

Purpose:

To inform the end user about basic navigation skills within D365 F&O

Revision History:

Revision	Prepared By:	Description of Change	Effective Date
A	Thomas Siegrist	Documented Standard Procedure	01/04/23

Process(es) required to be completed prior to starting this Work Instruction:


- Review System Terminology ([D705-D365-System Terminology](#))

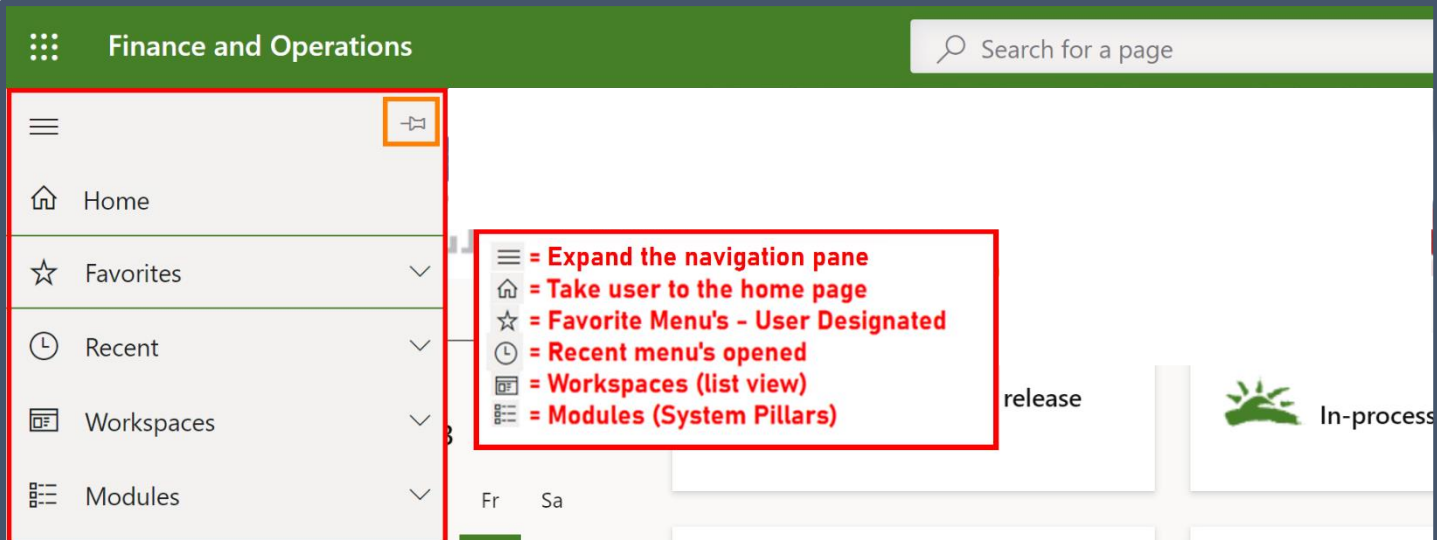
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Procedure:

Exploring the Navigation Pane:

NOTE: Select the "  " to pin the open navigation pane to the left side of the screen



Legend:



-  = Expand the navigation pane
-  = Take user to the home page
-  = Favorite Menu's - User Designated
-  = Recent menu's opened
-  = Workspaces (list view)
-  = Modules (System Pillars)

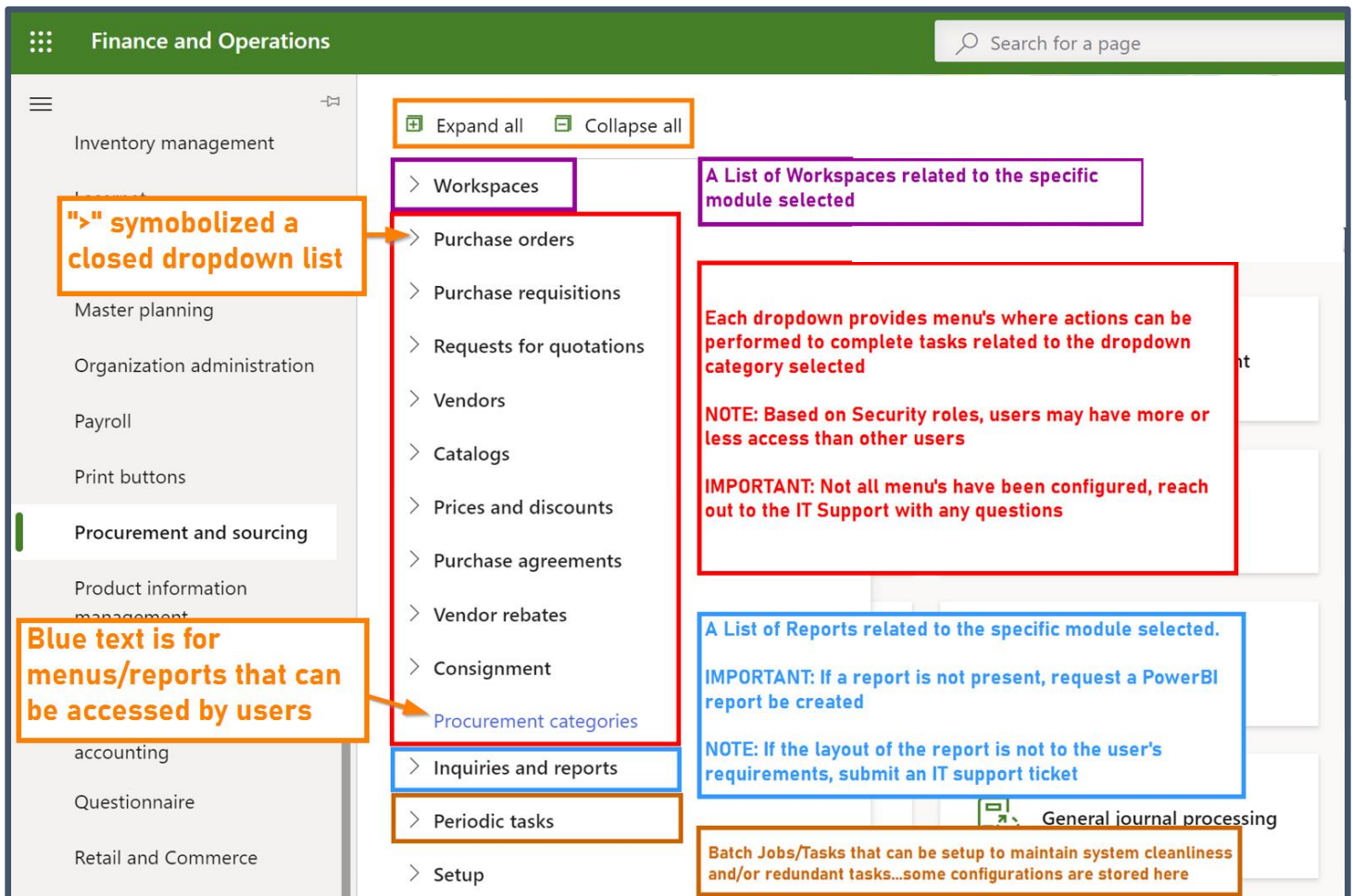
Exploring a Module:

What is a Module?

A module contains all the functionality, data, configuration, and reports for a pillar in the system.

Example: Procurement and sourcing

NOTE: The "  Expand all  Collapse all " can be used to expand/collapse all dropdowns within the module



Finance and Operations Search for a page

- Inventory management
- Master planning
- Organization administration
- Payroll
- Print buttons
- Procurement and sourcing**
 - Expand all Collapse all
 - Workspaces
 - A List of Workspaces related to the specific module selected
 - Purchase orders
 - Each dropdown provides menu's where actions can be performed to complete tasks related to the dropdown category selected
 - NOTE: Based on Security roles, users may have more or less access than other users
 - IMPORTANT: Not all menu's have been configured, reach out to the IT Support with any questions
 - Purchase requisitions
 - Requests for quotations
 - Vendors
 - Catalogs
 - Prices and discounts
 - Purchase agreements
 - Vendor rebates
 - Consignment
 - Procurement categories
 - A List of Reports related to the specific module selected.
 - IMPORTANT: If a report is not present, request a PowerBI report be created
 - NOTE: If the layout of the report is not to the user's requirements, submit an IT support ticket
 - Inquiries and reports
 - Batch Jobs/Tasks that can be setup to maintain system cleanliness and/or redundant tasks...some configurations are stored here
 - Periodic tasks
 - Setup
- Product information management
- accounting
- Questionnaire
- Retail and Commerce

General journal processing

Exploring the Ribbon (*Located on a Menu*):

Ribbon:

- A list of menus (*Organized by Function*) that have one or more sub-sections








Example: Costings, Warehouse/work, Order Actions, etc.

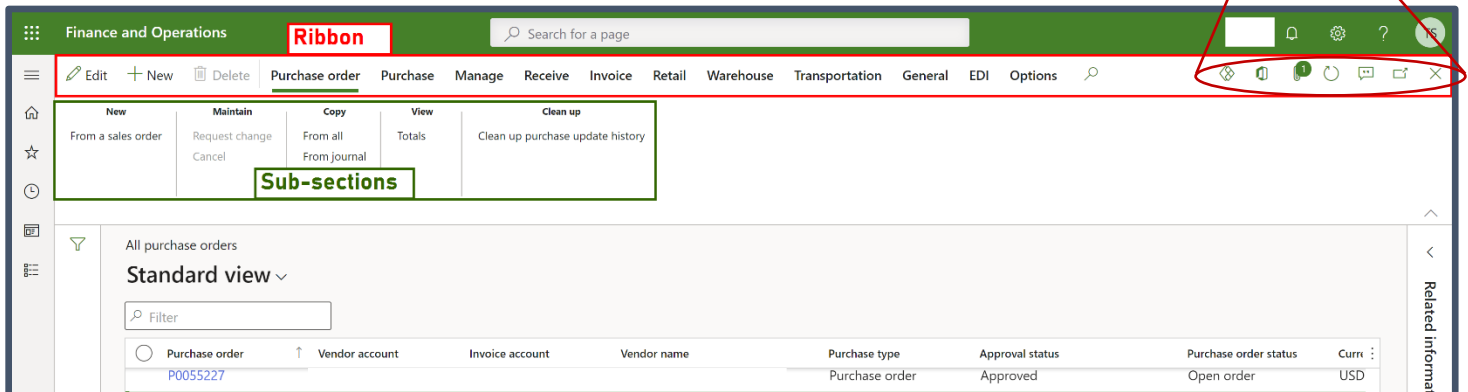
NOTE: Depending on the menu, location of functions may change

Sub-Sections:

- A group of functions/actions that relate to specific topic, the function will execute on the highlighted record(s) in the grid

Example: processing an order, cancelling an order, modifying the quantity/date of an order

- | | |
|---|---|
|  | - Adding an Available PowerApp to the menu |
|  | - Export data to excel or open a data connector in excel |
|  | - View attachments associated with the record highlighted |
|  | - Refresh the data on the open page (Maintains Filters) |
|  | - Lasernet Infolog – Ignore if available |
|  | - Pop out the menu (Similar to duplicating a tab) |
|  | - Return to the previous screen |

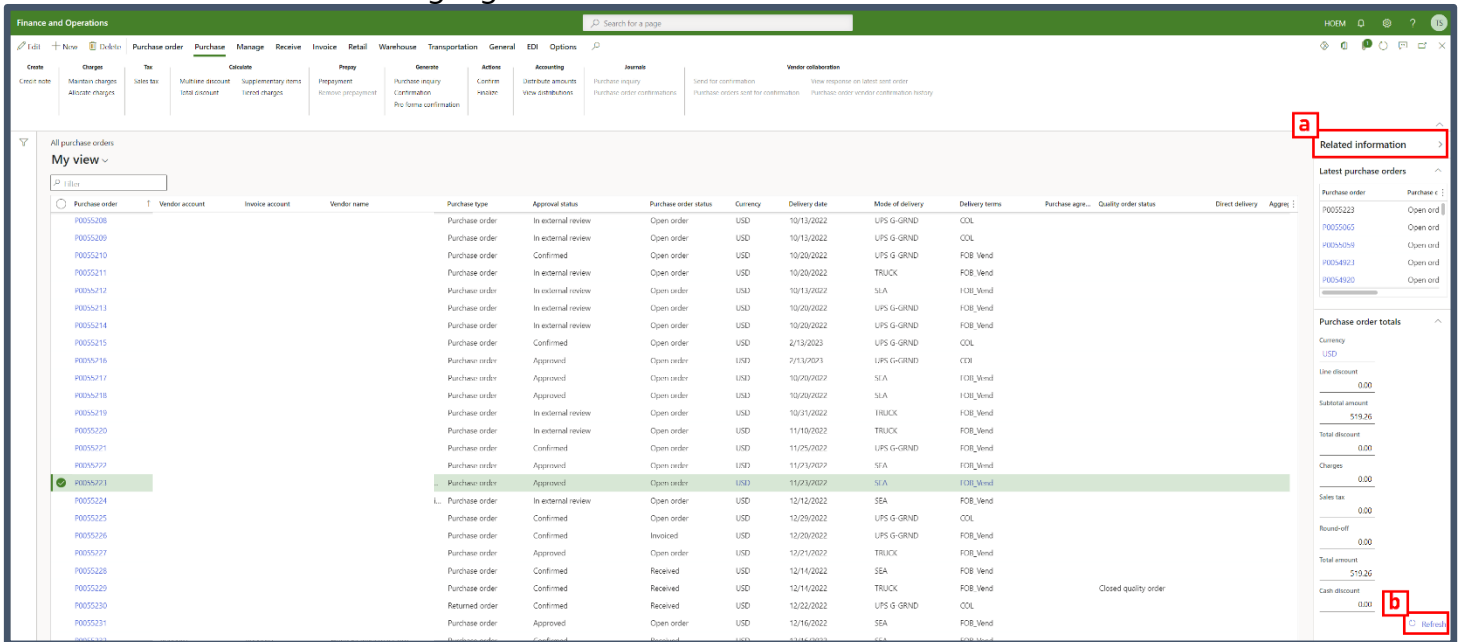


The screenshot displays the Dynamics 365 Finance and Operations interface. The top navigation bar shows 'Finance and Operations' and a search bar. The 'Purchase order' ribbon is highlighted, showing sub-sections like 'New', 'Maintain', 'Copy', 'View', and 'Clean up'. The 'Sub-sections' label is placed over the 'Copy' sub-section. The main area shows a list of purchase orders with columns for Purchase order, Vendor account, Invoice account, Vendor name, Purchase type, Approval status, Purchase order status, and Currency. The first row shows a purchase order with ID P0055227, Vendor account, Invoice account, Vendor name, Purchase type (Purchase order), Approval status (Approved), Purchase order status (Open order), and Currency (USD).

Exploring Related Information; Pop-Up (Located on the right-side of the menu):

1. Open the "Related Information" side pop-up menu

- Select "Related Information" on the right-hand side of the screen
- Select Refresh at the bottom of the related information pop-out to view information related to the highlighted record



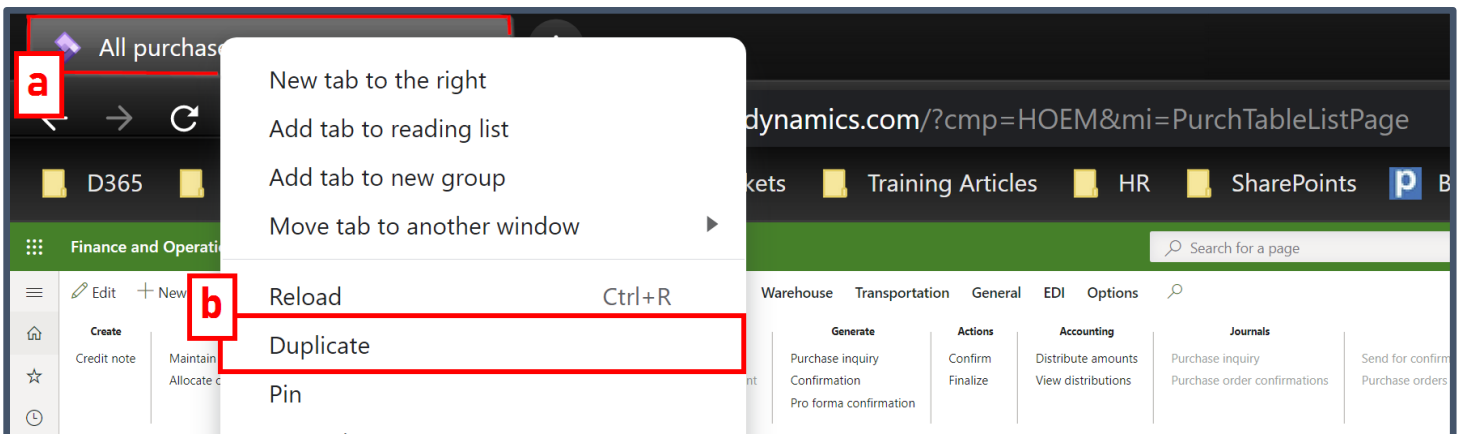
Duplicating a Tab in the Web-Browser (Similar to Window Pop-out)

Purpose: To duplicate sessions another session in D365 to reduce navigational clicks when comparing data to another record on the same table/menu

1. Duplicate the web browser tab

- Right-click (on the mouse) the web browser tab at the top of the web browser session
- Select "Duplicate" in the pop-up menu that appears

NOTE: A second web browser will appear that will load the identical table/menu duplicating from



How to Favorite a menu:

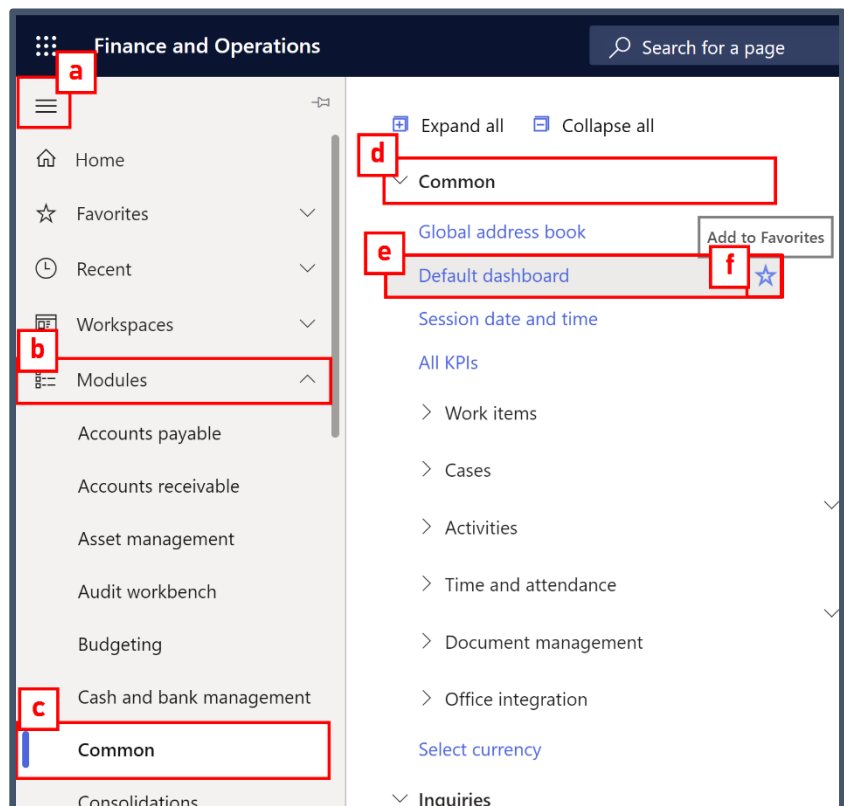
Purpose: To show the end user how to add a menu as a favorite, this will show up in the favorites section of the navigation pane

1. Navigate to the menu to add to the favorites list

- Select the ≡ menu (Navigation Pane)
- Select "Modules"
- Select the appropriate module

Example: Common

- Select the appropriate dropdown(s) – IF APPLICABLE
- Hover over the menu
- Select the "★" that appears on the right-side of the menu

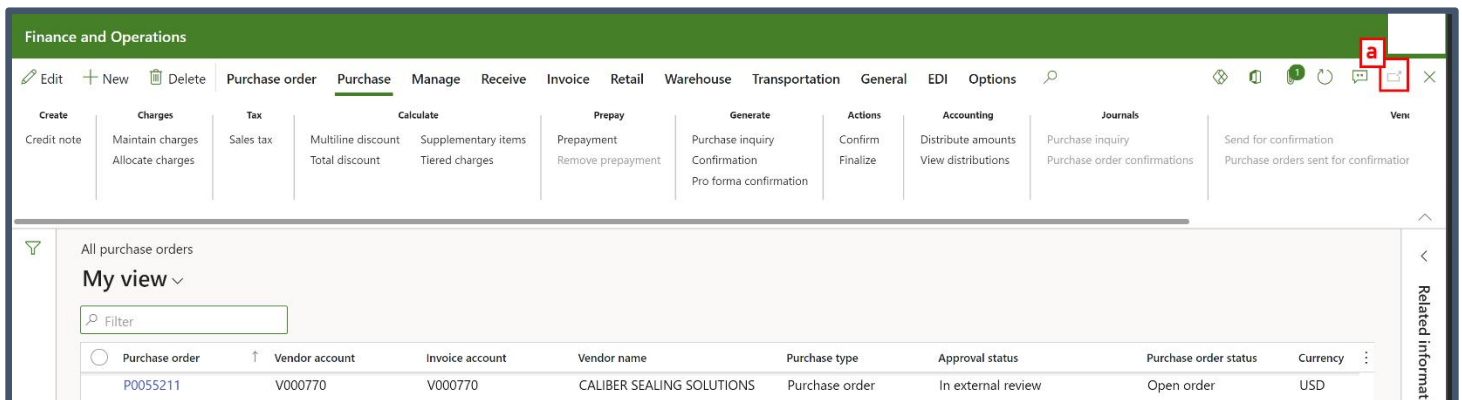


Popping out a menu in D365 (Similar to Duplicating a Tab in the Web-Browser):

Purpose: To pop-out a menu in D365 to reduce navigational clicks when comparing data to a separate menu/table

2. Pop out the menu/table in D365


- Select the "📄" icon in the ribbon to pop the table out to a separate window
- Wait for the menu to load

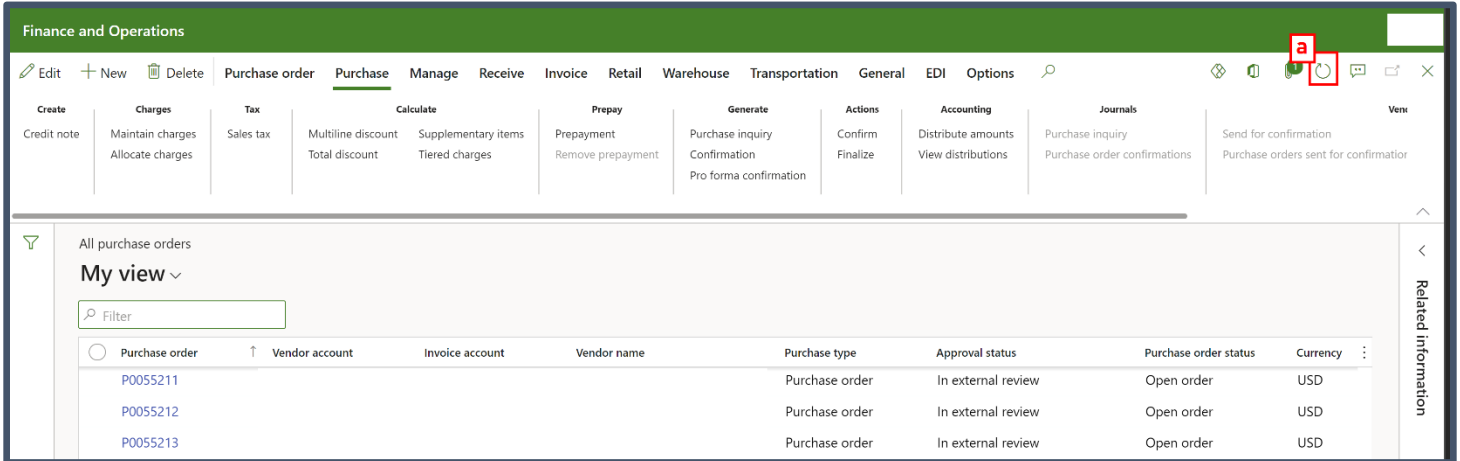


Refreshing a menu in D365 (Maintaining the Filter Criteria):

Purpose: To pop-out a menu in D365 to reduce navigational clicks when comparing data to a separate menu/table

1. Refresh the menu/table in D365

- a. Select the "  " in the ribbon to refresh the table & maintain the filter criteria already applied to the grid




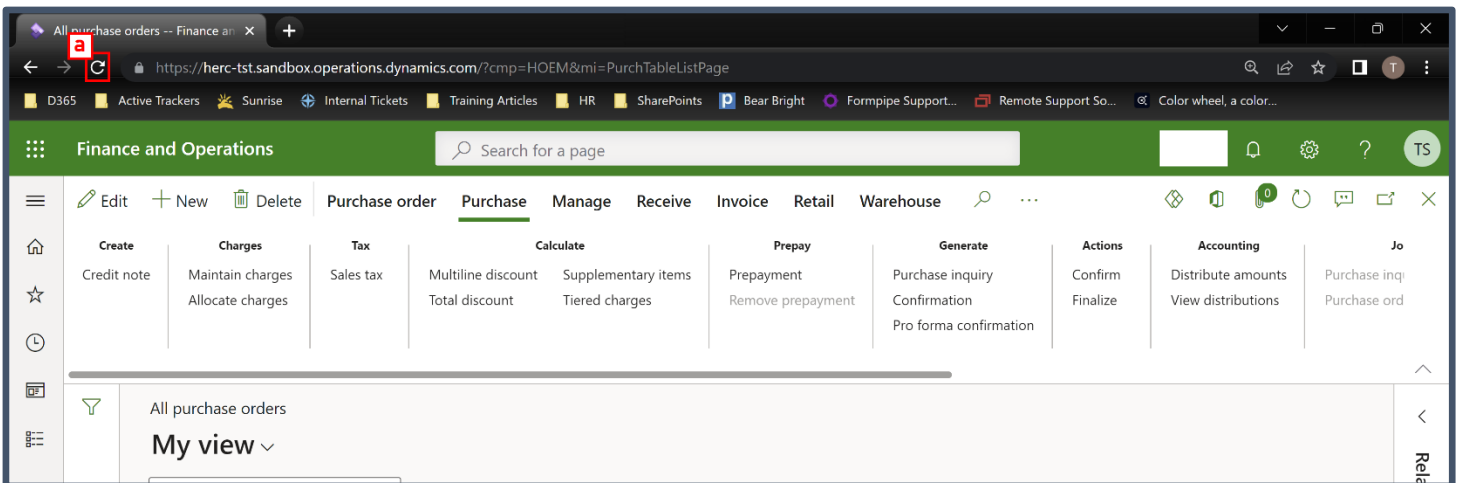
The screenshot shows the Dynamics 365 Finance and Operations interface. The 'Purchase' ribbon is active, and the 'Refresh' icon (a circular arrow) is highlighted with a red box and the letter 'a'. Below the ribbon, the 'My view' section shows a table of purchase orders with columns: Purchase order, Vendor account, Invoice account, Vendor name, Purchase type, Approval status, Purchase order status, and Currency. The table contains three rows of data.

Refreshing a menu & system in D365 (Removing the Filter Criteria):

Purpose: To pop-out a menu in D365 to reduce navigational clicks when comparing data to a separate menu/table

1. Refresh the menu/table in D365

- a. Select the "  " in the web browser to refresh the table/entire system. This will remove the filter criteria already applied to the grid



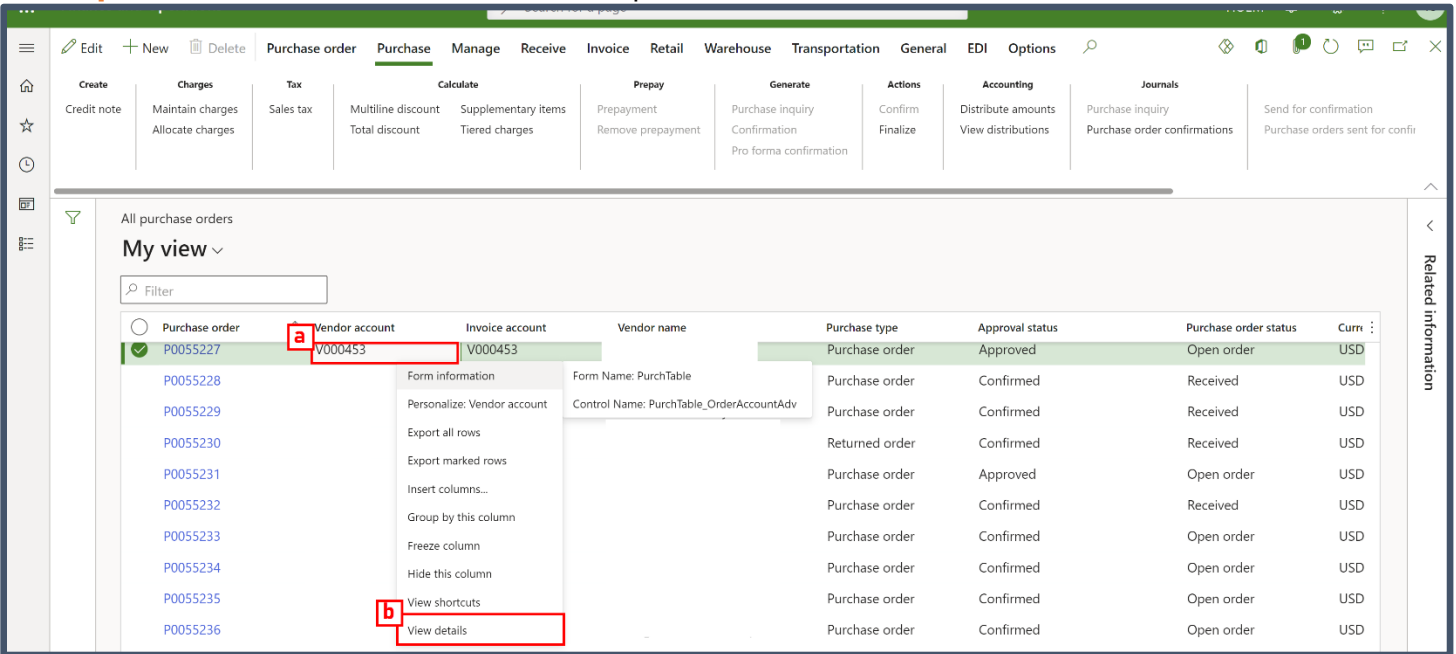
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Navigation through a field to locate a menu:

Purpose: When unable to determine where/how a menu is located, this will provide a potential solution to find the menu

1. Navigate to the specific field on the menu that is unable to be located

Example: I am unable to locate the License plate menu



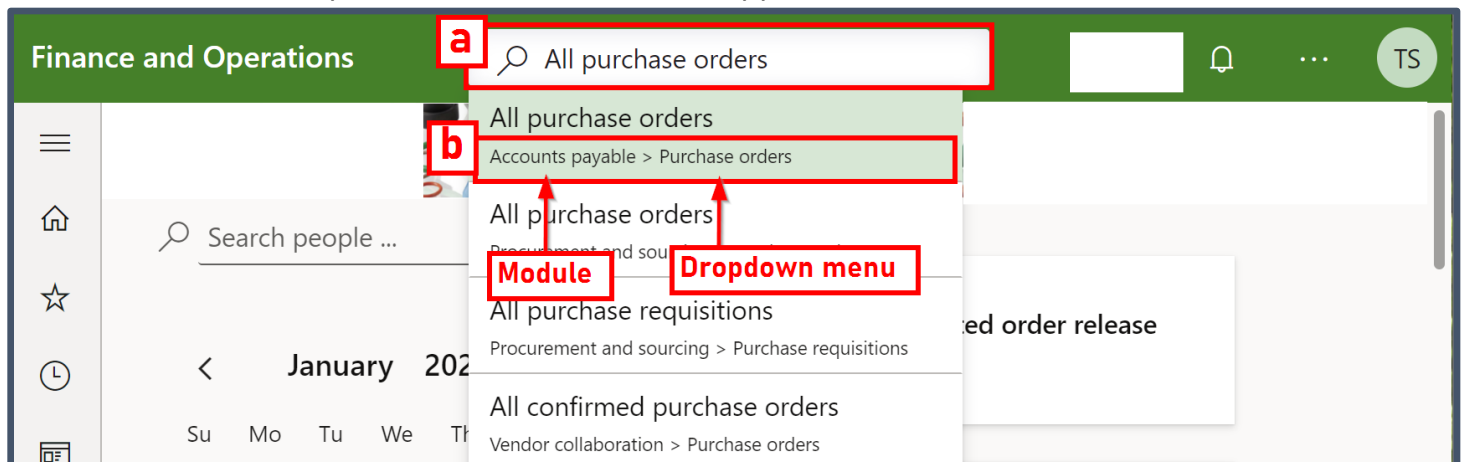
Identifying the Navigation Path through the search bar:

Purpose: When unable to determine where/how a menu is located, this will provide a potential solution to find the menu and favorite for future use

1. Type the name of the menu in the search bar of the colored ribbon

Example: I am unable to All Purchase Orders

- Type the name into the search bar of the colored ribbon (*DO NOT SELECT ENTER*)
- View the path below the menu's that appear



Highly Used Menus:

Purpose: To inform users of the highly utilized menu's within D365 for Hercules HOEM

- All Sales Orders – *CSR* – Shows all sales order headers – does not show line detail
- Open Sales Order Lines – *CSR* – shows only Open sales order lines
- All Purchase Orders – *Supply Chain* – Shows Purch Order headers – does not show line detail
- Open Purchase Order Lines – *Supply Chain* – Shows open Purch Lines
- Planned Orders – *Supply Chain* – Shows suggested supply to order based off demand signals
- Planned Orders – Simplified – *Supply Chain* – simplified functionality & processing compared to planned orders – user preferred
- All Production Orders – *Operations* - All orders related to kitting (Production)
- Transfer Order – *Operations* – Shows all transfer orders being sent between warehouses
- All Shipments – *Operations* – Shows all shipments being packed, processed, shipped
- Pack – *Operations* – Functionality for operations to pack product being shipped
- Confirmation – *Operations* – Extension to process through DHL services