Microsoft Dynamics NAV

Feature Enhancements Microsoft Dynamics NAV 3.70 to Microsoft Dynamics NAV 2009

The following document describes the enhancements to Microsoft Dynamics® NAV 3.70 that are included in Microsoft Dynamics NAV 2009. The enhancements are categorized by granule ID. This will aid Microsoft® Certified Partners in the upgrade process when showing customers the new features added to granules they have already purchased.

Date: November 2008

Microsoft Dynamics

Contents

General Ledger

3010 Basic General Ledger

Reversal of Journal Postings

Users can automatically create reversal entries to reverse the following:

- Ledger entries created from lines manually entered in journals.
- An entire general ledger register of ledger entries created from journal lines.

Related entries, for example VAT entries, are also reversed. There is a clear audit trail linking the journals reversed and the matching reversal entry.
The following journals can be reversed:

- General Journals
- Cash Receipt Journals
- Payment Journals
- Sales Journals
- Purchases Journals
- Fixed Asset Journals
- Maintenance Journals

Standard General Journals

A function has been added to the General Journal that supports the ability to save journal lines as standard journal lines and retrieve saved journals, such as a payroll journal, a journal of various recurring expenses, and so on. This is a simpler alternative to recurring journals that does not require allocations; however, standard general journals do not allow automatic reversing.

Master Data Import

A form has been added to the Industry Template feature, allowing an easy interface to export the format of the table data structure to a Microsoft® Office Excel® file. This form also allows the user to import master data after it has been entered in the correct format in the exported Excel spreadsheet.

New General Ledger Reports

- **Fiscal Year Balance report** – This report shows the closing balance until the end of the previous fiscal year for each ledger account, the fiscal year until this period, the current fiscal year until the end of the selected period (or alternate ending date), and the balance until the end of the selected period (or alternate ending date), excluding the closing entries.
- **Balance Comparison – Previous Year report** – This report is an overview of the GL Account with information about the current period, the balance at the end of the period (YTD, end of period, or alternate ending date), the balance in the same period from the previous year, and the balance (YTD, end of period, or alternate ending date) of the previous year.

- **Trial Balance by Period report** – This report shows the opening balance by ledger account, the movements in the selected period (month, quarter, or year), and the resulting closing balance.

Simple Mail Transfer Protocol

The Simple Mail Transfer Protocol (SMTP) feature has been added to support the SendMail operation from the Microsoft Dynamics® NAV Service. It supports the operating system method to manage SendMail from Microsoft Dynamics NAV.

Online Map

The online map feature demonstrates how Microsoft Dynamics NAV can integrate with other Microsoft products, for example, Microsoft MapPoint. The online map functionality shows a location on a map and also enables the user to get directions from one location to another. Through integration with an online map the user can also extend address features.

Document Approval

The document approval feature introduces an approval process for sales and purchase documents which includes:

- Ability to approve and reject documents with comments
- Ability to delegate approval to another approver
- SMTP mail notification to approvers and overdue-approval notifications

Prepayments

Prepayments allow the user to create one or more prepayment invoices based on a sales or purchase order. The prepayment can be either a set amount or a percentage of the total invoice. Prepayment invoices are tracked until the order is fully invoiced.

Integration with Microsoft Office

Integration with Microsoft Office consists of the following features:

- **Export Using Office XML** – A generic solution that allows the user to export data from any form in Microsoft Dynamics NAV using the new Office XML format. Additional style sheets can be defined by the partner or customer.
- **Record Links** - A generic solution that allows the user to add links to documents to any record in Microsoft Dynamics NAV. The documents can be stored in SharePoint or on a file server.

Rapid Implementation Methodology

Rapid Implementation Methodology (RIM) is primarily designed for new customers, but it can also be useful to an existing customer who is adding modules to their installation. RIM reduces the implementation workload by streamlining the repetitive tasks that an implementation requires.
RIM contains the following components:

Industry-Specific Information

Implementation Questionnaire

The Implementation Questionnaire is a collection of industry-specific questions and suggested answers which can be used to update the contents of Microsoft Dynamics NAV setup tables (for example, tables 79, 98, 311, 312, 313, and so on.) The questionnaire guides the user and the implementation consultant through the Microsoft Dynamics NAV setup requirements from a business perspective, to ensure that the setup reflects the customer's business rules.

The Implementation Questionnaire (in XML or Excel format) serves as a valuable document for making setup decisions.

Setup Data

RIM contains standard, industry-specific setup data that has been created by industry specialists with experience from many implementation projects. Reusing common data saves implementation time and makes a more industry-specific setup possible.

Master Data Templates

To optimally use Microsoft Dynamics NAV, you need valid information in the master data records. RIM includes industry-specific master data templates.

RIM contains predefined templates for five industry segments. For each industry segment, there is a template for the following master data types: Contacts, Customers, Vendors, and Items.

Master data templates can also be used in daily operations. For example, if you enter the item description and then apply the appropriate template, the required fields will be copied from the template to the master data record.

Partners can easily apply the master data template functionality to any master data table in Microsoft Dynamics NAV.

Batch Creation of Journal Lines

The Batch Creation of Journal Lines functionality allows you to create journal lines with predefined information, so the user only has to enter a few pieces of information (for example, amounts).

Predefined User Permissions (covers only the Microsoft Dynamics NAV core solution)

The predefined Microsoft Dynamics NAV user permissions cover the permission necessary to carry out work for seven archetypes of users in Microsoft Dynamics NAV.

The selected archetypes are:

Production Manager

Shipping & Receiving Clerk

Order Entry Clerk

Purchasing Agent

Accountant

Accounts Receivables Clerk

Accounts Payable Clerk

Payment Terms Translation

Payment terms and shipment methods have been enhanced so that the customer can now define translations for payment terms and shipment methods. For customers with

Multilanguage, this means they can ensure that the shipment method and payment terms on an invoice will appear in the correct language.

Document Archiving Functionality

The user can define a setup option to automatically archive sales and purchase quotes when they are turned into orders and archive orders when they are fully shipped or received.
Return orders may now be manually archived the same way as other documents.
Note, return orders are also included in the automatic archiving.
Archived quotes, orders, and return orders may be printed from the archive forms.
Comments are maintained when documents are posted. Both header and line comments are posted to non-editable forms.

3050 Consolidation

To comply with SFAS52/1AS21 in relation to foreign currency translation, customers can now choose which method to use when translating a specific general ledger account from a foreign entity. You simply select the appropriate consolidation translation method for each general ledger account.
Customers can now translate a foreign entity's financial statement using the following methods:

- **Average Rate (manual)** – The average rate for the period to be consolidated. You calculate the average either as an arithmetic average or as a best estimate and enter it for each business unit.
- **Closing Rate** – The current exchange rate on the date for which the balance sheet or income statement is being prepared. You enter the rate for each business unit.
- **Historical Rate** – The exchange rate for the foreign currency when the transaction took place.
- **Composite Rate** – The current period amounts are translated at the average rate and added to the previously recorded balance in the consolidated company. This method is typically used for retained earnings accounts because these accounts include amounts from different periods and are a composite of amounts translated with different exchange rates.
- **Equity Rate** – Similar to Composite Rate. The posting of the differences will be to separate general ledger accounts.

You can also choose whether the currency exchange rates from the business or the consolidating companies will be used. If customers want to consolidate using pre-4.0 methods, they can do this by selecting Average Rate (the default) as the Consolidation Translation method for all accounts. This will translate income statement accounts using the average rate, balance sheet accounts using the closing rate, and restate balance sheet accounts using the last closing rate.
Import and Export of Consolidation Files
Consolidation files are now in XML format. The TXT format is still supported, letting customers create and import TXT formatted files.

3070 Basic XBRL

The XBRL functionality has been updated to enable specification 2.1 reporting. In addition, the following improvements were made:

- Update of the XBRL whitepaper

- Annotations to each taxonomy are now versioned
- Comments on each taxonomy are now versioned

3090 Intercompany Postings

Intercompany Postings is new functionality that helps you create and distribute inter-company transactions between multiple Microsoft Dynamics NAV solutions and across multiple companies.

- You can create all the necessary documents—sales and purchase documents, general ledger entries and more—for the entire workflow, for more than one company at a time. Intercompany Postings allows for multiple databases, multiple currencies, multiple languages, and different charts of accounts.
- You can make the correct due to/due from entries in more than one company, using relevant intermediary accounts. Transactions referring to another set of books within the same group of legal entities can be entered directly in the general ledger or when entering sales and purchase documents.

Note, Intercompany Postings is not a consolidation solution.

The target market for Intercompany Postings functionality is businesses with complex business processes and a strong need for a vertical focus. They are frequently businesses in wholesale, manufacturing, and those that provide other business services, from super-user to one-person IT staff.

Intercompany Postings includes functionality for distribution of purchase invoice costs to partner companies.

When a parent company has subsidiary companies and the subsidiary companies are invoiced by vendors, the recorded costs can be spread across the organization.

It is not unusual within the mid-market for holding companies to be formed to create a greater synergy amongst like companies. In this case, there is no parent company. The holding company consolidates accounts receivable (A/R) and accounts payable (A/P) processes across the organization resulting in savings in overall costs. Bills received from vendors are distributed for all subsidiaries across the organization.

3810 Job Queue

The Job Queue replaces the Job Scheduler (from the Service Module). The new functionality allows you to set up jobs for both code units and batch jobs, as well as for areas outside the Service Module. For instance, Outlook Integration uses the job queue when requesting synchronization.

A job can be a one-time request or it can be set up as a recurring job at a specified interval. When jobs are created, the application server monitors the Job Queue and runs the entries in a prioritized order.

5010 Bank Account Management

Void Check

The Void Check feature enables the user to void checks from the Check Ledger Entries window. The user can choose whether to unapply the underlying bank ledger entry and the corresponding general ledger entries or just reverse the entries. The user can select a specific posting date for voiding.

Sales and Receivables

3260 Basic Receivables

Partial Payments

Microsoft Dynamics NAV enables you to decide how a payment is applied. This includes:

- Selecting the specific amount to apply to individual documents in a multiple document application.
- Viewing information about both the applying entry and the application in a single form.
- More detailed information about the amounts that will be posted to the general ledger prior to posting, such as payment discounts and rounding amounts.

Unapply

It is possible to reverse all postings and changes related to an application of customer ledger entries. Unapplied entries are set as open entries so that they can be applied again correctly.

Payment Terms Translation

An enhancement has been made so that the customer can now define translations for payment terms and shipment methods. For customers with Multilanguage functionality, this means that the data on an invoice will appear in the correct language.

3270 Sales Invoicing

Information Pane on the Sales Invoice

A new pane on the Sales Invoice contains:

- Instant access to and an overview of the customer's sales history, available credit, shipping information, and contacts information.
- Information about item availability, substitutes, prices, and discounts contained in a single view, which makes it easy to provide quick answers to customer questions.

Invoice entry is expedited through, for example, a "copy to document" function directly from the Sales History window.

Logo on Sales Documents

In the Sales and Receivables Setup window, you can indicate if a logo should be added to the sales invoice and where (left, center, right) it should be added. The logo will then be printed on the document. The logo is captured as a bitmap in the Company Information window.

Sales Quote Number Maintained in Documents

The sales quote number is maintained in all posted documents which started with a quote.

Customer Sales History

The sales history for a customer may be invoked from the customer card based on either the Bill-to or Sell-to role for a customer. (In the RoleTailored client, this information appears in a FactBox on the customer card.)

3280 Sales Order Management

Information Pane on the Sales Order

A new pane on the Sales Order contains:

- Instant access to and an overview of the customer's sales history, available credit, shipping information, and contacts information.
- Information about item availability, substitutes, prices, and discounts in a single view, which makes it easy to provide quick answers to customer questions.

Order entry is expedited through, for example, a "copy to document" command directly from the Sales History window.
In the Sales and Receivables Setup window, it is possible to indicate if a logo should be added to the sales quote, order confirmation and sales shipment and where (left, center, right). The logo will then be printed on the documents. The logo is captured as a bitmap in the Company Information window.

Work Order

A Work Order report has been added as an additional option on the Print button of the sales order. The work order presents a table where the user can manually enter possible changes to the sales order prior to delivering it back to a registering clerk.

Prepayments

Prepayments allow the user to create one or more prepayment invoices based on a sales order. The prepayment can be either a set amount or a percentage of the total invoice. Prepayment invoices are tracked until the order is fully invoiced.

Sales Quote Number Maintained in Documents

The sales quote number is maintained in all posted documents which started with a quote.

3350 Sales Return Order Management

Costing

The Sales Return Order Management granule was affected by the enhancements to the costing functionality. For more information, see the description of the costing functionality in the Basic Inventory granule.

Purchases and Payables

3510 Basic Payables

Partial Payments

Microsoft Dynamics NAV enables you to decide how a payment is applied. This includes:

- Selecting the specific amount to apply to individual documents in a multiple document application.
- Viewing information about both the applying entry and the application in a single form.
- More detailed information about the amounts that will be posted to the general ledger prior to posting such as payment discounts and rounding amounts.

Unapply

It is possible to reverse all postings and changes related to an application of vendor ledger entries. Unapplied entries are set as open entries so that they can be applied again correctly.

Payment Terms Translation

An enhancement has been made so that the customer can now define translations for payment terms and shipment methods. For customers with Multilanguage functionality, this means that the data on an invoice will appear in the correct language.

3520 Purchase Invoicing

Information Pane on the Purchase Invoice

A new pane on the purchase invoice contains:

- Instant access to and an overview of the vendor's purchase history, shipping information, and contacts information.
- Information about item availability, prices, and discounts.

Purchase Quote Number Maintained in Documents

The purchase quote number is maintained in all posted documents which started with a quote.

Vendor Purchase History

The purchase history for a vendor may be invoked from the vendor card based on either the Pay-to or Buy-from role for a vendor. (In the RoleTailored client, this information appears in a FactBox on the vendor card.)

3530 Purchase Order Management

Prepayments

Prepayments allow the user to create one or more prepayment invoices based on a purchase order. The prepayment can be either a set amount or a percentage of the total invoice. Prepayment invoices are tracked until the order is fully invoiced.

Information Pane on the Purchase Order

A new pane on the purchase order contains:

- Instant access to and an overview of the vendor's purchase history, shipping information, and contacts information.
- Information about item availability, prices, and discounts.

Purchase Quote Number Maintained in Documents

The purchase quote number is maintained in all posted documents which started with a quote.

3570 Purchase Return Order Management

Costing

The Purchase Return Order Management granule was affected by the enhancements to the costing functionality. For more information, see the description of the costing functionality in the Basic Inventory granule.

Inventory

4010 Basic Inventory

Work-In-Process Account is Cleared Upon Finishing and Adjusting Production Order

Even though related purchased/produced components have not been invoiced, a finished production order can now be adjusted (invoiced) so that production cost values are moved from the Work-in-Process (WIP) account. In principle, this implies that the WIP account now only contains costs associated with released production orders. This modification applies to all costing methods.

Standard Cost Revaluation

Revaluation of expected (not yet invoiced) inventory valued at standard cost is also possible as the new (revalued) standard unit cost will now apply to item purchase/production entries that are invoiced as well as those that have not been invoiced. The Interim Inventory account will use the updated item costs. For the end users this means that they do not have to get purchases/production (inbound transactions) invoiced prior to standard costed item revaluation or use other workarounds.

Cost Adjustment Process Can Be Performed in Real Time

Users can now choose to perform cost adjustment and item unit cost updates in real time. This means that adjustments—forwarding cost changes from inbound to outbound entries—can happen when:

- Posting inbound transactions (and outbound, in the case of average costing method)
- Posting item charges
- Changing production order status to finished
- Posting revaluation, as opposed to doing it in a batch job

The last option provides users with the advantages of operating with accurate inventory cost values and profit calculations, without having to rely on co-workers in Finance to run the adjustment routine periodically. In operational environments with complicated costing flow, where real-time cost updating may cause a potential decrease in performance, the users will still have the option of running some or all adjustments in the batch job.

Standard Item Journals

On the Item Journal a function has been added to support the ability to save journal lines as standard journals as well as to retrieve the saved journals.

Costing

The costing functionality has been redesigned and the improvements can be grouped into two categories:

- Improving UI designs of the existing costing framework
- Enhancing costing framework with better facilities for decision making

Features:

Costing Data Trustworthiness

- Cost update on the sales/customer statistics
- Inventory Period Closing feature
- Corrected principles behind cost adjustment batch job

Traceability

- Re-visited principles behind posting inventory value entries to general ledger
- New reporting tool for G/L Inventory reconciliation
- New reporting tool for item value dynamics

Simplicity and Usability

- Improved cost reversal (returns) process-support
- Resilient costing-related batch jobs
- Possibility to undo item entry application
- Simplified costing setup on the item card

New

- Periodic average costing method

Planning Transparency

From the Untracked Quantity field in the Order Tracking window, it is now possible to drill down to a form that lists the various supply lines that generate the untracked quantity.

Item Tracking

The Basic Inventory granule was affected by enhancements to the Item Tracking functionality, which is described in the following section.

4140 Item Tracking

Item Tracking

The Item Tracking functionality has been enhanced as follows:

- New traceability feature (the Item Tracing window) allows the user to quickly identify where lot or serial numbers have been sold or bought. The Navigate window has also been enhanced.
- Enhancements to the Item Tracking Lines window when selecting, allocating, or counting serial/lot numbers.
- A First Expired First Out (FEFO) criterion for the flow of goods has been implemented.
- Several reports have been created or enhanced.

4230 Analysis Reports

Sales and Purchase Analysis Reports

The Analysis Reports functionality enables users to create customized reports based on records of their posted transactions, for example, sales, purchases, transfers, and inventory adjustments. In a customizable report, the source data, which is derived from the item ledger (with associated value entries), can be combined, compared, and presented in meaningful user-defined ways. In this sense, the analysis report is very similar to a PivotTable report in Microsoft Excel.

For example, customers can create a personalized report that focuses on their key customers in terms of total turnover both in amounts and quantities sold, gross profit, and gross profit percentage during the current month, and compare those figures with the results from previous months or the same month last year, and calculate deviations. All this can be done in the same view, with the possibility to navigate to the cause of the identified problem by drilling down to the individual transactions.

The look and feel of the Sales and Purchase Analysis report is similar to the Account Schedule features offered in the General Ledger area of Microsoft Dynamics NAV.

Sales and Purchase Analyses by Dimensions Report

The Sales and Purchase Analyses by Dimensions report enables users to analyze sales amount, COGS, purchase cost, item sales, and purchase quantities. With this report, you can:

- Quickly change the information to show in the columns and lines in the analysis.
- Analyze specific items and periods.
- Analyze specific customers and vendors (Requires Granule 3260 and/or 3510).
- Analyze specific locations (Requires Granule 4045).
- Analyze dimensions (Requires Granule 4760 as a minimum).
- Export your analysis to Microsoft Excel.

The look and feel of the Sales and Purchase Analyses by Dimensions report is similar to the Analysis by Dimensions features offered in the General Ledger area of Microsoft Dynamics NAV.

Note, you must purchase Granule 4010 Basic Inventory before you can use this granule.

4240 Item Budgets

Item Budgets enables users to create Sales and Purchase Budgets that can be:

- Entered in terms of monetary values (Sales, COGS, and Cost) and quantities.
- Created for specific items and periods.
- Exported to and imported from Microsoft Excel.
- Created for specific customers and vendors (Requires Granule 3260 and/or 3510).
- Created for specific dimensions (Requires Granule 4760 as a minimum).

The look and feel of the Sales and Purchase Analyses by Dimensions report is similar to the G/L Budget features offered in the General Ledger area of Microsoft Dynamics NAV.

Note, you must purchase Granule 4010 Basic Inventory before you can use this granule.

4640 Automated Data Capture System

The Automatic Data Capture System (ADCS) is used as a primary tracking system for movement of goods on the warehouse floor. In Microsoft Dynamics NAV 2009, the connection between the VT100 Plug-in handheld (a handheld device to scan bar codes on goods) and the Application Server for Microsoft Dynamics NAV has been simplified using TCP Sockets.

Jobs

4510 Jobs

The entire Jobs feature area has been redesigned and improved to provide a better foundation for partners. At the core of the new Jobs module lies the new budget structure made up of job task and planning lines. The task and planning lines replace the phases, tasks, and steps you may know from previous releases. Job task lines are now required, meaning that at any point an itemized overview of the job can be viewed from the Job Task Lines window.

In the new Job Task Lines window, you can drill down to view values generated by the underlying job planning lines. These planning lines are used to generate itemized sales invoices directly from the job.

The following improvements have been made to jobs:

- Handling of fixed price projects by separation of amounts into schedule (budget), usage, and contract (sales), which can be selected in the job planning lines.
- Five new Work-in-Process (WIP) calculations based on IAS standards have been added, which can be recalculated and reposted for part or all of a job.
- Better integration to item ledger and item tracking.
- Job-based pricing for items, resources, and general ledger accounts.
- Foreign currency functionality that gives users the option to plan in their local currency and bill in a customer’s foreign currency or plan and bill in a customer’s foreign currency.
- Copy job functionality.
- Two new reports have been created.
- It is possible to set up dimensions on job tasks and transfer these to WIP entries generated in the general ledger.

Marketing and Sales

5160 Interaction/Document Management

Postponed Interaction Log Entries

Document Management has been enhanced to enable you to save an interaction during the process and later reopen and continue.

5195 Outlook Client Integration

You can use the Outlook Client Integration feature to synchronize your to-dos and your contacts in Microsoft Dynamics NAV with meetings, tasks and contacts in Microsoft Office Outlook®. You can create, update, cancel, and delete contacts, meetings, and tasks in

either program. Then you can activate the synchronization from within Outlook, or setup a recurring synchronization schedule in Microsoft Dynamics NAV. Data can be synchronized bi-directionally or one-way.
A standard synchronization schema for contacts, to-dos, and appointments is available. You can also customize the synchronization by including additional fields or new entities.

Fixed Assets

5260 Basic Fixed Assets

Fixed Assets Depreciation

It is now possible to use a calendar year of 365 days, where each month has the same number of days as in the calendar. The only exception is February in leap years, which is 28 days and not 29. Because of that, all years, also leap years, are considered to have 365 days.
This new feature, ’365-days depreciation,’ cannot be used in combination with ’Custom 1 Depreciation’.

Service

5911 Service Order Management

Service Order Handling

The Service module has been aligned with the design of other modules in Microsoft Dynamics NAV. The following areas have been standardized and aligned with other areas of the application:

- Integration with item tracking, jobs, and costing.
- Handling of inventory consumption for outbound service. Improvements have been made to predefine consumption, handling of actual consumption (inventory), and determine what is to be invoiced to the customer and what is consumption.
- Posting of a service order (sales of spare parts, service order closing, and invoicing) with the following shipping options: ship, consume, invoice, and ship and invoice.

Manufacturing

5410 Production Orders

Easy Production Reporting

Improved production reporting allows users to record consumption and output from the context of a production order line. The Production Journal window combines the functions of the consumption journal and the output journal into one journal, which is accessed directly from a released production order line. When the journal is opened, it is preset with the expected or remaining (by partial posting) quantities or times to be recorded (both output and consumption).
When using routing link codes, the consumption lines (components) will be indented under the linked output lines (operations) to provide a process overview. Quantities and

times already recorded for the production order line are displayed at the bottom of the journal as actual entries.

Planning Resiliency

You can now run the planning batch job in a fault tolerant mode. This allows a supply plan to be created even if some preconditions for the calculation are not met. Instead of stopping the calculation, an error will be logged in an error log. The entries in this log can then later be resolved and the remaining supply plan be calculated.

- **Planning resiliency** – The planning batch job (report 99001017) has been made fault tolerant. You can let the batch job log errors in an error log instead of stopping the execution. The error log can then be retrieved for resolution.
- **Carry out action message resiliency** – The carry out action message batch job (report 99001020) has been made fault tolerant. You can now let the batch job continue even if it is not possible to carry out an action message for one or more planning lines.
- **Prevent acceptance of suspicious action messages** – The Accept action message is set to No when the message is related to a released purchase order or production order or the starting date is before the working date.

6010 Basic Capacity Planning

Manual Planning

The manual planning feature is a simple supply planning tool that functions as a manual MRP system, where the user makes order planning decisions based on visibility and manual planning functions. The Order Planning feature uses parts of the existing planning engine to find and analyze new demand but it does not consider planning parameters defined for the items and is therefore much more transparent than the automatic system.

The Order Planning window displays all new demand along with advanced availability information and suggestions for supply. It provides the visibility and tools needed to manually plan for demand from both sales lines and component lines and then create different types of supply orders directly. It requires a Planner to deal with demand on a level-by-level basis. That is, any dependent demand for lower-level production items is only visible after the higher level is planned. The Order Planning feature includes functions to supply from alternative sources, to easily create different supply orders, and to quickly recalculate new demand.

6040 Production Schedule

Graphical Production Schedule

The graphical production schedule feature provides a graphical representation of production orders and capacity loading in an integrated Gantt component. The Production Schedule window is a Gantt chart that is fully integrated with Microsoft Dynamics NAV and allows a user to reschedule operations by drag-and-drop in a graphical interface and thus update the related production order data. This feature does not provide new scheduling functionality—it merely enables a graphical interface for tasks otherwise done in tabular form in routings, task lists, load windows, etc. As such, it is a consolidation of existing data and functions for capacity planning and scheduling in one graphical interface, which provides a much improved overview that is easy for different user roles to use.

You must purchase Granule 6010 Basic Capacity Planning before you can use this granule.

E-Commerce

6810 Employee Portal

Employee Portal for Microsoft Dynamics NAV has been integrated with Windows SharePoint Services and the SharePoint Portal Server. Employee Portal for Microsoft Dynamics NAV provides Web-based access to real-time enterprise resource planning based on data for employees and partners via a known Microsoft Web platform. The solution has functionality similar to the discontinued User Portal.

The main benefit of having an intranet portal offering is to broaden the footprint of the Microsoft Dynamics NAV application. Instead of using the standard Microsoft Dynamics NAV client to view, modify, or create data in Microsoft Dynamics NAV, it will now be possible to do these tasks using an application that resides on all desktops—Internet Explorer. This enables a broader range of users to work with Microsoft Dynamics NAV data and reduces the amount of time it takes to learn to read and update data.

The solution is a toolkit that makes Microsoft Dynamics NAV data and business logic available in SharePoint. The Microsoft Dynamics NAV Employee Portal will not be a complete readymade portal but rather a framework to present and update data via Microsoft SharePoint.

The toolkit comes with three generic Web parts:

- List Web part for displaying data in a tabular manner, such as a customer list.
- Card Web part for displaying details about a record in a card-like manner such as a Customer card.
- Header-line Web part for displaying items with both header and line information such as a quote.

Furthermore it will be possible to connect the various Web parts as well as display reports and run custom code.

When you install Microsoft Dynamics NAV Employee Portal, an optional sample application will be available. This sample application can be used for demonstration purposes. The sample application is not meant to be an "out-of-the-box" template for partners to implement at customer sites.

99008510 Commerce Gateway

Commerce Gateway has been updated as follows:

- Support for the latest version of BizTalk Server (BizTalk Server 2004)
- Enhanced security with optional encrypted communication
- Accepting and sending of multiple documents

Business Notifications

7010 Business Notifications

Business Notifications is functionality within Microsoft Dynamics NAV that gives customers the ability to automatically send notifications and alerts both internally in the company and externally to business partners. These alerts and notifications are sent via e-mails, based on business rules, determined by the customer's business needs, and set up within their Microsoft Dynamics NAV solution.

7011 Business Notification Worksheet

The Business Notification Worksheet enables customers to run events in periodic batches. This granule also includes the following event templates that solve problems around the supply chain business processes:

- Purchase order - Ensure delivery of goods
- Purchase order - Vendor confirmation not received
- Purchase order - Goods not received from vendor
- Production order - Production delayed
- Inventory - Item quantity status
- Production BOM, and Production BOM version – Items updated

Business Analytics

Business Analytics for Microsoft Dynamics NAV provides an easy-to-use tool that enables users to leverage the data stored within Microsoft Dynamics NAV.
The main benefits of the Business Analytics solution are:

- **Ease of analysis** - This is obtained by integration with Excel, which has been the data analysis tool for the majority of business users, or by using the Business Analytics front-end solution.
- **Ease of configuration** - Customers are able to configure the data that they want to analyze from within Microsoft Dynamics NAV itself using their knowledge of Microsoft Dynamics NAV.

Both Basic and Advanced Business Analytics run on Microsoft SQL Server® 2000 and SQL 2005.

7020 Business Analytics – Basic

The basic offering of Business Analytics enables customers to analyze data from different application areas within Microsoft Dynamics NAV. It includes:

- A set of forms within Microsoft Dynamics NAV for configuration of dimensions and measures.
- A configuration engine that configures DTS packages for data transfer and schema for OLAP cubes and data mart tables.

Customers can view and analyze data through Microsoft Excel via the OLAP cubes.
Note, definition of the OLAP cubes is included in the granule but to create the cubes you need to download the configurator from PartnerSource.
Business Analytics in Microsoft Dynamics NAV 2009 includes:

- Filters that allow customers with large volumes of data to run on subsets of data. Filtering can be done on any of the dimensions used in a cube:
    - A date/time interval
    - A set of accounts
    - A set of customers

- Calculations between virtual cubes that allow for cross-cube calculations to be handled by Business Analytics Basic. Given a cube with actual sales and budgeted sales, Business Analytics can calculate budget deviations, forecasts, and deviations between them.
- Multiple active configurations that allow users to have configurations that can be updated with different frequencies. Budgets tend to change less frequently than actual sales.
- Support for Instances of SQL Server and Analysis Services that allows for more complex server topologies at customers and hosted scenarios.
- *Freehand MDX* with multidimensional eXpressions (MDX). MDX is the query and calculation language of Analysis Services that allows for very complex calculations to be stored in cubes created by Business Analytics for the following purposes:
  - Calculating commission
  - KPIs for Scorecards or Dashboards
  - Calculations across multiple dimensions where navigating multidimensional data is key

7021 Business Analytics – Advanced

The advanced offering of Business Analytics includes all the features of the basic offering plus a front-end solution designed specifically for core small businesses and lower mid-market companies to enable targeted analysis of detailed information generated from Microsoft Dynamics NAV. Microsoft Dynamics NAV Business Analytics makes it possible to gain a 360-degree view of your business performance.

Mobile

8800 Mobile

Mobile Functionality in Microsoft Dynamics NAV

Microsoft Dynamics NAV 2009 includes mobile functionality so mobile users can interact with Microsoft Dynamics NAV using Microsoft Dynamics Mobile 2008—Mobile Sales from a mobile device.

Microsoft Dynamics Mobile 2008 provides customers, while away from the office, with mobile access to the same line of business applications that they rely upon in the office.

Microsoft Dynamics Mobile 2008 consists of a Mobile Sales application and Mobile Development Tools that include Server Components and Framework Components to enable customers and partners to create and run mobile solutions.

Microsoft Dynamics NAV 2009 contains the integration components for Mobile Sales and Mobile Development Tools—Server Components to support the Mobile Sales scenario.

The mobile functionality is described in a Help file, mobile.chm, which is available in English (US) only. The mobile.chm file provides guidance about how to set up mobile functionality in Microsoft Dynamics NAV.

Note, to take advantage of this functionality you need to have Microsoft Dynamics Mobile 2008.

Technology Enhancements

Office Look Navigation Pane replaces Main Menu

Microsoft Dynamics NAV introduces a navigation pane similar to the one in Microsoft Office Outlook 2007. The new navigation pane helps users work more efficiently by combining easy-to-access menu information with personalization options. Further, users with administrator permissions for the navigation pane have various menu configuration options. Some of the main benefits include:

- Customer license file and security permissions automatically determine the menus shown and the items shown within each menu.
- The content of the main menu has been restructured to reflect end users' tasks and make it easier for them to find the functionality they need.
- End users can personalize menu content to suit the way they work. For example, they can hide menu items that they do not use very often.
- End users can make shortcuts to the menu items that they use the most and make shortcuts to all the files, programs, and Web sites that they use in their daily work.

Administrator users can be granted access to the Navigation Pane Designer:

- Administrators can create and modify menus to best suit their companies' departmental needs.
- Administrators can assign users to menus so that end users only see menus that are relevant to their roles.

Simple Bar Chart Graph Components

Predefined Key Performance Indicators (KPIs) can be viewed in a generic graph component in Microsoft Dynamics NAV that can be customized by partners. The predefined KPIs represent Financial Management, Supply Chain Management, and CRM. The graph component enables users to create a simple bar chart diagram consisting of a limited number of squares and the ability to drill down. The graph can be generic and customized by partners.

1700 C/ODBC

Microsoft Dynamics NAV 2009 includes a new ODBC driver. This driver supports conformance level 2 and supports the majority of the business intelligence tools on the market.
The new ODBC driver is built on top of C/Front which will be embedded within the ODBC driver.
Note, the C/Front granule is not required to run the new ODBC driver.

1800 C/FRONT

The C/FRONT for Microsoft Dynamics NAV includes a dynamic link library that gives developers the chance to read data from and write data to Microsoft Dynamics NAV from an external application. The C/FRONT .NET dynamic link library (DLL) enables the development of the external application to be done from any of the .NET languages such as C# or Microsoft® Visual Basic® .NET.
The .NET DLL is not a complete .NET data adapter but does offer all the functions that were available from the existing C/FRONT dll. All functions have revised Help, including tooltips, and are coded in a single base class with namespace Microsoft.Navision.CFront.

Included in Microsoft Dynamics NAV 2009 are the following improvements:

- Addressed quality issues in the C++ C/FRONT DLL
- New COM interop wrapper to provide a .NET C/FRONT DLL
- Addressed quality issues in the C/FRONT OCX sample
- New Visual Studio C# project to show usage of the C/FRONT functions
- Documentation of existing C/FRONT functions that were previously undocumented

2010 Microsoft SQL Server Option

Performance Optimization

The following general performance improvements have been made to the Microsoft SQL Server Option for Microsoft Dynamics NAV.

- **C/SIDE tools that can be used in customer installations to solve specific customer performance problems** - The goal of these improvements is to produce a more SQL-aware standard application and to empower solution developers to tune customizations with SQL Server, while continuing to support the Microsoft Dynamics NAV Server and maintain a single code base.
- **Introduce new C/AL functions to make FIND more efficient** - Provides the optimal SQL queries for traversing forward through a set of records (also available through C/FRONT). A non-cursor query that is faster and consumes less server resources can be used.
- **New database options** - Allowing SQL Server to determine the best lock granularity (table, page, or rowlocks) as opposed to always overriding with rowlocks, makes for more efficient use of server resources. Introducing a lock timeout will improve the user experience because the client will not be left hanging while other users are blocking tables for long periods. This will also cut away peaks from the server and smooth out the workload.
- **Create alternative SQL indexes to the keys defined by the application** - Introduce a new key property 'SQL Index' that allows the field sequence of the SQL index for a particular Microsoft Dynamics NAV key to be specified explicitly. As a result, read performance problems due to inefficient SQL indexes can be avoided, especially with regard to the cardinality of fields at the beginning of an index.
- **Introduce a clustered property on keys** - Introduce a 'clustered' key property to allow a key to be nominated as the clustered key, rather than always defaulting to the primary key. As a result, read performance can be improved in situations where the primary key is not a good candidate for clustering since it is not present in filters.
- **SQL implementation of SIFT indexes improved** - The SQL implementation of SIFT indexes has been modified to improve the performance of update and delete operations, by reducing the overall number of update statements executed by SQL. This has the effect of reducing the overall time required to execute the operation, and also reducing the possibility of contention with other concurrent users. While this change has the greatest impact on multi row updates, it also improves the performance of a single row update.

7140 XML Port Designer, 8700 XML Ports (Each) and 8750 XML Ports (100)

A new XML Port feature makes it easier for partners to customize Microsoft Dynamics NAV. The XML port improves the overall performance of Microsoft Dynamics NAV when handling document exchange, and reduces the need for partners to have expert knowledge of XML parsers. Partners can develop, implement, and manage XML documents in an efficient and cost effective way, and customers can more easily manage data exchange of business documents.

Discontinued Functionality

1540 and 1610 IBM AIX and IBM iSeries

The IBM AIX and IBM iSeries granules have been discontinued.

5200 Smart Tags

The Smart Tags granule has been removed.

6210, 6220 Commerce Portal

The Commerce Portal granules have been removed.

6710, 6750 and 6760 User Portal

The User Portal granules have been discontinued.

Company Notes

The Company Notes feature has been discontinued.

Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like and with familiar Microsoft software, automating and streamlining financial, customer relationship and supply chain processes in a way that helps you drive business success.

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