Web Orders'. Fejlmeddelelse: Denne meddelelse er henvendt til C/AL-pr…	Opgavekøposter
SQL\NASUSER	07-05-2014	Fejl ved behandling af 'Get Web Orders'. Fejlmeddelelse: Denne meddelelse er henvendt til C/AL-pr	Opgavekøposter

Ok then, let's run the table and delete the records from there (everything is easier with a developer's license)

Well, that is possible, but that is hardly a user interface we want to pass on to our users.

The notifications are not stored in a normal Dynamics NAV table but rather in the Record Link table. Deleting all records in the Records Link table is not an option, because that would remove ALL real record links and intentional notes as well.

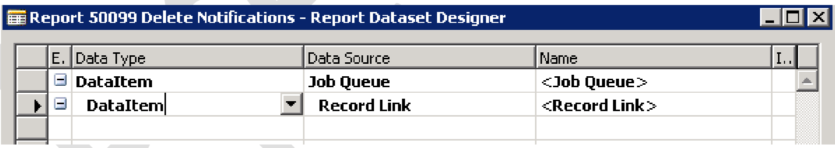


Running the table, we can see the record link table.

The **Type** field will show if the record link points to a link or a note. Within the notes, we can distinguish between user notes and system notes by the User ID—all the more reason for running the NAS using a dedicated domain User ID.

The bottom line is a note made on a customer by a user, whereas the rest are the notifications from the NAS user.

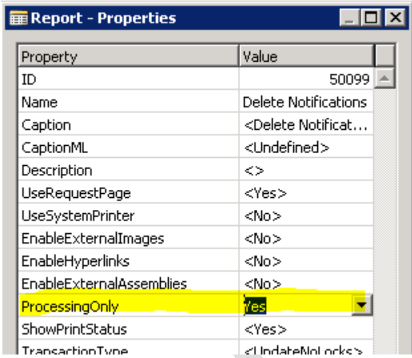
Now we have enough information to create a report to do the deletion:



Using the Job Queue to find all NASs and combine it with the Record Link table,

I start by changing a report property:

ProcessingOnly. There is no reason to involve the Visual Studio layout, unless you want documentation for the deletion.



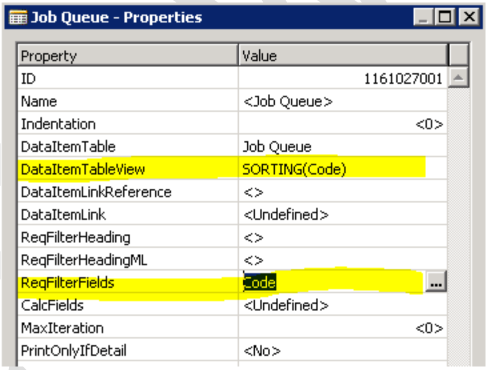
Report - Properties

Property	Value
ID	50099
Name	Delete Notifications
Caption	<Delete Notificat…
CaptionML	<Undefined>
Description	<>
UseRequestPage	<Yes>
UseSystemPrinter	<No>
EnableExternalImages	<No>
EnableHyperlinks	<No>
EnableExternalAssemblies	<No>
ProcessingOnly	Yes
ShowPrintStatus	<Yes>
TransactionType	<UpdateNoLocks>

Then a property on the Job Queue DataItem:

DataItemTableView to remove the sorting option on the request page

RequestFilterFields to enable filtering on the job queue code.



Job Queue - Properties

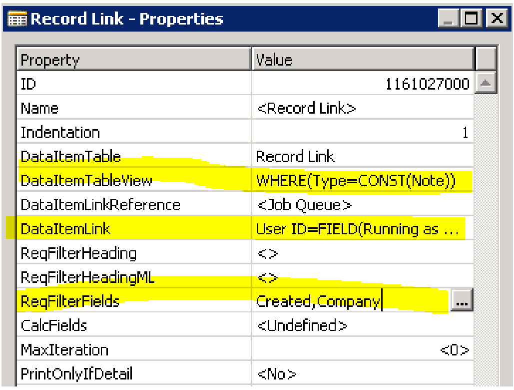
Property	Value
ID	1161027001
Name	<Job Queue>
Indentation	<0>
DataItemTable	Job Queue
DataItemTableView	SORTING(Code)
DataItemLinkReference	<>
DataItemLink	<Undefined>
ReqFilterHeading	<>
ReqFilterHeadingML	<>
ReqFilterFields	Code
CalcFields	<Undefined>
MaxIteration	<0>
PrintOnlyIfDetail	<No>

Then a property on the Record Link DataItem:

DataItemTableView to remove the sorting option on the request page and to filter Type to Notes.

DataItemLink to filter users with the User ID from the Job Queue.

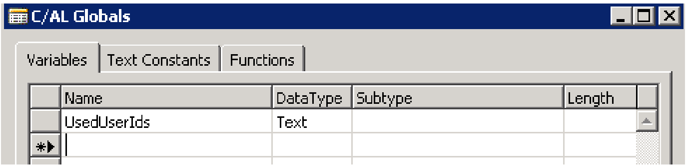
ReqFilterFields to enable filtering on Company Name and Creation Date.



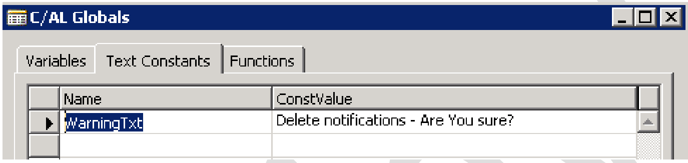
Record Link - Properties

Property	Value
ID	1161027000
Name	<Record Link>
Indentation	1
DataItemTable	Record Link
DataItemTableView	WHERE(Type=CONST(Note))
DataItemLinkReference	<Job Queue>
DataItemLink	User ID=FIELD(Running as …
ReqFilterHeading	<>
ReqFilterHeadingML	<>
ReqFilterFields	Created,Company
CalcFields	<Undefined>
MaxIteration	<0>
PrintOnlyIfDetail	<No>

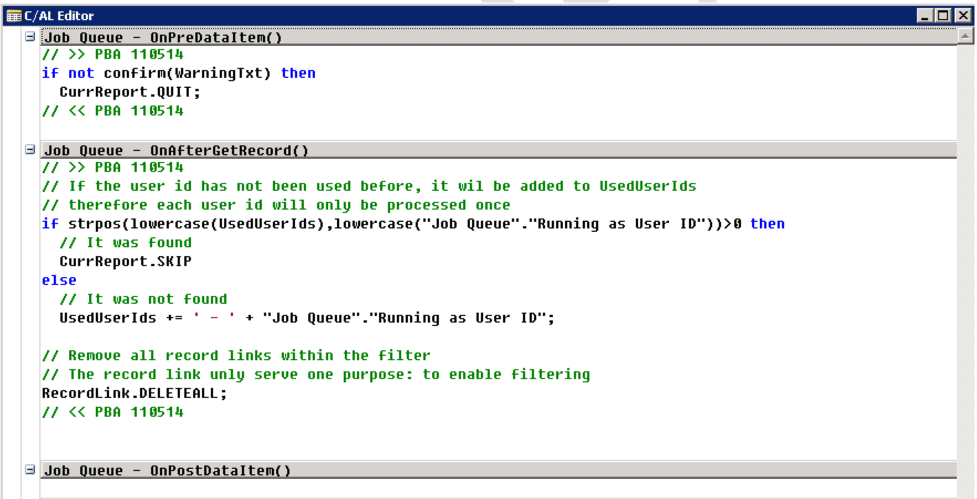
Now everything is ready, but I need a variable:



...and a text constant:



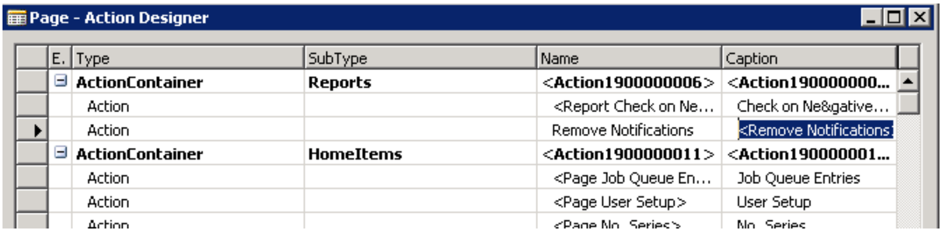
...and a couple lines of code:

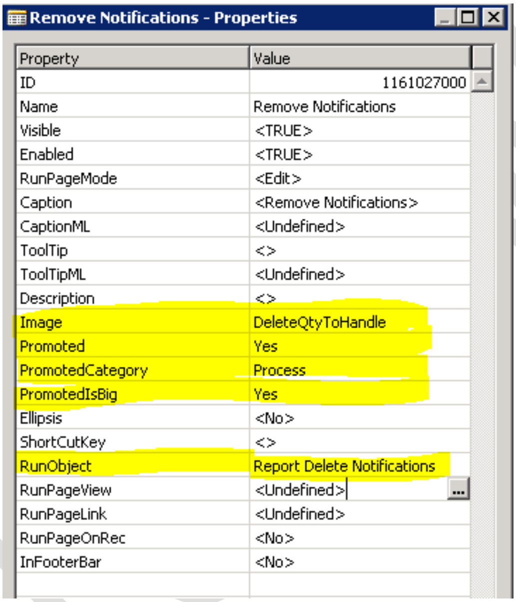



```
Job Queue - OnPreDataItem()
// >> PBA 110514
if not confirm(WarningTxt) then
  CurrReport.QUIT;
// << PBA 110514

Job Queue - OnAfterGetRecord()
// >> PBA 110514
// If the user id has not been used before, it wil be added to UsedUserIds
// therefore each user id will only be processed once
if strpos(lowercase(UsedUserIds),lowercase("Job Queue"."Running as User ID"))>0 then
  // It was found
  CurrReport.SKIP
else
  // It was not found
  UsedUserIds += ' - ' + "Job Queue"."Running as User ID";

// Remove all record links within the filter
// The record link unly serve one purpose: to enable filtering
RecordLink.DELETEALL;
// << PBA 110514

Job Queue - OnPostDataItem()
```

Save and exit.

Now add the report to the **IT Manager** Role Center (9018):


Page - Action Designer
E.
Type
SubType
Name
Caption
ActionContainer
Reports
<Action1900000006>
<Action190000000...
Action
<Report Check on Ne...
Check on Ne&gative...
Action
Remove Notifications
<Remove Notifications
ActionContainer
HomeItems
<Action1900000011>
<Action190000001...
Action
<Page Job Queue En...
Job Queue Entries
Action
<Page User Setup>
User Setup


Remove Notifications - Properties
Property
Value
ID
1161027000
Name
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Visible
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Enabled
<TRUE>
RunPageMode
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InFooterBar
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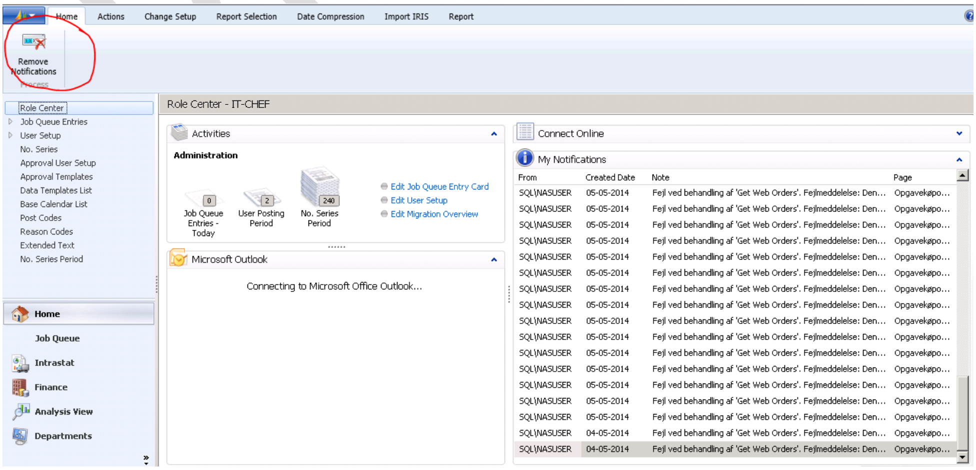
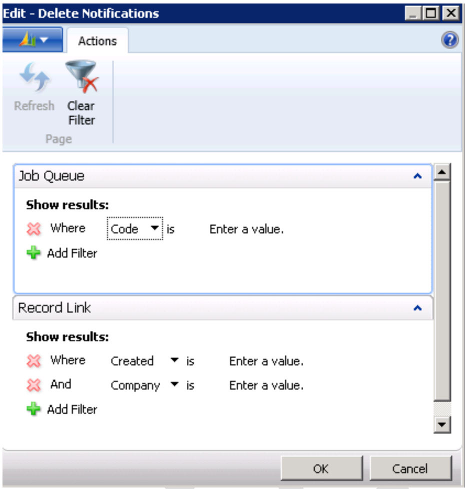
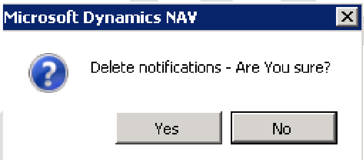

Home
Actions
Change Setup
Report Selection
Date Compression
Import IRIS
Report
Remove Notifications
Role Center
Job Queue Entries
User Setup
No. Series
Approval User Setup
Approval Templates
Data Templates List
Base Calendar List
Post Codes
Reason Codes
Extended Text
No. Series Period
Home
Job Queue
Intrastat
Finance
Analysis View
Departments
Role Center - IT-CHEF
Activities
Administration
Job Queue Entries - Today
User Posting Period
No. Series Period
Edit Job Queue Entry Card
Edit User Setup
Edit Migration Overview
Microsoft Outlook
Connecting to Microsoft Office Outlook...
Connect Online
My Notifications
From
Created Date
Note
Page

Now run the report:

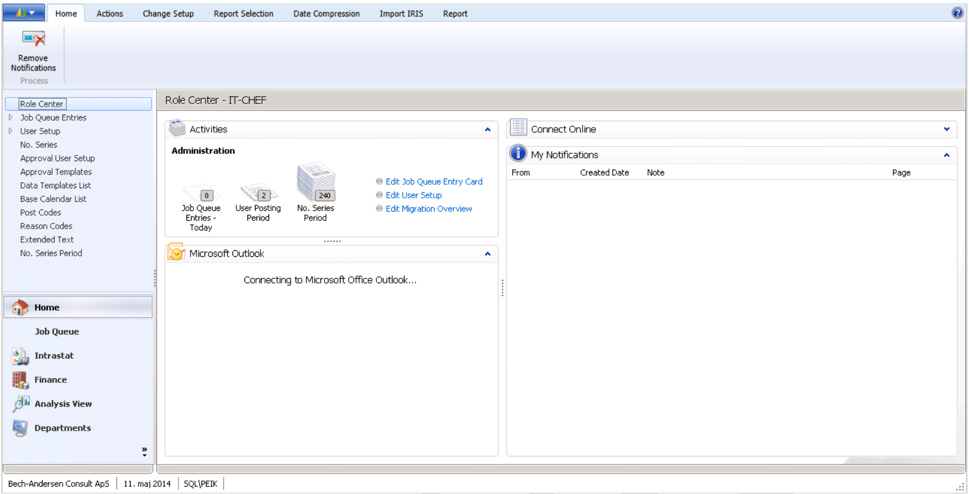


Take everything, please…



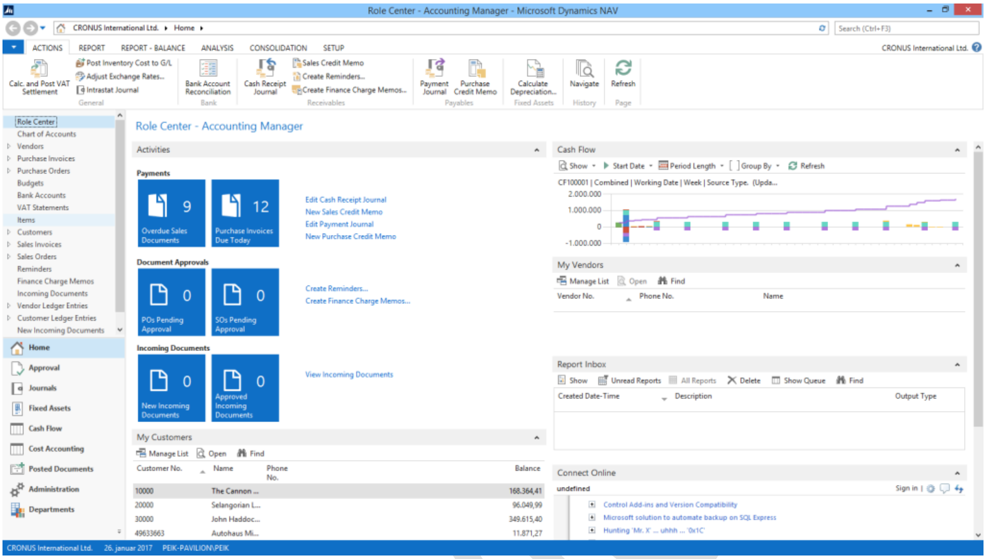
And YES, I am sure.

Press F5, and the Role Center looks like this:



Profiles

Accounting Manager



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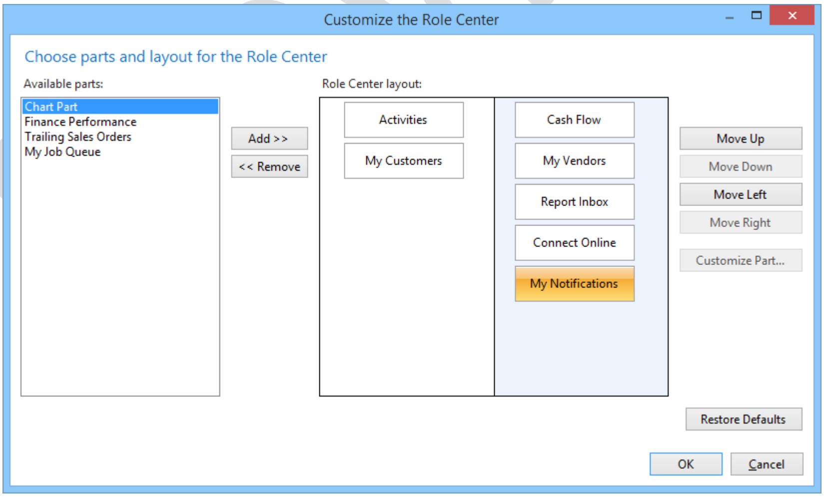
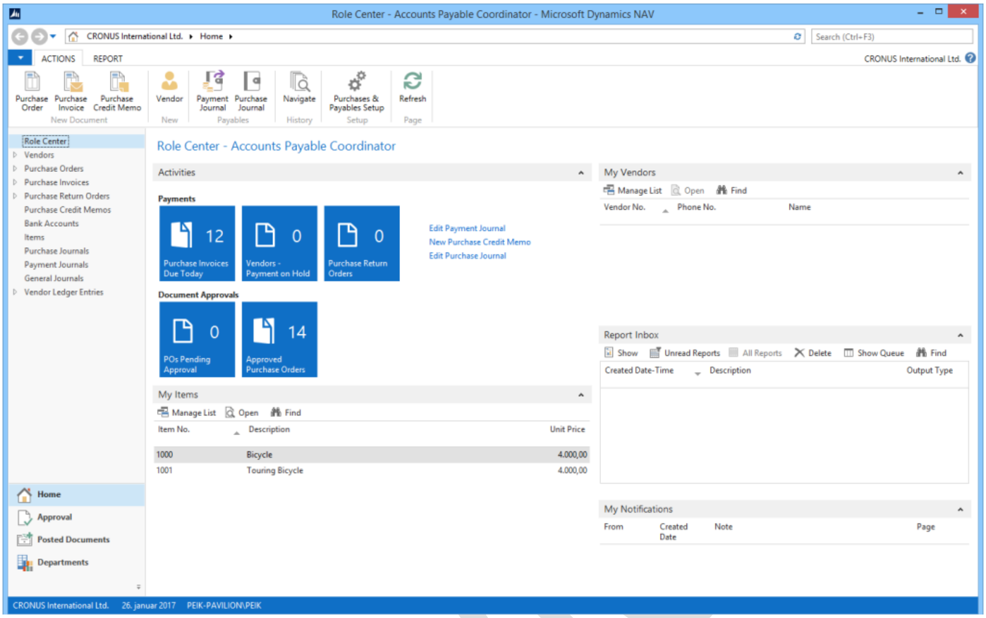


Accounts Payable Coordinator



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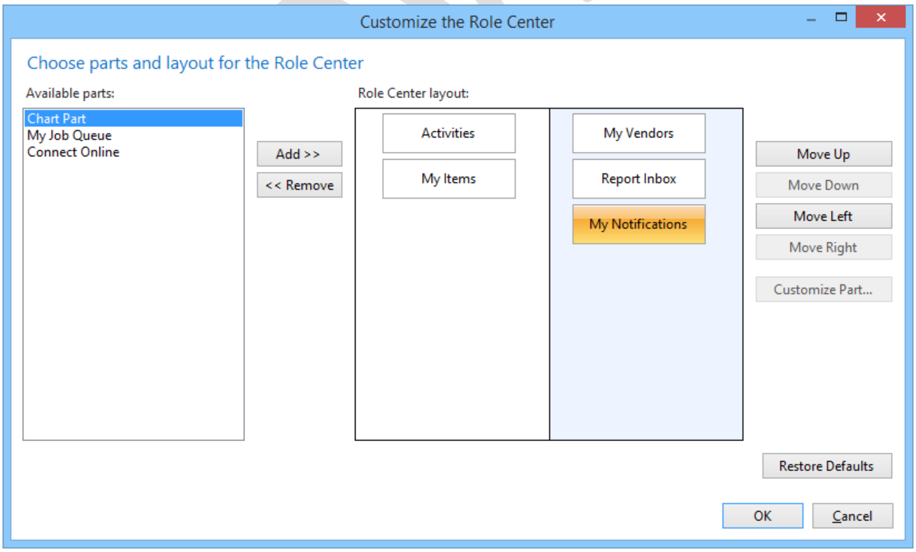
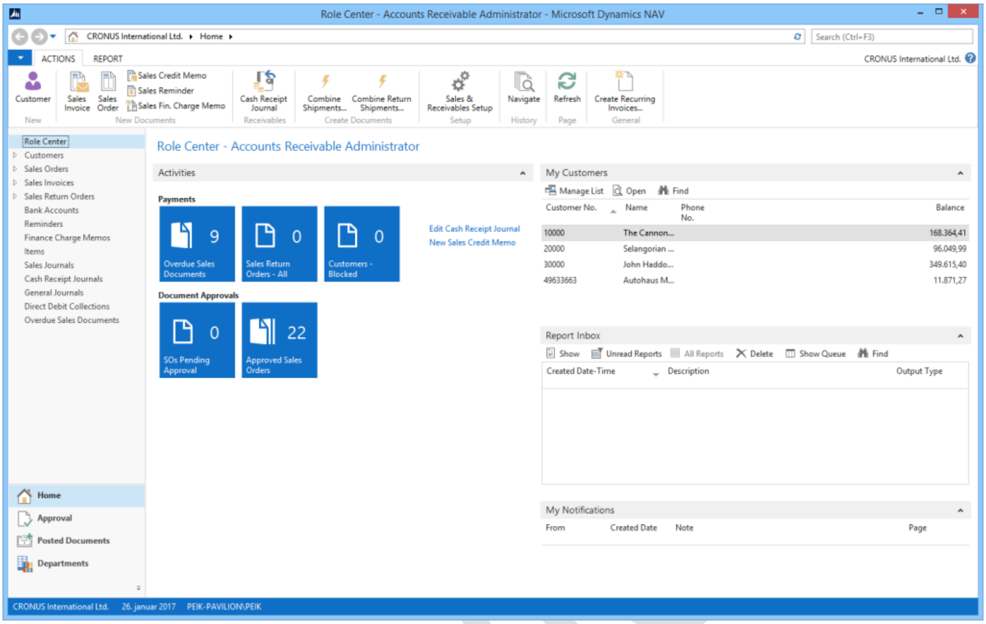


Accounts Receivable Administrator



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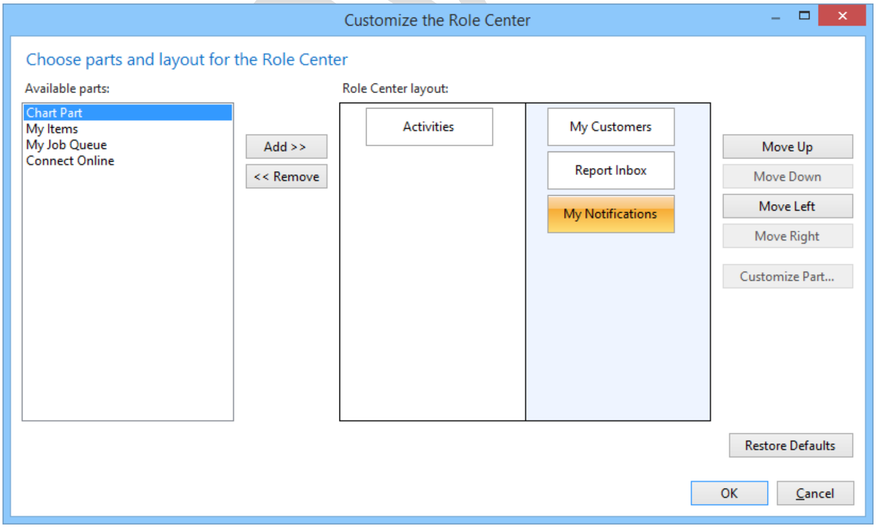
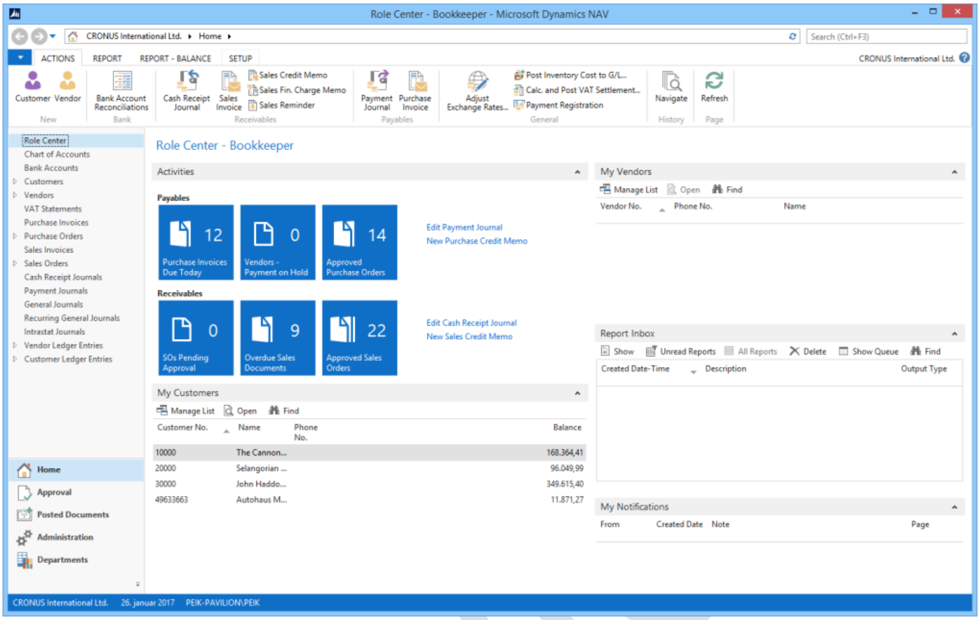


Bookkeeper



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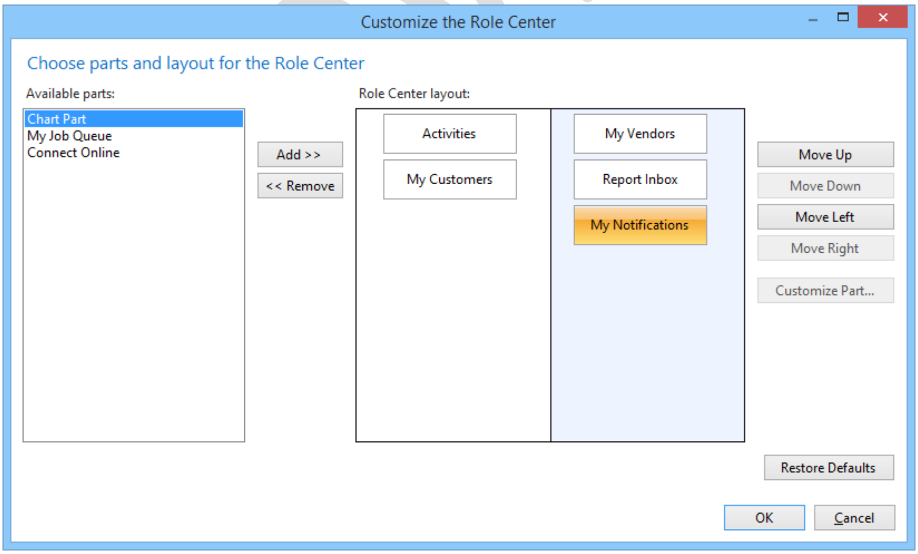
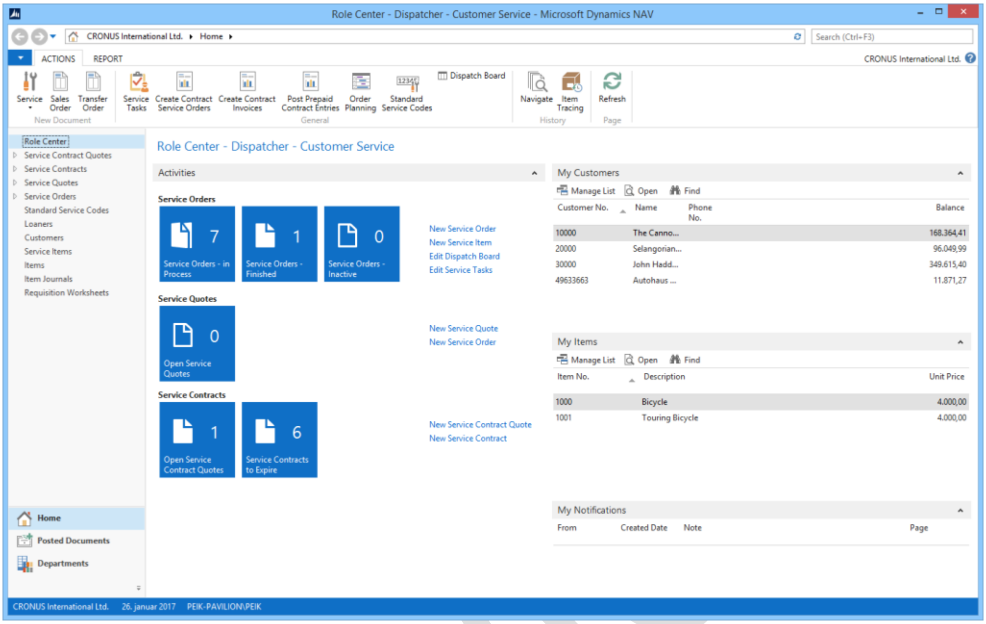


Dispatcher - Customer Service



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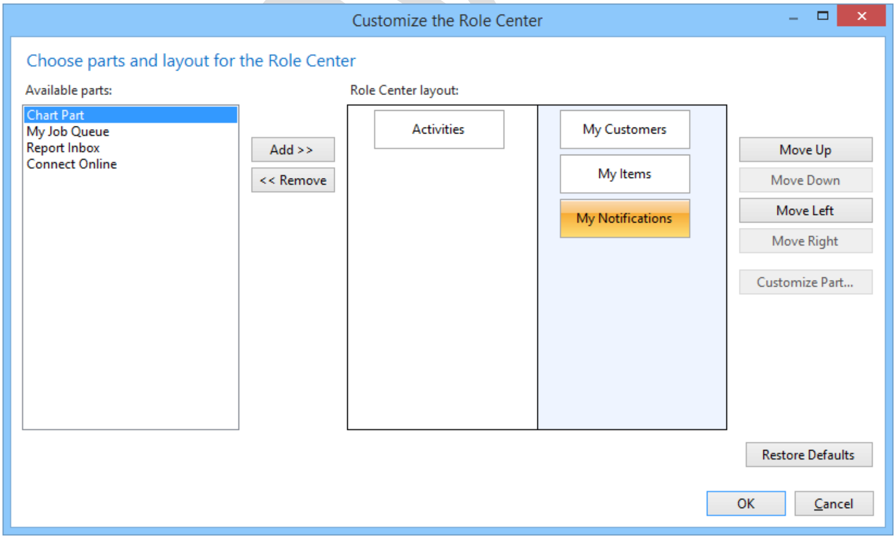
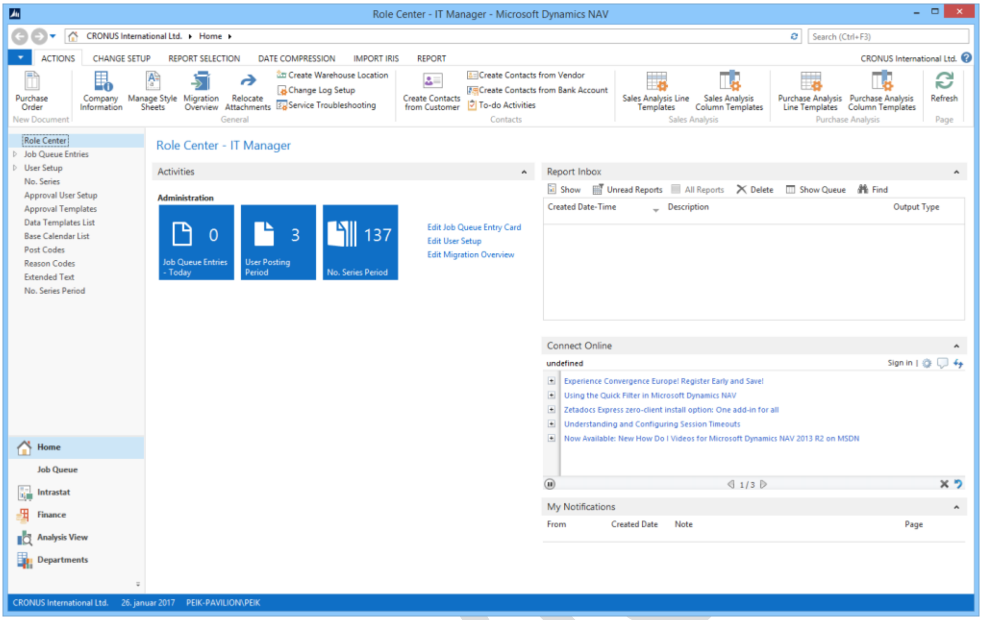


IT Manager



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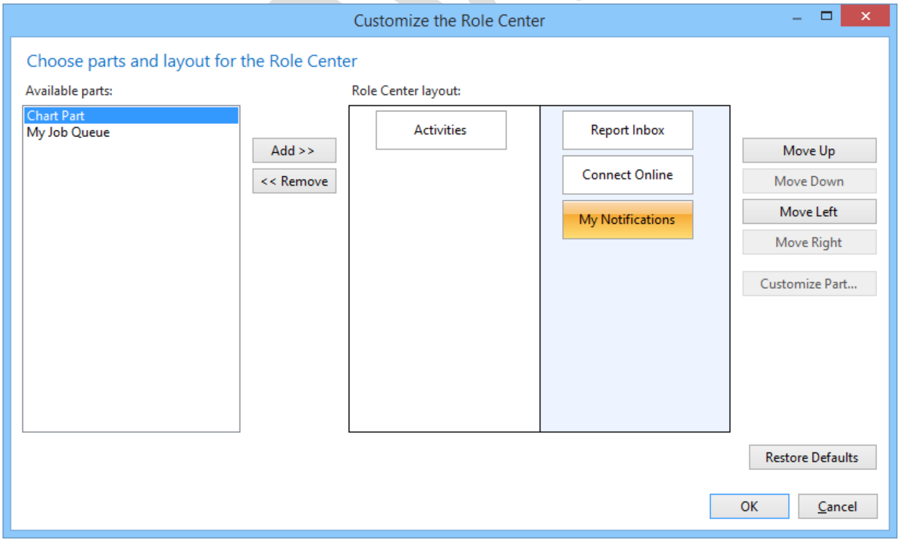
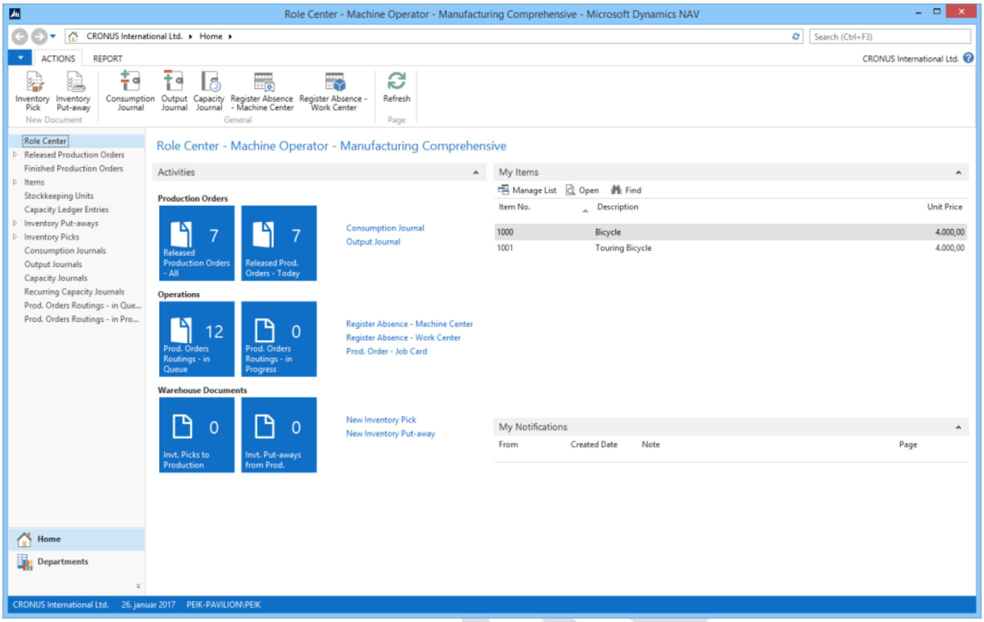


Machine Operator - Manufacturing Comprehensive



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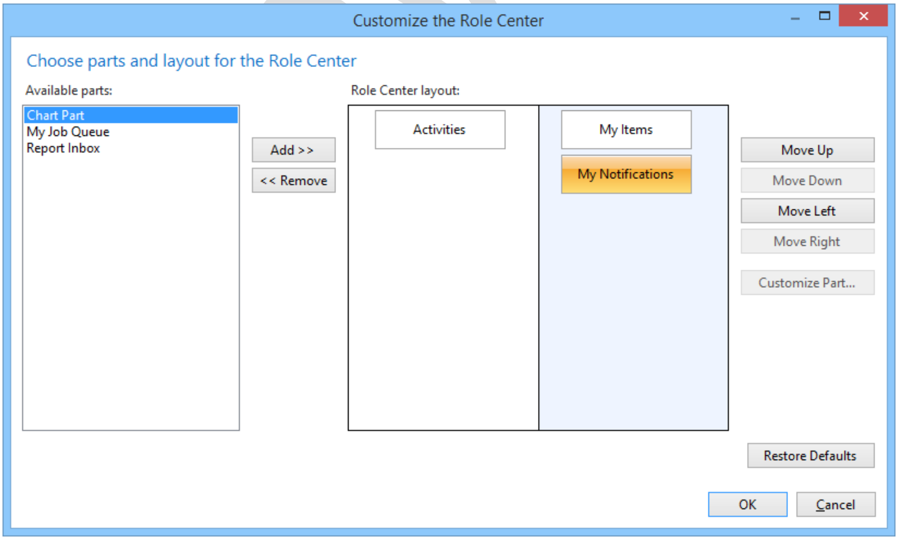
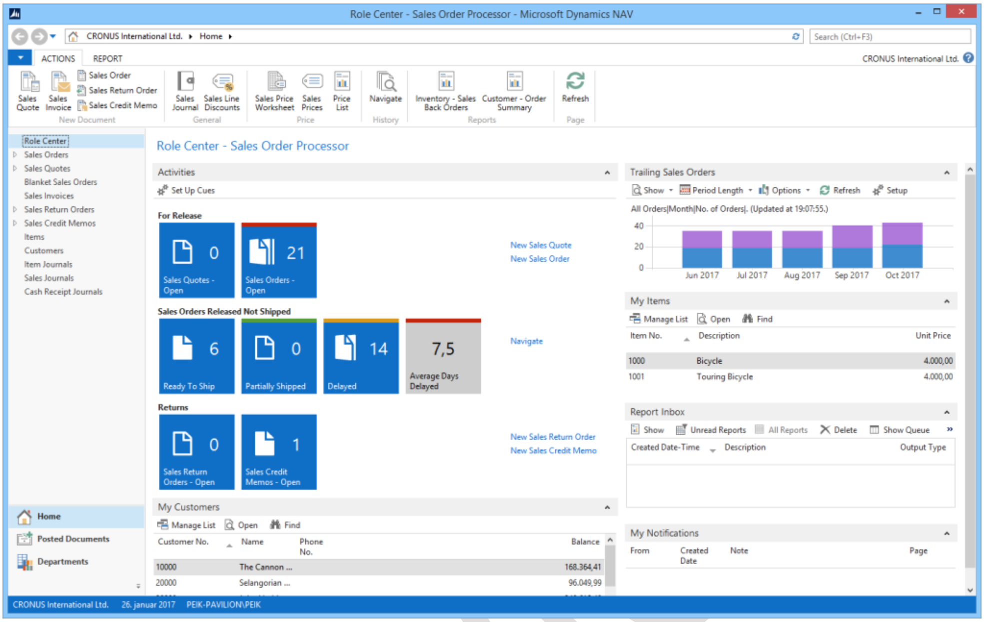


Sales Order Processor



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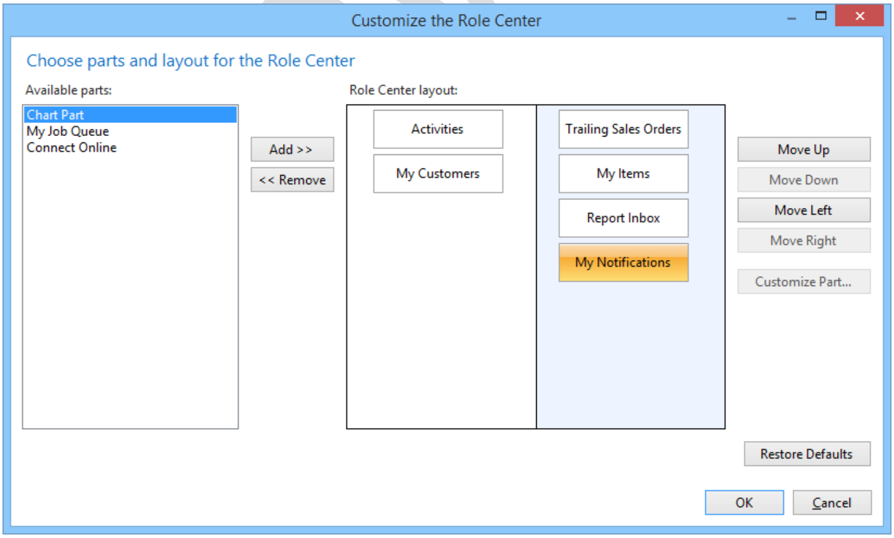
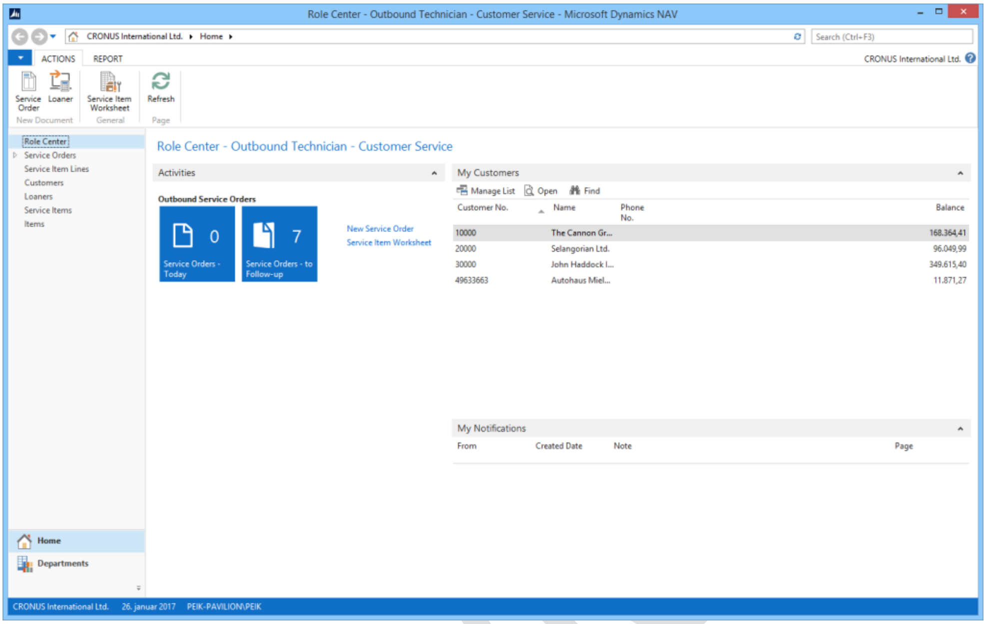


Outbound Technician - Customer Service



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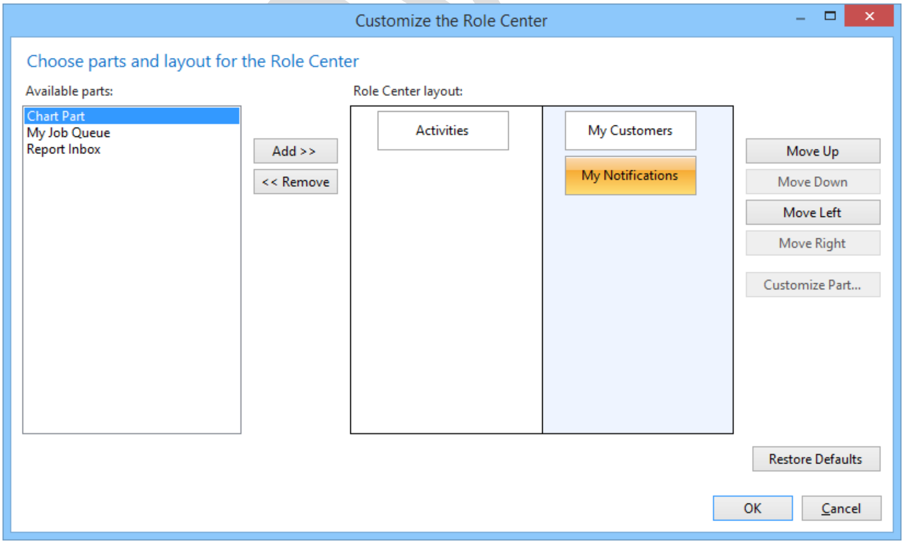
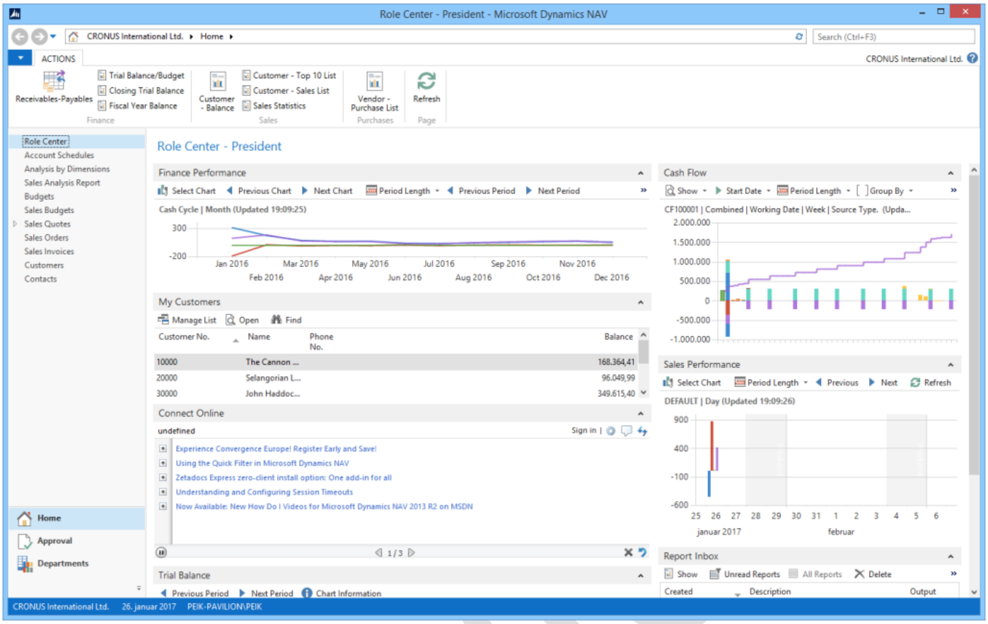


President



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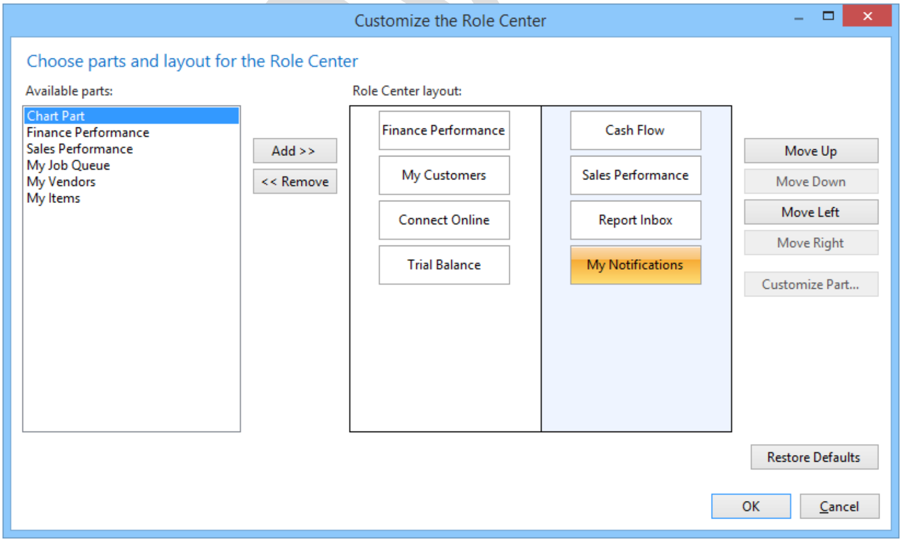
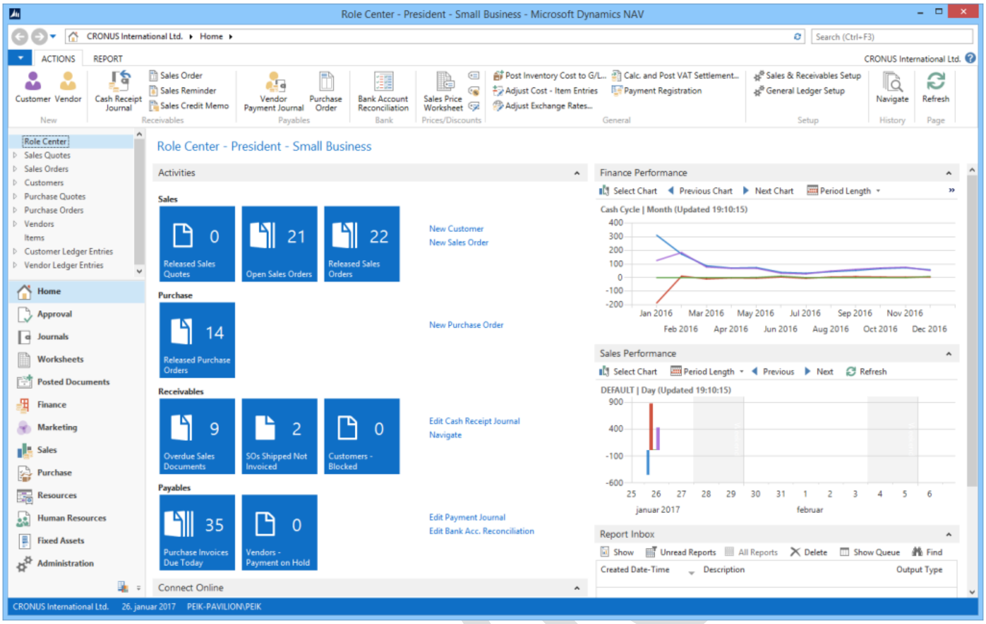


President - Small Business



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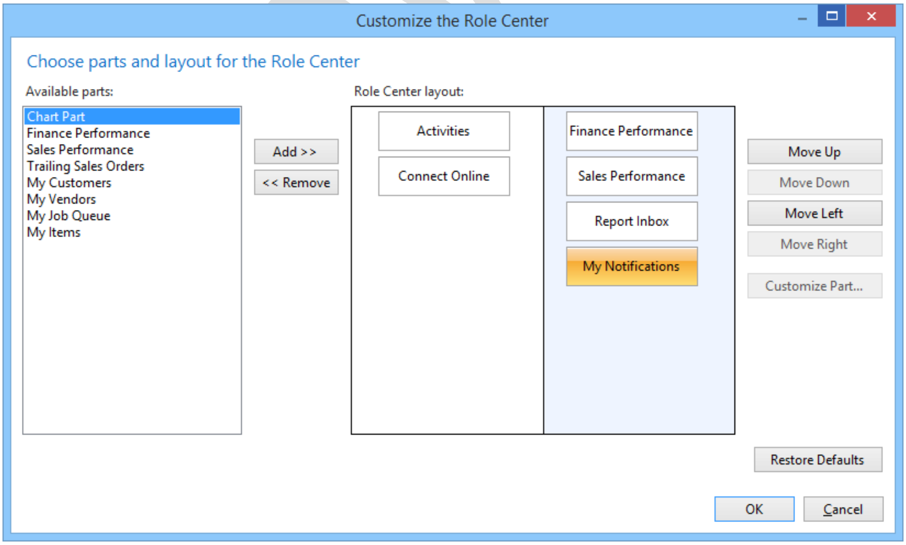
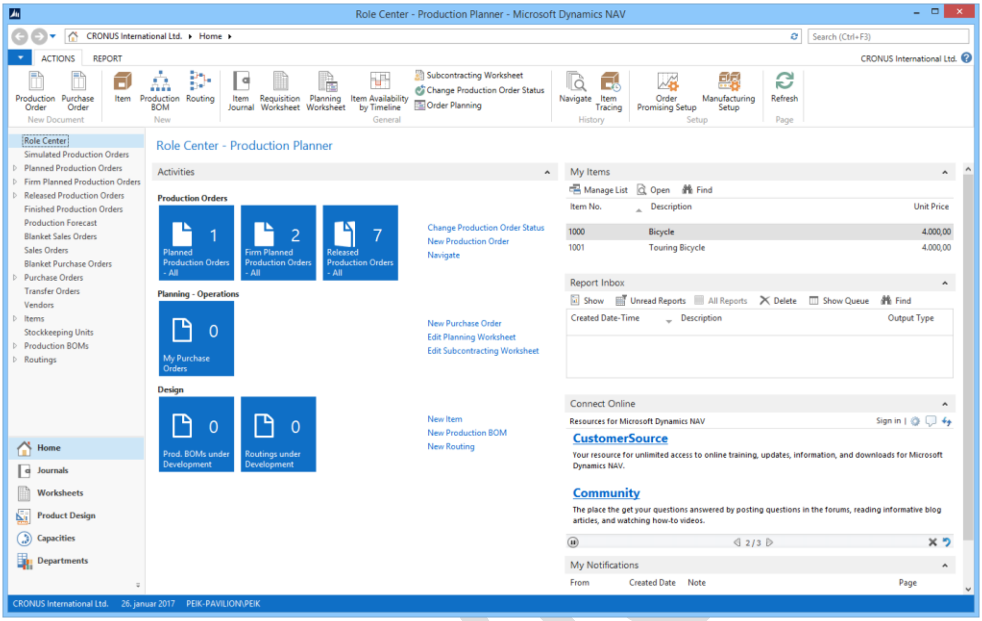


Production Planner



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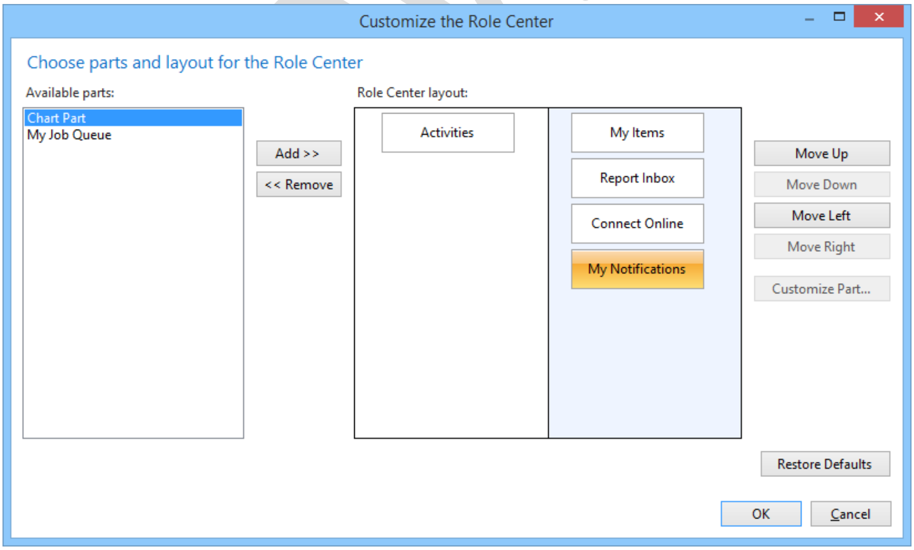
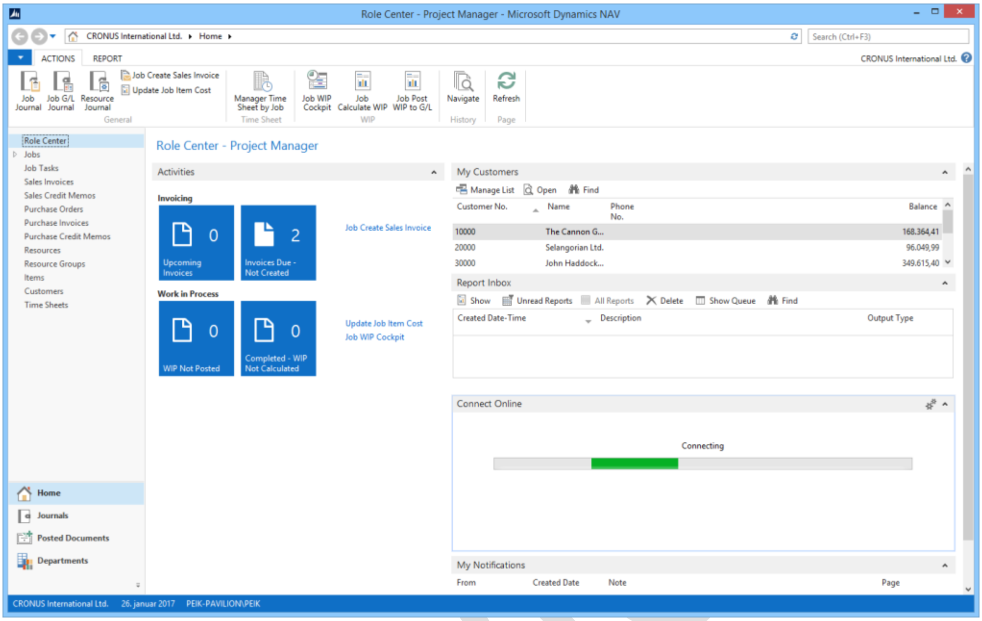


Project Manager



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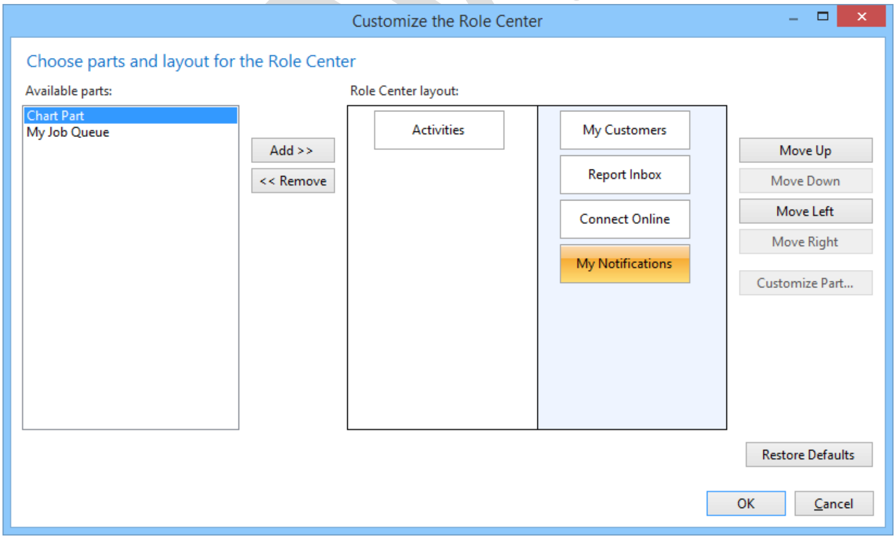
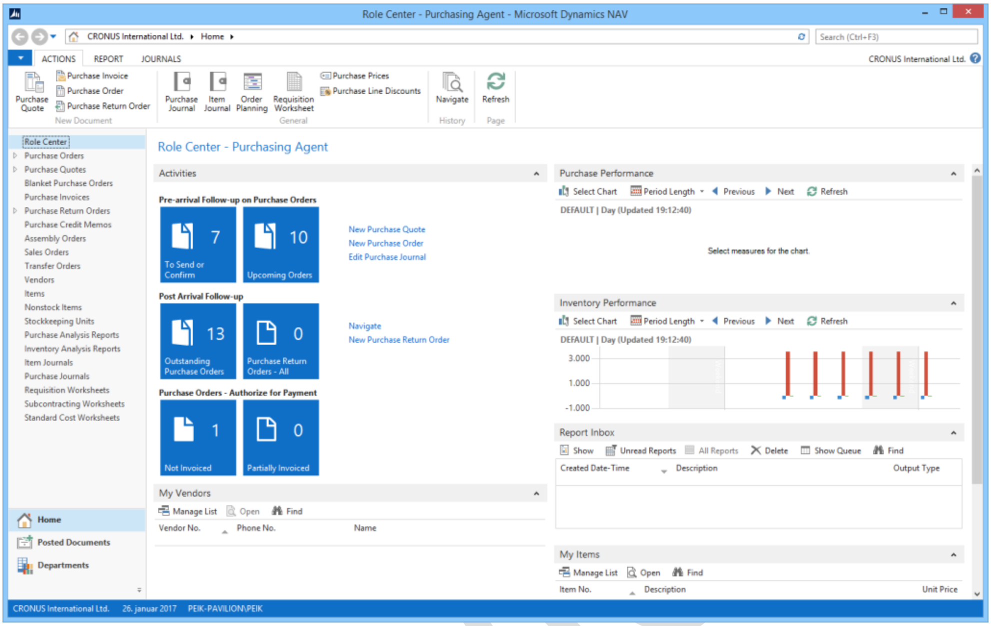


Purchasing Agent



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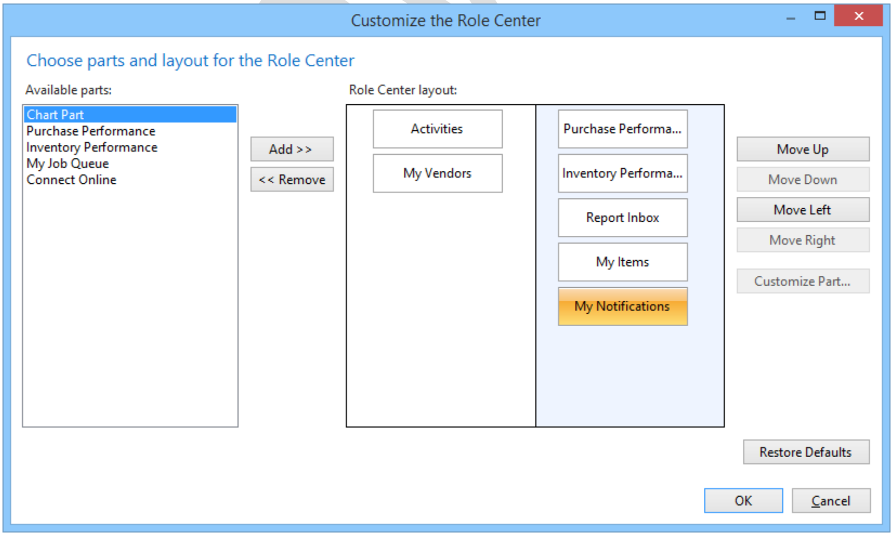
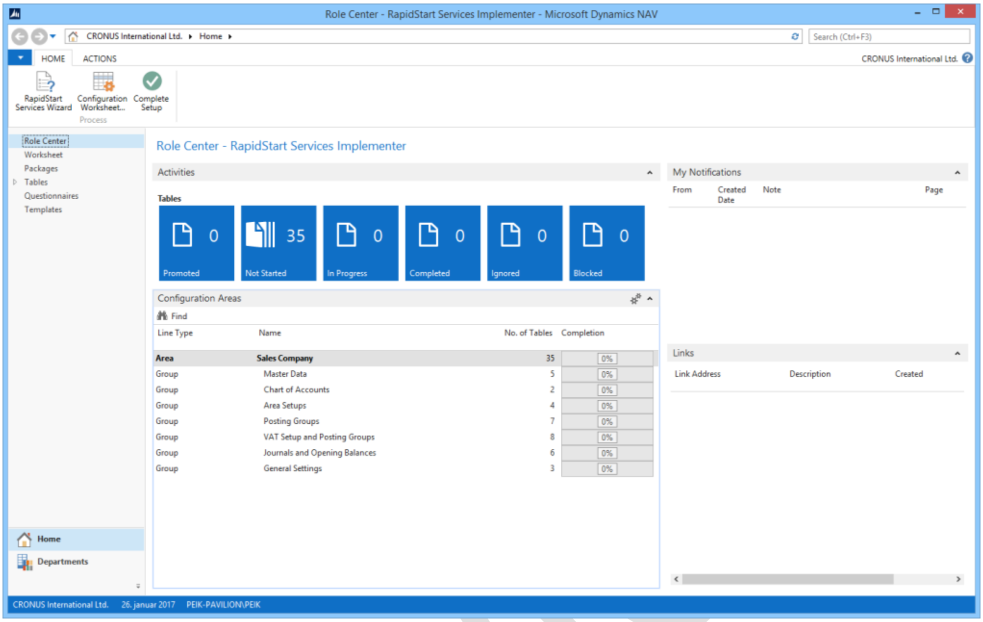


RapidStart Services Implementer



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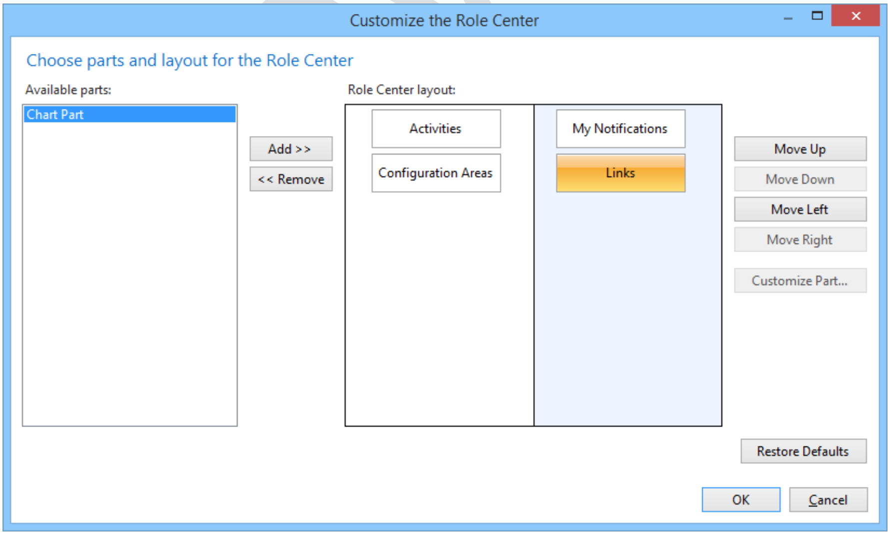
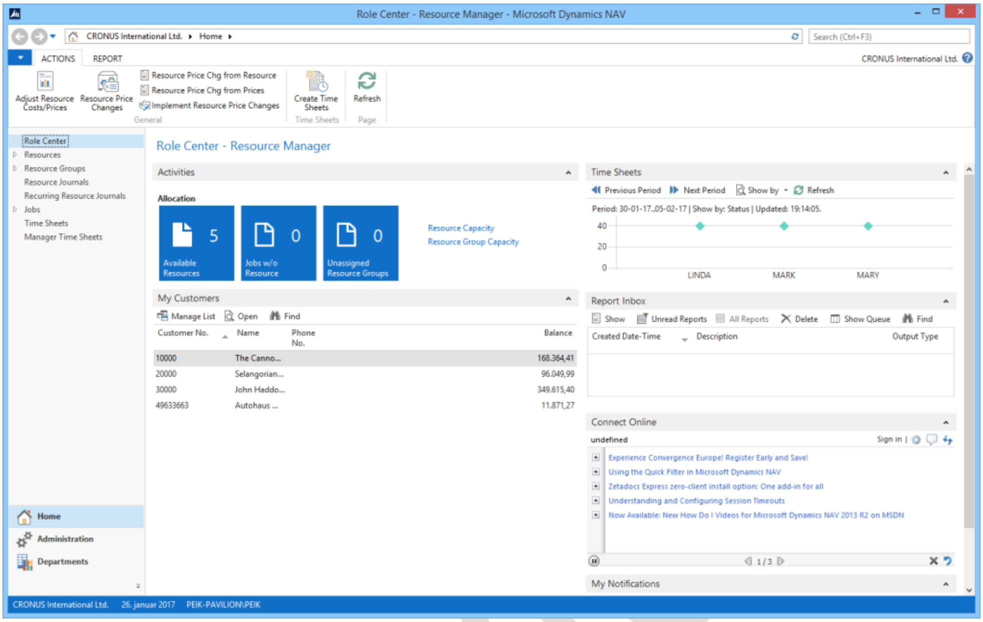


Resource Manager



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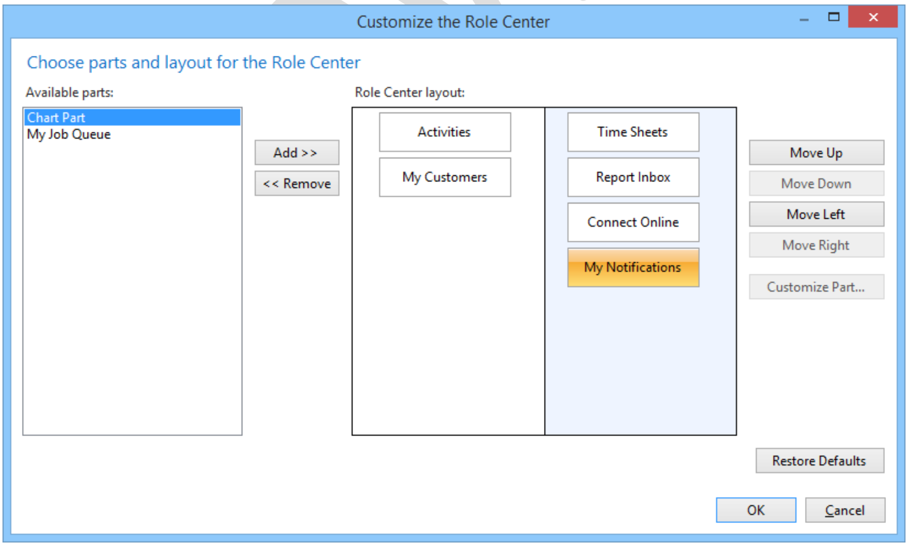
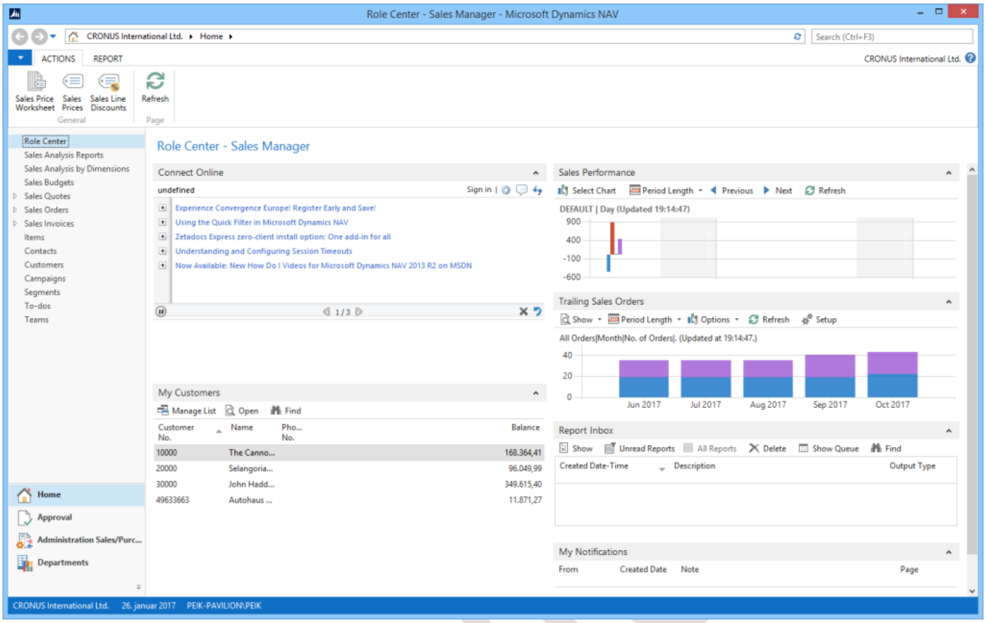


Sales Manager



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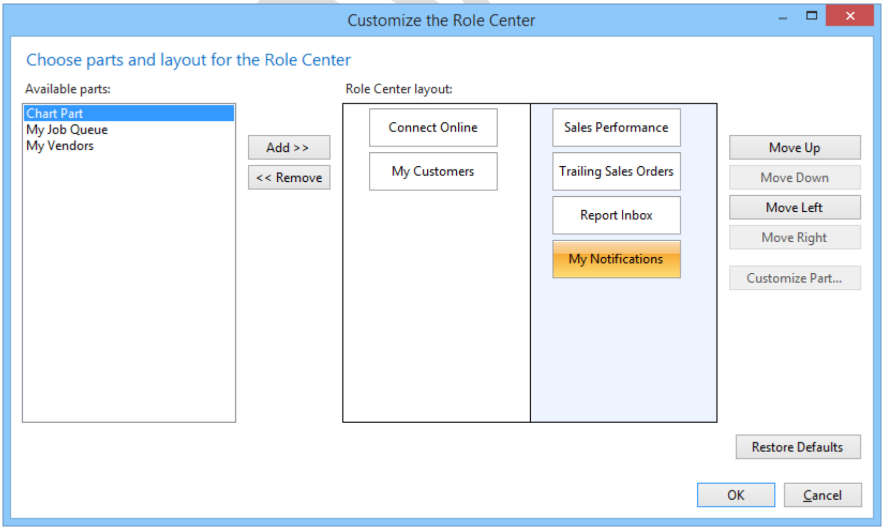
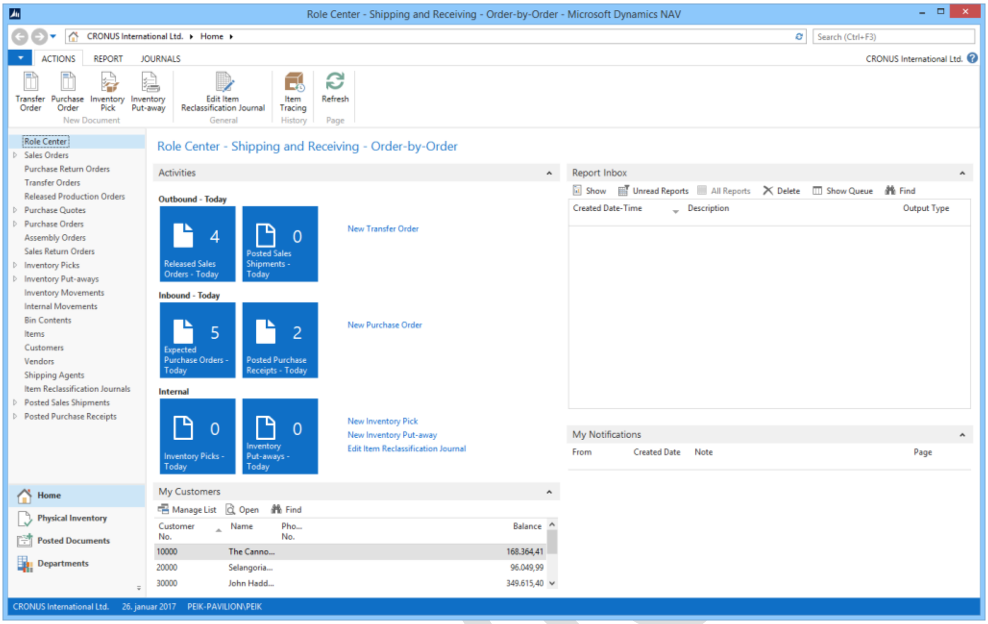


Shipping and Receiving - Order-by-Order



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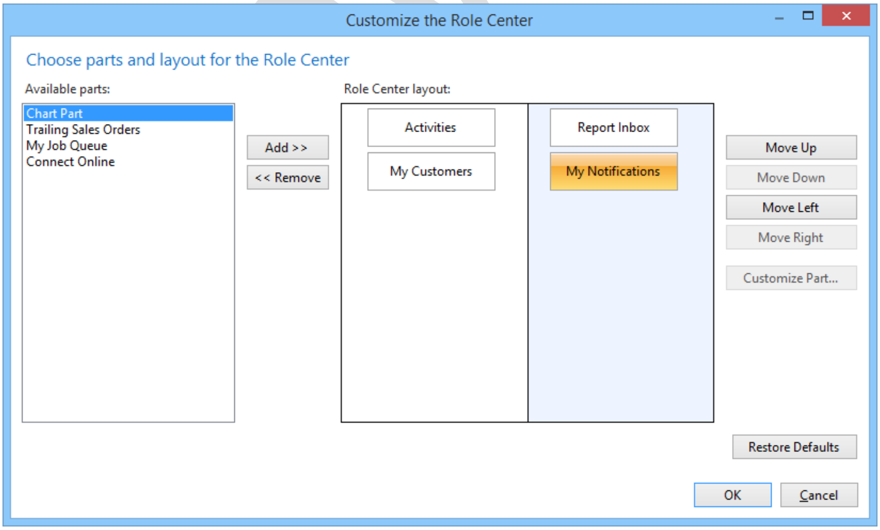
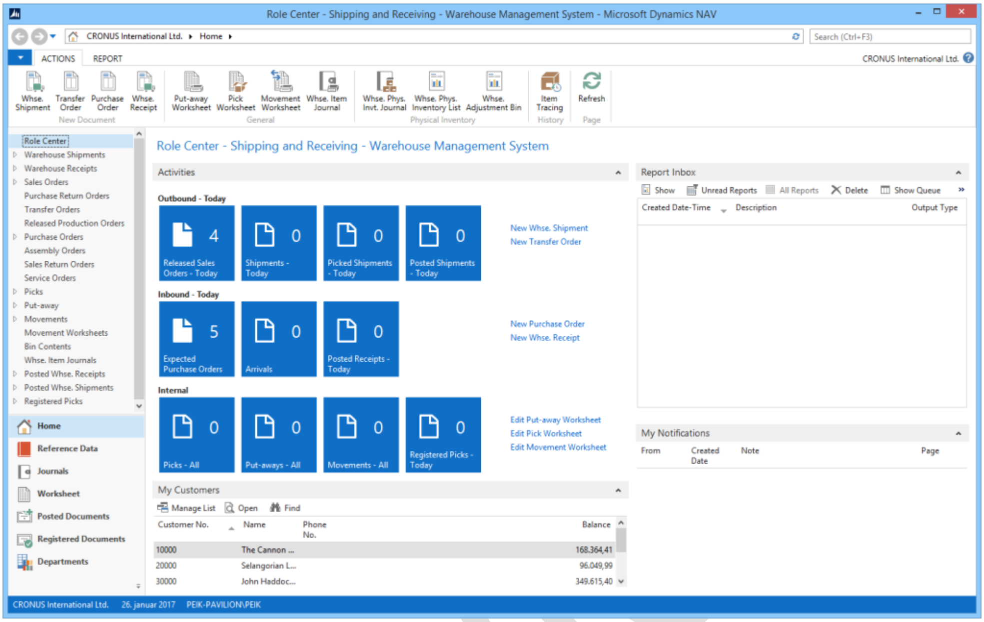


Shipping and Receiving - Warehouse Management System



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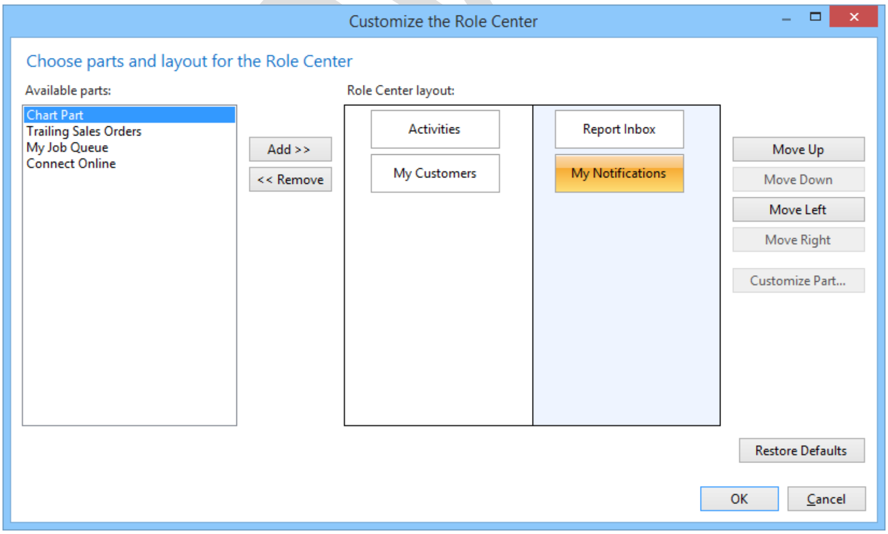
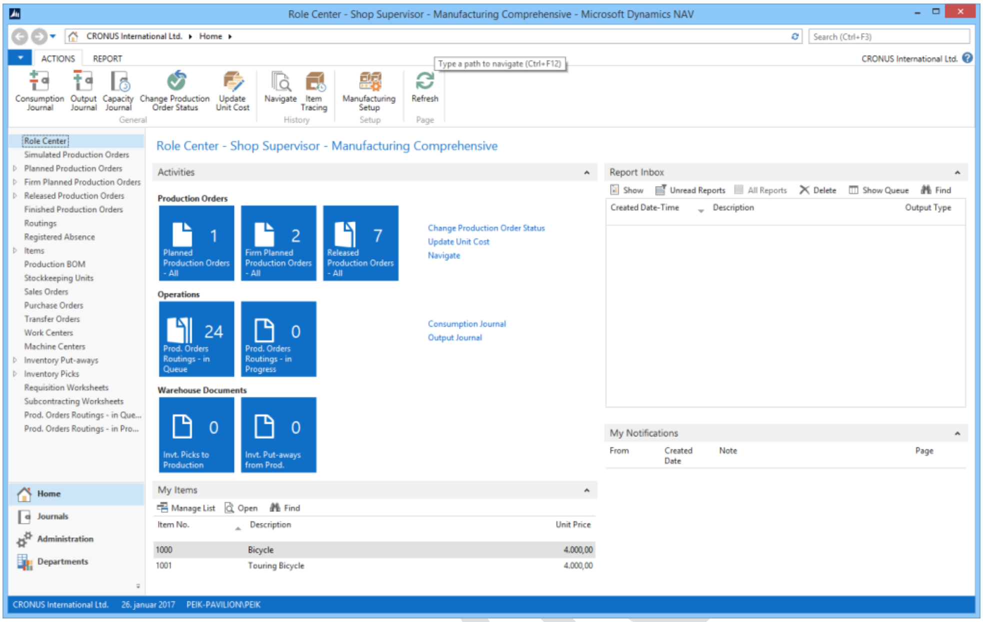


Shop Supervisor - Manufacturing Comprehensive



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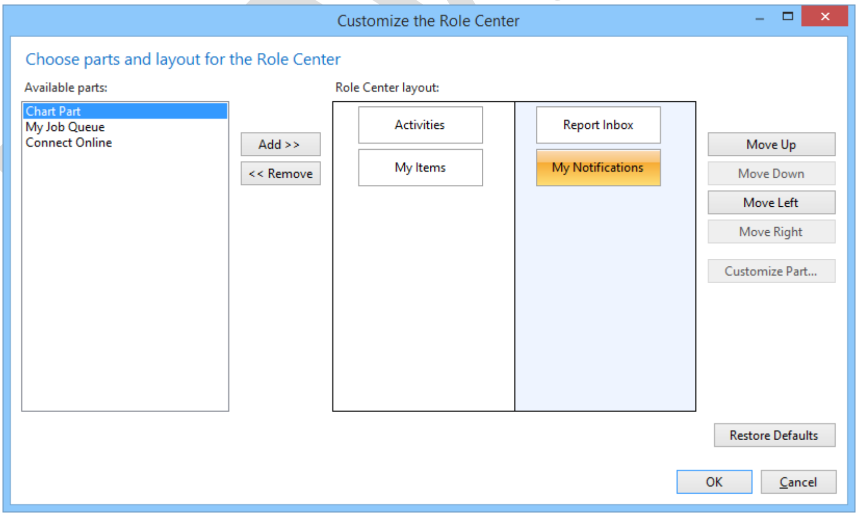
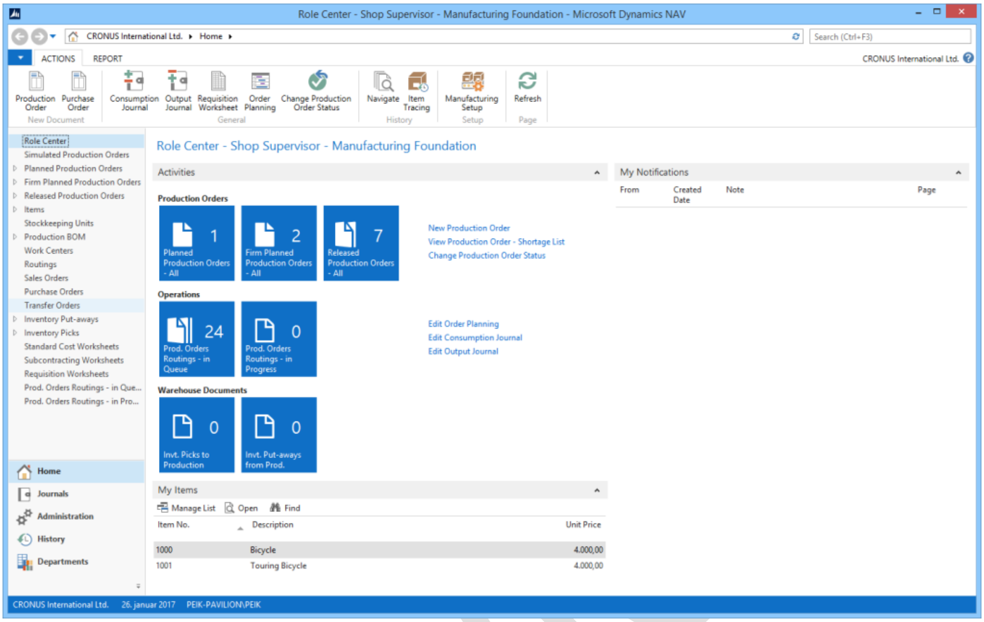


Shop Supervisor - Manufacturing Foundation



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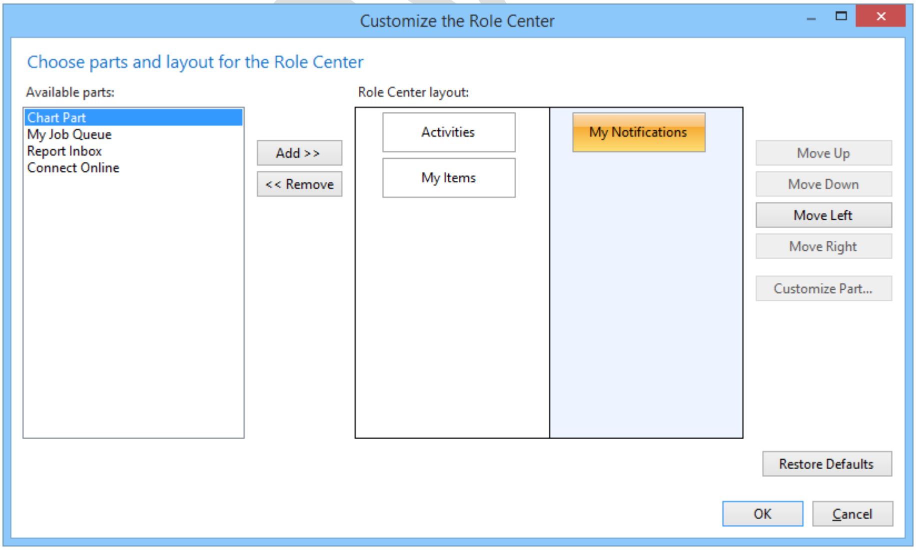
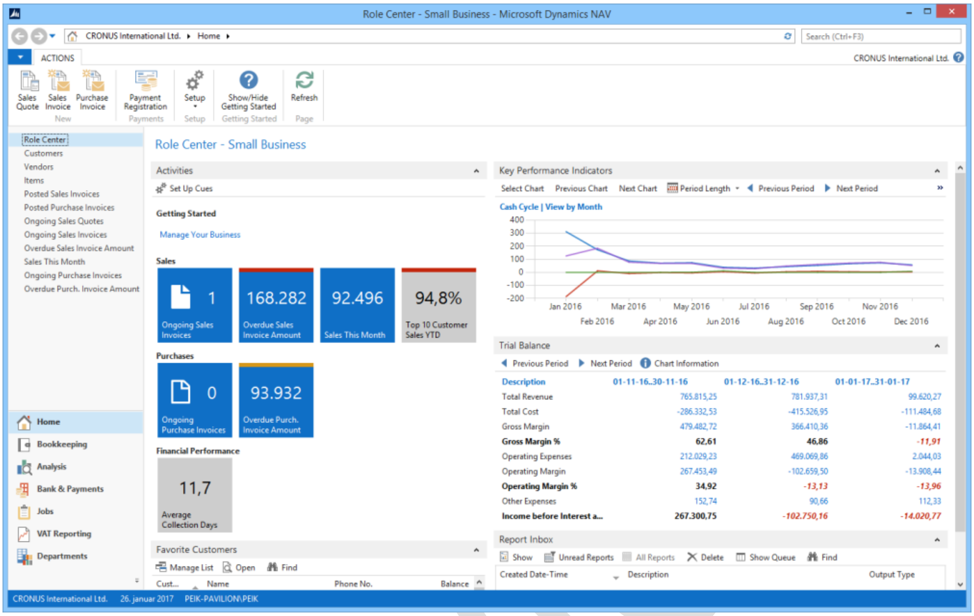


Small Business



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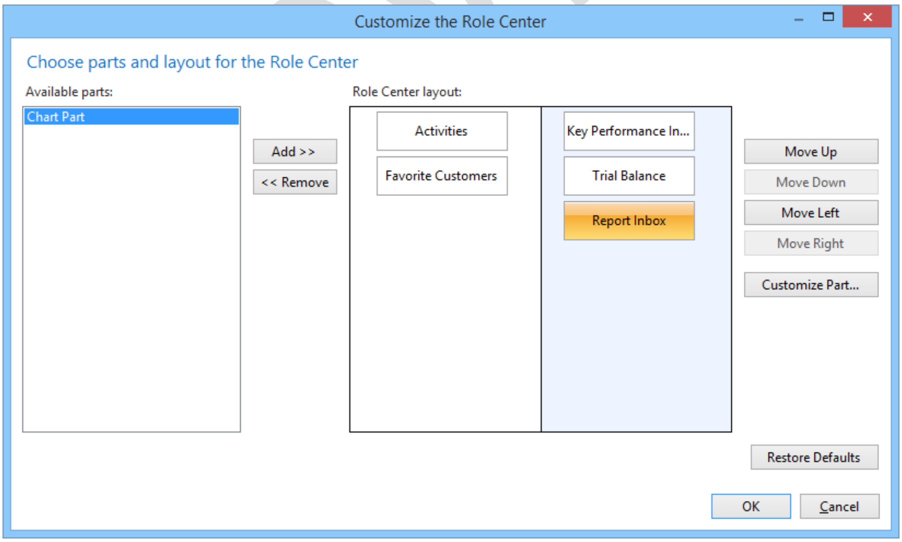
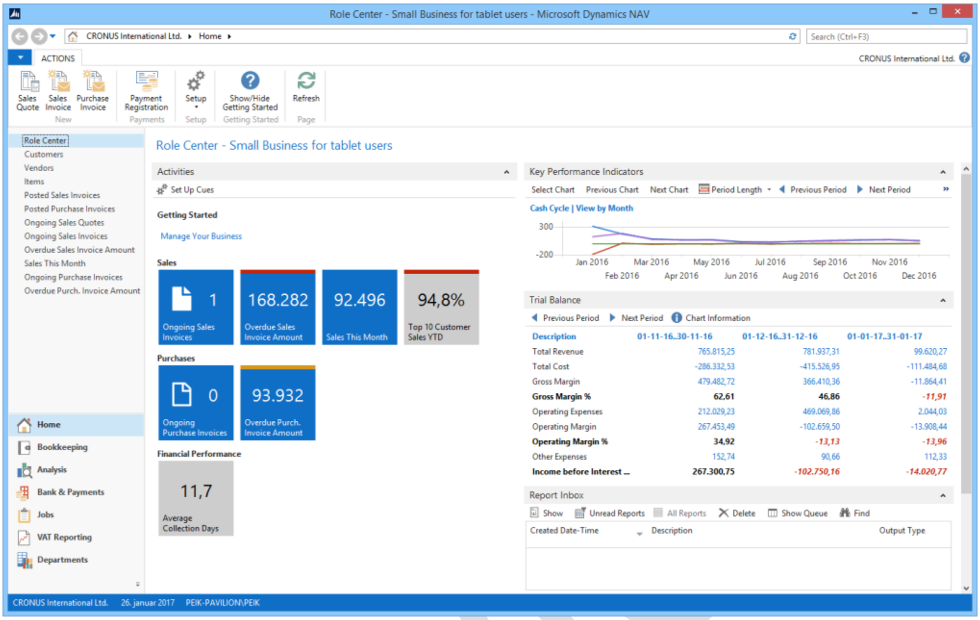


Small Business for tablet users



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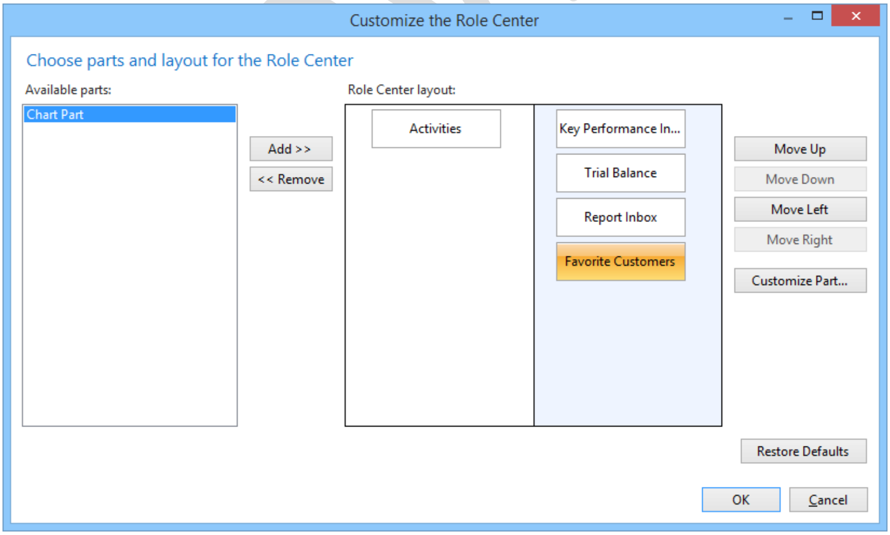
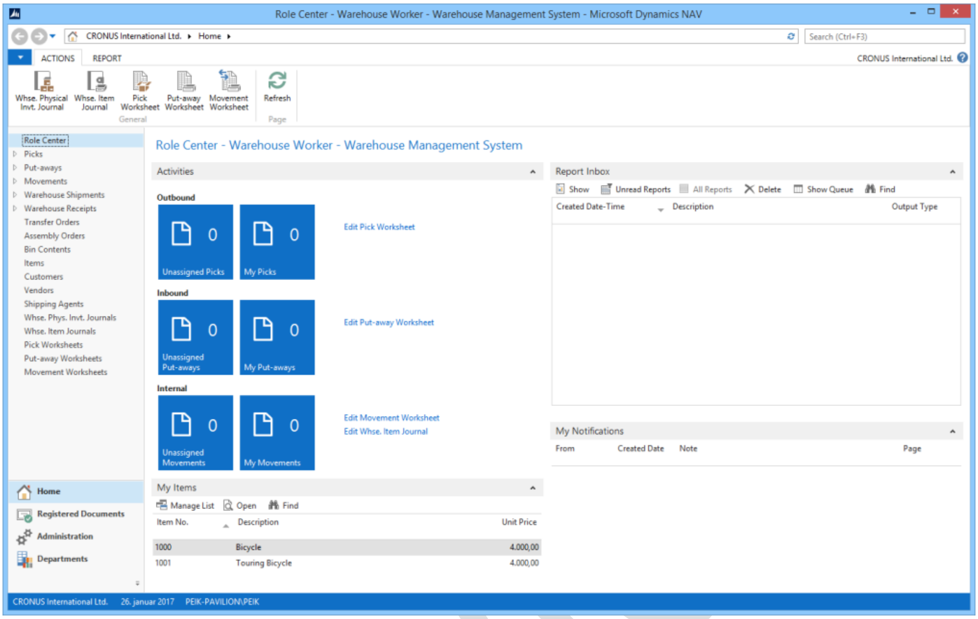


Warehouse Worker - Warehouse Management System



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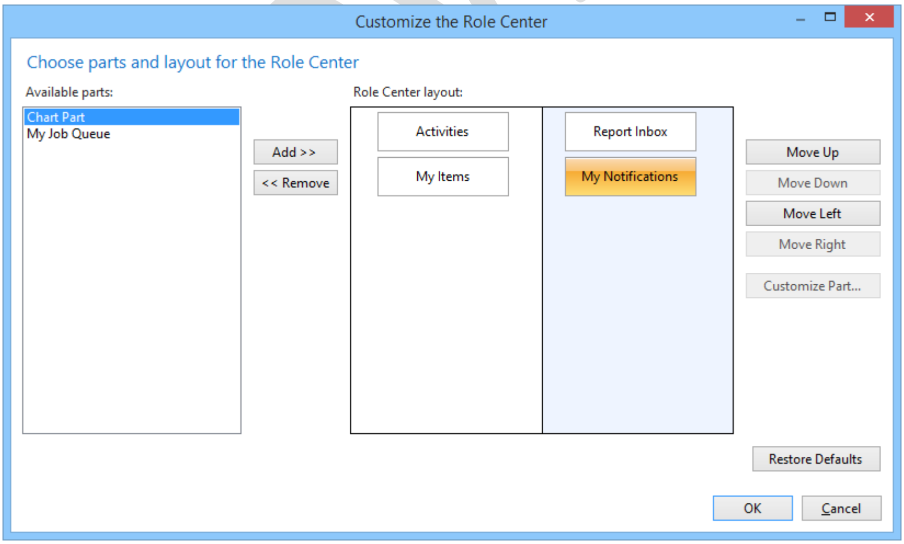

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since 1994

Manufacturing

Project and Production Handling
A Unique Solution for Manufacturers

THOROUGH BUSINESS SOLUTIONS FOR MANUFACTURING COMPANIES

The Columbus NSC manufacturing solution is a business solution, tailored for companies dealing with project and discrete manufacturing.

The Columbus NSC manufacturing solution for Microsoft Dynamics NAV makes it possible for companies to combine their ERP system with an industry specific solution, which combines financial management, project management and production management. The solution offers effective tools for handling the business processes, guiding you from the offer, through production planning, resource handling, billing, and service and maintenance, to the actual order.

Our unique and certified solution for project and manufacturing handling ensures effective business processes and improves companies' ability to adapt to future possibilities and conditions. The solution is a tool that enables companies to increase and optimize the value of their business processes.

Through many years of specific industry experience, Columbus NSC has amassed a great amount of knowledge around solutions for project and production companies.

THE MANUFACTURING SOLUTION MAKES IT POSSIBLE TO:

- ✔ *Optimize your project finances*
- ✔ *Provide realistic delivery deadlines*
- ✔ *Reduce waste*
- ✔ *Reduce amount of working hours in connection with offers*
- ✔ *Improve service level and customer satisfaction*
- ✔ Visualize your project plan

WANT TO KNOW MORE?

Please call us on +45 70 20 50 00
or email us on:
kontakt.nsc@columbusglobal.com

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Columbus Manufacturing®
Once you *know* how...

Version Manager

Protect your Dynamics NAV source code

Make it possible to register changes made to the business logic or table structure in a Microsoft Dynamics NAV database.

During an installation phase many different parties are involved in implementing a new Dynamics NAV solution:

- The NAV Partner, who will often have the main responsibility
- Independent Software Vendors delivering solutions for:
  - EDI
  - Payment Management
  - Shop Floor Control
  - Capacity planning
  - Barcode scanners at the Warehouse
- Super users making simple changes to pages and Role Centers
- Hosting partners maintaining the solution

A backup made every night will solve the problem of recreating the original source code if an implemented build proves to be faulty and needs to be rolled back, but this will only work if there are no structural changed made to the database structure (new or changed fields or new tables). And it does not give the answer to: who-did-what-when.

Version Manager records all changes made to any object in a Microsoft Dynamics NAV database. It provides functionality for:

- Object history
- Object backup
- Object restore
- Object compare
- Export earlier versions of objects to a text file
- Managing builds and making object roll-out and roll-back packages

Available from January 1st 2016

Version Manager

Bech-Andersen Consult ApS
Bolbrovej 121
DK-2960 Rungsted

0045 2892 9111

http://versionmanager.dk

info@versionmanager.dk

Tested with:

Microsoft Dynamics NAV 2013 · Microsoft Dynamics NAV · NAV 2015 Microsoft Dynamics · NAV 2016 Microsoft Dynamics