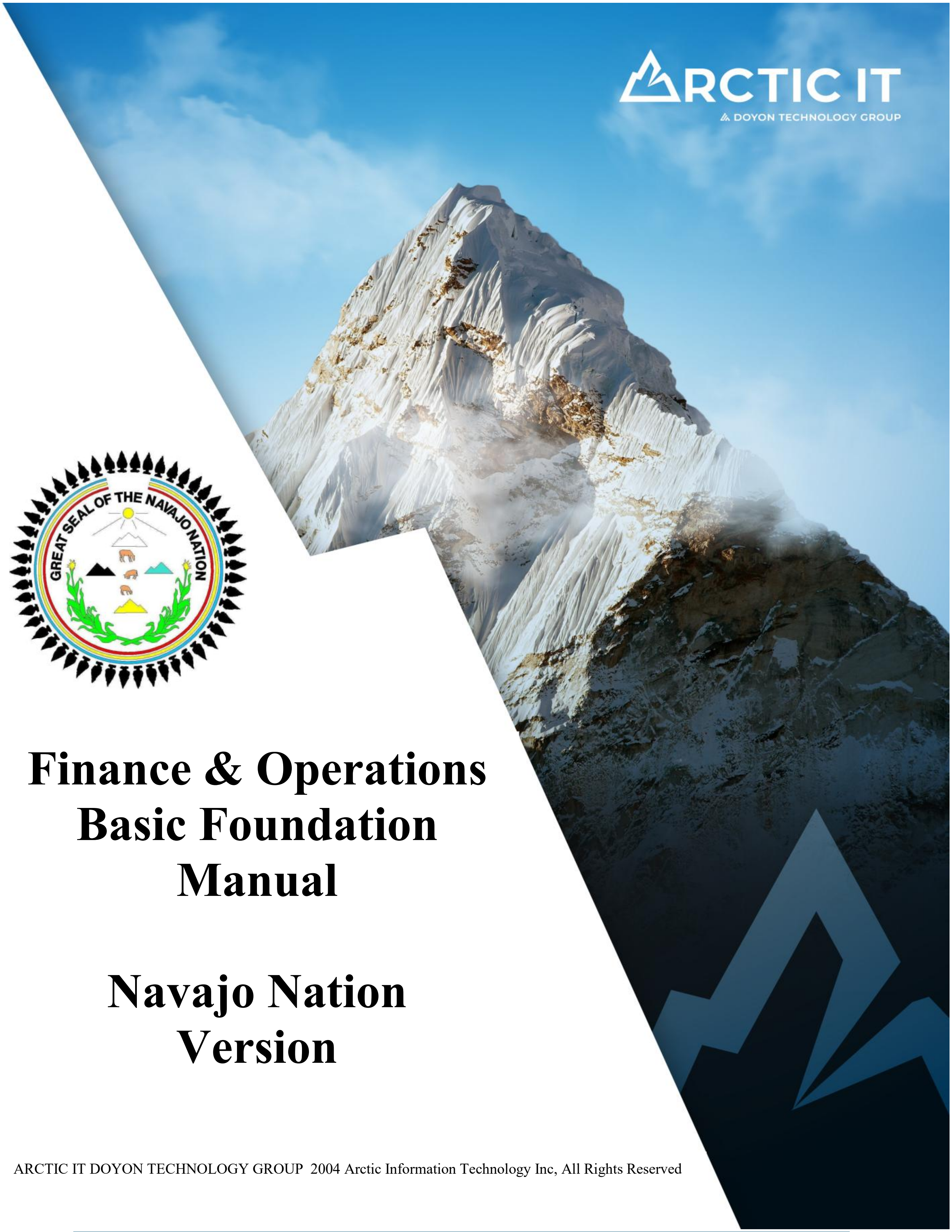


Finance & Operations Basic Foundation Manual

Navajo Nation Version

TABLE OF CONTENTS

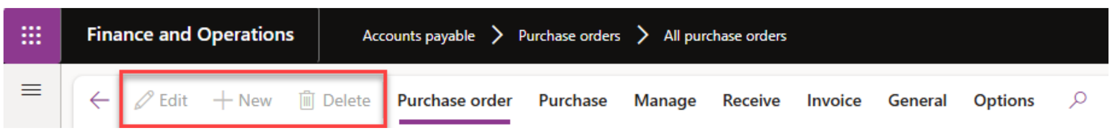
Overview

Licensing requirement

Navajo Nation employees whose job descriptions include financial responsibility within their departments will require an appropriate Microsoft Dynamics 365 license before being granted access to the Nation's financial enterprise resource planning (ERP) system.

Security Roles

In Dynamics 365 Finance & Supply Chain Management (F&SCM), security roles are aligned with the employee's job responsibilities and required level of access, Security roles are the primary mechanism used to determine what users can view, create, modify, process, or otherwise perform within the system.



The ***TNN-Inquiry Only*** role is a controlled, read-only role; you can review the details of the Nation's financial data without making changes. It's often used as a preliminary check before finalizing an action. The action pane toolbar buttons are greyed out and unavailable. However, you can run reports that are available to you.

Security Hierarchy

Uses a four-layer security hierarchy to control user access and align system permissions with job responsibilities:

Security Roles – Groupings of duties that map to job responsibilities.

Duties – Sets of privileges that represent parts of a business process.

Privileges – Specific permissions on tasks or actions.

Permissions – Access to individual securable objects.

Basic Navigation in Dynamics 365

Basic navigation refers to the core user interface (UI) elements and paths that let users move between modules, pages, and tasks efficiently — primarily the navigation pane, dashboard, workspaces, tiles and navigation search.

A UI element icon is a small, visual symbol in a digital interface that represents a specific function, action, navigation path, or status, helping users quickly understand and interact with the system

Purpose and Function: UI icons:

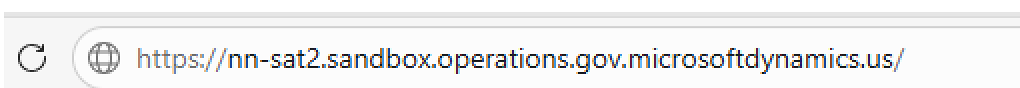
- Represent actions or features (e.g., a download arrow for downloading a file)
- Guide navigation (e.g., a home icon for returning to the main page)
- Indicate status (e.g., a warning triangle for alerts)
- Reduce cognitive load by using familiar visual metaphors to replace or supplement text, making information easier to understand, navigate, and remember.

Examples of Some Common UI Icons

- Hamburger menu (three horizontal lines) opens a navigation menu.
- Search magnifying glass — triggers a search function.
- User profile silhouette – accesses account settings or profile information.
- Back arrow — returns to the previous page.

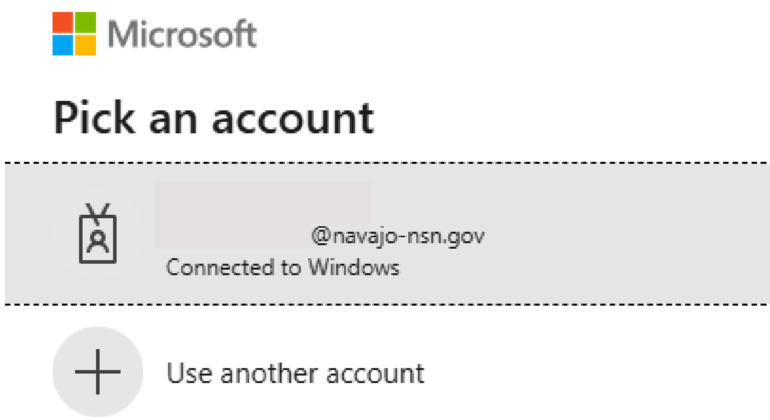
D365 Finance & Operations (F&O) *Login:*

Dynamics 365 Finance & Operations Login
Dynamics 365 F&O is a web-based application accessed through an internet browser. 1. Open your preferred ***Web Browser*** Google Chrome or Microsoft Edge. The Production Environment is a live system used for day-today business operations. All data is real, and any changes made directly impact active processes. The official Production web link will be shared on October 1, 2026. It will appear simular to this format: *https://nn-gold261...*

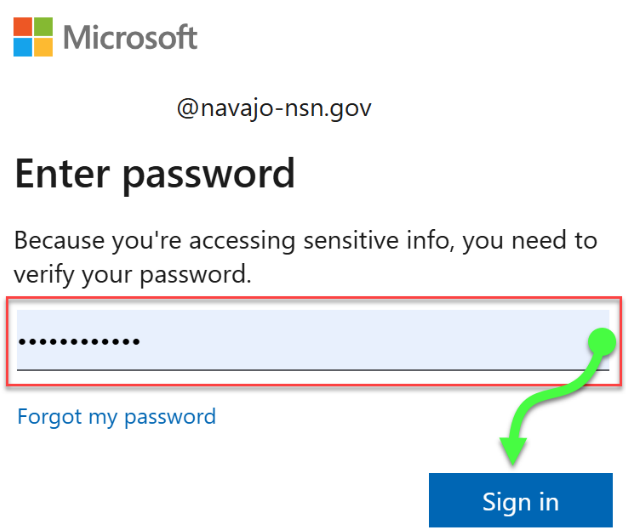


Dynamicas 365 Finance & Operations Login
For *training purpose only*, this is OOC's Sandbox training environment used for practice. 2. In the browser field, enter web link: https://nn-sat2.sandbox.operations.gov

Sign in to Your Microsoft Account



Dynamicas 365 Finance & Operations Login
On the ***Microsoft Pick an account*** screen, your email address is displayed Note: This page is a time sensitive entry. 3. Click the account displaying your email address.



Dynamicas 365 Finance & Operations Login

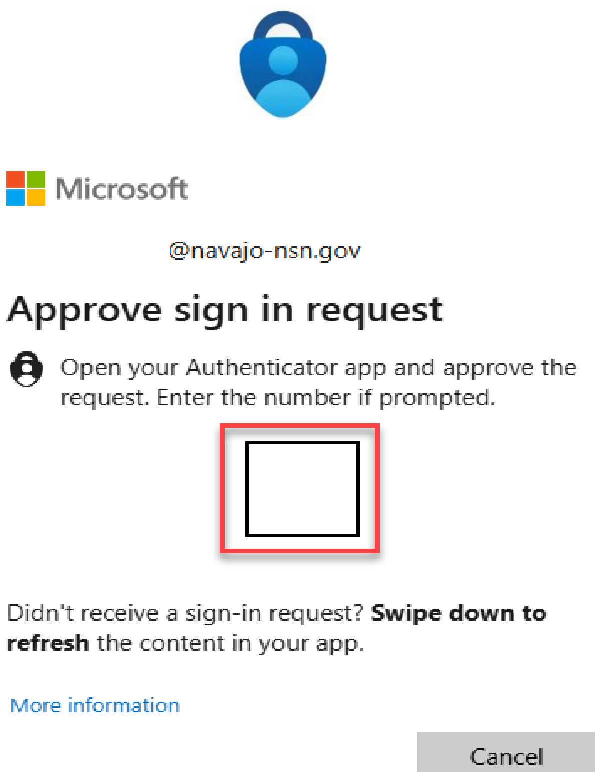
On the ***Microsoft*** screen, your email address is displayed.

4. Enter your password credentials. This is a sensitive information ***do not*** share your password.

5. Click ***Sign in***.

Multi-Factor Authentication (MFA)

Multi-Factor Authentication (MFA) is a security process that requires users to provide two-factor authentication. Verification factors to a confirm your identity before gaining access to an account or system. MFA adds an additional layer of security by requiring more than just a username and password.

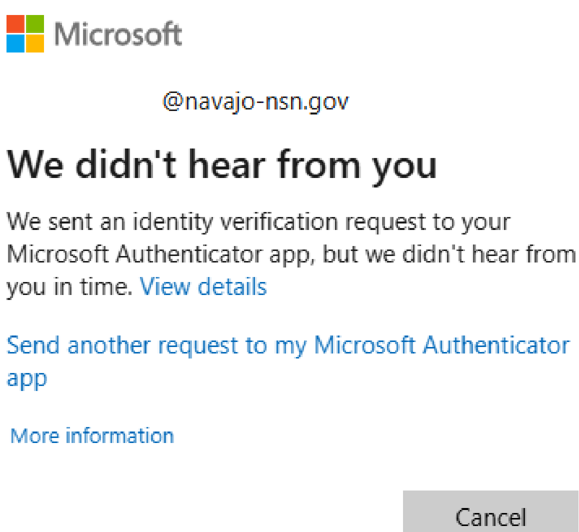


Dynamicas 365 Finance & Operations Login
On the ***Microsoft*** screen, your email address is displayed. 6. When prompted enter the identify verification number displayed in your Microsoft Authentication app. 7. If you signed in successfully go to page 13.

Troubleshooting Common Login Issues

- Ensure your internet connection is stable.
- Double Check your username and password for accuracy.
- Contact via email ooc.fmissupportteam@navajo-nsn.gov
    - Provide your email address
    - Provide nature of the error

Microsoft Account Sign-in Error Messages

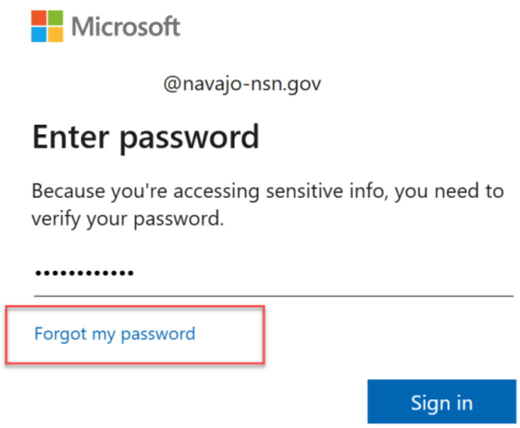


Microsoft Error Message – We didn't hear from you

On the ***Microsoft*** sign-in screen, your email address is displayed. This message indicates that you have exceeded the allowed time window.

If you encounter this screen, click the ***Cancel*** button.

Prompts you back to step (3) above.

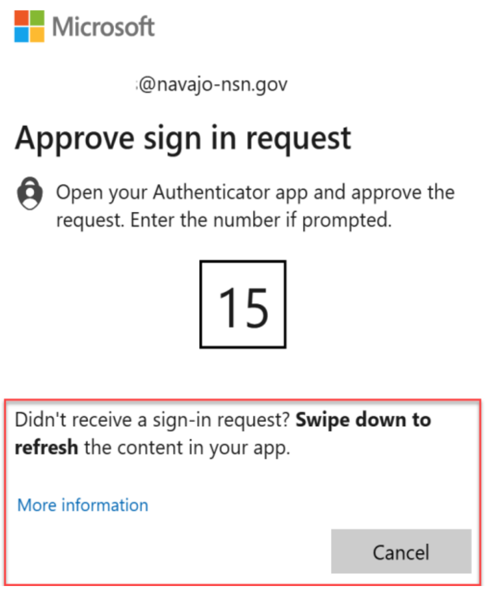


Microsoft Error Message – Forgot your password

On the ***Microsoft*** sign-in screen, your email address is displayed. If you forgot your password credentials do this:

1. Click the ***Forgot my password*** button.

2. Follow the DIT help desk steps on page (12) below.

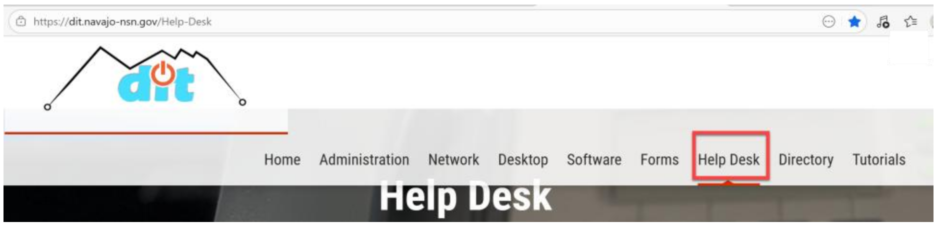


Microsoft Error Message – Authentication problems
On the ***Microsoft*** sign-in screen, your email address is displayed. If you are encountering authentication problems with your authentication verification code from the Microsoft Authenticator app. 1. Click the ***Cancel*** button. 2. Follow the DIT help desk steps on page (12) below.

Department Information Techology (DIT) – Help Desk

To request troubleshooting assistance or reset your Multi-Factor Authentication (MFA), submit a ticket through the Department of Information Technology (DIT) ticketing process.

If you purchase or replace your mobile phone, you ***must*** request a password reset when submitting a ticket through the (DIT) Help Desk.



Help Desk link - *https://dit.navajo-nsn.gov/Help-Desk*

DIT Help Desk

1. Open your web browser and enter https://dit.navajo-nsn.gov/Help-Desk.

2. Select the ***Help Desk*** tab on the dit website.

3. Follow the instructions to submit a *DIT Incident Ticket.*
   Note: ***Request to reset your password***.

Also note: Response time varies on the ***Priority*** option you select.
(*None, Low, Medium, High, Critical*)

Finance and Operations

Finance and Operations

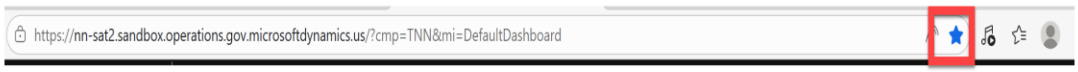
Dynamics 365

Microsoft

Finance and Operations Dynamics 365
You have successfully login to the Office of the Controller Finance and Operations Production Environment.

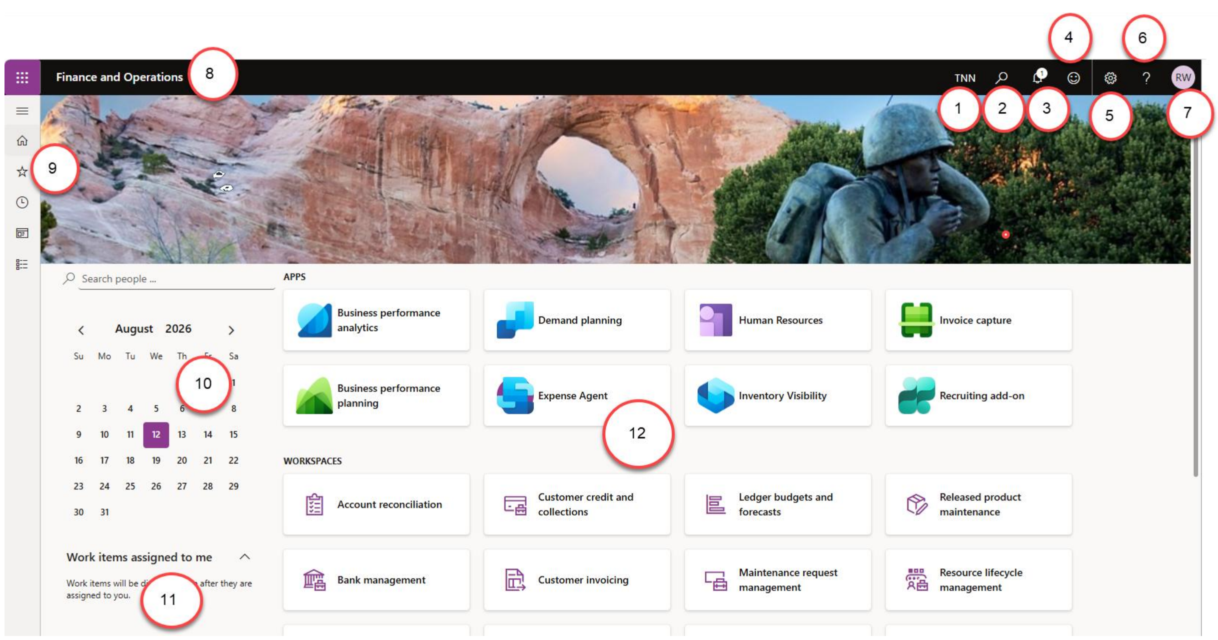
Welcome! to The Navajo Nation (TNN)
Finance and Operations (F&O)
Resource Enterprise Planning (ERP)

Dashboard – Favorites



Dashboard Favorite (Optional)
To bookmark the F&O Gold2 production environment web browser link for quick access. 1. Select the ***star icon*** (Favorites) in your browser's address bar. 2. Enter a descriptive name. 3. Save the link.

Home Page / Dashboard

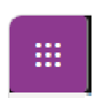


Home Page
The first screen you see when you login. It serves as a central dashboard for prioritized tasks, system insights, and quick access to key activities. 1. Legal entity 2. Navigation Search 3. System Messages 4. Feedback 5. Settings 6. Help & Support 7. User Account 8. Calendar 9. Navigation pane 10. Calendar 11. Work items 12. Workspaces

Basic Navigation Overview

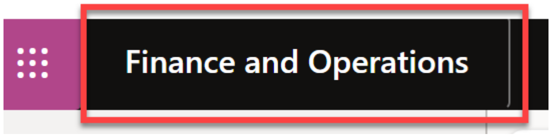
Navigation Bar

Navigation Bar
The bar at the top of the interface contains the Dynamic 365 portal, Search, Company picker, Action Center, Settings, Help & Support, and the User Profile. It serves as a quick access point to core system areas.



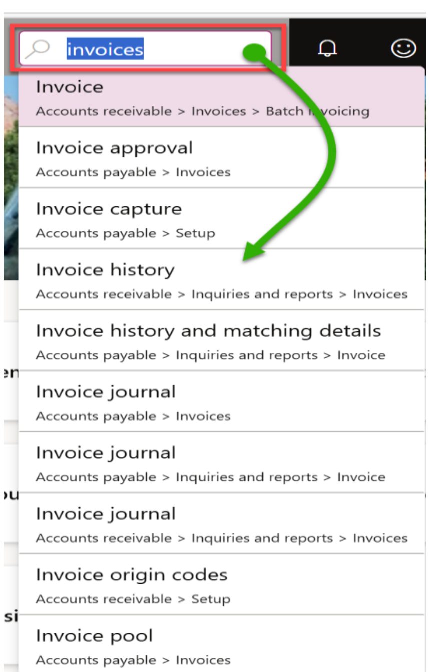
Navigation Bar – Office 365
Go to the 365 site, is a site essentially a SharePoint site that acts as a centrallized hub for collaboration, content management, and communication within an organization. These sites allow teams to store documents, create lists, manage workflows, and share information securely. They can be accessed from anywhere using a

web browser, making remote collaboration seamless.



Navigation Bar – Finance and Operations
Finance and Operations is typically used as a landing page or navigation hub. You can return to the dashboard at any time by selecting ***Finance and Operations*** on the navigation bar at the top of the page. 1. Click the ***Finance and Operations*** button to return to the Home Page.

Search



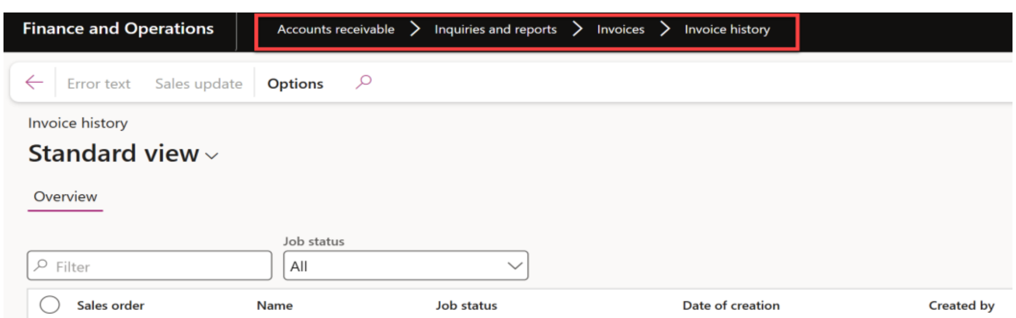
Navigation Search

The search mechanism is used for finding and navigation to pages and workspaces that appear in the navigation pane and on the dashboard.

There are two specific ways to search:

- Keywords - Using the search feature, you can enter keywords to find a specific page. The results in the list include complete and partial matches, as well as the manual navigation path for the page.
- Form names - Technical users who are looking for a specific form name in the system can use the search feature by entering “form:” followed by the actual form name, such as “vendInvoice” to find specific pages in the system that use that form. The list will populate with pages that use the specified form.

1. In the Finance & Operations inerface, locate Search icon in the navigation bar.
2. Click in the ***Search box***, field will default with ***Search for a page***.
3. Enter your search by typing one or more words related to the page you want.
4. The system matches your input against ***page titles*** and ***navigation paths***.
5. You can click any result to navigate directly to the page.



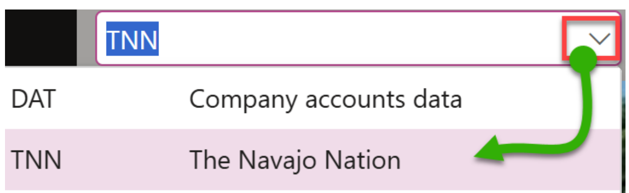
Navigation Bar - Search

The navigation bar is the top bar in the application interface.

When navigating from modules to applications, displays your current location link and provides quick access to related applications directly to the page.

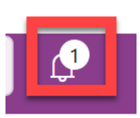
Company Picker

Company Picker - TNN
Legal entity, If there are multiple legal entities that is maintained in a specific environment you can go on to different legal entities. To view the company picker abbreviation TNN 1. Click the company picker field ***TNN***.

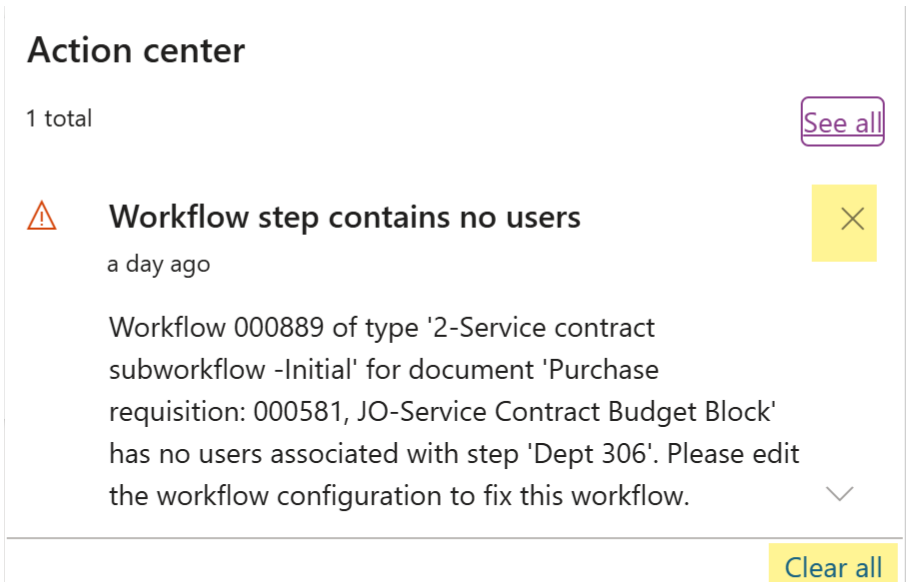


Navigation Bar - TNN
2. Click the ***down arrow*** button to open the list (TNN = The Navajo Nation).

Messages /Action Center

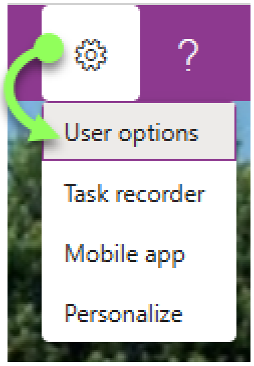


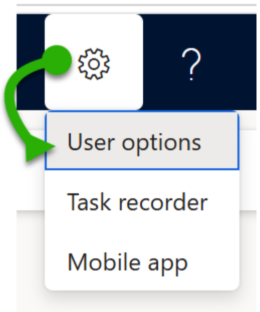
Navigation Bar – Messages / Action Center
The bell icon displays messages, triggers a message used to communicate important information, confirm actions, or initiate processes directly from the form. You can see notifications, contains workflow notification that requires your review or approval, it displays the number of notifications. To view the (1) message detail or notifications. 1. Click the *Message icon* button.



Navigation Bar – Action Center
The notification provides workflow information, ensures users are informed of actions pending or whether immediate actions are required. 2. To exit the form click the **X** button.

User Options – Settings





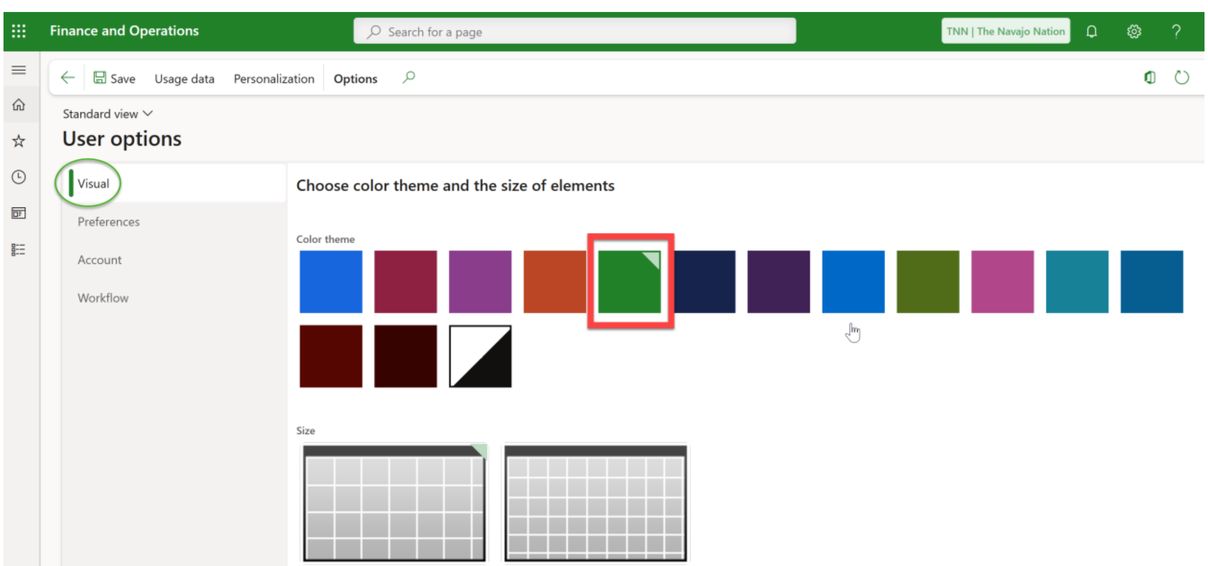
Navigation Bar – Settings

The users settings button is your control center where you can manage your personal preferences and system wide settings. Task recorder, Mobile app and Personalization. To view your User options.

1. Click the ***Settings*** button.

2. Select ***User options***.

Note: Personalize may not be available due to the environment or your role access.

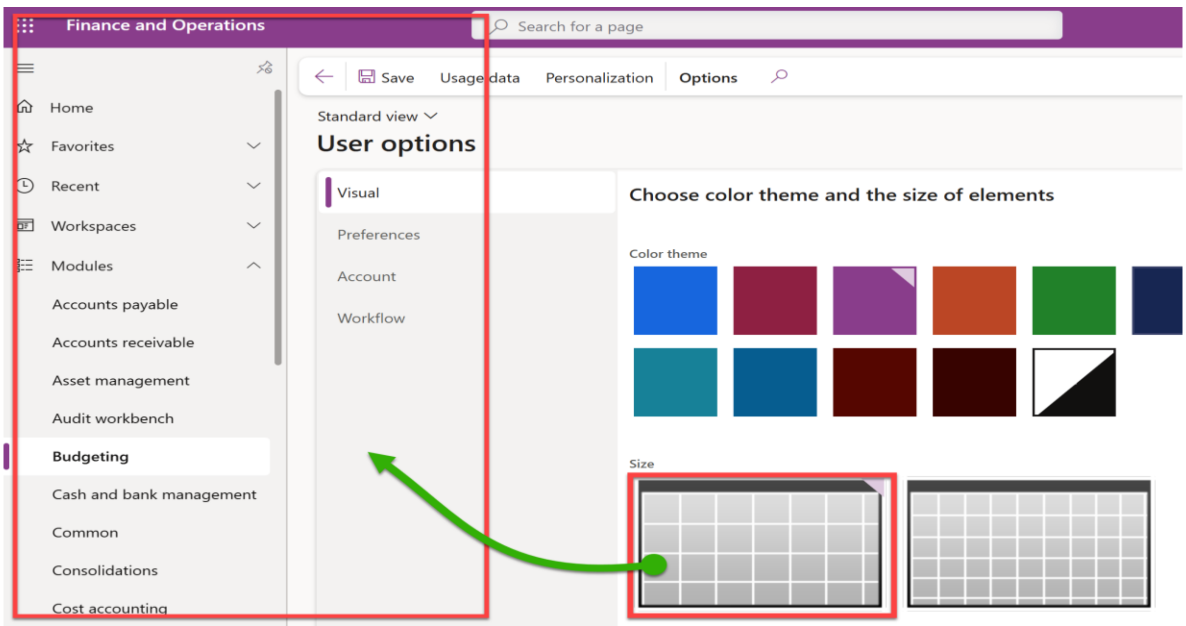


Navigation Bar – Settings / User options

At the *Visual* screen, you can view or change your system settings, mobile app, and personalization.

3. Select a color theme. The tiles and background will update to match the color you choose.

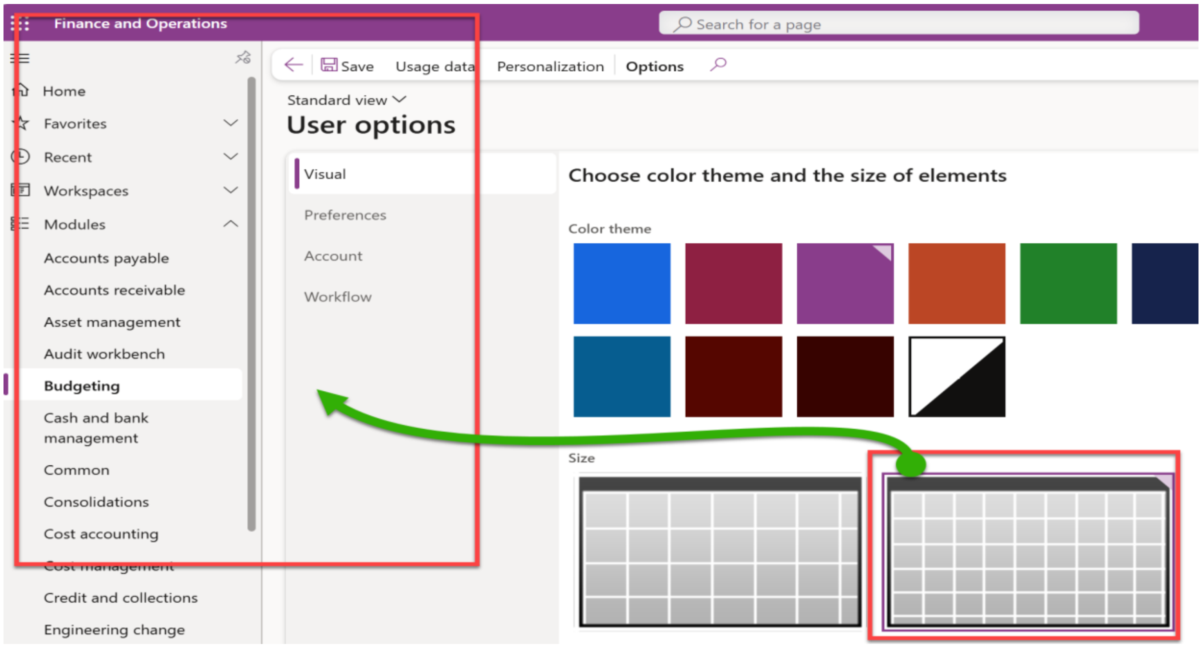
Note: Throughout this manual, you will see the *visual feature* in which the *background* pages appear in *different colors*.



Navigation Bar – Settings / User Options

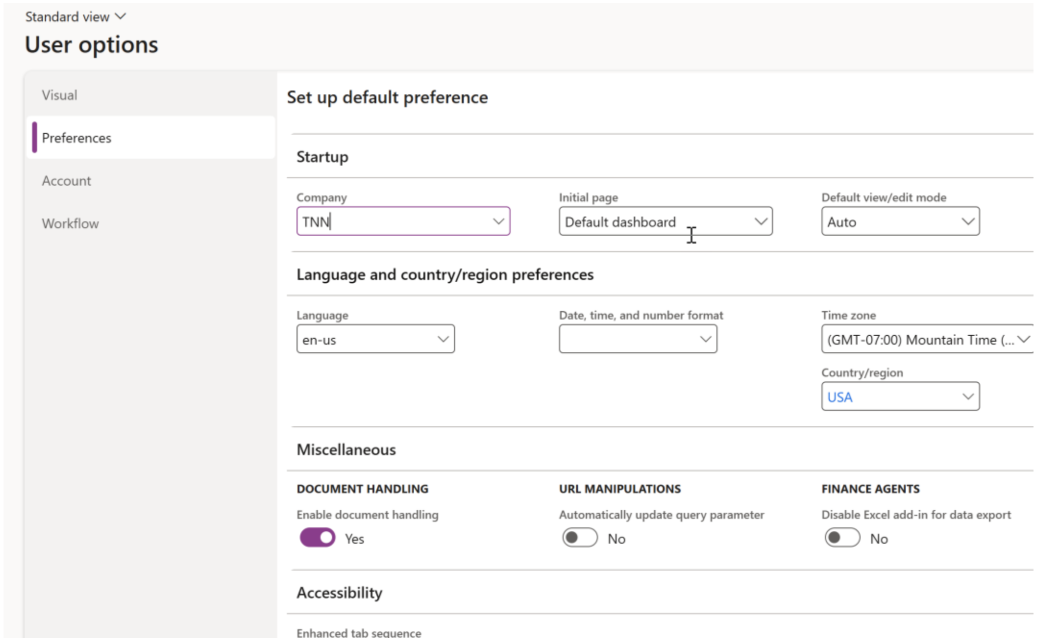
To change the default size of elements to large on the pages.

1. Select the ***large tile size***, enlarges the font elements on the pages.



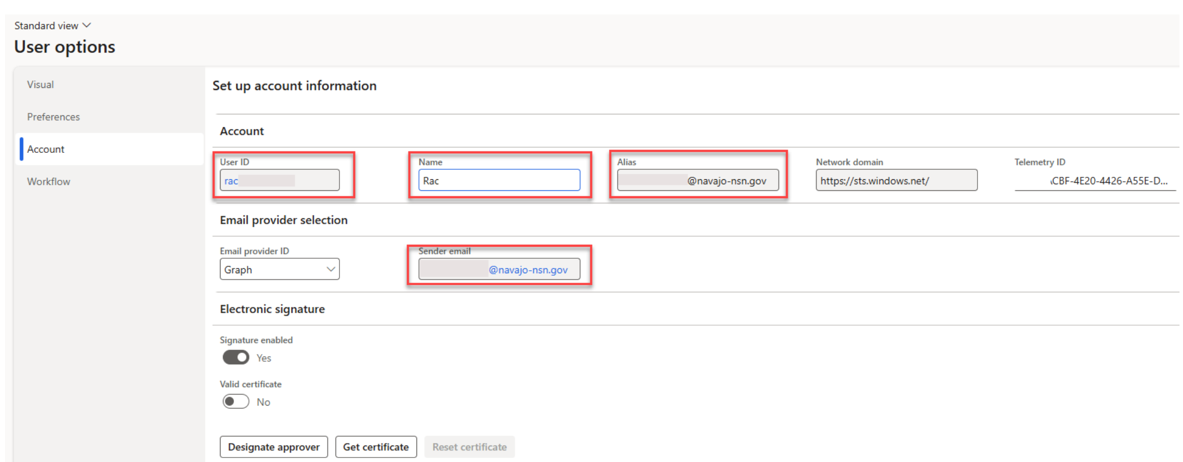
Navigation Bar – Settings / User Options
To change the size of elements to small. 1. Select the ***small tile size***, defaults size of the elements on the pages.

Preferences



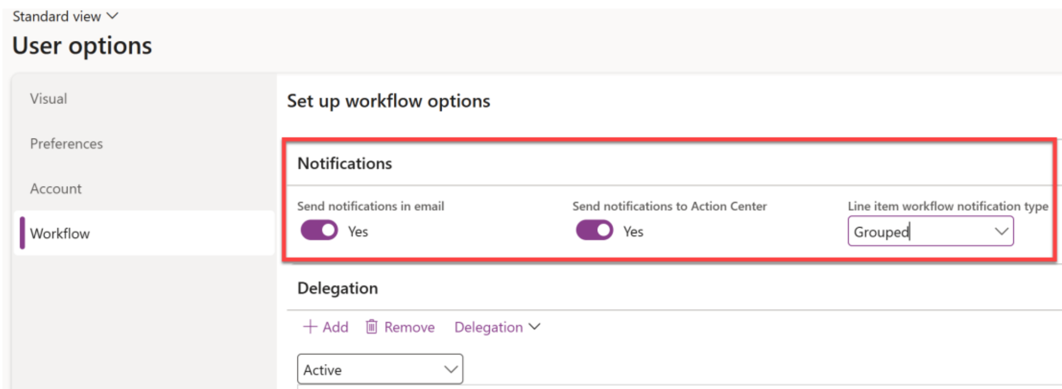
Navigation Bar – Settings / Preferences
These are default value settings. The *company*, the initial page, and the default view/edit mode. *Language*, the time zone, and date, time, and number formats. Finally, this tab includes several *miscellaneous* preferences that vary from release to release.To view your preferences settings. 1. Select ***Preferences***.

Account

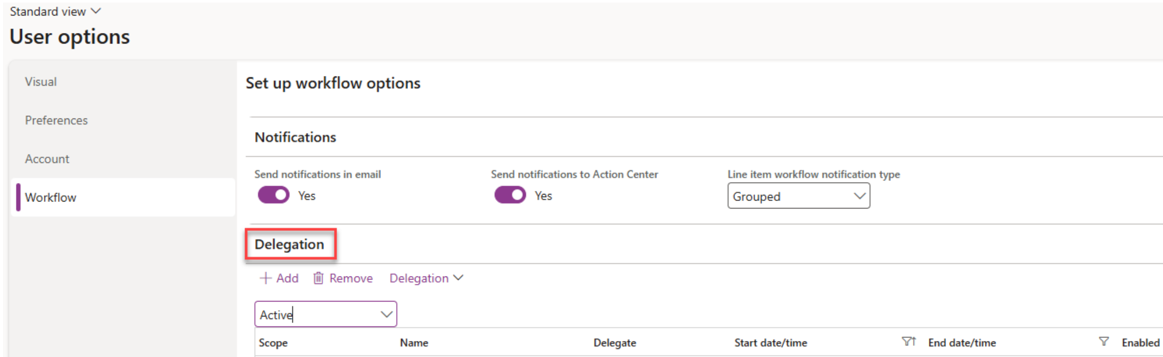


Navigation Bar – Settings / Account
View your user name and other account-related options. To view your *Account* settings. 1. Select ***Account*** from the User options. 2. Verify that the ***Sender Email*** field is correct.

Workflow



Navigation Bar – User Options / Workflow
Workflow section in the User options is where you can manage and configure your user interacts with workflow processes in the system. Options such as notifications and delegations. To view the workflow. 1. Select ***Workflow***, verify email and action center radio buttons are set to *Yes*.



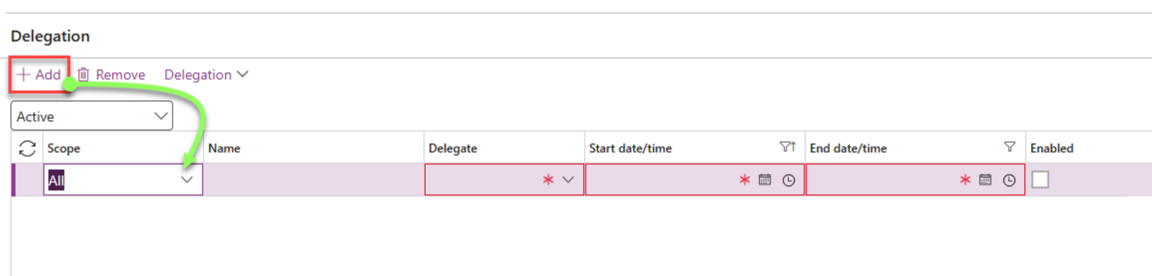
Navigation Bar – User Options / Workflow / Delegation

Delegation – To temporarily assign responsibility for a workflow task to another user. This is useful when an approver is unavailable so that approvals can continue without delays.

Important: The delegated user must have the correct security role to approve the type of workflow (e.g., Procurement Manager for purchase order approvals).

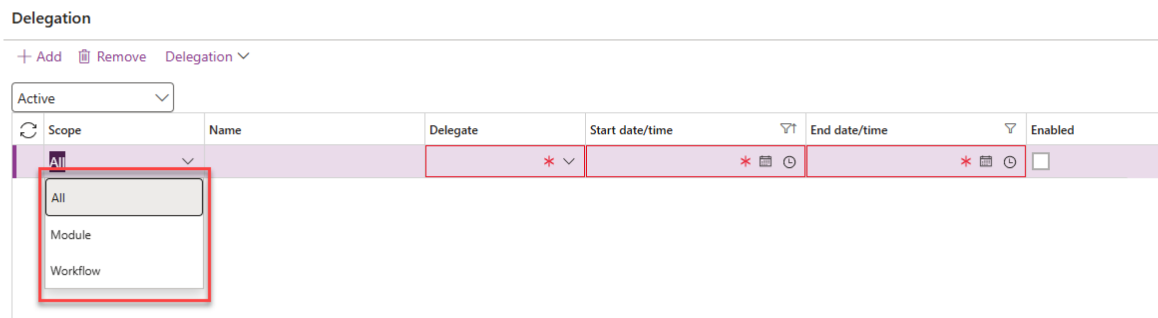
To view the delegation.

1. Click ***Delegation*** to expand the section.



Navigation Bar – User Options / Workflow / Delegation

2. Click the **Add** button to create a delegation rule.



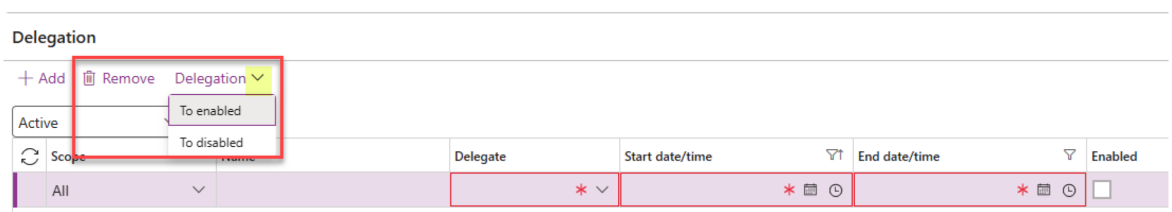
Navigation Bar – User Options / Workflow / Delegation

3. **Scope:**
   - *All* – Delegate all work items assigned to you.
   - *Module* – Delegate only work items from a specific module (e.g., Procurement).
   - *Workflow* – Delegate only work items from a specific workflow (e.g., Vendor Invoice Approval).

4. **Delegate**: Select the user who will handle the tasks.

5. **Start/End Date/Time**: Define the period during which delegation is active.

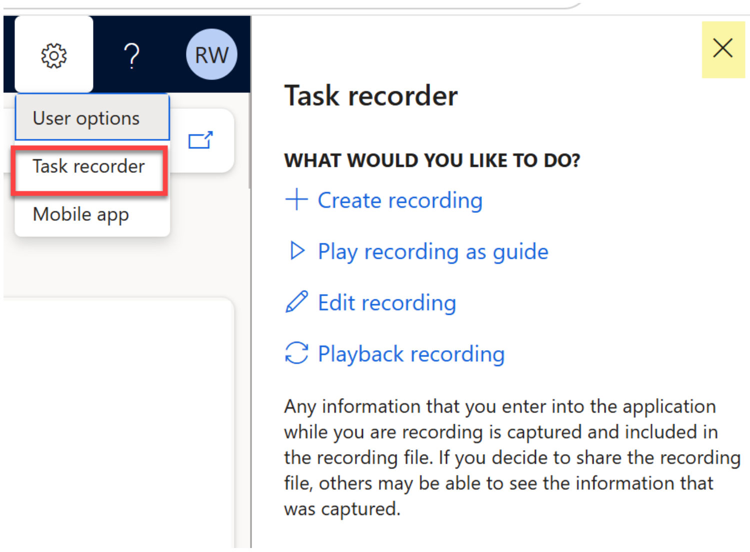
6. **Enable the Rule** and save.



Navigation Bar – User Options / Workflow / Delegation

7. **Remove** – Deletes the delegated rule.

8. **Delegation** – Enables or disables the delegation rule.



Navigation Bar – User Options / Task Recorder

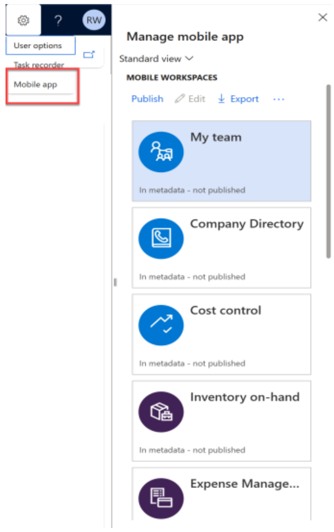
The Task Recorder is a built-in utility that captures your actions in the application user interface so you can replay them as interactive guides, export them for documentation, or use them testing.

1. From the setting options select ***Task Recorder***.

2. Follow the prompts on the menu.
   Tip: Always plan your process before recording.

3. Click the **X** to exit the task recorder.

Note: Users may not have access due to your user role and responsibilities.



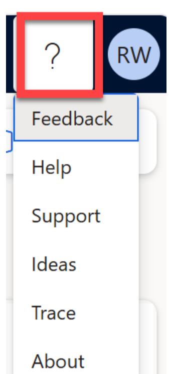
Navigation Bar – User Options / Mobile App

The Mobile app is a customized *Warehouse Management* mobile app experience for specific devices, brands, modules, or individual workers.

1. Click the **X** to exit manage mobile app.

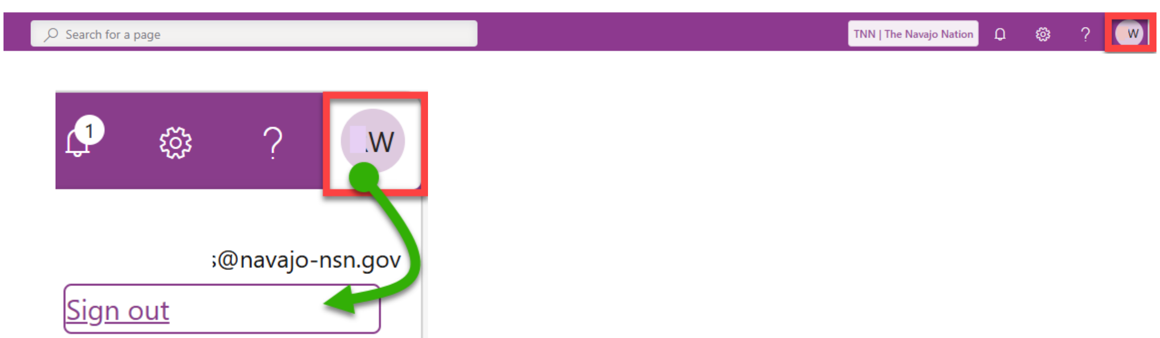
Note: Users may not have access due to your user role and responsibilities.

Help & Support



Navigation Bar – Help & Support
The Help & Support is a combination of self-service resources (Microsoft) and structured support processes, to help you resolve issues, learn the system, and get assistance when needed. Feedback – Send feedback of your like and dislikes Microsoft. Help – Provide additional resources, task and learning guides. Support – Only Administrators can access Lifecycle Services. Ideas – Submit new ideas how to improve Dynamics 365. Trace – A BI tool used for raw material tracing, capture and analyze system activity. About – System's identity card, tells you what version of F&O your are using, typically includes legal, license, and version installed. Note: Users may not have access due to your user role and responsibilities.

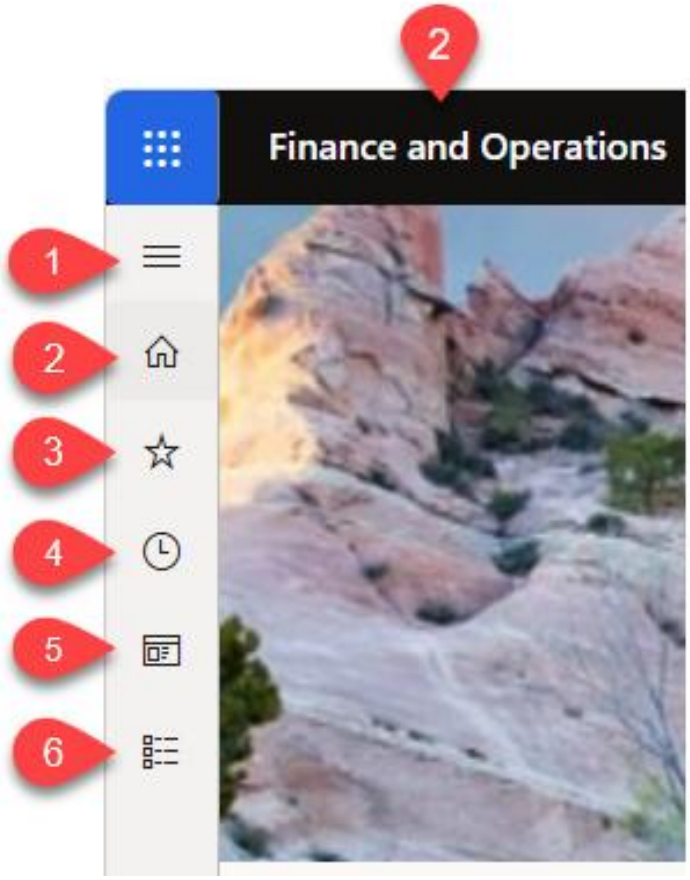
User Account



Navigation Bar – Sign out
The sign-out button is the process of recording when a user logs off their Finance & Operations (F&O) account. To sign out, hover over your initials in the upper-right corner to display your full name and email address. 1. Click the ***circle*** icon displaying your initials.

2. Select ***Sign out*** to securely exit F&O.

Navigation – Pane



Navigation Pane
The list of the navigation elements that you should understand to work with in Finance and Operations. 1. **Navigation Pane**: the navigation pane is the left-side, expandable and collapses the menu, serves as the main hub in F&O, lets you jump between workspaces, modules, and favorite pages (aka: Hambuger icon). 2. **Home**: The main landing page, returns you to the Home Screen and/or the Finance and Operations button.

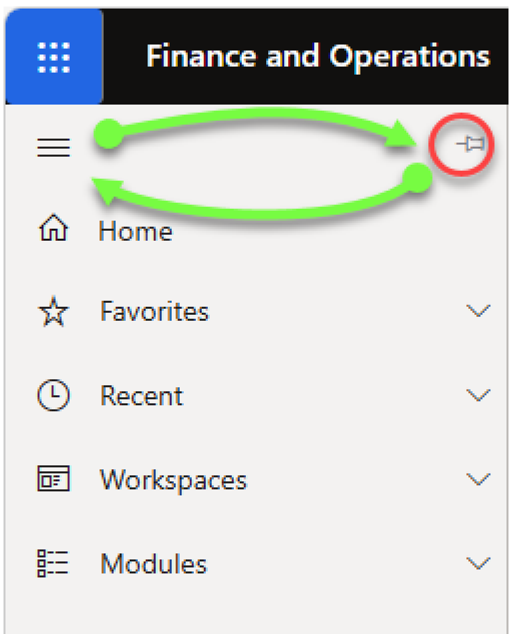
3. **Favorites**: Is a personal shortcut list that lets you access the pages and forms, or workspaces you use often.

4. **Recent**: Displays the (10) most recent accessed pages.

5. **Workspaces**: Displays the set of workspaces the user has access to.

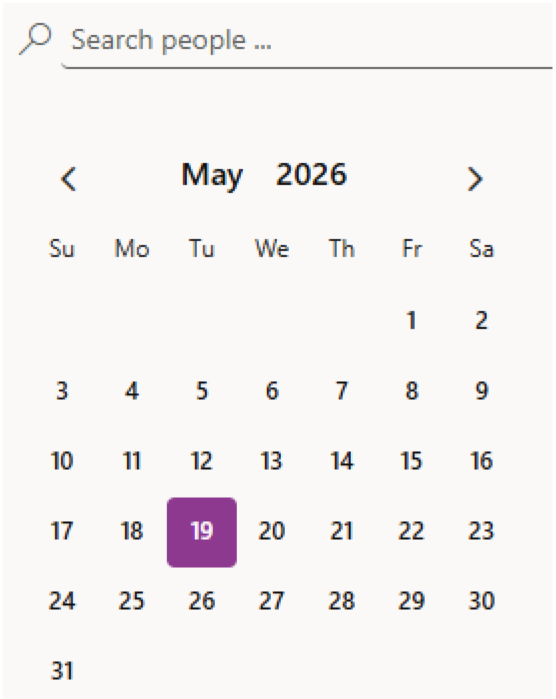
6. **Modules**: Displays the full list of all functional modules, each module is a collapsible menu that expands to show sub-modules and related functions.

Basic Navigation – Navigation Pane



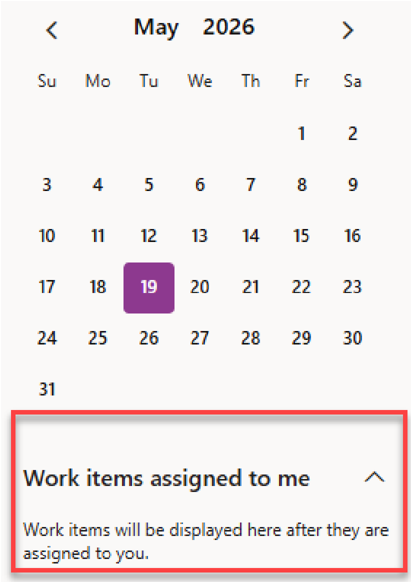
Pin Navigation Pane
The expandable navigation pane provides access to the home page, the navigation pane in open position. 1. Select the ***Navigation Pane*** button, displays as *expand the navigation pane*. 2. Click the **pin**, to open the navigation pane to remain open on the Home page and not collapse as you navigate. 3. Click the **pin**, to collaspe the navigation pane.

Calendar



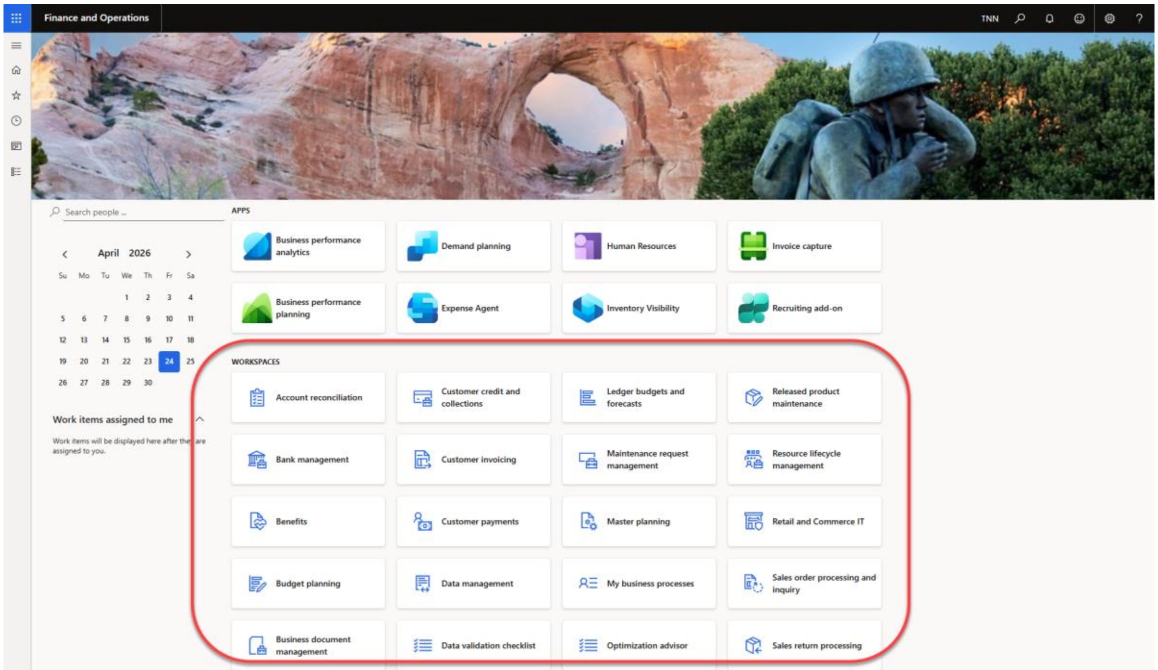
Home Page – Calendar / Search
The ***calendar*** is a structured set of dates that define working days (open dates) and non-working days (closed dates) for various supply chain and financial activities. It serves as the backbone of planning, scheduling and operational control. ***Search*** (magnify glass) – Is the HR/employee search functionality, use to find people or position, *is current deactivated*.

Work Items



Home Page - Work Items
Work items assigned to me, shows all workflow task and approvals that are currently assined to you. Generated by business processes such as requisitions, purchase orders, vendor invoices, or purchase agreement approvals. These work items require your review, approval or attention.

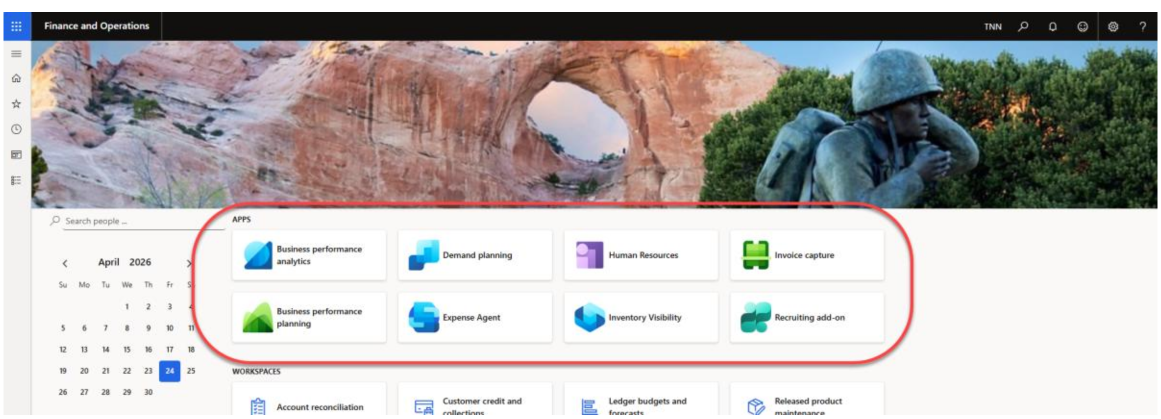
Workspaces - Tiles



Tiles - Workspaces

A tile is a rectangular buttons that behaves like a menu item button. It is used to navigate to, or open pages, Tiles can also be display relevant data, such as counts or key performance indicators (KPIs). A tile can include images that provide you with more visual context.

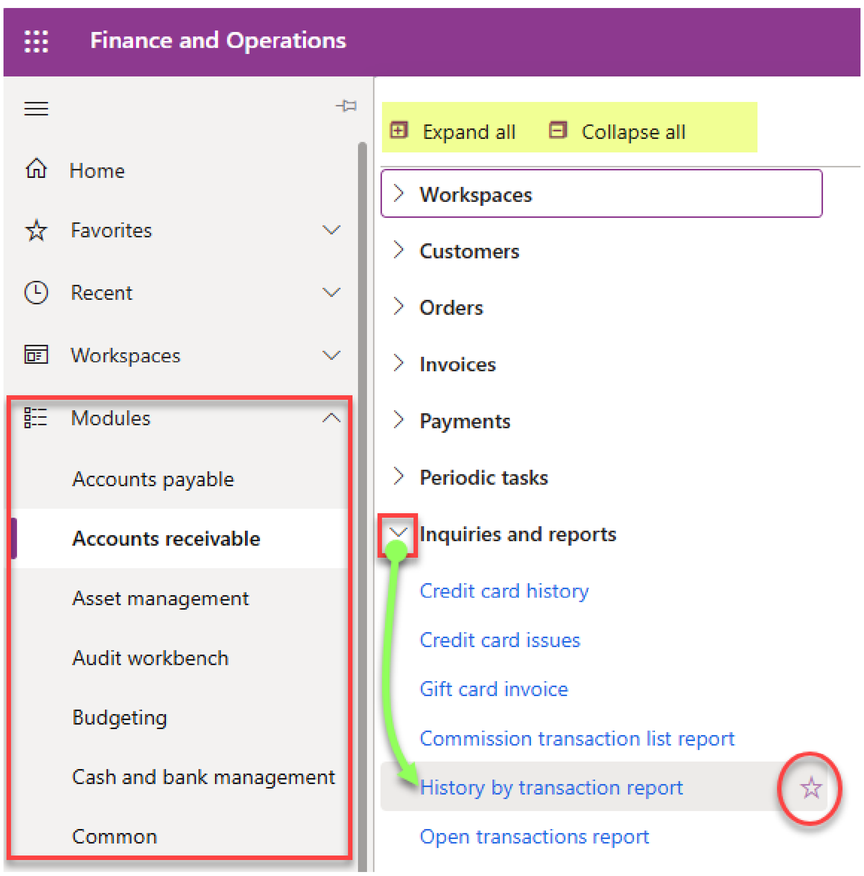
This is the set of workspaces a user has access to. The Administrators determine which workspaces users have access to for their specific role.



Tiles - APPS
Access to apps is determined by the System Administrators based on your specific role. If you do not see apps it means they are not required for your position.

Favorites

Favorites provide quick access to the list of pages the user has explicitly marked as a favorite. This can be helpful for areas of the system that are used frequently or, conversely, areas of the system that are not used frequently but could benefit from being easily accessible when the need arises.

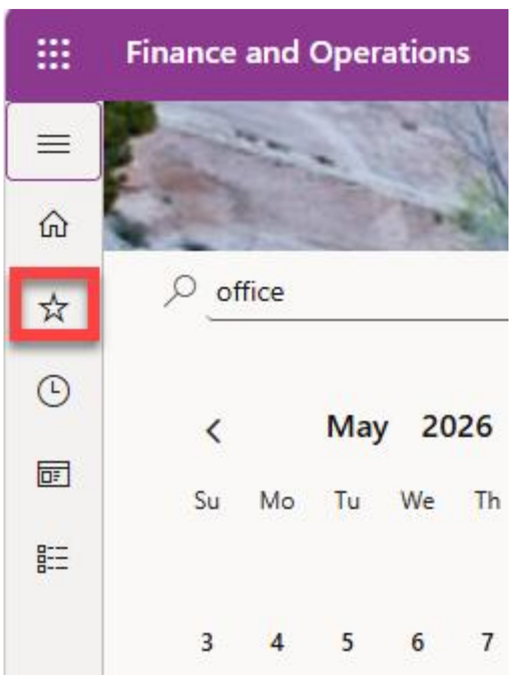


Navigation Pane - Favorites

Navigate to the page, form, or workspace you use frequently, how to add a favorite:

1. Select a module, *the Expand all and Collapse all* displays the tasks.
   Training purpose: Select Accounts receivable
2. Open ***folder*** *Inquires and reports* to view more tasks.
3. **Hover** over the task name (ex: History by transaction report).
4. Click the ***star icon*** (Add to Favorites) to add to your Favorites.

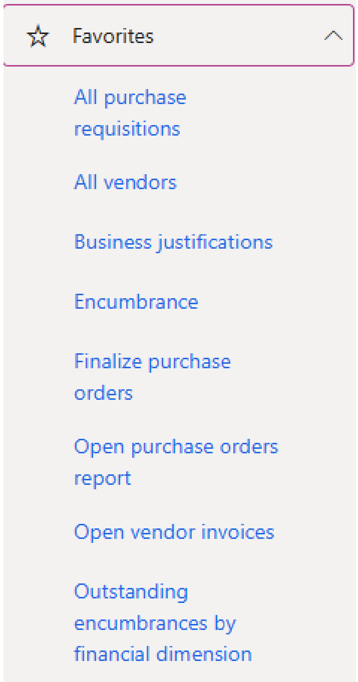
Once added, it will apppear in the ***Favorites*** list and can be opened directly.



Navigation Pane - Favorites

Steps to view your favorites pages, reports, and inquires.

1. Click the ***Favorites*** star icon in the navigation pane.

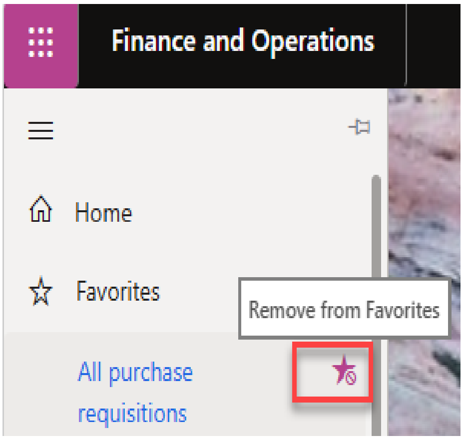


Navigation Pane - Favorites

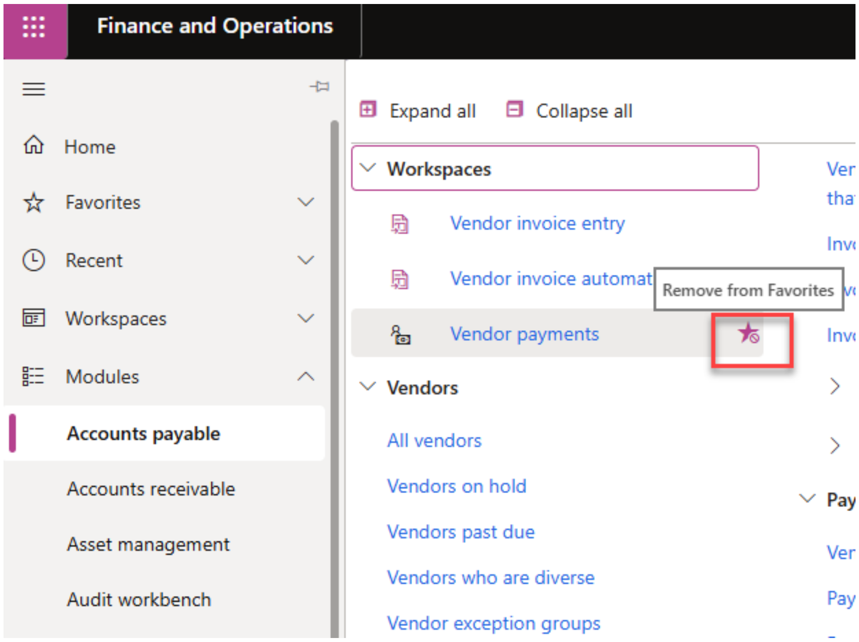
1. Browse the of saved items, each entry is a page you’ve booked marked.

2. Select any item in the list to open it instantly, without drilling down through menus.

Removing Favorites



Navigation Pane - Removing Favorites
Favorites can be removed to quickly clean up your favorites list and keep your navigation pane organized. To remove a favorite: 1. In the navigation pane, click the ***Favorites*** (star icon) to expand the section. 2. ***Locate*** the page or form you want to remove. 3. ***Hover*** over it. 4. The star icon displays ***Remove from Favorites***. 5. Click the ***star icon*** to remove page or form.



Navigation Pane - Removing Favorites Workspaces

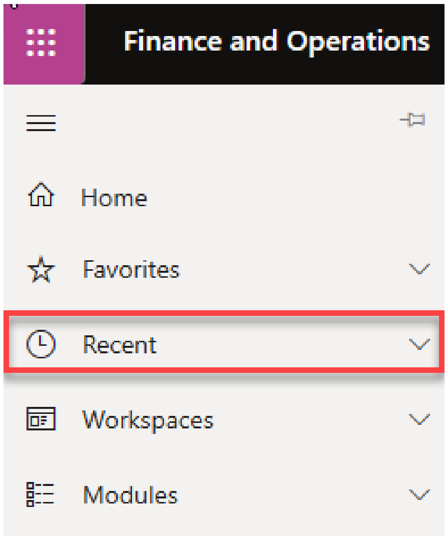
Favorites can be removed from the module workspaces how to remove:

1. ***Locate*** the page or form from your expanded workspace menu you want to remove.

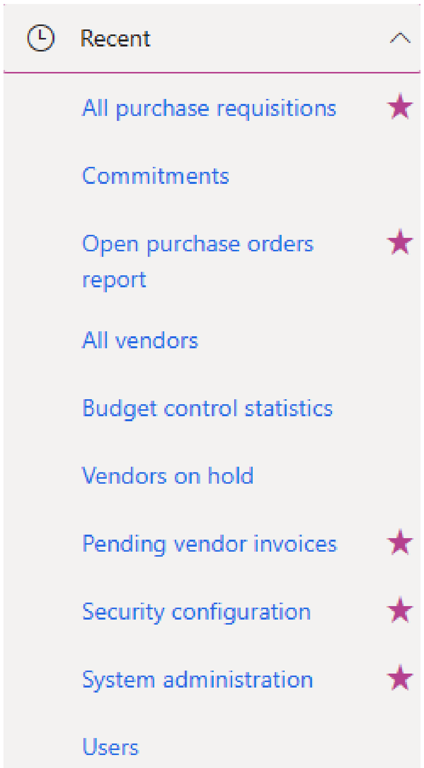
2. Hover over it.

3. Click of the ***star icon***, which deplays '*Remove from Favorites*'.

Recent



Navigation Pane - Recent
The *Recent* feature is a built-in navigation shortcut that automatically tracks the last 10 pages you have recently visited in the application. This can be helpful for reference purposes, and easily switching back and forth between separate areas of the system without navigating throuh the full menu. 1. Click the ***Recent*** button on the navigation pane.



Navigation Pane - Recent
The *Recent* feature tracks your last 10 visited pages automatically, it is use to switch between two screens during research, return to page after an interruption, and recovering your place after a session timeout. 1. Select the page you want to return to instantly.

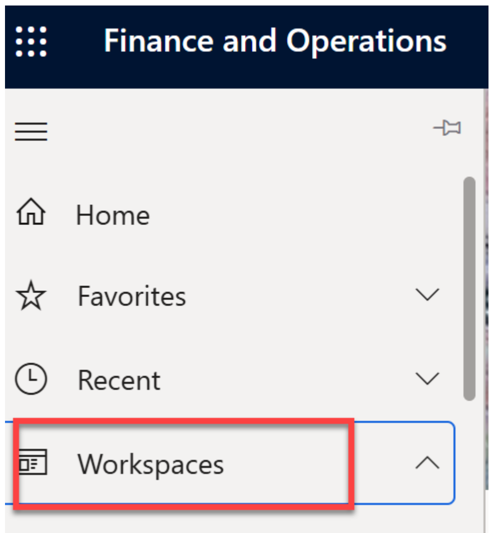
Workspaces

Navigation Pane - Workspaces

The workspace are role-specific pages that consolidate tiles, lists, and links for common tasks. Tailored to the user's responsibilities, workspaces can help drive productivity referred to as a one-stop-shop.
 	
• 360-degree view of activities - No need to navigate to multiple lists.
 	
• Answers specific questions - Questions such as:
  ○ Are there urgent cases that need to be attended
  ○ How difficult will my workload be?

    - Are cases easy or difficult to solve?

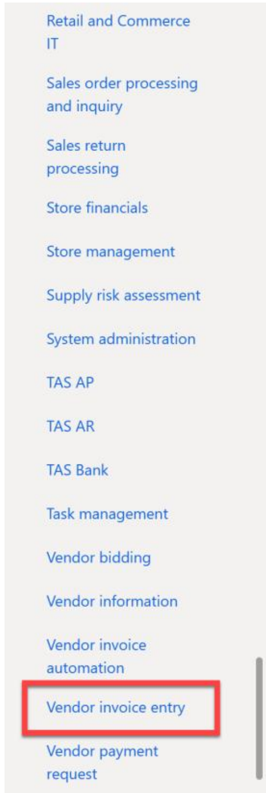
- Provides insight - Compare multiple sources of data. Provide a big picture view that might be difficult to achieve when only looking at lists in specific modules.
- Navigates by data - Less time spent filtering to find results.
- Direct access to tasks - Tasks can be performed directly from the workspace.



Navigation Pane - Workspaces

Let’s explore workspaces to view key areas:

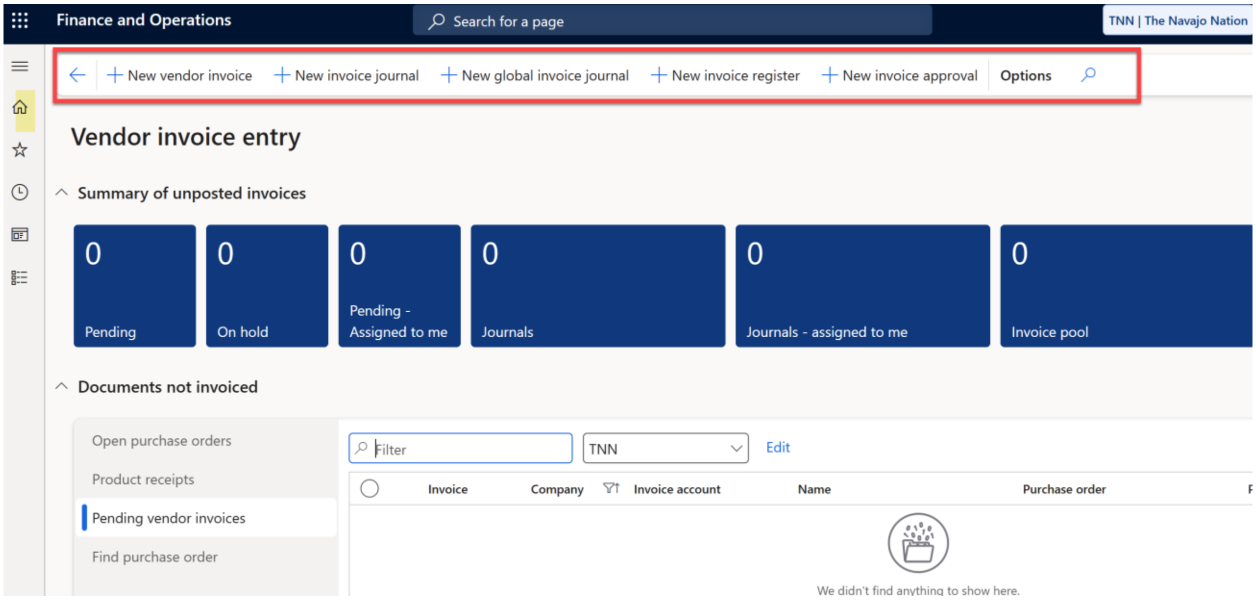
1. Click ***Workspaces*** in the navigation pane.



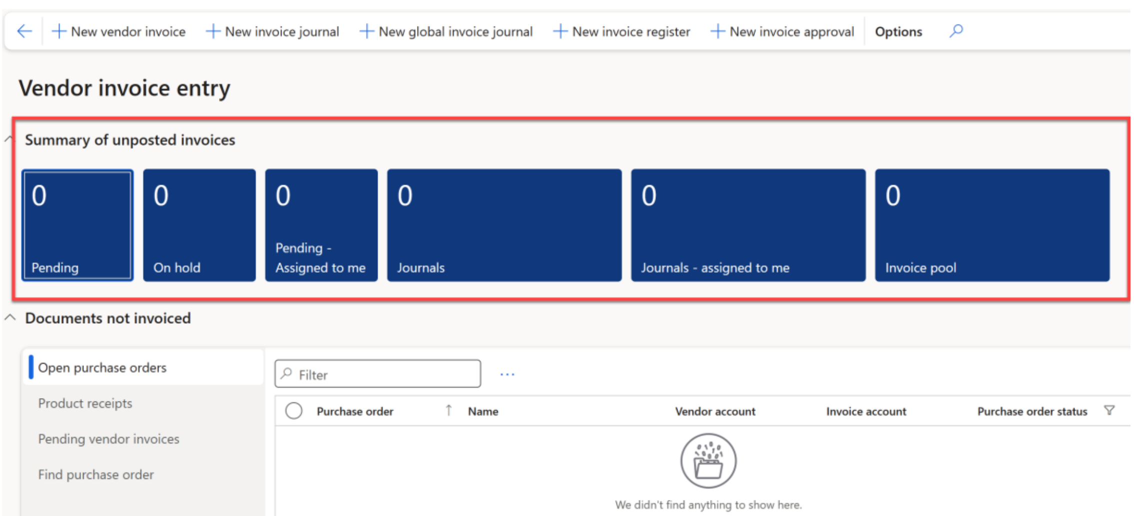
Navigation Pane - Workspaces

For training, select *Vendor invoice entry* from the list to view workspaces available.

2. ***Locate and select*** Vendor invoice entry.



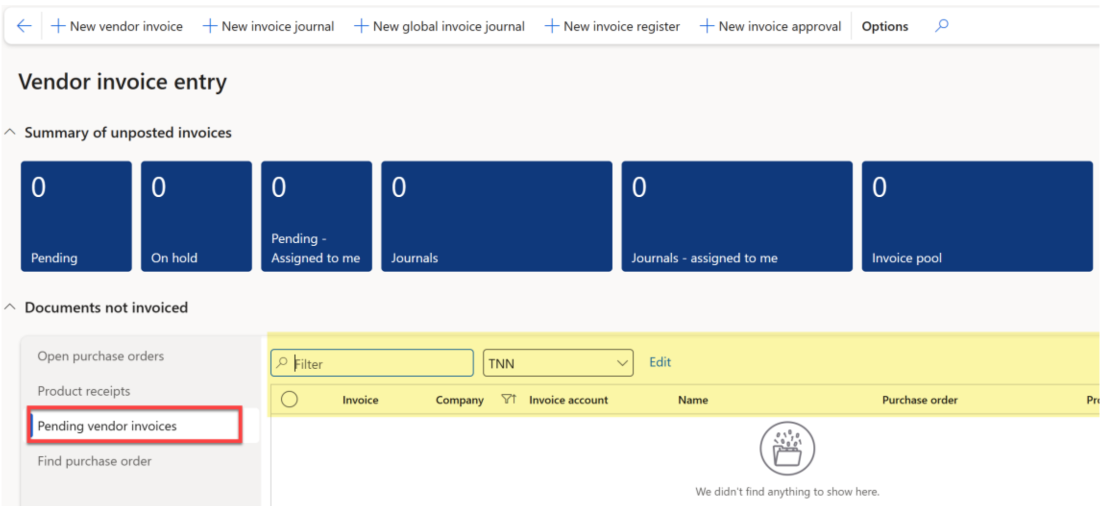
Navigation Pane - Workspaces
At the *Vendor invoice entry page*, depending on your role responsibilities the action pane allows you to process transaction.



Navigation Pane - Workspaces
At the *Summary of unposted invoices,* each tile is a link to a form, saved query or quick action often with a ***counter showing the number of records*** or items ***to process***. Provides the user a glance view of your current workload and priorities.

Note: Displays (0) indicates no transactions pending to process.

The ***Summary*** section is a set of tiles that you can select to begin new tasks or access lists of items. Each tile will also display how many orders belong to each category. You can click the tile to open a relating list page.



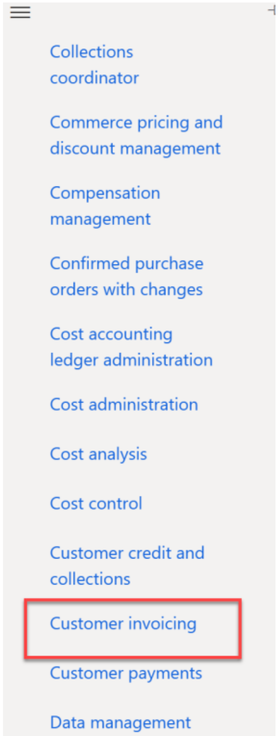
Navigation Pane - Workspaces Summary

The ***Documents not invoiced*** section are open PO's or receipts without a corresponding invoice and are tracked in AP workspaces and reports to ensure accurate financial inventory records.

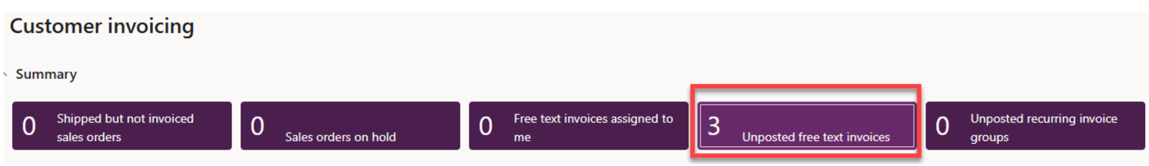
1. Click the ***Pending vendor*** *invoices* list item.

2. The page display the grid records, columns and filter search box allows you to easily find others invoices.

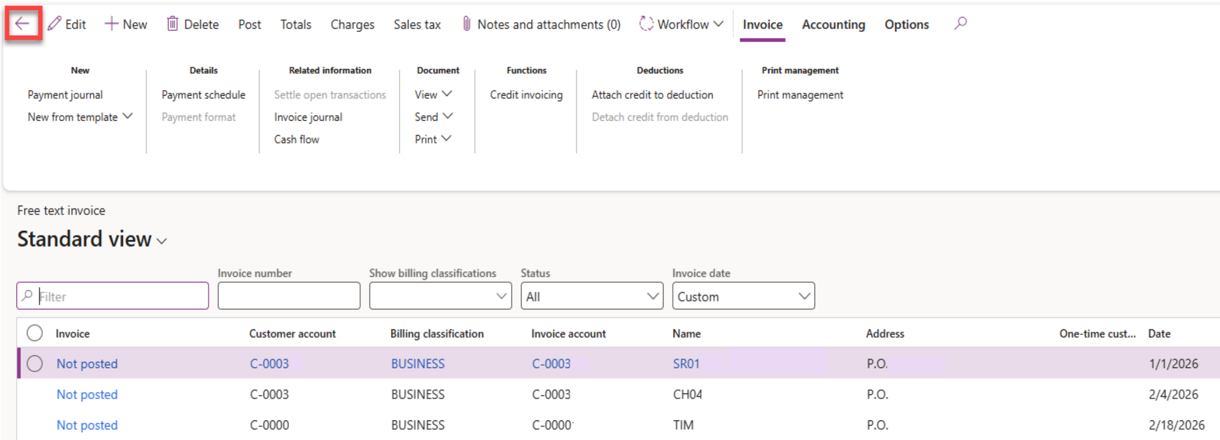
3. Click the left arrow (←) on the action pane to exit.



Navigation Pane – Workspaces Lists
For training select *Customer invoicing* from the workspace list, then open the tile that displays a number. 1. ***Locate and select*** Customer invoicing.



Navigation Pane - Workspaces
At the *Summary* page, tiles are clickable elemens in the workspace that link to forms, lists, or saved queries. Tile ***Unposted free text invoices*** is showing (3) records or items ***to process***. You can navigate directly from this tiles by selecting the tile. To view the (3) list items. 2. Click tile ***3 Uposted free text invoices*** to open the link form.



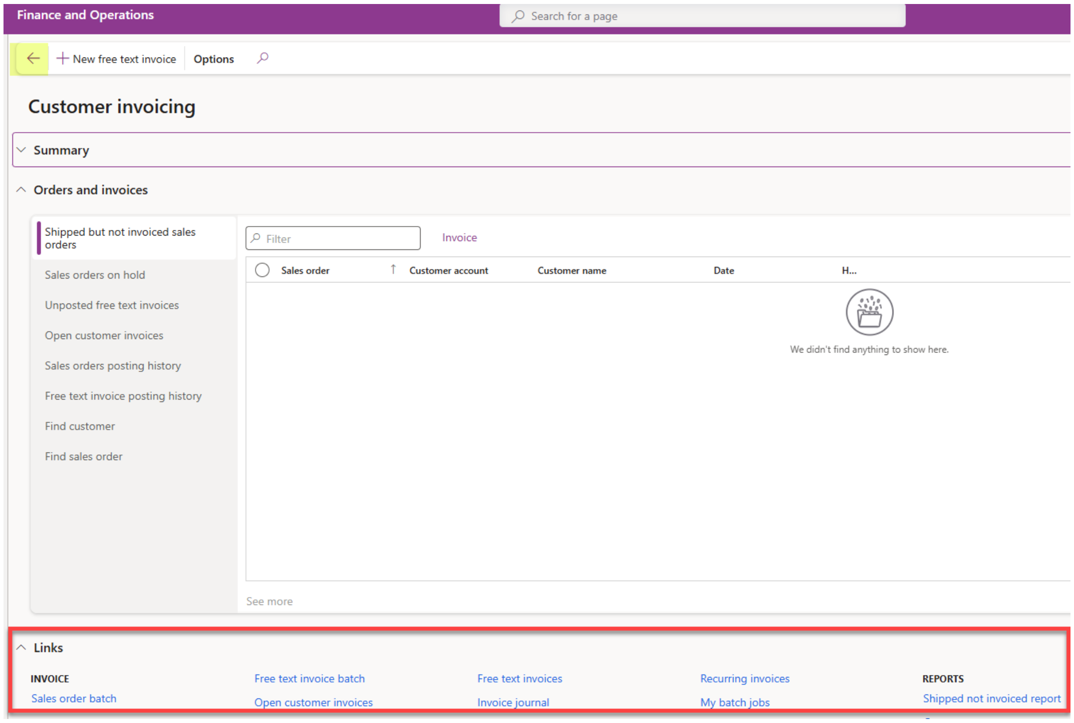
Navigation Pane - Workspaces - Tiles

The tile selected had a count of (3), here it displays the number of records matching the query.

Various tabs provide access to various sections of the workbench. Each tab contains information relating to the task.

Task can be completed directly in the workspace, reducing navigating trips.

3. Click the ***back arrow*** (←) to return to the previous page.



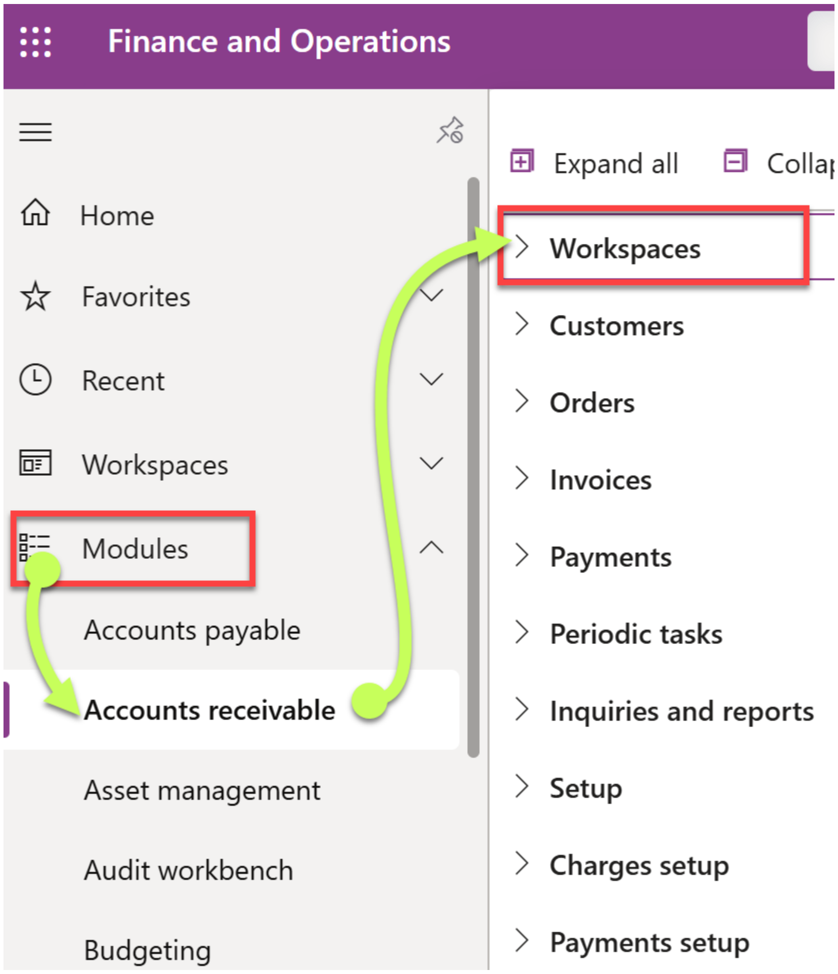
Navigation Pane - Workspaces Links

The ***Links*** section is broken into two sections: Links relating to invoices and links relating to reports.

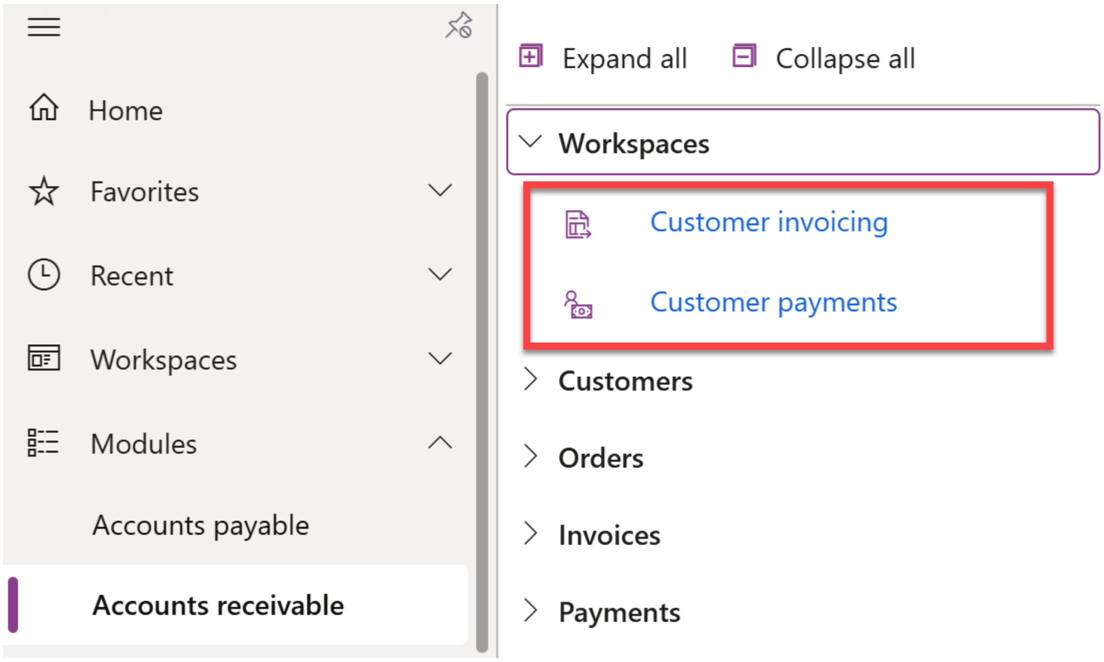
Form links open a specific form.
Report links are open power BI reports or other analytics views

Purpose of Links in Workspaces: Reduce navigation, increase productivity and role specific tailored to the user’s job function, they see only what is relevant.

Module Workspaces



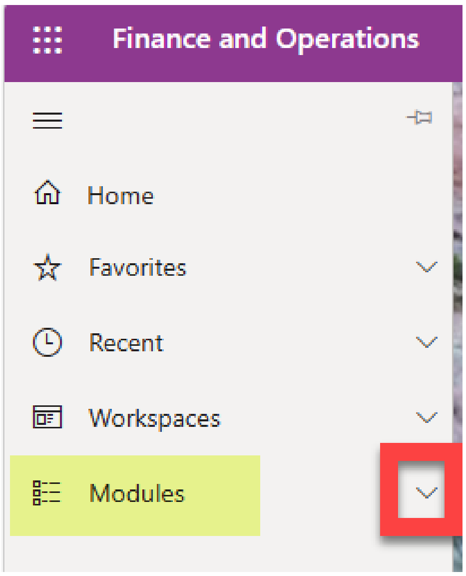
Navigation Pane – Module - Workspaces
Single point of entry into the application and where the user wil spend the majority of their time as they complete various tasks, monitor specific reports and Key Performance Indicators (KPI's), and manage their day to day responsibilities. Access to the various workspaces depends on the roles that users have in the organization. 1. Click ***Modules*** in the navigation pane. 2. From the list, select the *Module* you manage day to day responsibilities. Note: For training select *Accounts receivable*. 3. Select ***Workspaces*** in the expanded page.



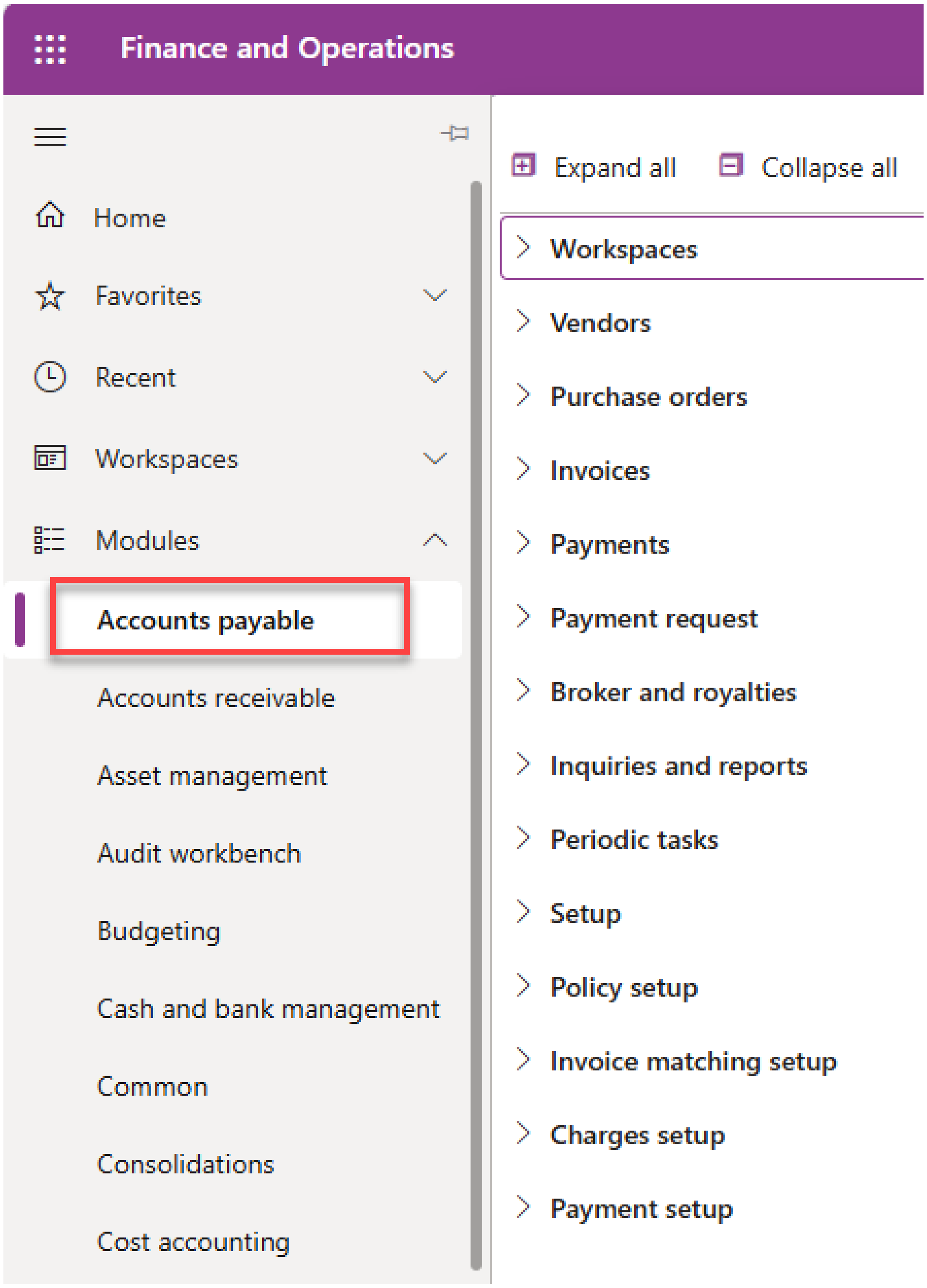
Navigation Pane – Modules - Workspaces
Shows two revelant set of workspaces that a user can conveniently access. These links are the doors to the tasks and data a user needs to perform daily.

Modules

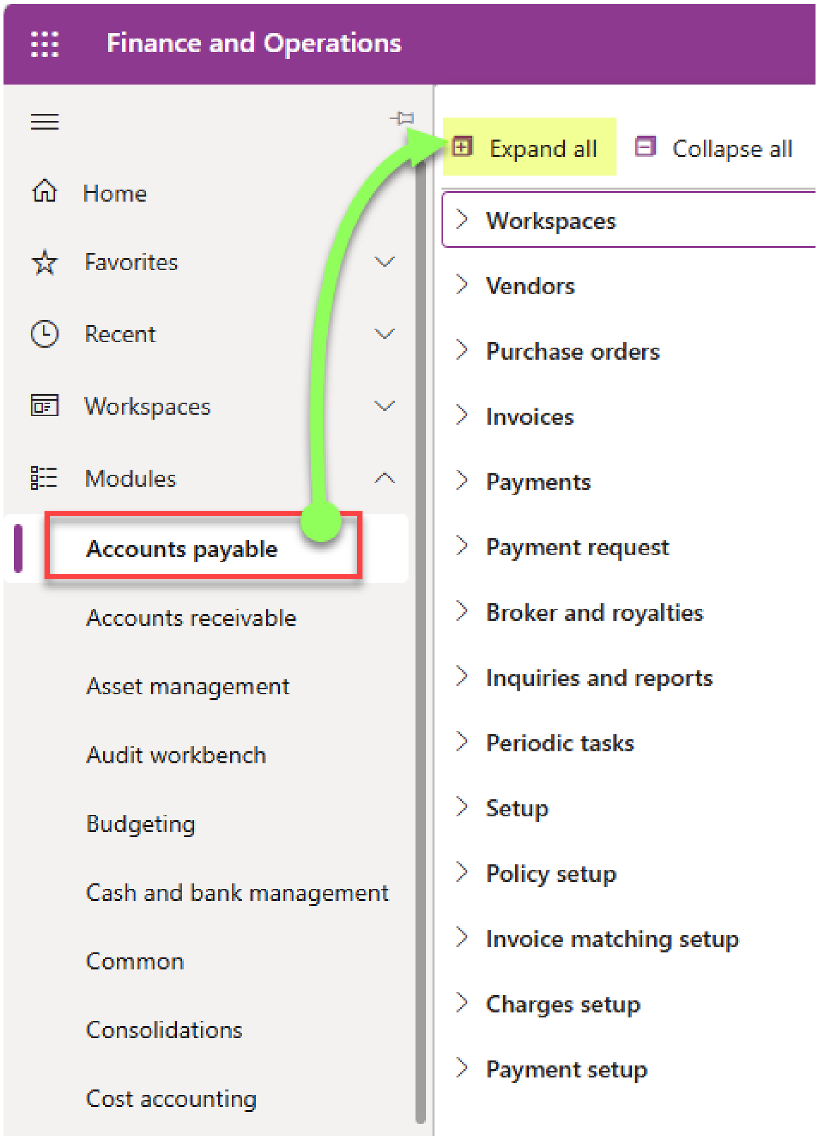
Modules is a set of integrated applications that combine financial processes with supply chain operations. They are individual functional areas within these applications that handle specific business processes. These modules are interconnected so that data flows seamlessly between finance and supply chain functions.



Navigation Pane – Modules
The ***Modules*** button on the navigation pane provides the core functional areas that enable a unified ERP environment. 1. Click the ***down-arrow*** or ***Modules*** button to open.



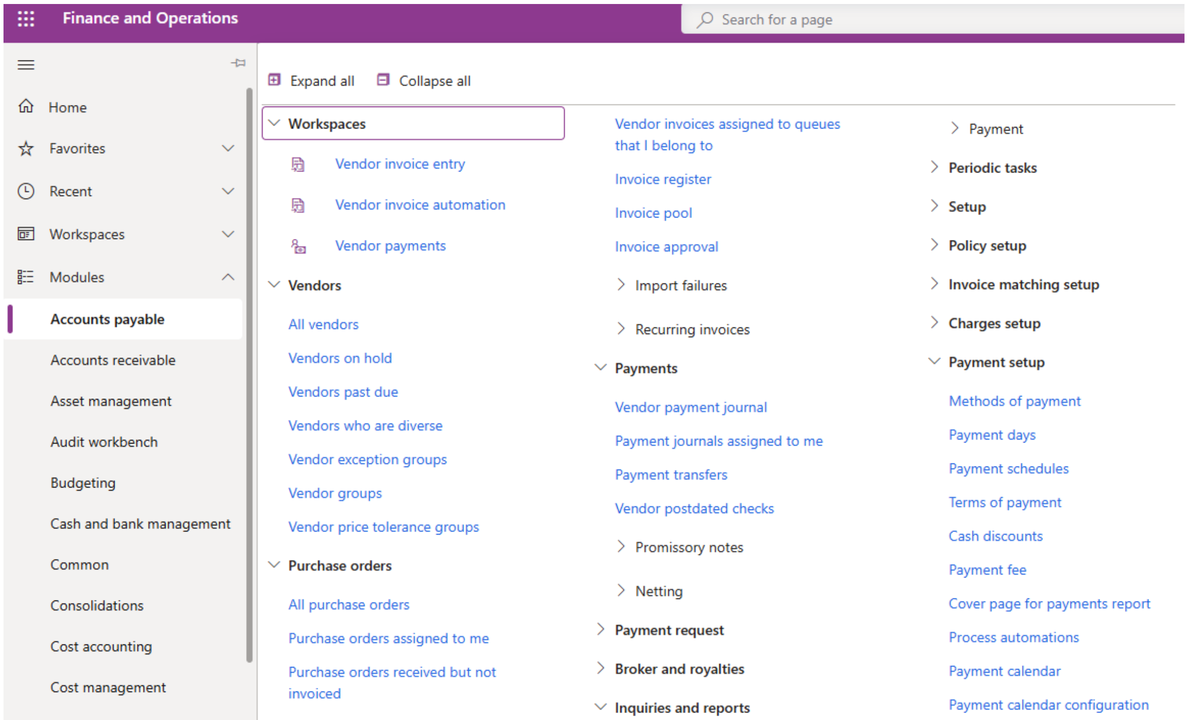
Navigation Pane – Modules
1. Select module ***Accounts payable*** for training. Selecting a module opens the right side of the navigation pane, where the area page displays the available functions, reports, setup, and parameters in that module.



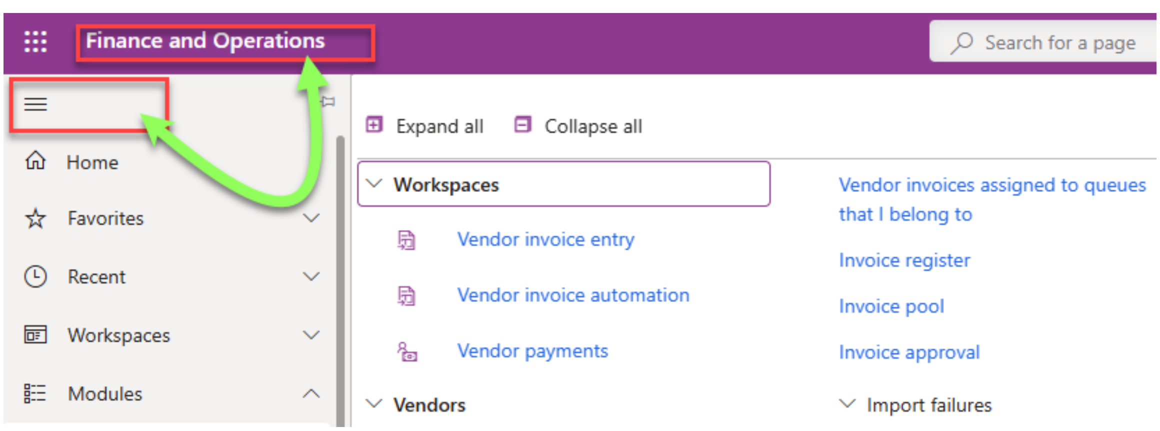
Navigation Pane – Modules

At the top of the page, you have the option to *Expand all* (opens all applications) and *Collapse all* (closes the menu). This feature is used to reveal the full hierarchy of grouped data in a view.

2. Click ***Expand all*** options.



Navigation Pane – Modules
The complete hierarchy of grouped data in a view, enabling you to analyze or process all levels of information. Provides a cleaner, more organized view when you want to work with the entire dataset.

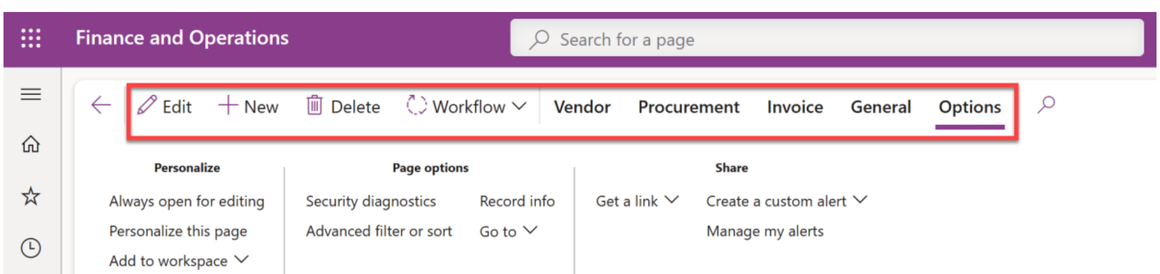


Navigation Pane – Modules
To return to the home page or dashboard. 3. Click the ***Expand the navigation pane*** (Aka hamburger icon) or the ***Finance and Operations*** button to return to the home page.

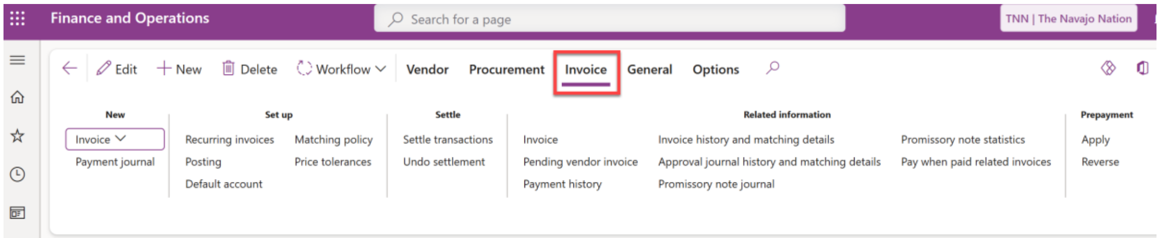
User Interface Elements

The ***user interface*** (UI) elements used in the applications, before users can navigate the interface, it's important to know the names and functions of the elements that make up the interface. Action Pane, FactBox, FactBox Pane, Filter Pane, Navigation bar, Navigation list, Navigation Pane, Navigation Pane, Page, Pane, and Tab.

Action Pane – Tab



Navigation – Action Pane - Tab
The key navigation and action control emement that appears on most forms and pages. It’s position beneath the navigation bar. The buttons trigger specific operations, to edit, new, delete, save and etc.,



Navigation – Action Pane - Tab

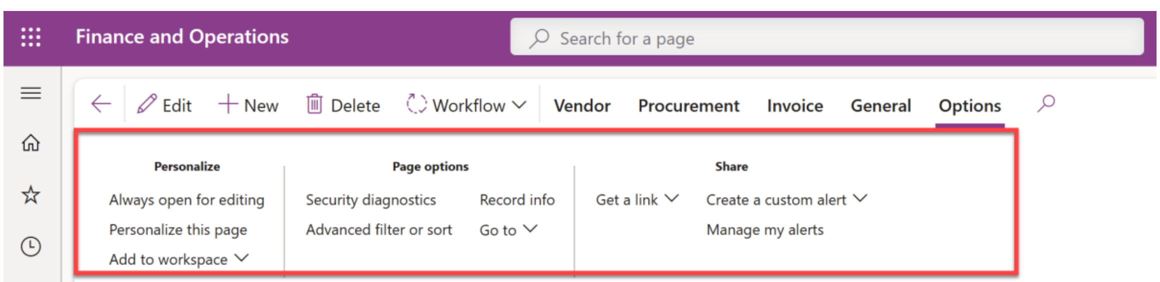
The action pane contains action group buttons which are organized into tabs and groups.

1. Click the ***Invoice*** Tab.

You can perform actions on a selected record with related buttons and links, allowing quick access to related functions without navigating away from the form.

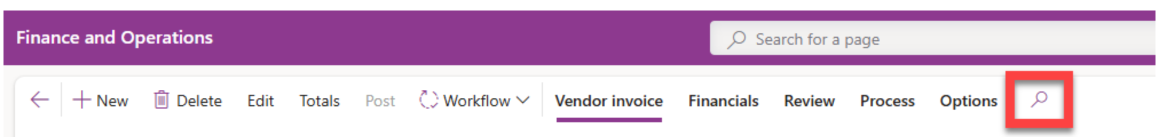
2. Click the **(←)** back arrow button to return to previous form.

Action Pane

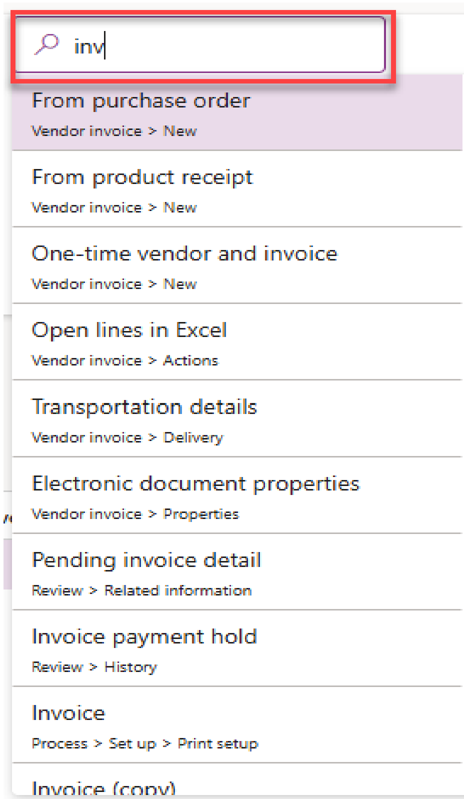


Navigation - Action Pane
When referring to the Action Pane, centralizes related actions in one place, improving efficiency and reducing the need to navigate through multiple menus. Personalize – Adjust columns, hide/show fields, move FastTabs, change labels, or skip fields. Page Options – May include setting for layout, views, or personalization tools. Share – Allows you to export your customized page view and make it available to other users.

Action Pane – Search

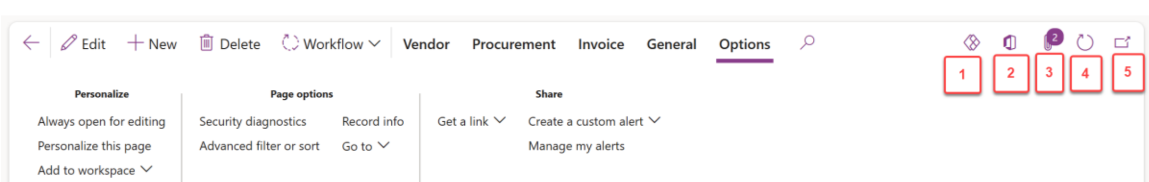


Navigation – Pane Action Search
The action search feature helps you quickly find and run any button or action from within the Action Pane ***on the form or page***. To use the action search feature: 1. Select the ***Action search*** field (magnifying glass icon). Action search is intended to look and run for Actions available on a page whereas Navigation search is intended to find and navigate pages.



Navigation – Pane Action Search
2. Type all or part of the name of the button that you want to run. You can also search by using words from the button's "path." 3. The results list shows matching buttons. 4. Select the button from the list to run it. After running, focus returns to your last position on the page, so you can continue to work.

Navigation Page



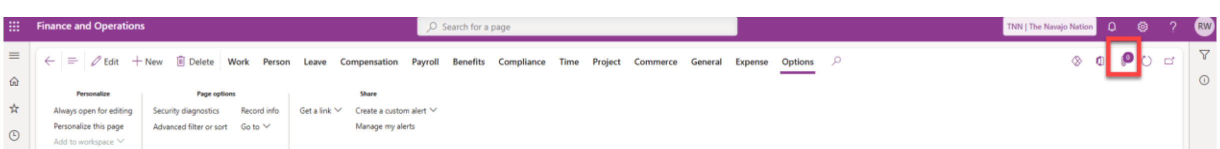
Navigation – Navigation page
Part of the action bar or action pane accessible on a form or grid. 1. **PowerApps** – Use to integrate PowerApps studio in D365 F&O. Allows business users and developers to create tailored workflows, data view, and tools without deep coding. 2. **Open in Microsoft Office** – Comes with Open in Excel and Export in Excel. • *Open in Excel* – Launches Excel with the Microsoft Dynamics 365 Office Add-in • Export in Excel – Creates a static Excel workbook with the current grid data. 3. **Attachment** – Is a file or document linked to a record or transaction to store and reference related information directly within the system. Click this button if there are documents or files you want to attach. 4. **Refresh** – A standard action that reloads or updates the data displayed on a form or page to ensure you see the most current information. 5. **Open in new window** - You can make use of this button to work on the same environment with multiple windows instead of navigating different pages on a single window.

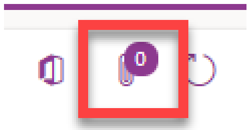
Attachments

Attachments are used to link files, images, texts, Word or Excel files. They help keep related documentation centralized and accessible.

Preview documents directly in D365 F&SCM, use the toolbar to increase view,enhance, save and print.

Preformed the actions. Actions include create, delete, restore and move. Stores file attachments and notes for records. Attachment history can be enabled to maintain an audit of actions related to individual attachments and the user.

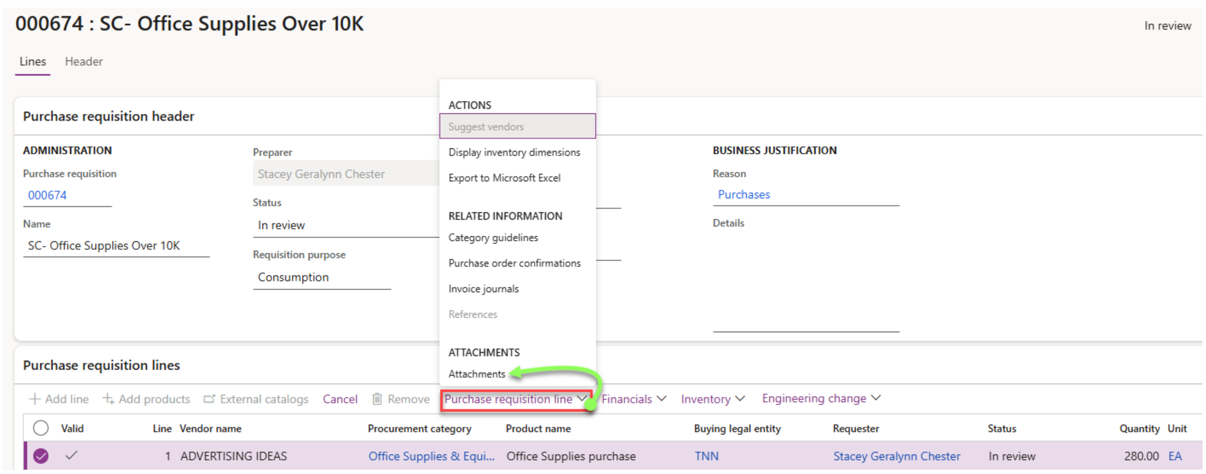




Attachments

The attachment is also referred to as a paper clip, if there are attachments, the number of attachments will be displayed so that multiple orders can be viewed. Note: The paper clip icon displays zero attachment.

1. Lets review an attachment, click the ***Attachment*** button.



Attachments

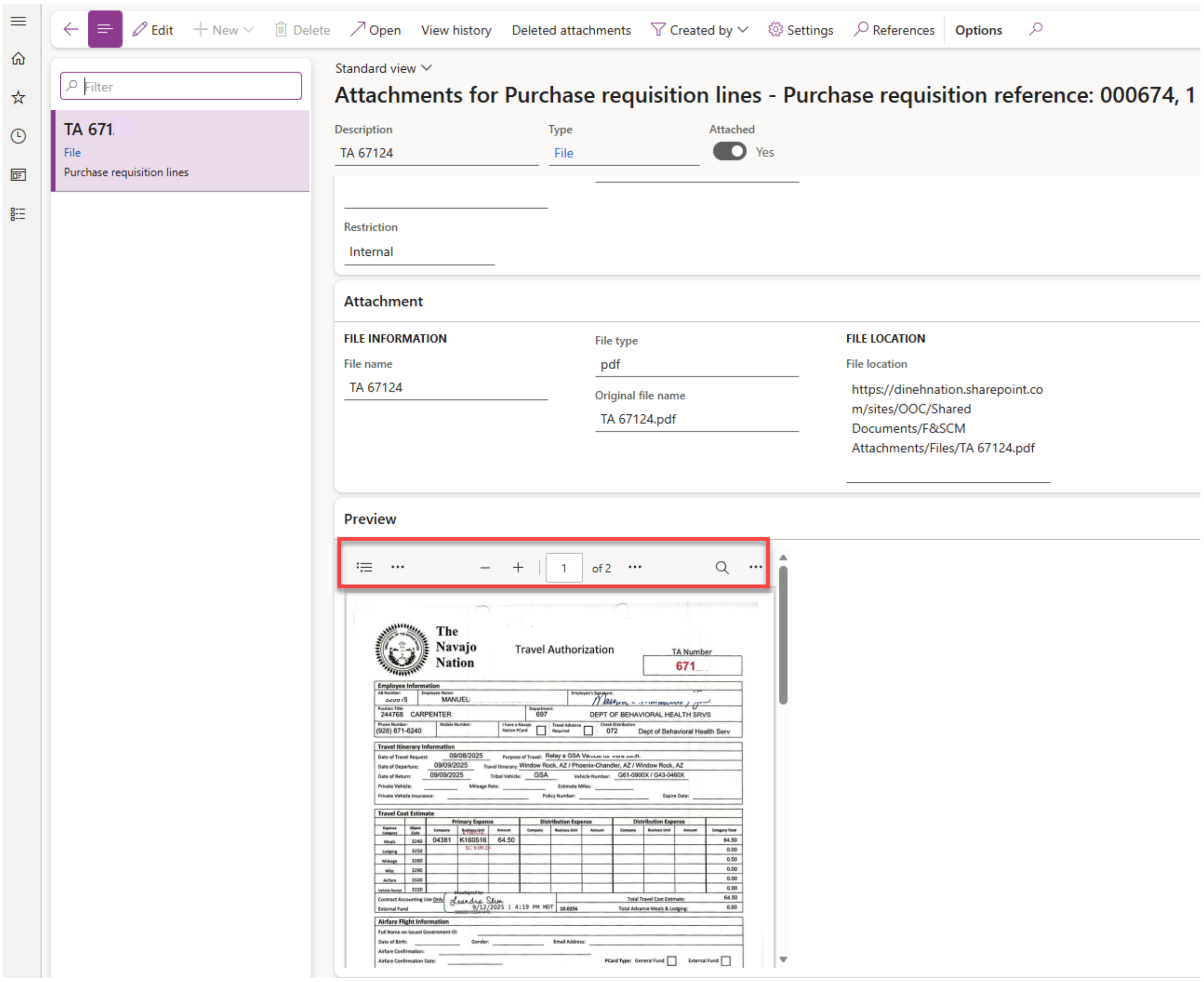
To view an attachment on a requisition order, locate the requisition.

1. ***Select*** the requisition in the grid.

2. Select ***Purchase requisition*** on the action pane.

3. From the drop-down menu look for ***ATTACHMENTS*** section. This will display any files linked to the requisition line.

4. Select ***Attachments***.

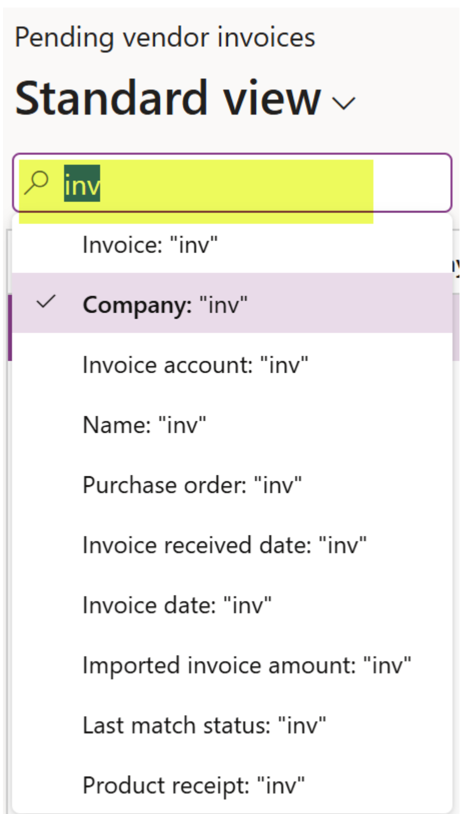


Attachments
The file will open in the browser viewer. To enhance your view, increase, save and print use the ***toolbar***. 4. Select the enhancement option in the list panel and use the vertical scroll bar to view all files. 5. Click the (⟵) ***back arrow*** button to exit.

Filtering techniques

Filtering
Filtering techniques are methods used to select and display only the relevant subsets of data for analysis, reporting, or processing, without altering the full dataset. There are several filtering options that you can use in finance and operations apps.

Quick Filter



Quick Filter

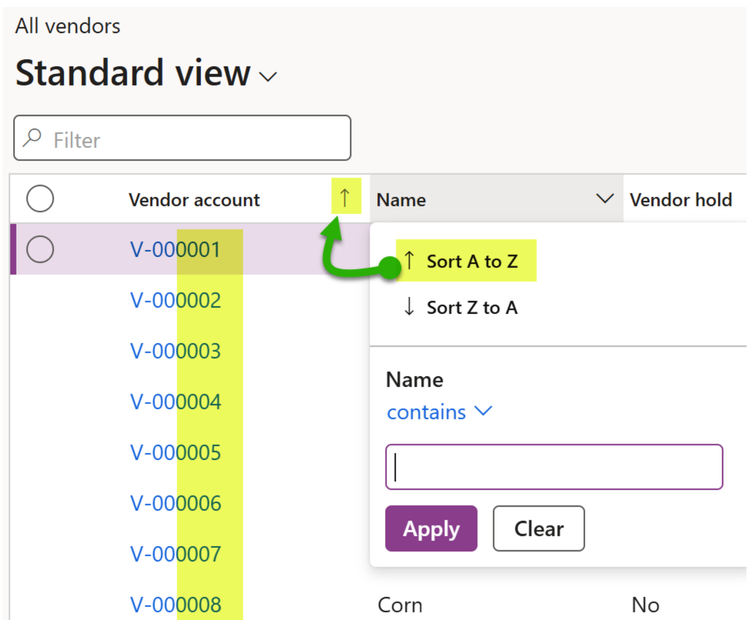
The *Quick Filter* is a modeled control that can be associated with any grid in the system. As the user starts to type, a column selector drop-down menu appears to guide the user toward the column that the filter will be applied to.

1. Enter a common filter name in the ***search*** field.

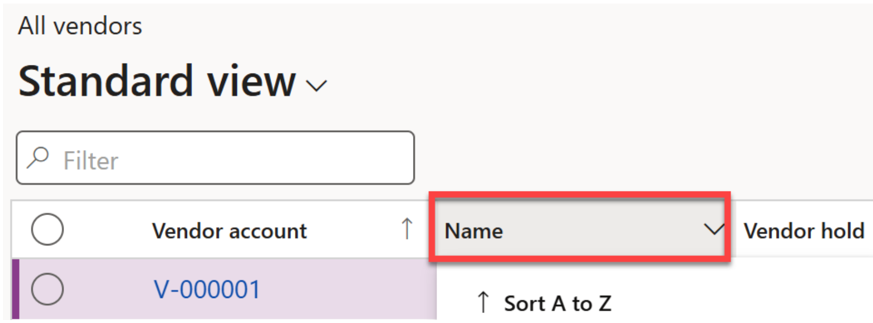
2. ***Select*** the filter name from the drop-down menu.

Grid Column header sorting & filtering

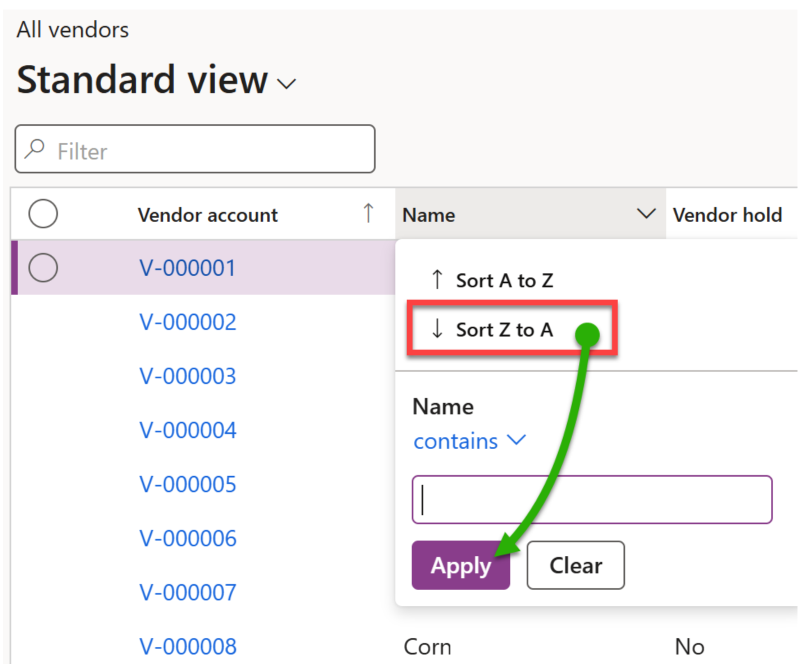
Header Column Sorting



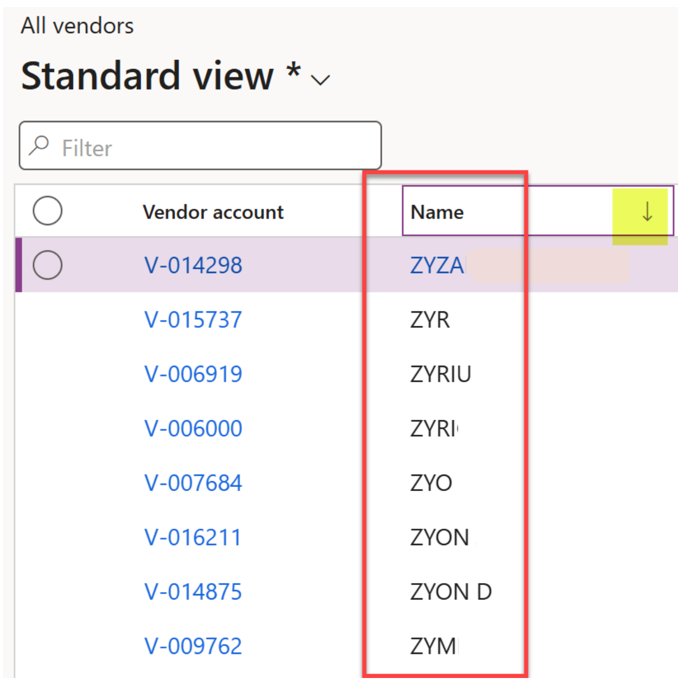
Grid Column - Header sorting
In most grids sorting arranges records in specific order, ascending or descending based on one or more columns. When you click a column header, a drop-down menu appears with options to sort and filter based on the selected column. Note: The vendor account column is already sorted by ascending order.



Grid Column - Header sorting
To sort the ***Name*** column header in the grid. 1. Select the column header and click the ***down arrow*** (V) button.

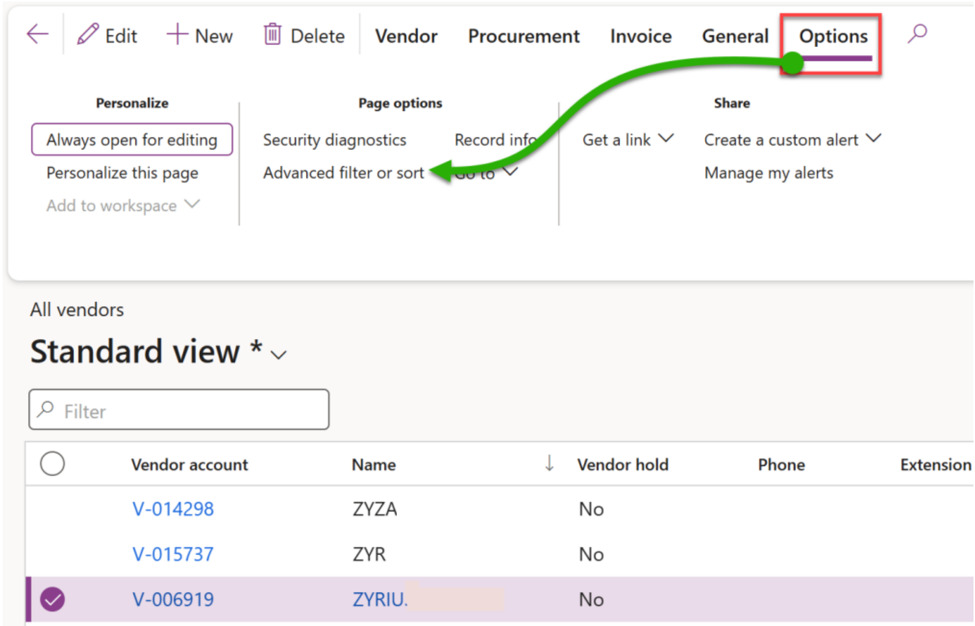


Grid Column - Header sorting
2. Select option ***Sort Z to A***, descending order. 3. Click ***Apply*** to view results. 4. To refine your search click the ***Clear*** button.



Grid Column header sorting
The header column now displays descending order.

Advanced Filter



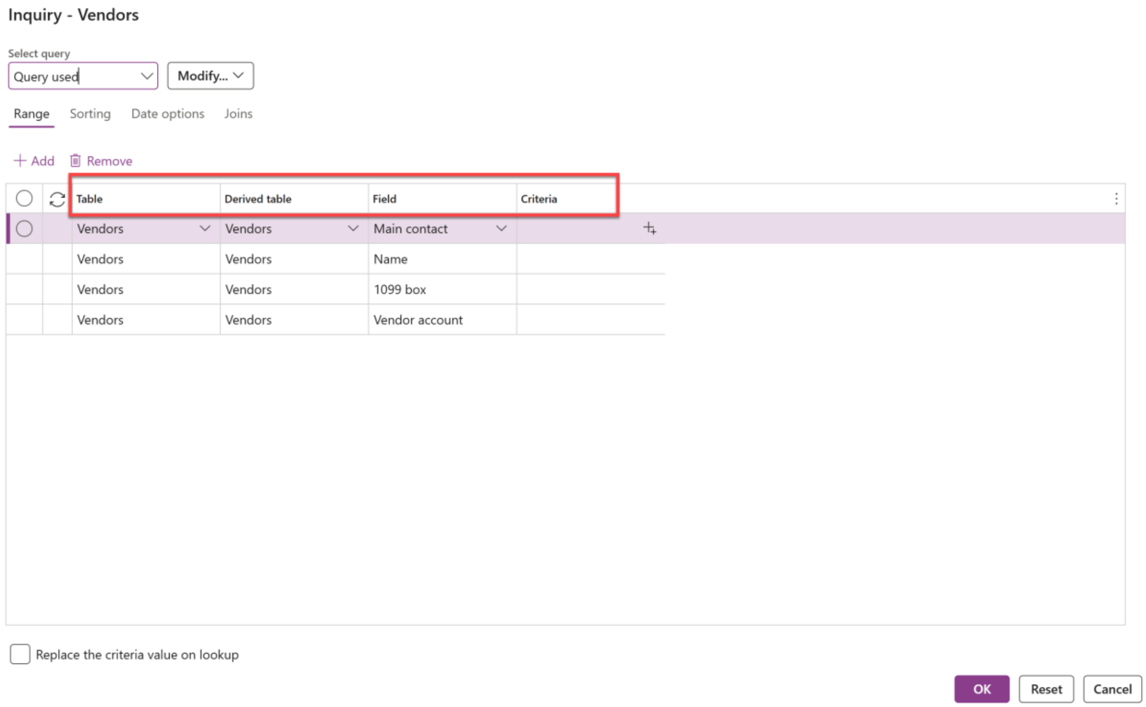
Advanced Filter

There may be cases where a user has a more complex query that needs to use data from another related tables. In these cases, the advance filter functionality can be used to craft a complex query to find the data you are looking for.

The advance filter functionality allows users to join multiple related tables together that are not natively accessible for the standard form.

1. Click the ***Options*** button.

2. Click ***Advance Filter*** *or sort option.*



Advanced Filter

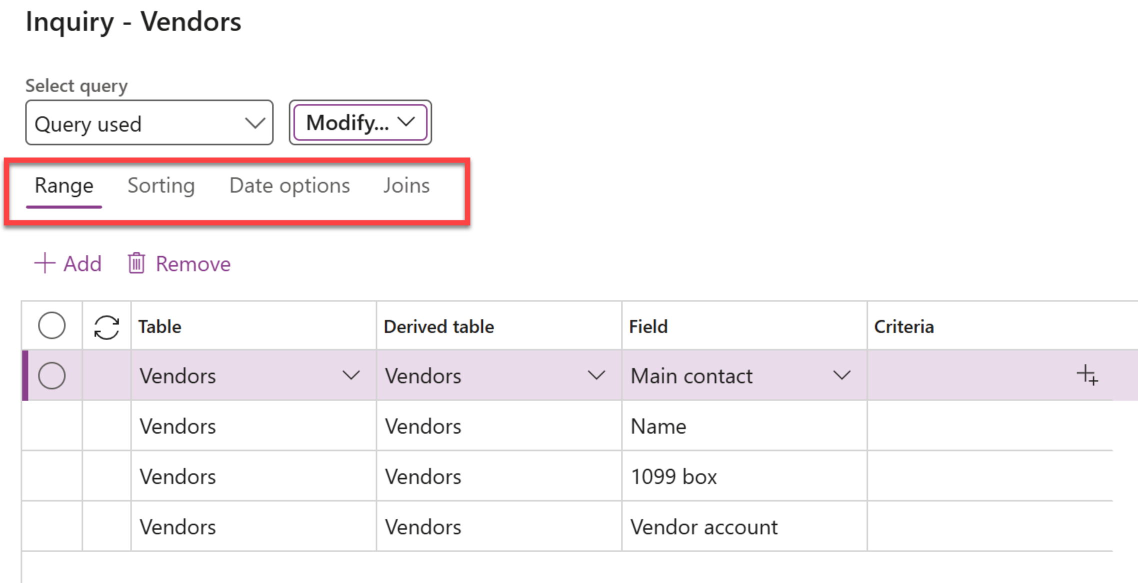
There are four fields in the advanced filter form. You will use these four fields to construct a query.

1. Table – This identifies the table where the field you want to use in your filter criteria will come from.
2. Derived table – This will set automatically when you select the 'Table'.
3. Field – Choose the field(s) to filter on.
4. Criteria – Enter your filter condition(s) using query syntax.

Query Syntax & Operators: Use ***query symbols*** to define conditions.

- `=` or `circle` (Equal to)
- `!` (Not equal to)
- `..` (Between / Inclusive)
- >, <, >=, <= (Greater / less than or equal)
- `*` (Starts with)
- `*value*` (Contains)
- `*value` or `value*` (Ends with)

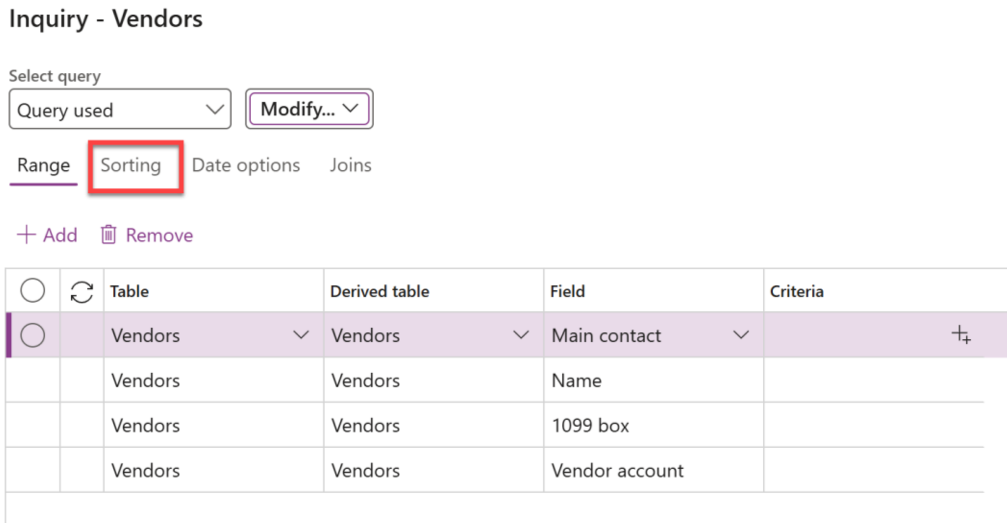
- ? (One or more unknown characters)
- , (Is one of /multiple values)



Advanced Filter

There are four tab at the top of the form that are also used to help construct your query.

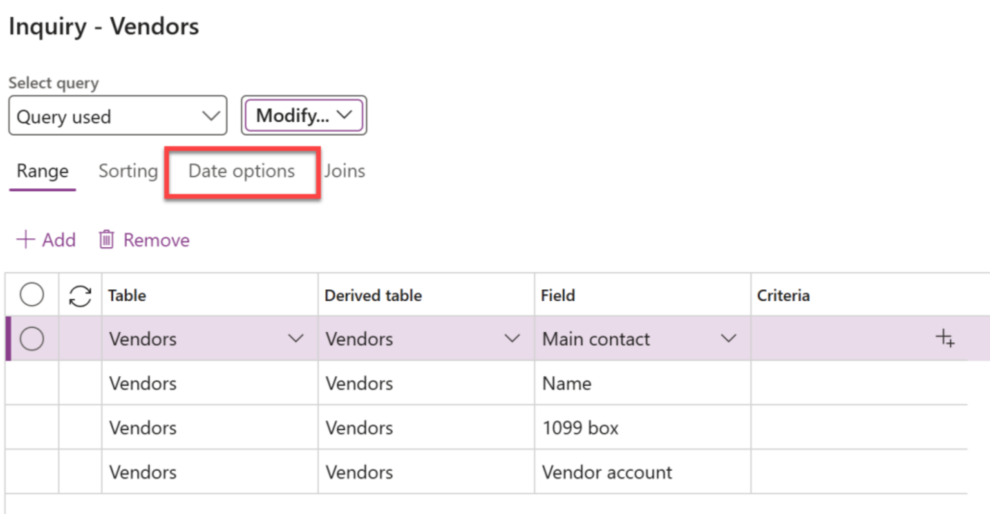
Range tab, use query symbols like values from 1 to 10 or strings starting with A, B, or exactly C.



Advance Filter

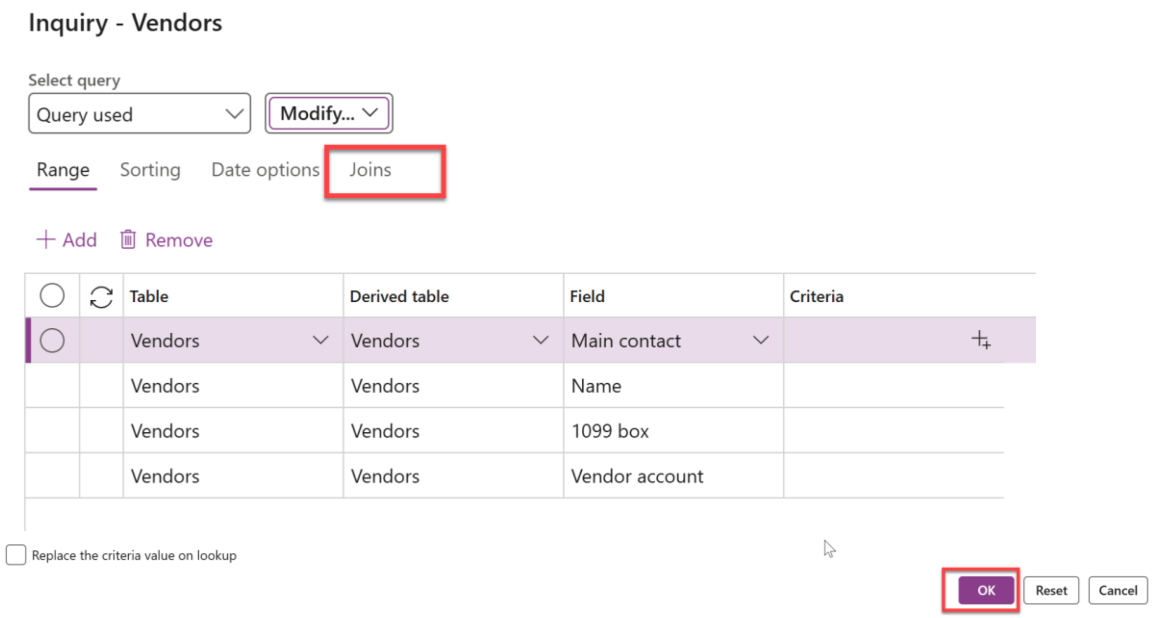
Sorting tab allows you to set one or multiple sorts to your query.

Simply select the table and field that you would like to sort and select the ***Search*** direction to sort the data ascending or descending.



Advanced Filter

Date options tab allows to filter on active records or as of a specific date. Useful for valid date fields like addresses or organizational hierarchies.

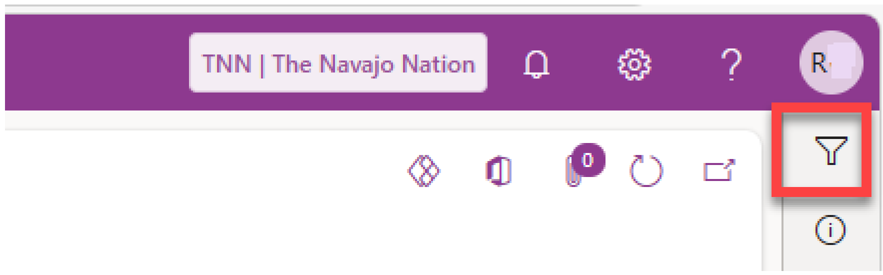


Advanced Filter
Joins tab shows all of the related tables that are available for you to add to your query. By default, you will see all of the tables that make up the list page or inquiry you are currently on.

Wildcards

Wildcards
Wildcards are special characters used in search or query to represent unknown or variable characters in a string. Allows you to match data and makes it easier to find records that share common prefix or substring. You can use the * (asterisk) to indicate that any value ***before or after*** this point is valid. Matches zero or more characters anywhere in the string.

Show Filters

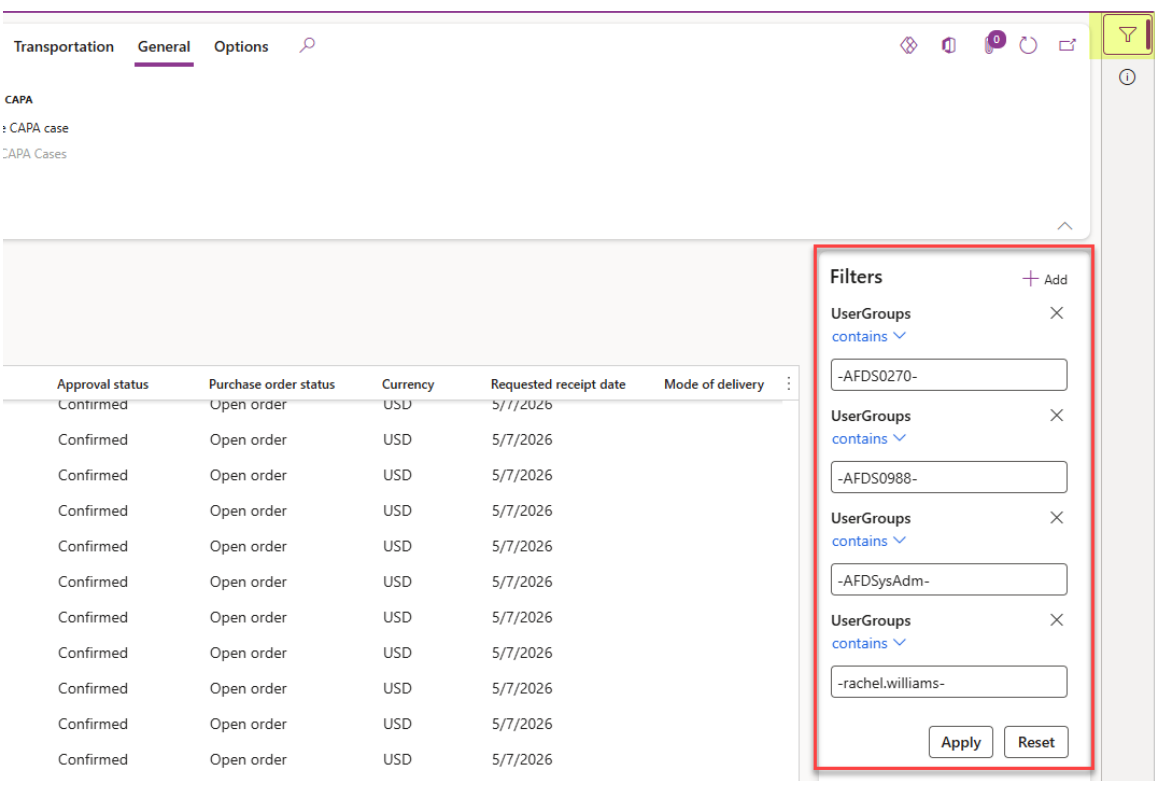


Filtering – Show filters

The Filter Pane provides an easy-to-use interface for filtering full page lists. The Filter pane is an inline pane that slides in from the right side of the screen and pushes the page content to the left, so that users can see the data that they want to filter.

Show Filter is located on the top left corner, flask looking icon, open the filter mechanism by…

1. Clicking the ***Show filters*** button.



Filtering – Show filters

1. Select a ***filtering operator*** in the list that's associated with each filter field. The set of operators that appear depends on the data type of the field.

2. Enter an appropriate value for the filter condition.

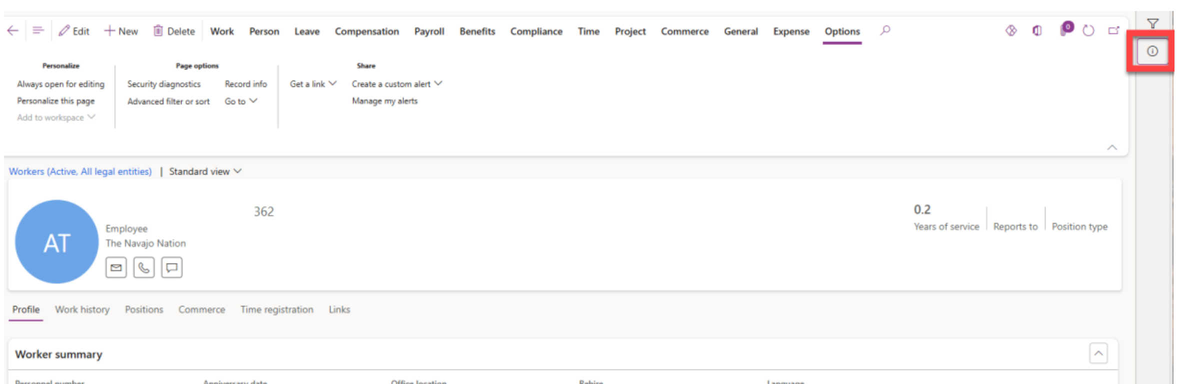
3. Click ***Apply***.

Use the ***Add*** button to add filter fields.

Note: Once opened, the Filter pane remains visible until you navigate to a new page.

4. To exit click the ***Show filter*** button.

FactBox – Related Information

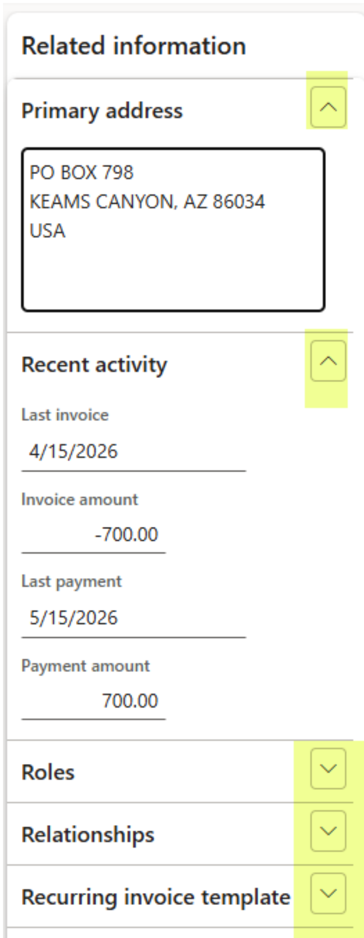


FactBox

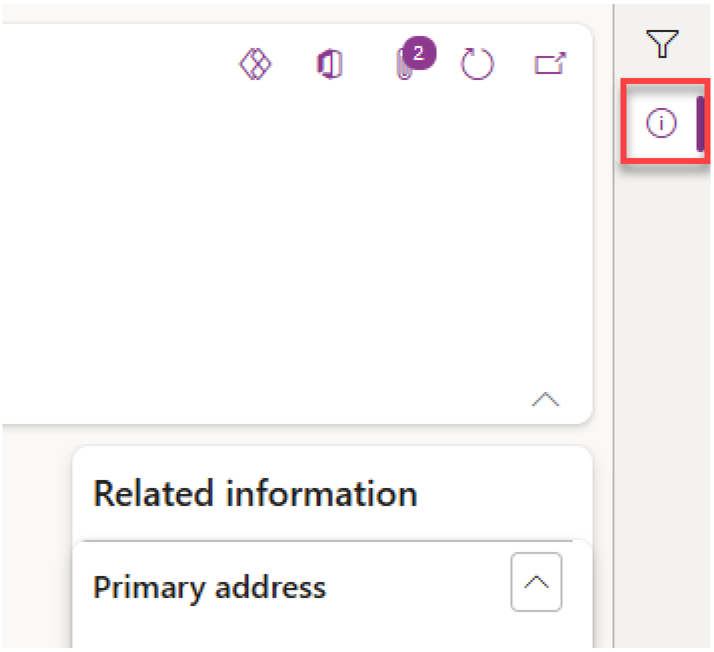
FactBox is a user interface (UI) element that displays related information for a record directly in a dedicated pane. Users can see key details without opening a separate form or navigation list.

Used for quick access to related data, no need to navigate from the main record to view related information and show workflow history, product images, tracking details, or other custom data.

1. Click the ***Related Information*** button.



FactBox
On the *Related Information* form, you can scroll through different aspects of a record to view them in the FactBox. You will also find several buttons related to the page, and you can narrow your search by adding additional related information.



FactBox Pane
On some pages, you can select ***Show filters*** to open the filter pane. This allows you to narrow the results that are displayed on the page. 2. Click the ***Related Information*** button to exit the form.

Compare Views

Grid Views

Compare View is a feature that allows you to visually and interactively compare two sets of data side by side – such as records, item details, or configurations - to quickly identify differences.

There are four views in the list pages and pages:

- Grid view
- Details view
- Line view
- Header view

The views can be used for different purposes:

- ***Grid view*** is useful for updating multiple records at the same time. By viewing a list page (for example, a list of vendors) in the Grid view, you can update data on each line instead of having to open the page for each vendor to update the information.

- ***Detail's view*** is available on any page that shows the Grid view by default. You can use it to review data for a single item that you've selected. This view provides details that are considered standard information for creating a new record.

- ***Line view*** is useful for reviewing the details of a single item in the system, like a single purchase order or customer. This view provides additional FastTabs and information.

- ***Header view*** is useful for looking at the higher-level details of a single record. It can be used to enter default values and to do a bulk update of the lines on some page types, like purchase orders. This view is also a good place to view general information about a page, like the customer details on a customer account.

Many list pages use Grid and Details views for their layout, whereas many pages that have line information use Header and Line views for their layout.

The *Header view* and *Line view* options are typical for data that has a header/line relationship, like purchase orders and sales orders.

Depending on the page type, you can switch among the different views.

Working with Grids - Grid Options

Grid Options

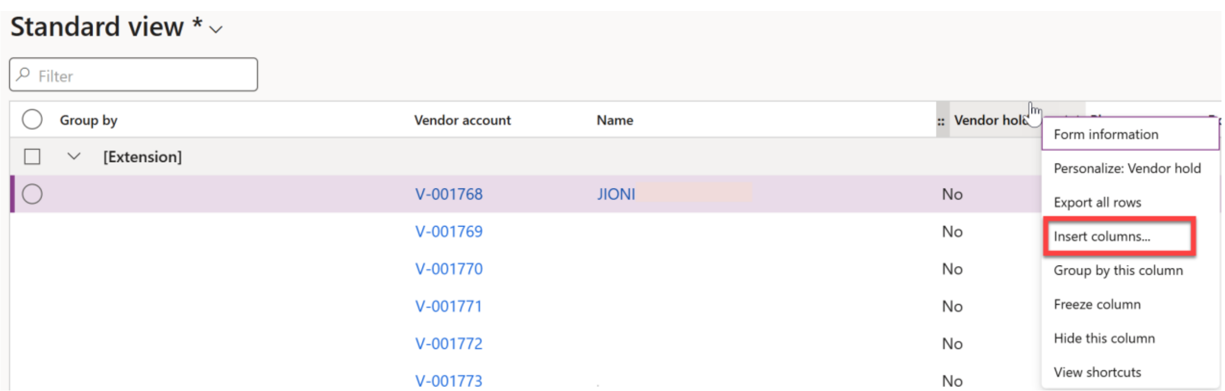
The *Grid Options* menu includes Insert columns, Show footer, and Edit selected rows.

There are two methods for inserting columns, The first method uses the ***header column*** on the form page. The drop-down menus vary across columns depending on the function of each header column.

Let's explore the *Insert columns…option.*

Column Customization

Column customization is adding, editing, or configuring columns in a grid or form to capture data views or display additional information.



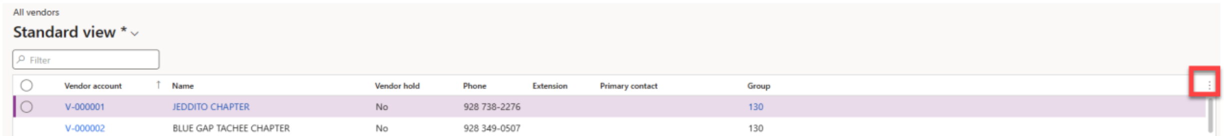
Grid Options - Insert columns

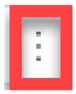
The first method is to insert a column using a column header.

1. ***Right-click*** a column header on the form.

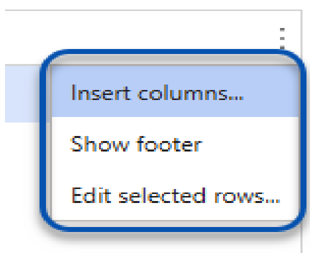
2. Select ***Insert columns****… from the* drop-down menu.

3. Follow the instructions in *Step 3 below* using the second method.

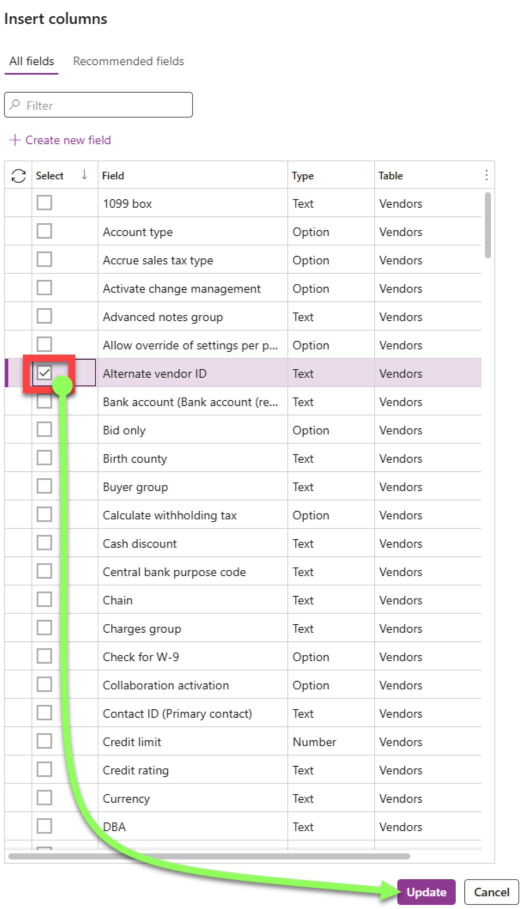


 Enlarged view of the *Grid Options, also* referred to as the tree.

Insert columns…
The second method is to insert a column using the three dots (aka tree). 1. Click the ***Grid Options*** (tree) button.



Insert columns…
2. Select the ***Insert columns****…* option.



Insert columns

All fields　Recommended fields

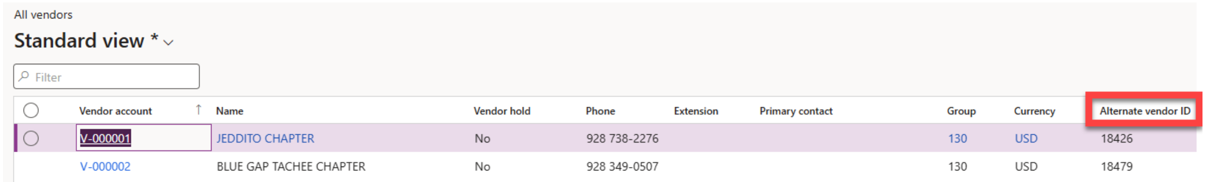
Filter

+ Create new field

Select	Field	Type	Table
☐	1099 box	Text	Vendors
☐	Account type	Option	Vendors
☐	Accrue sales tax type	Option	Vendors
☐	Activate change management	Option	Vendors
☐	Advanced notes group	Text	Vendors
☐	Allow override of settings per p...	Option	Vendors
☑	Alternate vendor ID	Text	Vendors
☐	Bank account (Bank account (re...	Text	Vendors
☐	Bid only	Option	Vendors
☐	Birth county	Text	Vendors
☐	Buyer group	Text	Vendors
☐	Calculate withholding tax	Option	Vendors
☐	Cash discount	Text	Vendors
☐	Central bank purpose code	Text	Vendors
☐	Chain	Text	Vendors
☐	Charges group	Text	Vendors
☐	Check for W-9	Option	Vendors
☐	Collaboration activation	Option	Vendors
☐	Contact ID (Primary contact)	Text	Vendors
☐	Credit limit	Number	Vendors
☐	Credit rating	Text	Vendors
☐	Currency	Text	Vendors
☐	DBA	Text	Vendors

Update　Cancel

Insert columns…
3. Review the ***Field*** names. 4. Click the box next to the Field in the ***Select*** column. Note: Blank box = No; Checked box = Yes and you may select more than one field name. 5. Click the ***Update*** button or click ***Cancel*** to exit the form.



Insert columns…

Note: The selected column ‘Alternate vendor ID’ is added as the last column on the page.

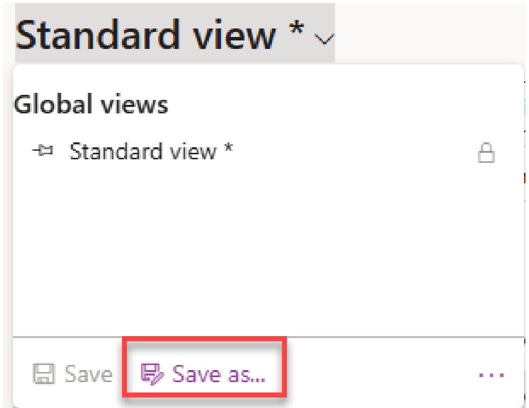
Aftering customizing a column, you must save your changes to ensure you can revert to the default columns later. This can be done using the saved views feature.

Saved Views

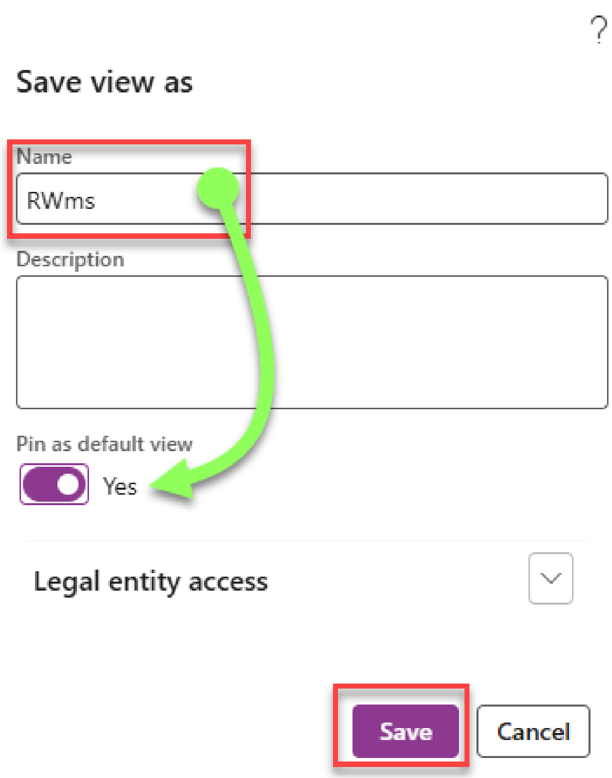
Standard view – Saved Views

Personalization plays an important role in allowing users and organizations to optimize the user experience to meet their needs. It permits users to have multiple named sets of personalization per form that they can quickly switch between as needed.

1. Click the ***down arrow*** at the Standard view*



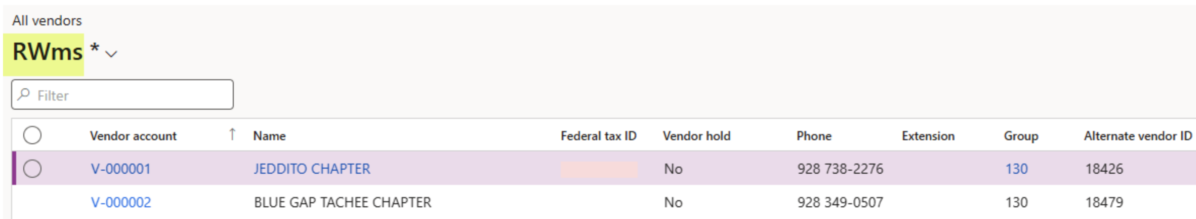
Standard view – Saved Views
2. At the Global views click the ***Save as****… option.*

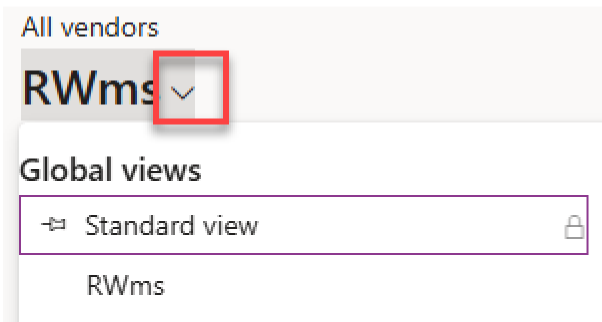


Standard view – Saved Views
3. Click in the ***Name*** field and give it a descriptive name.

4. Slide the ***Pin as default view*** button to ***Yes***.

5. Click the ***Save*** button.

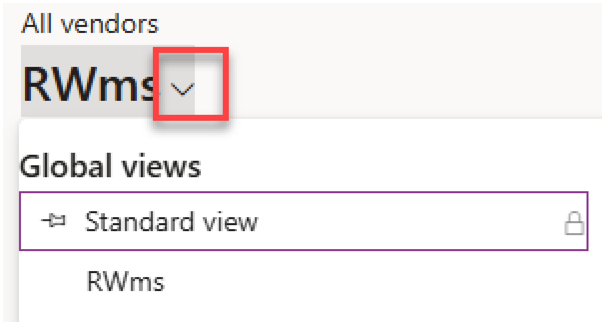




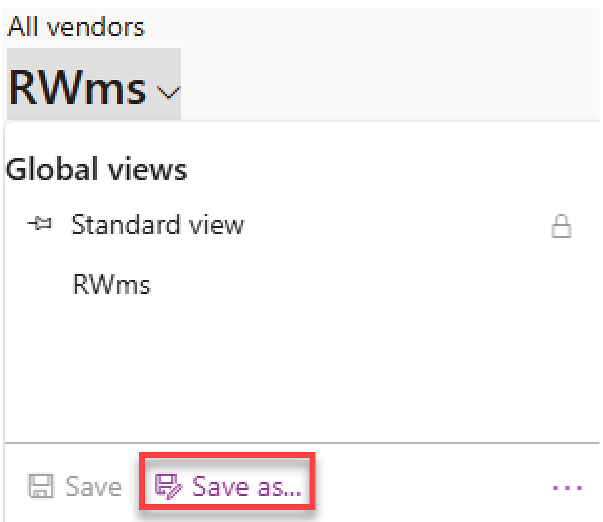
Standard view – Saved Views
Your personalized descriptive grid name is set as your default. At the *Global views* you can view your personalized views and toggle between personalized views for quick access. 6. Click the ***Down Arrow*** button displays all your Global Views.

Rename Saved Views

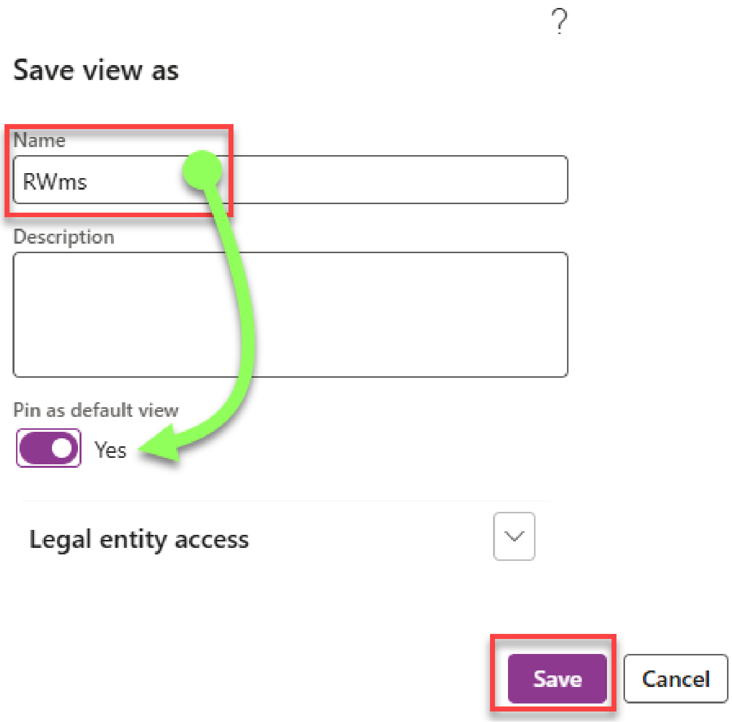
Personalization grid names are important; users can rename their personalized global view to meet their needs.



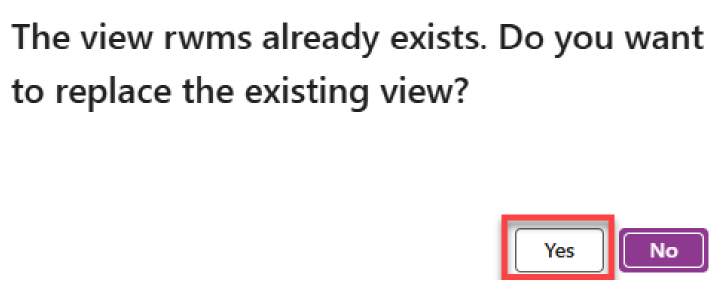
Rename Saved Views
1. Click the ***Down Arrow*** button.



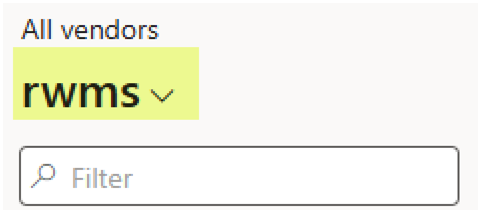
Rename Saved Views
2. Click the ***Down Arrow*** button.



Rename Saved Views
3. Click in the ***Name*** field and reenter a new descriptive name. 4. Slide the ***Pin as default view*** button to ***Yes***. 5. Click the ***Save*** button.



Rename Saved Views
5. Click the ***yes*** button to rename the global view.



Rename Saved Views
Your personalization view is now set as your default.

Resizing Columns

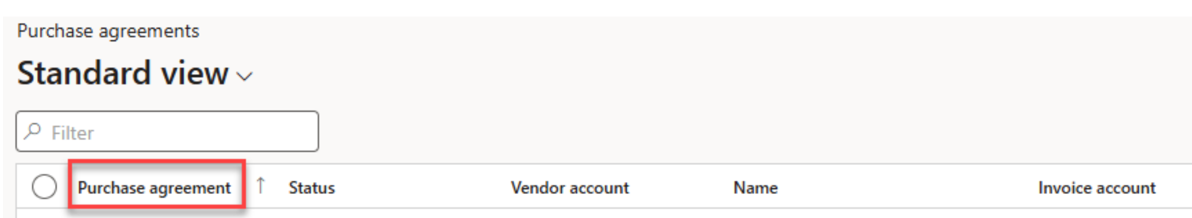
The user decides which columns are most important to view and the ideal view to make them wider or narrower for better readability for each columns. By using personalization each user can resize grid columns and keep track of that user's preference.

Sizing columns

To increase or decrease a column width use resize handle icon (double sided arrow).

⟺

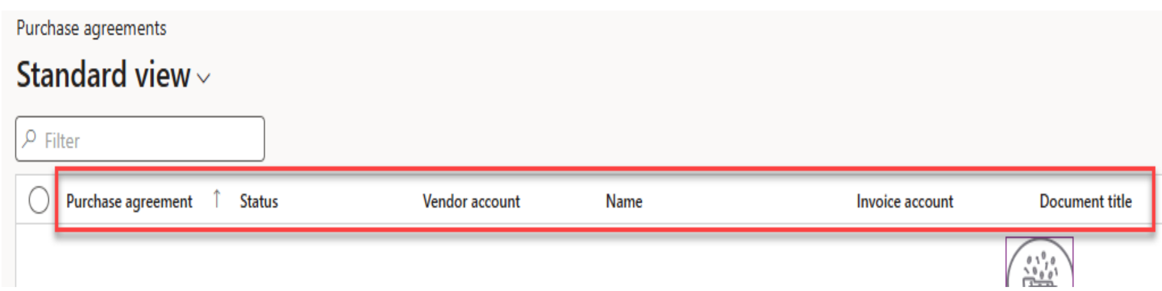
1. Place your cursor on the *right edge* of the column header until it turns into a resize handle.
2. ***Drag*** the handle to the left or right to adjust the width of the column.
3. ***Release*** the resize handle at the desired width.



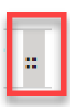
Sizing columns
You are able to view the full column header name. The change is saved to your personal layout and will not affect other users. Save Your Layout • After resizing, you can save your column widths as a global view. • This ensures your preferred layout is available the next time you open the list.

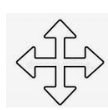
Rearrange Columns

The user decides which columns are most important to view, user can rearrange columns in most list pages, grids, and workspaces using the personalization feature.



Rearrange columns
Here's how you can rearrange columns on a page using a four-way arrow icon.





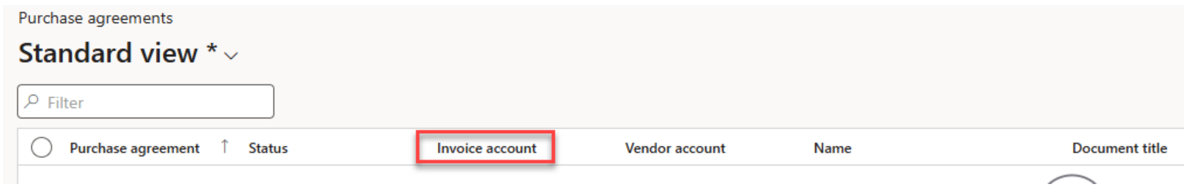
1. Navigate to the list, grid or workspace where your want to rearrange a column.

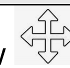
2. **Hover** in front of the column header name you want to move.

3. You will see ***four dots*** appear, and your cursor will change to a ***drag handle*** (a four-way arrow).

4. ***Click*** and hold the column header.

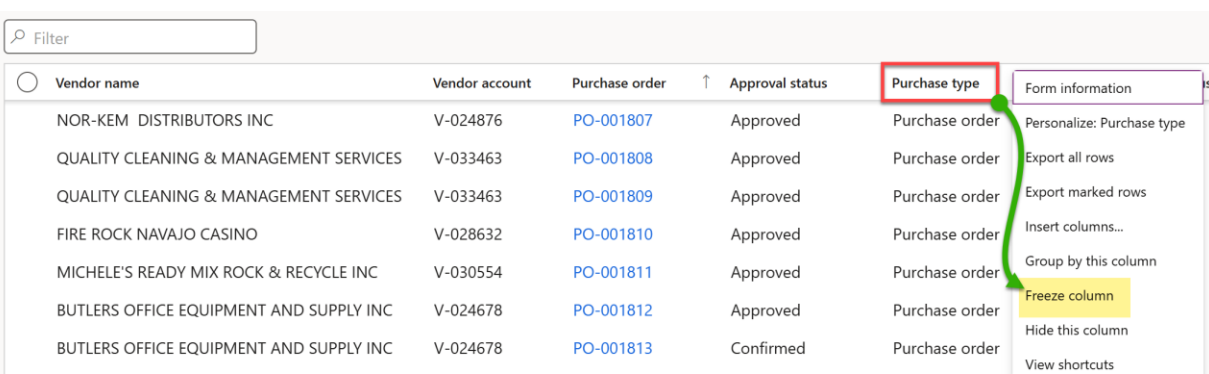
5. ***Drag it*** left or right to the desired position.
6. Release the mouse button to drop it in place.
7. Save your personalization by using the Saved views feature.



Rearrange columns
The column header is rearranged on the page using the four-way arrow .

Freeze Columns

The user decides which columns are most important to view. By using personalization it allows you to freeze certain columns in a grid so they stay visible even when you scroll hortizontally.



Freeze columns

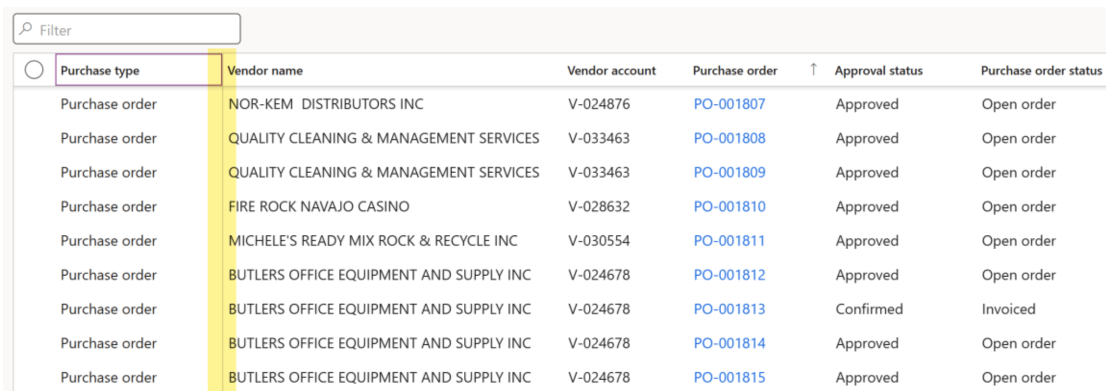
For training, let's enable the feature using the *Purchase type* column:

1. Navigate to the page or inquiry where you want to freeze columns.

2. ***Select*** a column to freeze.

3. ***Right-click*** the column header on the form.

4. Select ***Freeze*** *column from the list*.

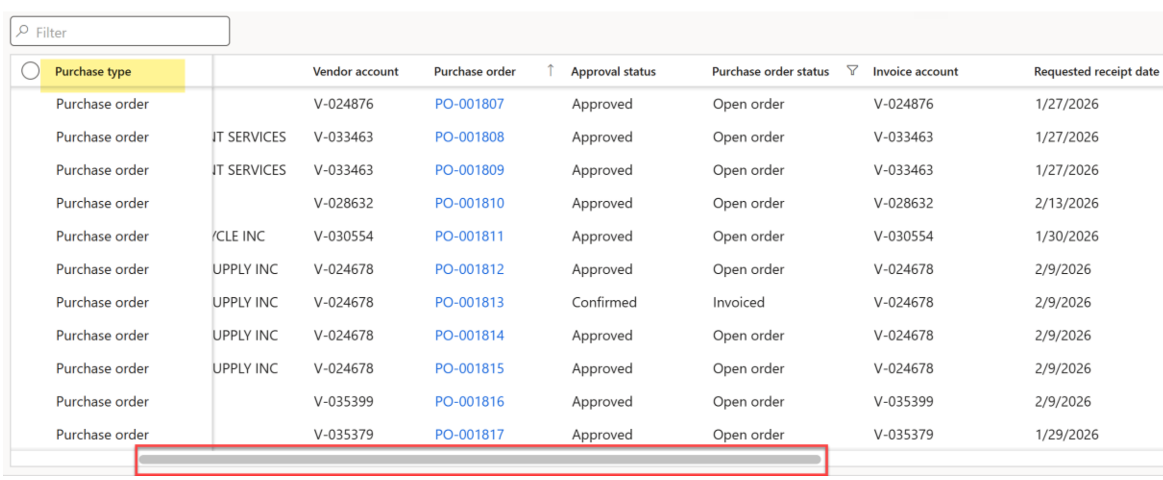


Filter

Purchase type	Vendor name	Vendor account	Purchase order	Approval status	Purchase order status
Purchase order	NOR-KEM DISTRIBUTORS INC	V-024876	PO-001807	Approved	Open order
Purchase order	QUALITY CLEANING & MANAGEMENT SERVICES	V-033463	PO-001808	Approved	Open order
Purchase order	QUALITY CLEANING & MANAGEMENT SERVICES	V-033463	PO-001809	Approved	Open order
Purchase order	FIRE ROCK NAVAJO CASINO	V-028632	PO-001810	Approved	Open order
Purchase order	MICHELE'S READY MIX ROCK & RECYCLE INC	V-030554	PO-001811	Approved	Open order
Purchase order	BUTLERS OFFICE EQUIPMENT AND SUPPLY INC	V-024678	PO-001812	Approved	Open order
Purchase order	BUTLERS OFFICE EQUIPMENT AND SUPPLY INC	V-024678	PO-001813	Confirmed	Invoiced
Purchase order	BUTLERS OFFICE EQUIPMENT AND SUPPLY INC	V-024678	PO-001814	Approved	Open order
Purchase order	BUTLERS OFFICE EQUIPMENT AND SUPPLY INC	V-024678	PO-001815	Approved	Open order

Freeze columns

5. The freeze line becomes visible on the page.



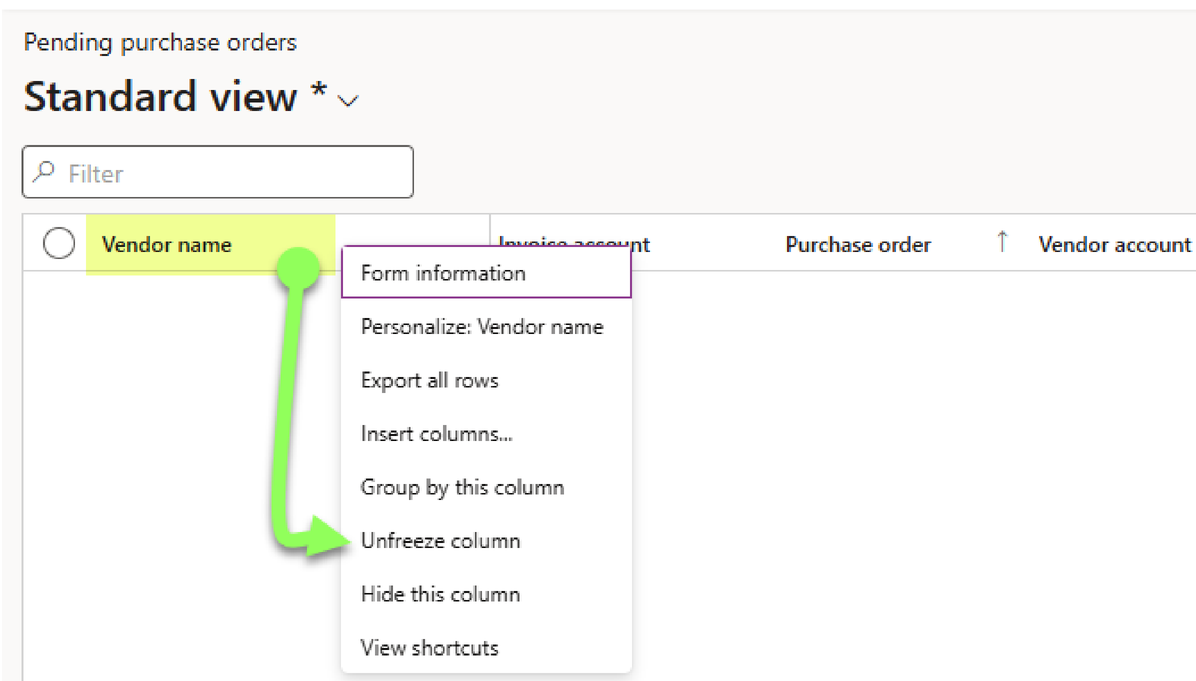
Filter

Purchase type		Vendor account	Purchase order	Approval status	Purchase order status	Invoice account	Requested receipt date
Purchase order		V-024876	PO-001807	Approved	Open order	V-024876	1/27/2026
Purchase order	IT SERVICES	V-033463	PO-001808	Approved	Open order	V-033463	1/27/2026
Purchase order	IT SERVICES	V-033463	PO-001809	Approved	Open order	V-033463	1/27/2026
Purchase order		V-028632	PO-001810	Approved	Open order	V-028632	2/13/2026
Purchase order	/CLE INC	V-030554	PO-001811	Approved	Open order	V-030554	1/30/2026
Purchase order	UPPLY INC	V-024678	PO-001812	Approved	Open order	V-024678	2/9/2026
Purchase order	UPPLY INC	V-024678	PO-001813	Confirmed	Invoiced	V-024678	2/9/2026
Purchase order	UPPLY INC	V-024678	PO-001814	Approved	Open order	V-024678	2/9/2026
Purchase order	UPPLY INC	V-024678	PO-001815	Approved	Open order	V-024678	2/9/2026
Purchase order		V-035399	PO-001816	Approved	Open order	V-035399	2/9/2026
Purchase order		V-035379	PO-001817	Approved	Open order	V-035379	1/29/2026

Freeze columns
6. Click the ***horizontal scroll bar*** and slide it to the right in the grid, the frozen column remains visible. Note: You can freeze multiple columns by repeating the steps, the next column you freeze will appear in the second column in the grid. Aftering customizing a column, you must save your changes this can be done using the saved views feature.

Unfreeze Columns

This option is a grid display control that reverses a column freeze setting which allows the column to scroll along with the rest of the grid.

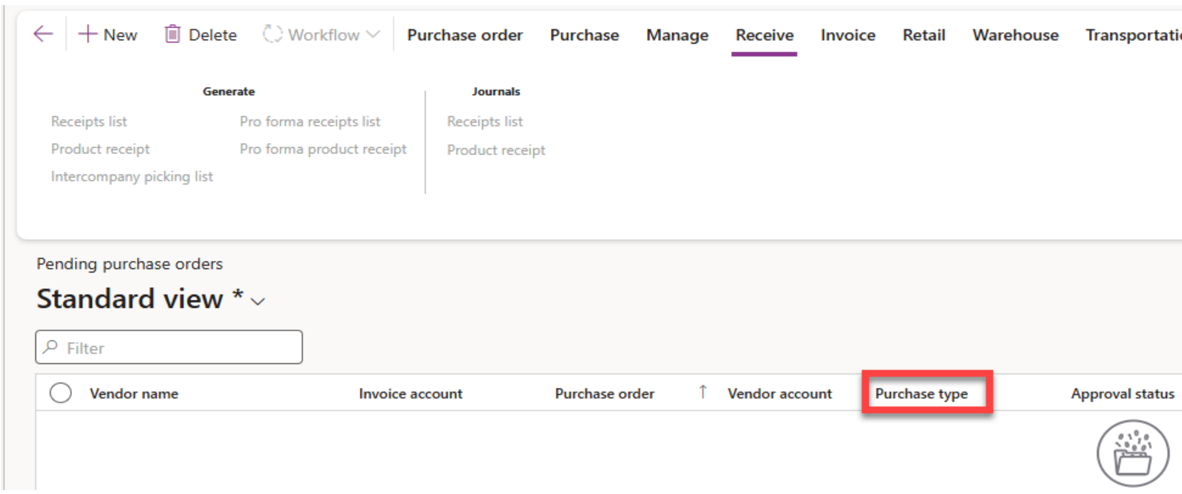


Unfreeze columns
1. **Right-click** the frozen column header using your mouse.

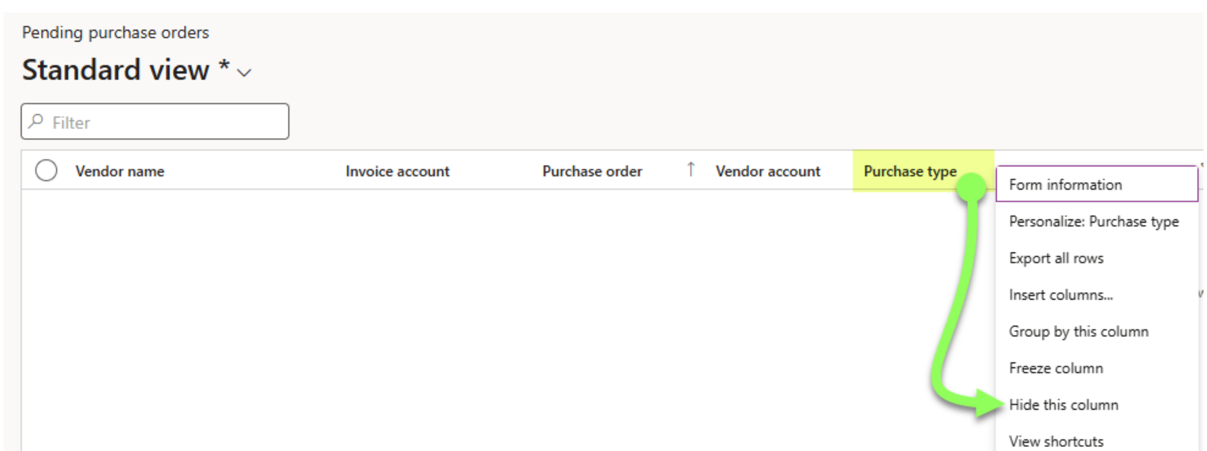
2. Select ***Unfreeze column*** from the list.

Hide Columns

Removes certain column from your grid view so they are not displayed while you work, without deleting the data or the column itself, this is a useful for focusing on the fields you need and reducing clutter.



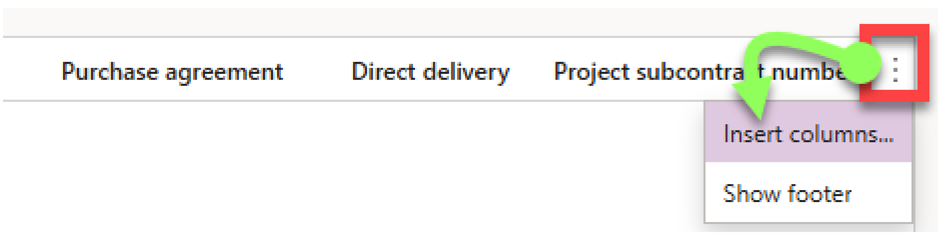
Hide columns
1. **Select** the column to hide in the form. (Example Purchase Type)



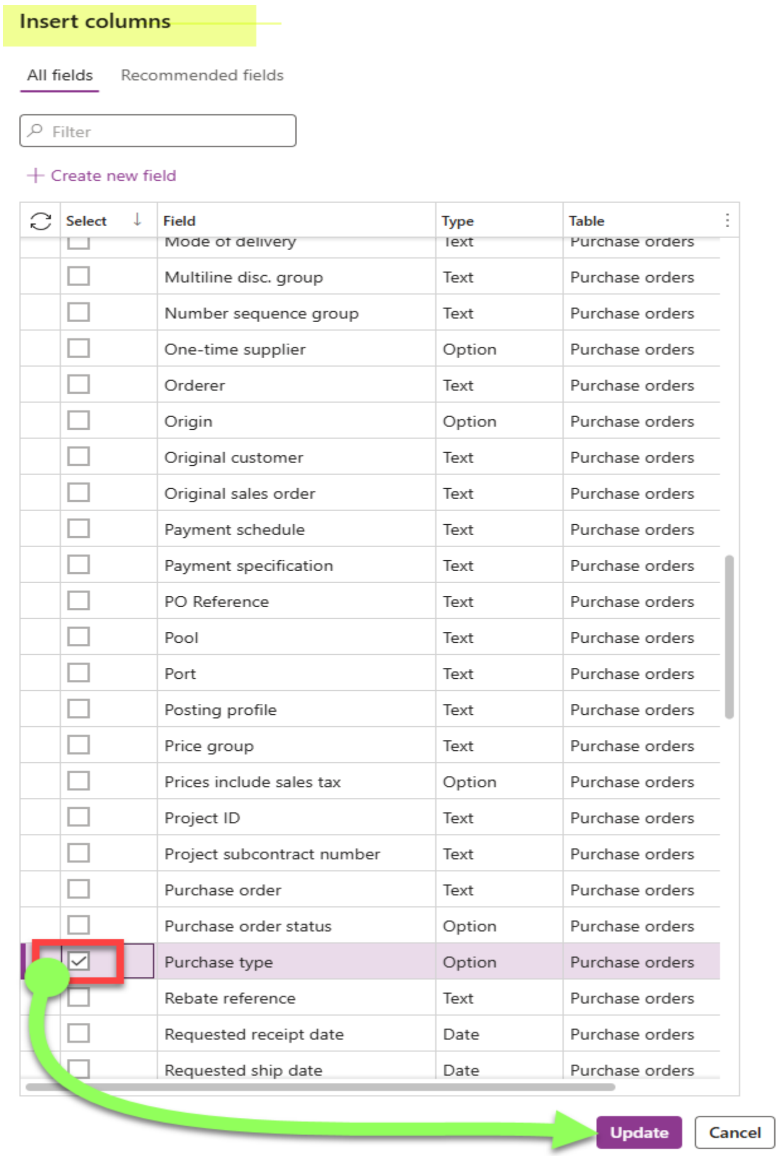
Hide columns
2. Right**-click** a column header on the form. 3. Select ***Hide this column*** from the list. Result: Purchase Type column is not visible in the grid. Aftering customizing a column, you must save your changes to ensure you can revert to the default columns later. This can be done using the saved views feature

Restore Hidden Columns

Restore hidden columns allows users to make previously hidden or removed data fields visible again in tables and forms.



Restore Hidden Columns
Using Personalization to restore hidden columns. 1. Click the **Grid Options** button, in the top-right corner (three dots - tree) icon. 2. Select ***Insert columns***….

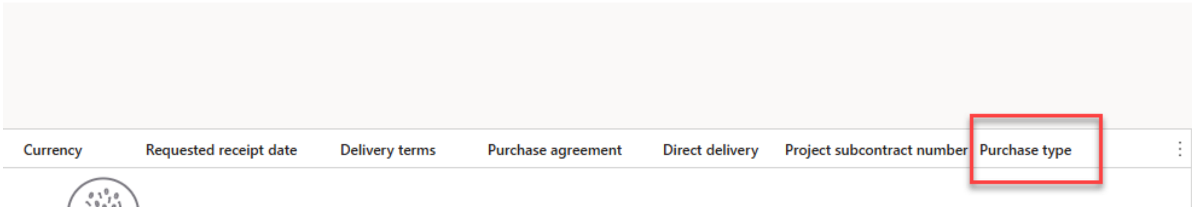


Restore Hidden Columns

3. At the Insert columns form, ***locate*** the field name to be restored to the grid.

4. ***Click*** the box next to the Field name in the *Select* column.

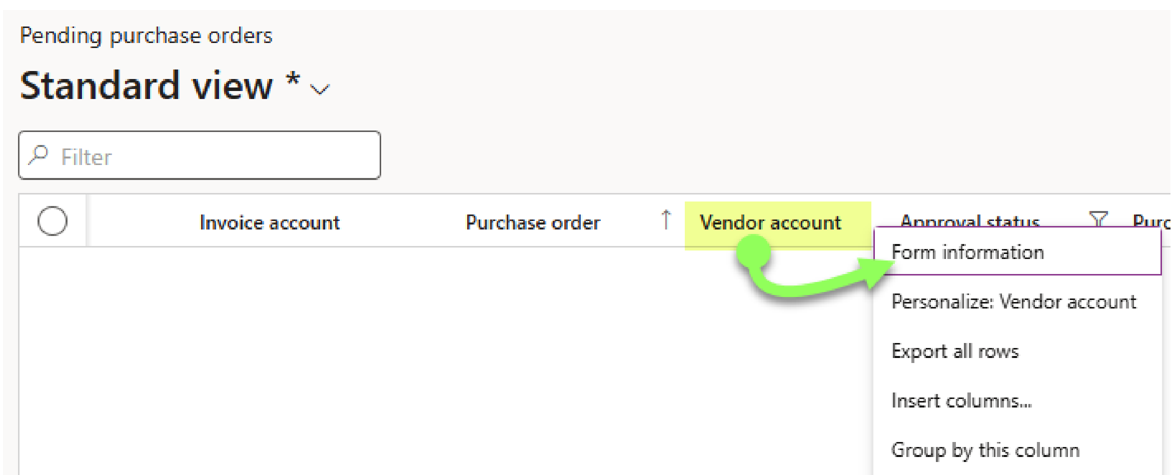
5. Click the ***Update*** button.



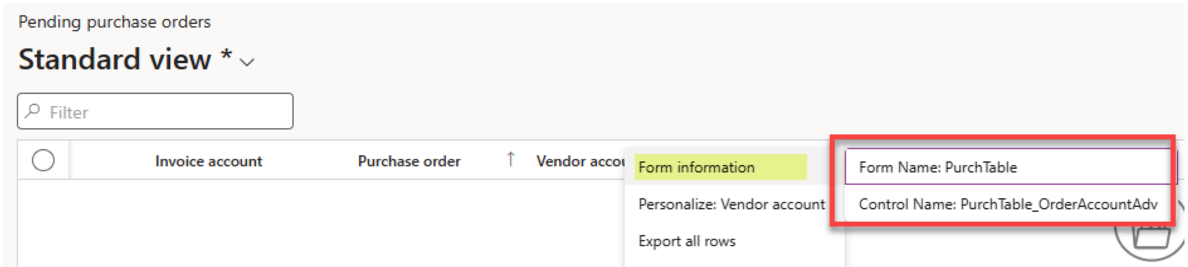
Restore Hidden Columns
6. Column Purchase type is restored at the last column on the page in the grid.

Form information

Form information generally refers to structured data definitions, templates, or configurations that describe how a process, document, or transaction is represented and handled within the system.



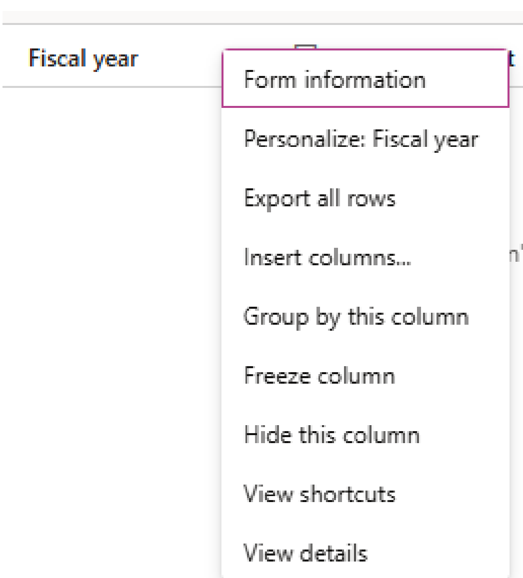
Form Information
1. **Select** the column *Vendor account* to hide in the form. (Example) 2. Right-click the column name on the page. 3. Hover over the ***Form information***.

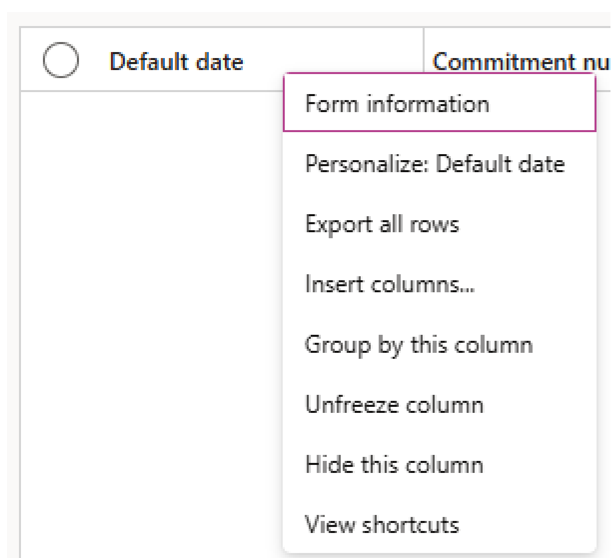


Form Information
4. The form and configured control name is displayed (Aka: Alias). The systems displays the table and control name structured and configuration details in F&SCM.

Customizing columns

Customizing columns is used to personalize tables by showing, hiding, reordering, or adding custom field to columns so users can tailor data views to their business needs. It includes adjusting column visibility, order, sorting, filtering, grouping, and enabling custom fields.

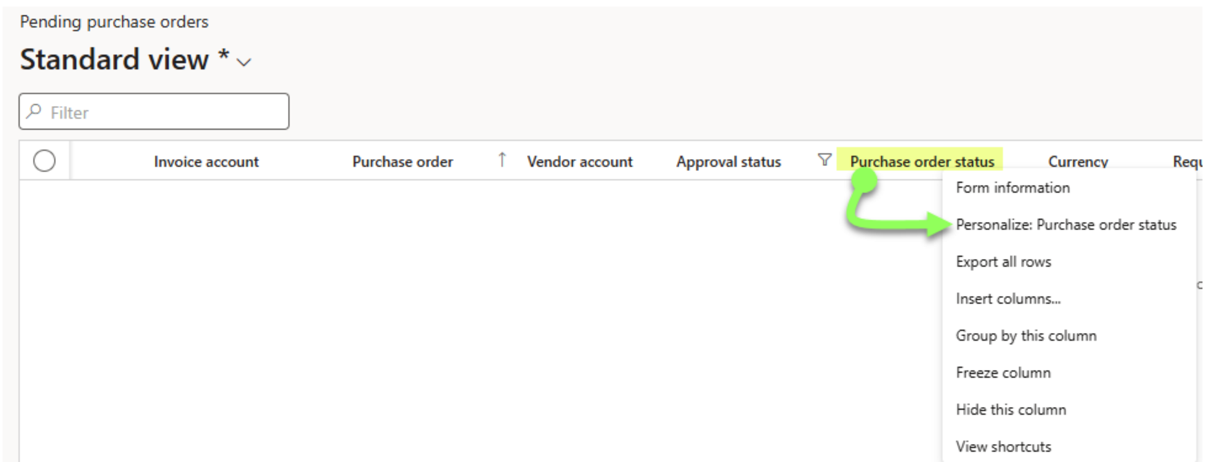




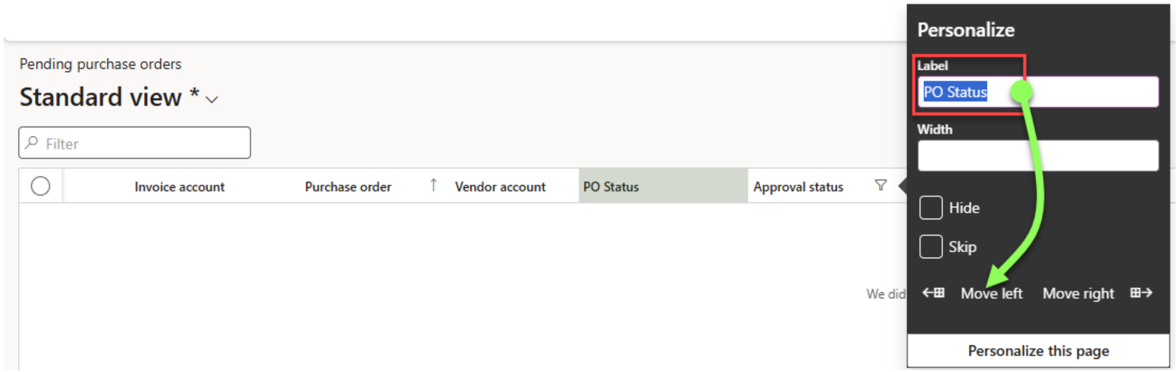
Personalize, Export, Insert, Freeze, Hide, and View columns
1. Depending on the function of each columns, ***right-click*** any column header to access a list of customization options.

Personalize Columns

Personalize columns in a grid or list view to match your workflow and data needs. This is a part of the broader personalization feature that lets you tailor the user interface without requiring developer changes.



Personalize column
How to personalize a columns, lets personalize the *Purchase order status* from the list. 1. **Select** a header column on the page. 2. ***Right-click*** the column header. 3. Select ***Personalize: Purchase order status***.



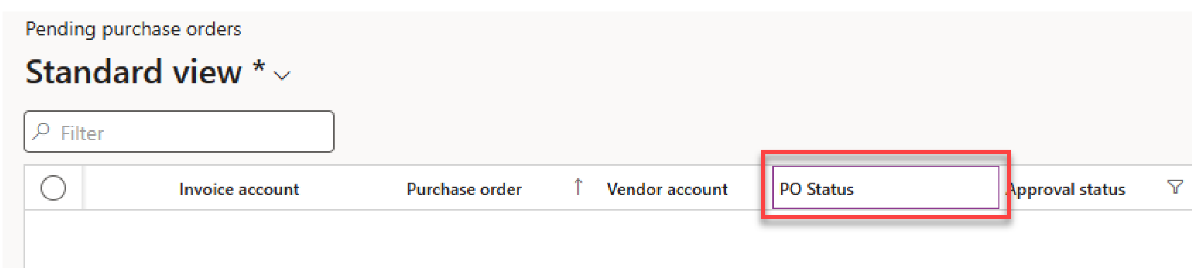
Personalize column

At the Personalize this page, let's shorten the column header name.

4. In the ***Label*** field enter the new column name '***PO Status***'.

Note: You can personalize the column using the column header options to increase or decrease the Width, Hide, Skip, Move left or Move right.

5. Select ***Move left*** (moves the column name on the left side on the column Header in the grid).



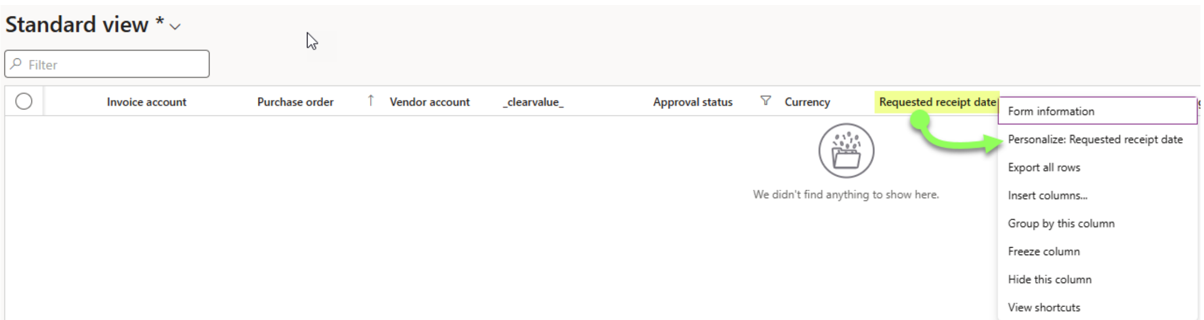
Personalize column

You have personalized a column by renaming the column and moving the name to the left side.

Tip: Always save your personalized view before refreshing the page, as changes may be lost

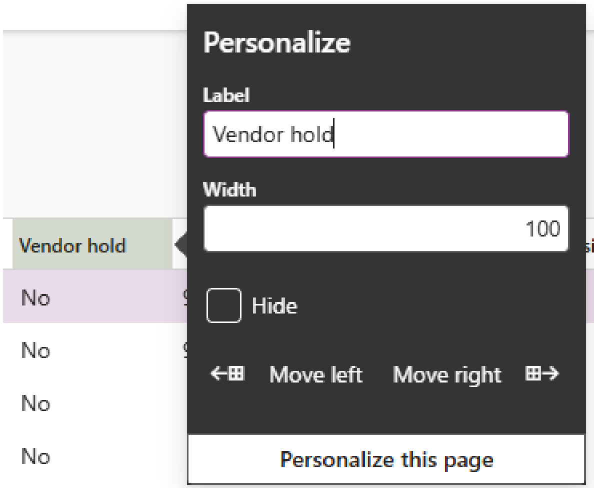
Personalize page

If you want to make multiple changes to a page, or changes that aren't available through other options (for example, if you want to reorder elements), you can use the Personalization toolbar.

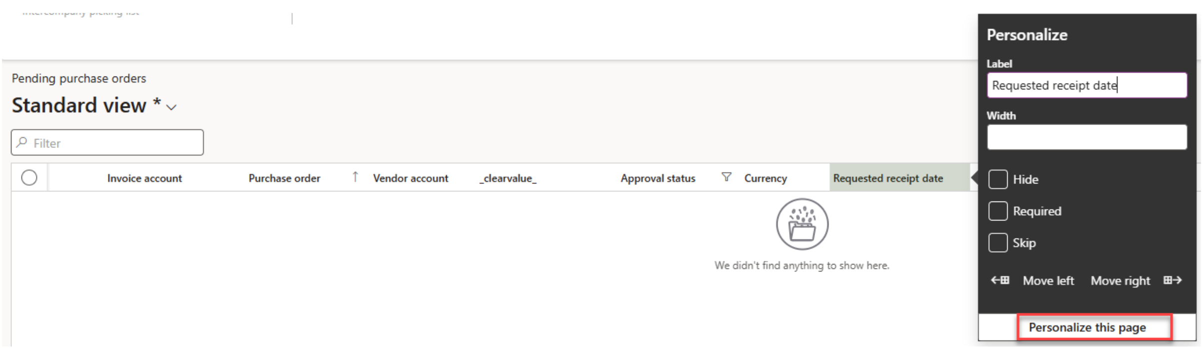


Personalize page
You can customized your column names on a page. 1. **Select** a header column on the page. (Example *Requested receipt date*) 2. ***Right-click*** the column name. 3. Select ***Personalize: Requested receipt date***.

A personalized page is a user-specific version of a standard application page that has been customized to meet that user's workflow needs. The customization can include changes to fields, columns, tabs, filters, and other page elements, and is saved so the user sees the same layout each time they open the page.

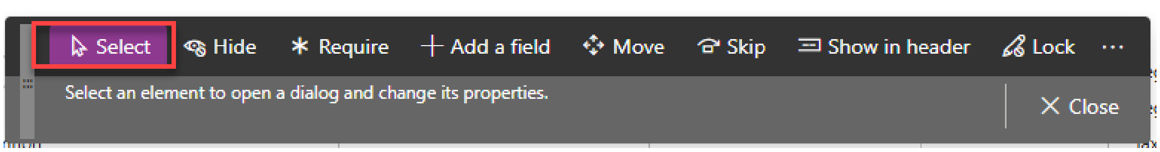


Some personalized properties might not be available in some scenarios. This menu includes width (recommend starting with 50, the higher the number the wider the coumn), hide, and move column to the left or right.



Personalize this page
4. Click the ***Personalize this page*** button.

*The following tools are available on the **Personalization** toolbar*.



Personalize - Select

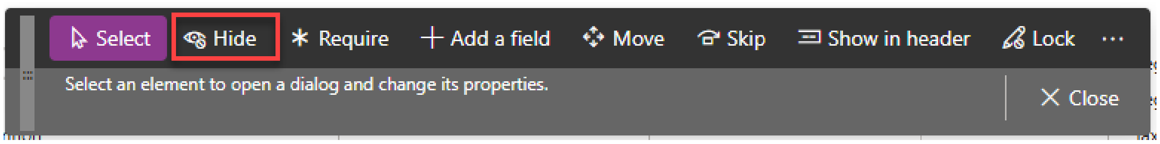
Select: Tool to select and change the properties of an element, to use the tool feature:

1. Select the ***Select*** button on the toolbar.

2. Select the desired column (element) in the grid.

3. The column (element's property) window appears; you can change any of the properties of the element.

4. You can repeat the process for other elements that can be personalized on the page.



Personalize – Hide

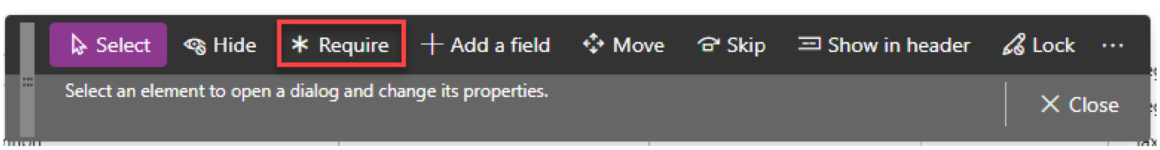
Hide: Tool to hide an element on the page, to use the tool feature:

1. Select the ***Hide*** button on the toolbar.

2. Select the element to hide (field, fasttab, tab, group…) from the list.

When you use the hide tool, the selected element will disappear from the form, but made visible in a shaded container.

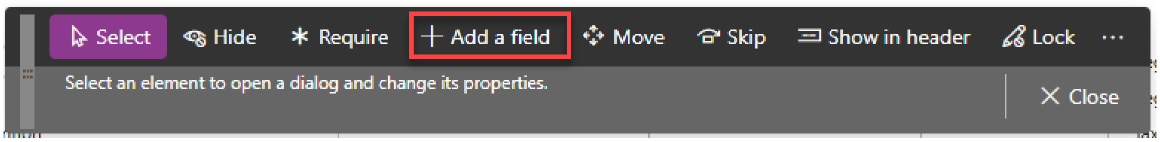
To make element visible reselect it, select the one you want reappear.



Personalize – Required

Required: Tool to designate an element as required for data entry. When selected all elements that are currently noneditable are shown in a shaded container. You can make them not required agained.

1. Click the ***Required*** button.



Personalize – Add a field

Add a field: Tool to add a field. You can only add fields that are part of the page definition.

To create new fields that are not part of the current page definition, see create and work with custom fields.

1. Select the grid or section where you want to add a field.

2. Select the ***Add a fields*** button on the toolbar.

3. A dialog shows the list of fields that are related to the selected grid or section. In the dialog, select one or more fields to add from either the Recommended fields or all fields list.

4. After you select the desired fields, select ***Update***.

To remove a field that you previously added, repeat the process, but clear the selection of the field in the dialog.

The *Recommended* fields list shows, fields that were previously added by other users in your organization. This list of fields is updated based on the recurrence frequency of the Recommended batch job. A similar experience exists when adding new filter fields using the Filter pane on a page.

Personalize – Move

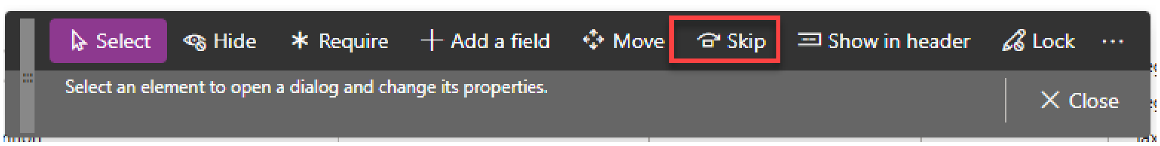
Move: Tool to move element to a different location in the current group of elements. You cannot move an element outside its parent group. To use the tool:

1. Select the ***Move*** button on the toolbar.

2. Select the element to move.

When you select an element, the app determines the locations where the element is allowed to be moved.

These locations are known as drop zones. As you dray the element around in the current group, each drop zone is shown as a colored, bold line next to the area where the element can be dropped.

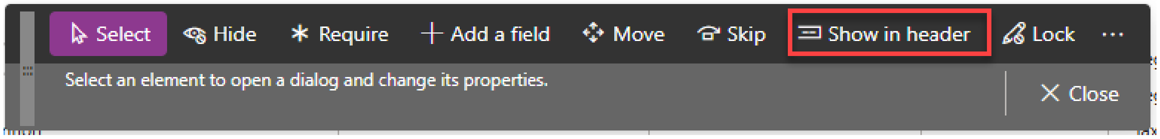


Personalize – Skip

Skip: Tool to remove an element from the pages keyboard tab sequence. When you select skip button on the toolbar, all elements that are currently shipped are shown in a shaded container.

You can interactively remove or add fields to the tab sequence.

1. Click the ***Skip*** button on the toolbar.



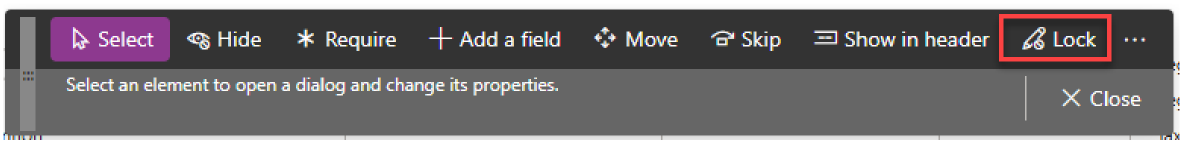
Personalize – Show in header

Show in header: Tool when you want to field to appear in the FastTab's summary section.

1. Click the ***Show in header*** button.

2. All fields that are selected as summary fields are shown in a shaded container.

You can interactively add fields to the FastTab summary and remove fields from the summary by selecting the fields.

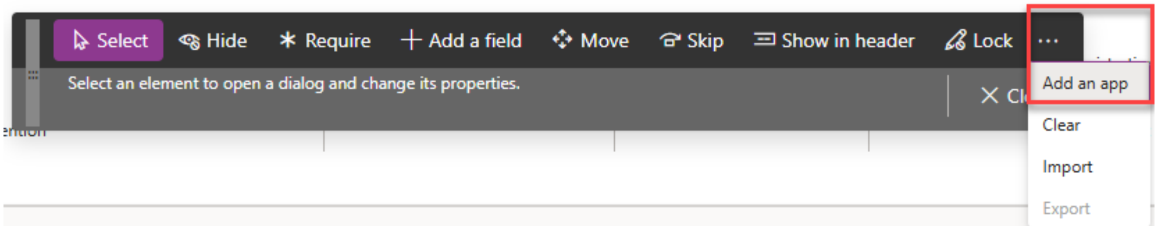


Personalize – Lock

Lock: When you select the Lock button on the toolbar, all elements that are currently noneditable are shown in a shaded container.

You can make them editable again. Some field are required and cannot be made noneditable. A padlock system appears next to those fields.

1. Click the ***Lock*** button.



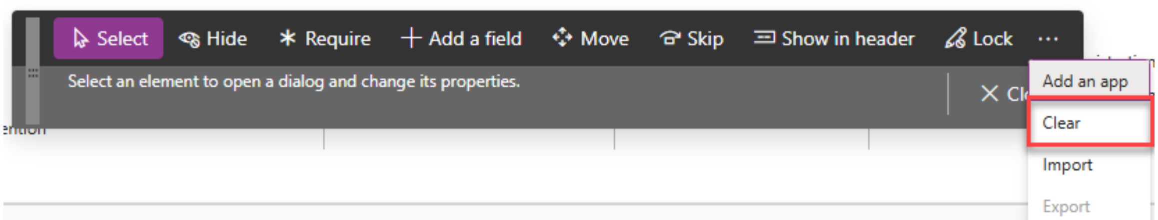
Personalize – Add an app

Power Apps: Tool to embed the app that was created by using Microsoft Power Apps into the page. This option is availabe only when a Saved views feature is turned off.
.

1. Select the three-dots (aka tree) button on the toolbar.

2. Select the ***add an app*** button from the menu.

Use the Add an app button to embed an app into the page. This app can either be an app created from Microsoft Power Apps or a [third-party] (embed-website.md] app.

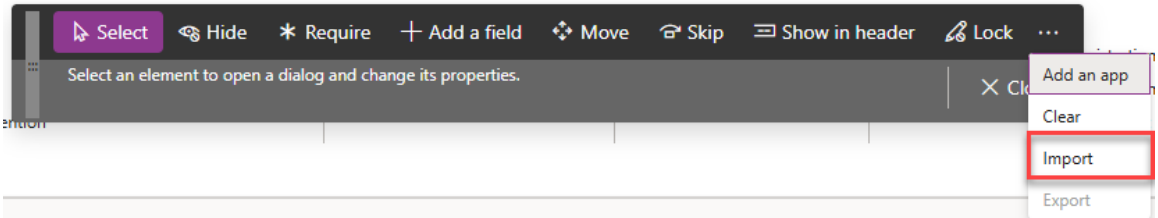


Personalize – Clear

Clear: Tool to reset the page to its default state. Action applies to the current view for pages that support saved views and to all personalizations on the current page or pages that don not support saved views.

You cannot undo this action, so only use this too if you are sure that your want to reset the view or page.

1. Click the ***Clear*** button from the menu.

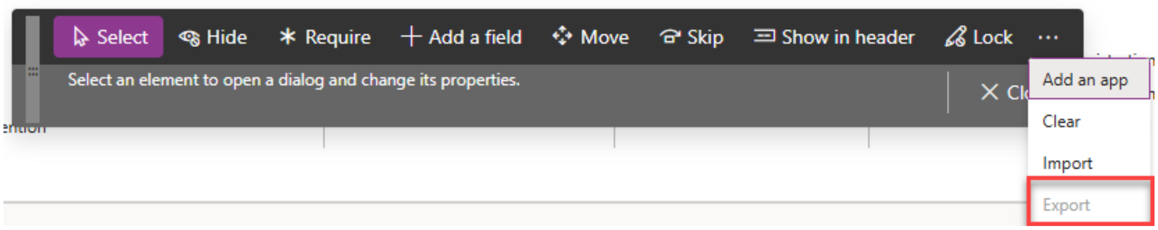


Personalize – Import

Import: Tool to load a personalization form a file that you or someone else previously created. The imported personalizations then become a view on the page.

If the view already exists, you have the option to skip the import, replace the current view that has the same name, or rename the imported view.

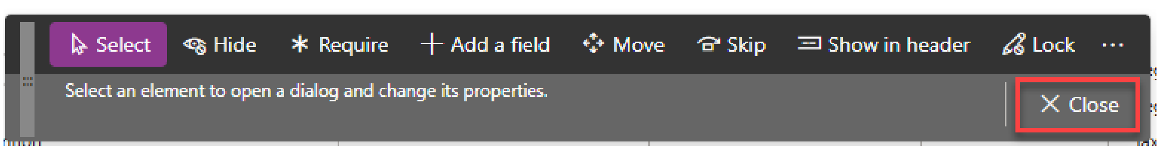
1. Select the ***Import*** button from the menu.



Personalize – Export

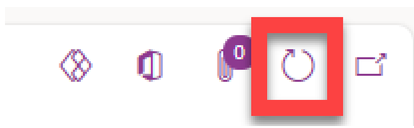
Export: Tool to save the current view for the page to file whith which you can share your personalizations with other users. User can then import the file that contains your personalization for the page.

1. Select the ***Export*** button from the menu.



Personalize – Close
Close: Click the Personalize this page button. 1. Select the ***Close*** button to close Personalization toolbar and return to the page to it's pervious interactive state.

Refresh

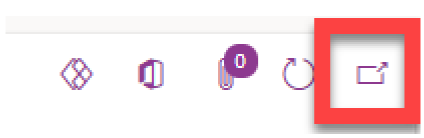


Refresh A Form
Refresh is a method that updates the form's display after an action like adding or updating a record ensures the user interface (UI) reflects the latest data. 1. Select the ***Refresh*** button to refresh the page. When a user updates a form you are currently working on, use the refresh button to view the updates.

Open in New Window

The feature is a navigation shortcut that lets you open a related page in a separate browser window so you can view it alongside the current page. A productivity tool for keeping related pages open and linked, so you can work more efficiently without constant navigation.

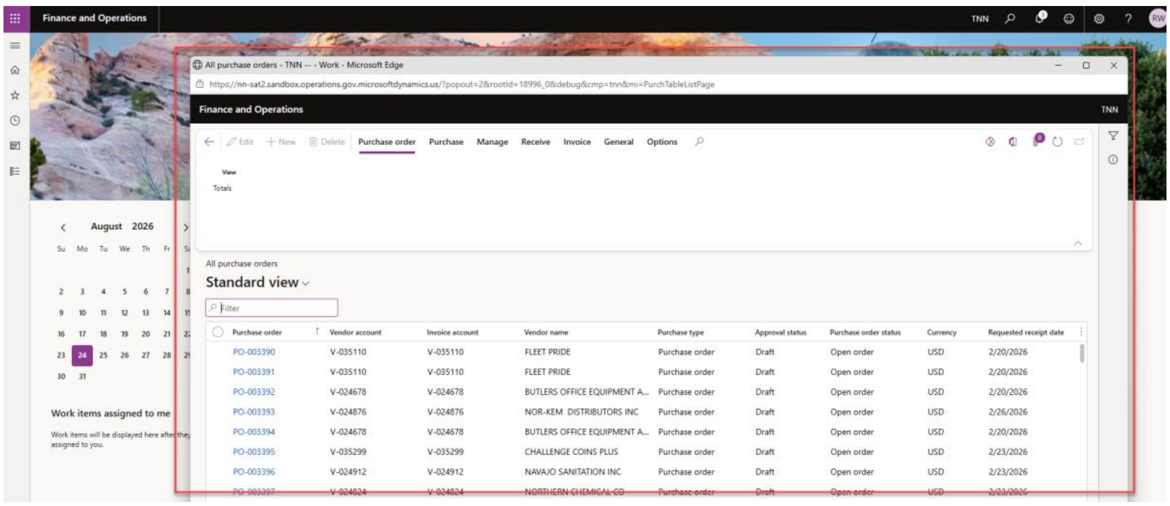
When to use it? When comparing a list of items with their detailed lines, validating or editing multiple related records without leaving the current list, and you can quickly switching between related modules.



Open New Window

How it works:

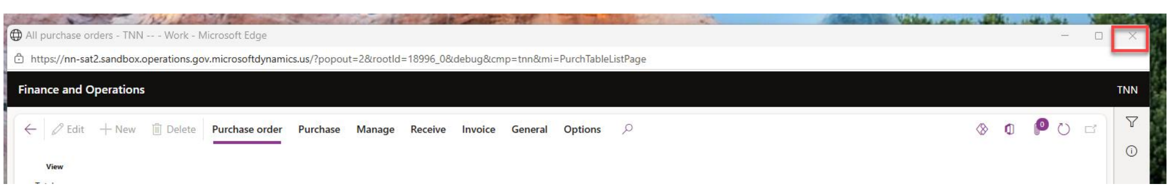
1. Select the ***Open in New Window*** icon on the action bar.



Open New Window

Opens the target page in a new pop-up browser window and returns the original window to the page you were on before the pop-up.

2. Select the ***New Window*** browser.



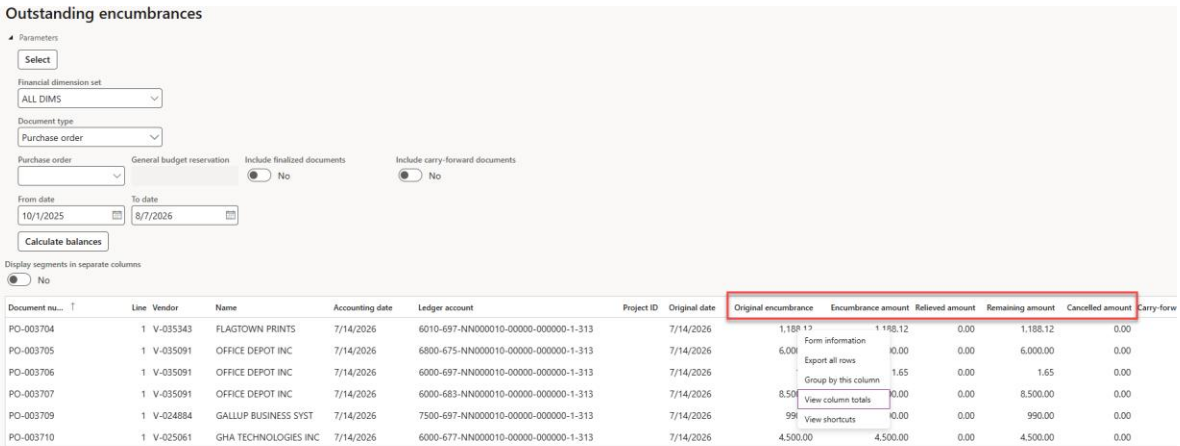
Open New Window

Maintains data linking between the two windows,

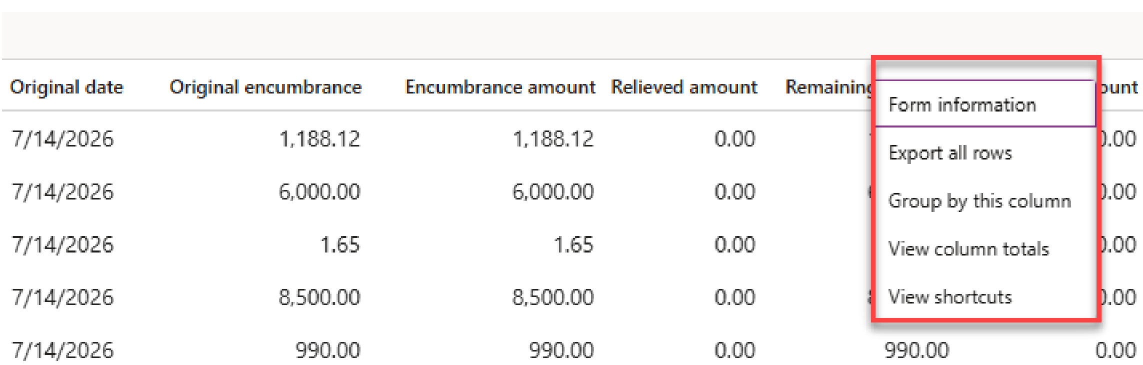
3. Select the ***Close*** button to exit.

Grid Calculations

For numeric columns, you can display totals in a grid by using the built-in grid footer with calculated values. This is an extended grid aggregation capabilities feature, configure a numeric column to show total (Average, Maximum, or Minimum) in the grid footer.



Grid Amount Column Options
1. Select a numeric column that displays amounts. Note: For training the ***Remaining amount*** column is selected.

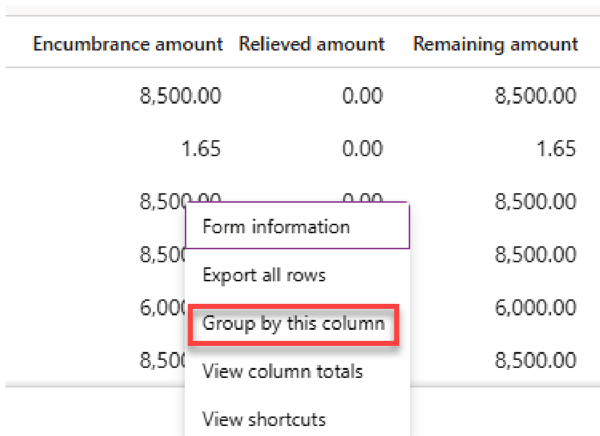


Group by this column

Let's explore the *Group by this column* option.

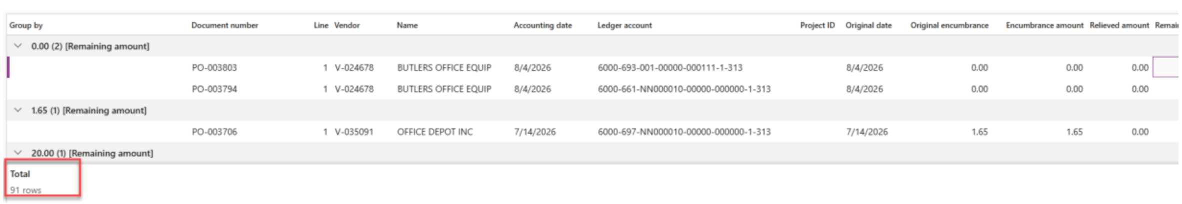
2. **Right-click** on the header column (*Remaining amount*) in the grid.

3. Menu displays the options to view.



Group by this column

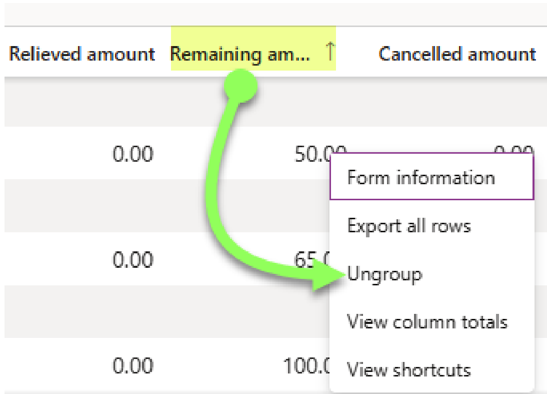
4. Select the ***Group by this column***.



Group by this column

5. The column displays the data in hortizontal format, in rows.

   Note: The bottom dispays the **Total** rows: ***91 rows***.

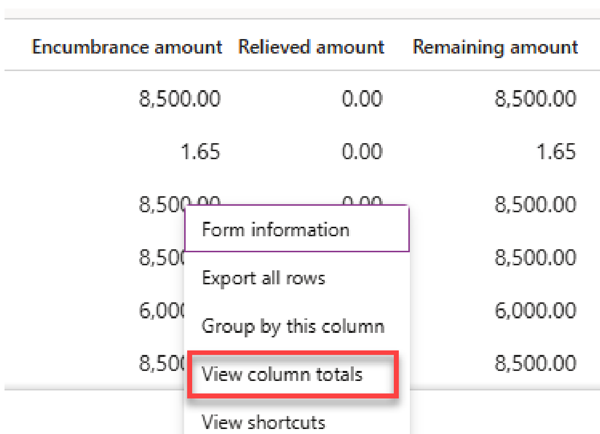


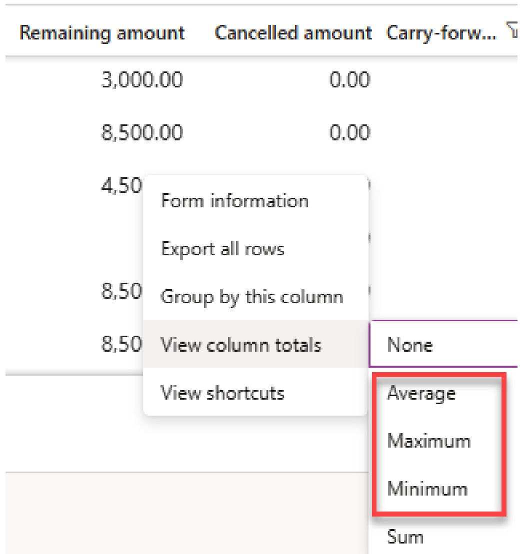
Group by this column

To return the column view to it's original layout.

6. ***Right-click*** the same column header (Remaining amount).

7. Select ***Ungroup*** this restores the data to the column view.





Average – When selected the footer will display the average column's values.
Example:
If a grid column has values of 100, 200, 300, the total amount will show 600
and the *Grid average* will show 200.

Maximum – When selected the footer will display the maximum value for that column, largest numberic value in the selected column.

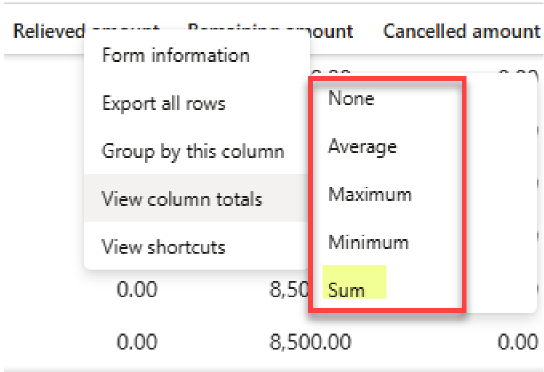
Minimum – When selected the footer displays the smallest numeric value in that column.

View column totals

Always select a column that contains numberic amounts in the the grid.
Let's explore the *Sum* option to view the total for that column. For training, select the *Remaining amount* column.

8. ***Right-click*** on the header column.

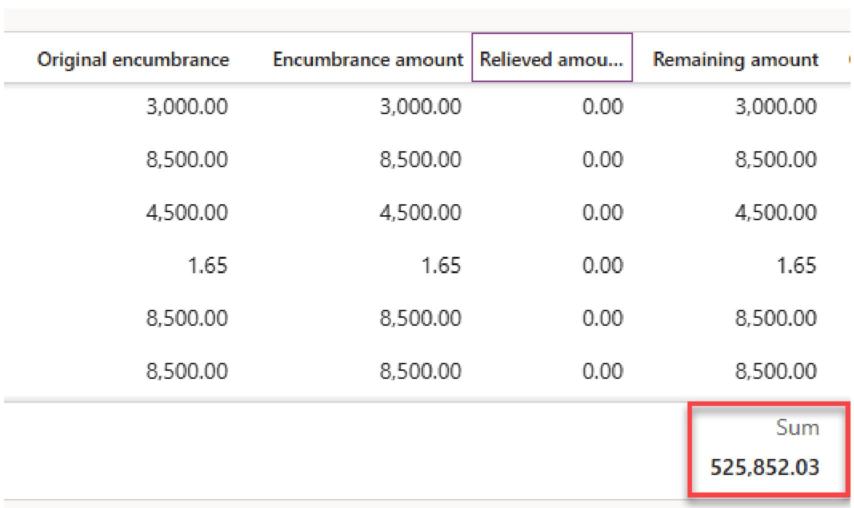
9. Select the ***View column totals***.



View column totals

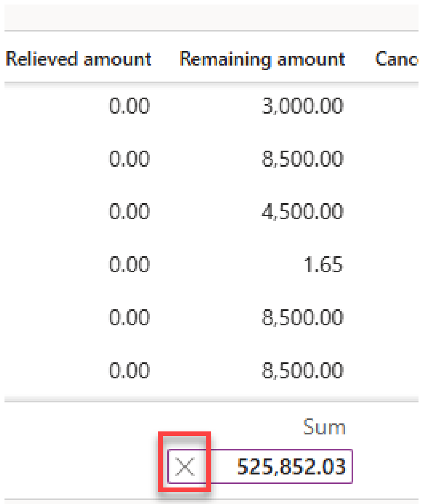
10. The drop down list is displayed.

11. Select ***Sum***.



View column totals

12. The total sum is displayed in the footer of the selected column, example above is the *Remaining amount* column total (Sum equals 525,852.03).



View column totals
13. To remove the sum total, hover over the total sum amount 14. Click the **X** button.

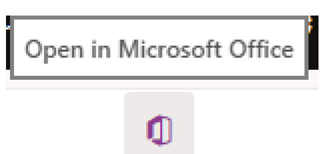
Office Integration – Export

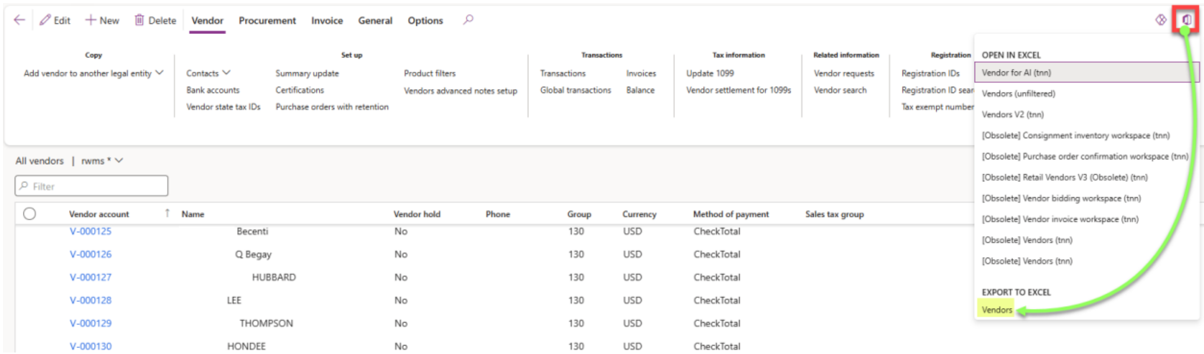
Refers to the ability to export data from Dynamics 365 to Microsoft Excel or other Office apps so users can view, analyze, edit, update, and then publish changes back into the system if user has access. Exported data allows you to:

- Perform independent calculations.
- Add data to information that already exists in other spreadsheets.
- Create polished-looking documents using word processing or spreadsheets.

Export to Excel

The Export to Excel feature lets you save data from a page or entity directly into Microsoft Excel file for viewing, editing, or further analysis. Is a powerful integration that brings your F&SCM data with Excel while maintaining a secure connection back to the system.





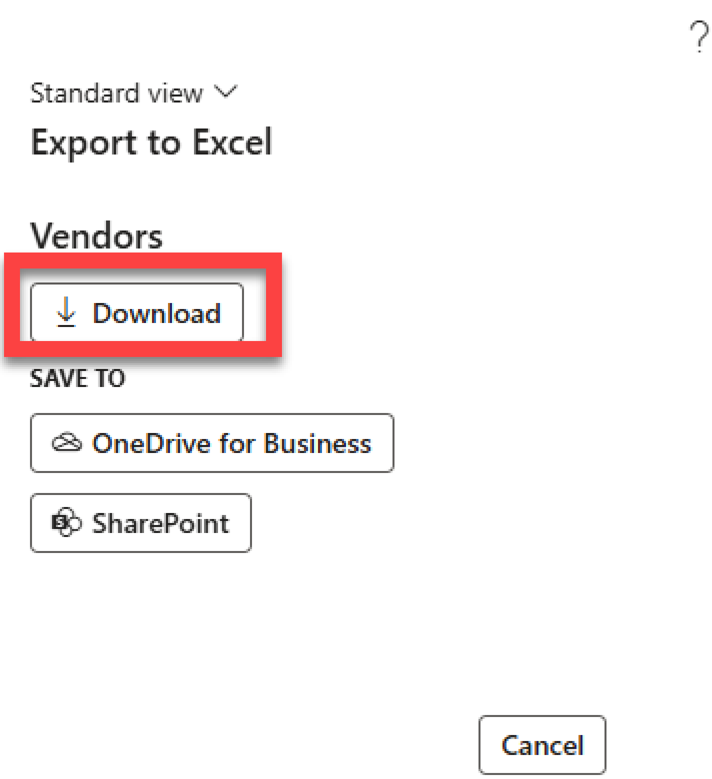
Export to Excel – Open in Excel

Where this option appears on any form with visible data. All grid data for the current filter is exported into a workbook. This allows you to export data to excel.

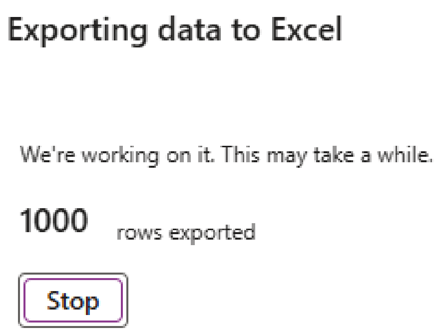
1. Select the ***Open in Microsoft Office*** button.

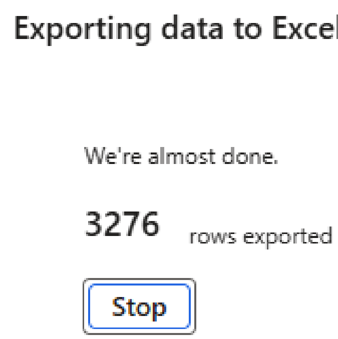
2. View the *EXPORT TO EXCEL* file and find the page.

3. Select file name ***Vendors***.

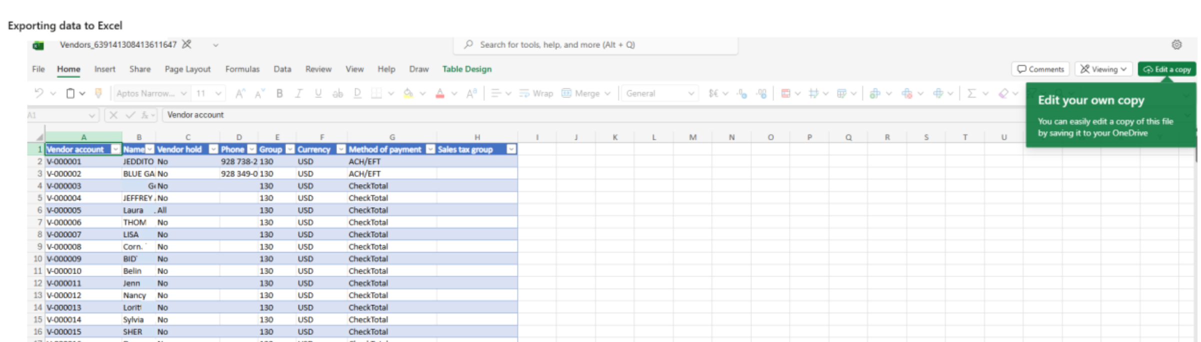


Export to Excel - Grid
A workbook will be generated containing all grid data for the current page. To download data to excel. 1. Click the ***Download*** button. Note: You choose the output format you want to export.



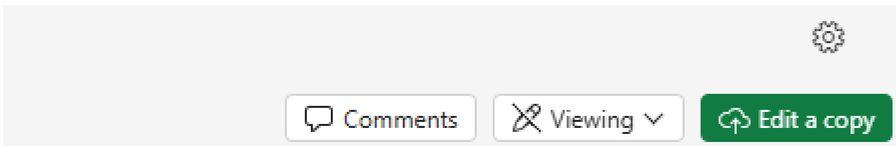


Export to Excel - Grid
Two examples show how the system displays download progress when exporting data to Excel. You also have the option to ***Stop*** the download, which terminates the job.



Export to Excel - Grid

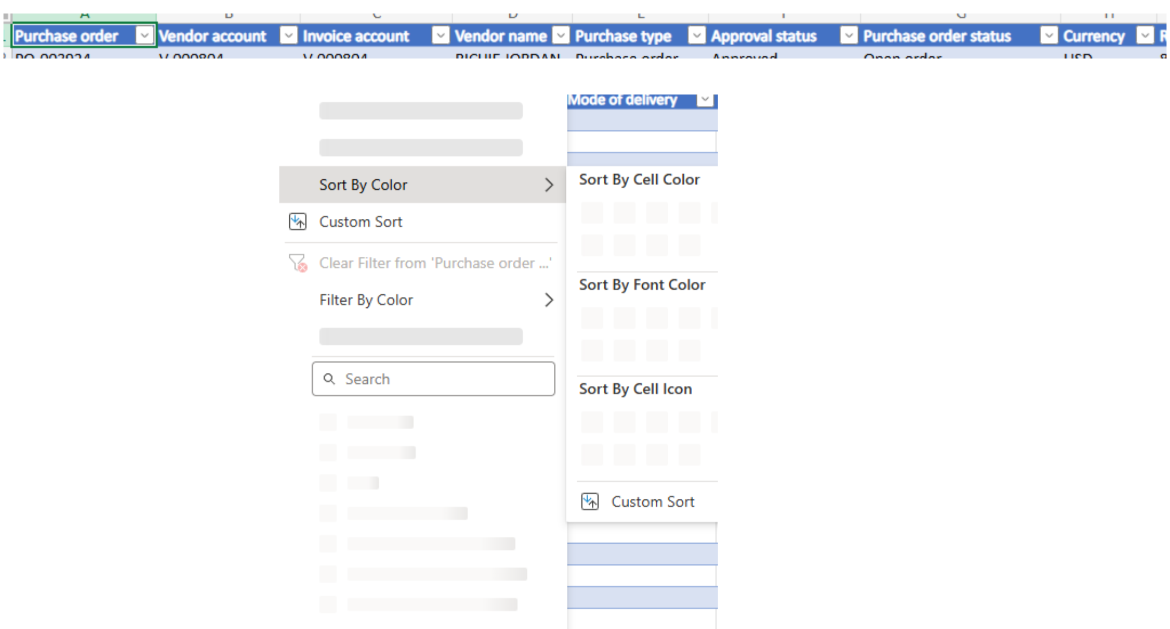
The Microsoft Excel Add-in displays the data formatted into an Excel spreadsheet or workbook. Excel add-in features enables users to work with large datasets in Excel without being inside the F&SCM interface.



Export to Excel - Grid

Additional excel editing functions are available.

Comments – Add comments for this file.
Viewing – Select editing or viewing option.
Settings (gear symbol) – Changes and Update to language, password, contact, accessibility.

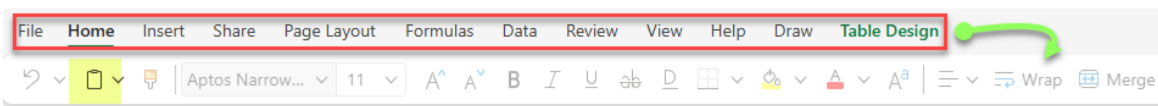


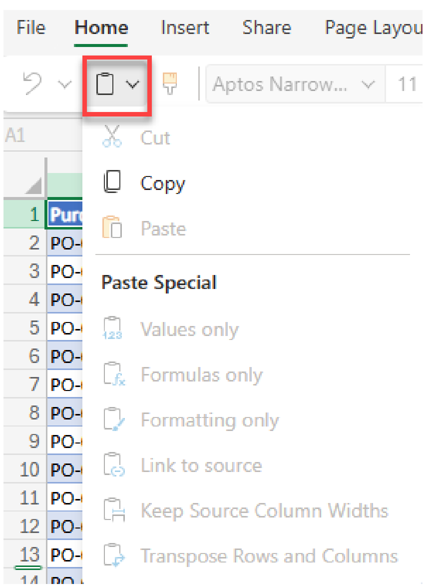
Export to Excel - Grid

Customization allows filtering, sorting, and formatting in Excel before re-importing or sharing.

What's included in the Excel file:

- All selected records from the chosen table are ***filtered*** search results.
- The exported excel file is a snapshop of the data at the time of export.
- Only certain tables are available for export by default.
- The number of records you can export is limited by application parameters.





Export to Excel - Grid

The Excel *toolbar*, also known as the *Ribbon*, organizes commands into tabs such as Home, Insert, or Data, etc., allowing users to efficiently access and perform tasks.

Groups are commands within the *tab* are organized into groups based on related functions.

Command Buttons are clickable buttons that execute specific actions such as Cut, Paste, Copy, and etc.,

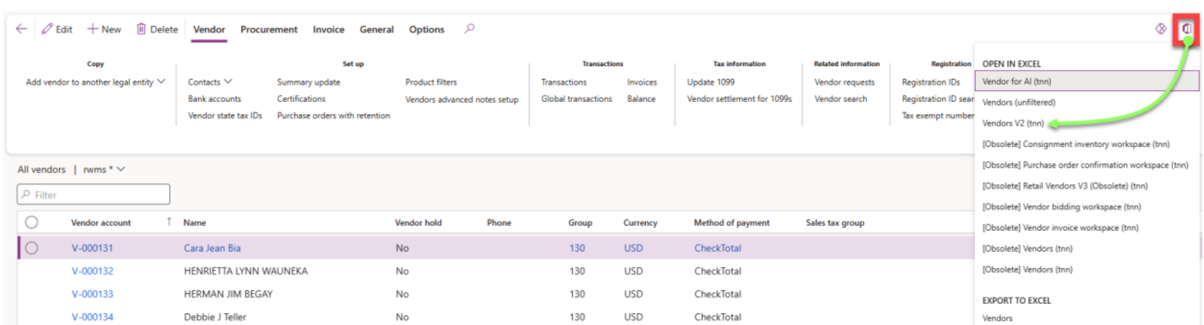
Tab Selection:
When you select a ***tab*** on the toolbar, it highlights the ***group commands*** buttons available for that tab and displays the ***command buttons.***

There are many powerful build-in capabilites within Microsoft Excel's interface that are not fully covered in this manual. Hands-on experience is essential, and well worth learning in depth.

Open in Excel

You can open entity data in Microsoft *Excel* directly from F&SCM. This connects to the Excel-Add-in for real-time editing, and viewing data without leaving Excel, then publish your changes back to F&SCM.

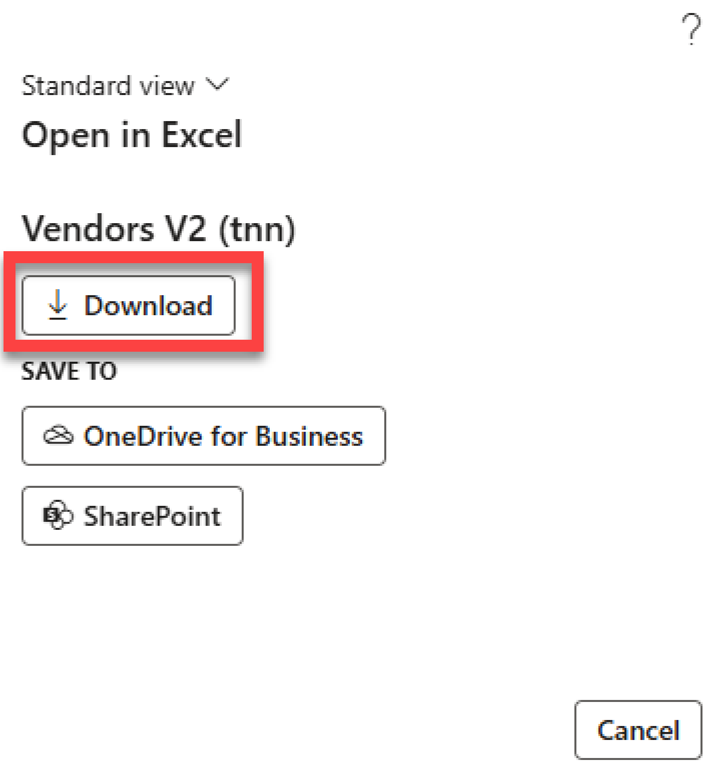
Permissions: Your user role must have create, update and delete rights for the relevant data entity to use this feature.



Open in Excel
Each one corresponds to a visible grid. All the grid data for the current filter is placed into a workbook. To export data to excel. 1. Navigate to the entity page (vendors, credit cards, etc..)

2. Locate and click the ***Open in Microsoft Office*** button.

3. Select the ***OPEN in EXCEL*** file **Vendors V2 (tnn)**.
   Note: This application is open in your F&O page.

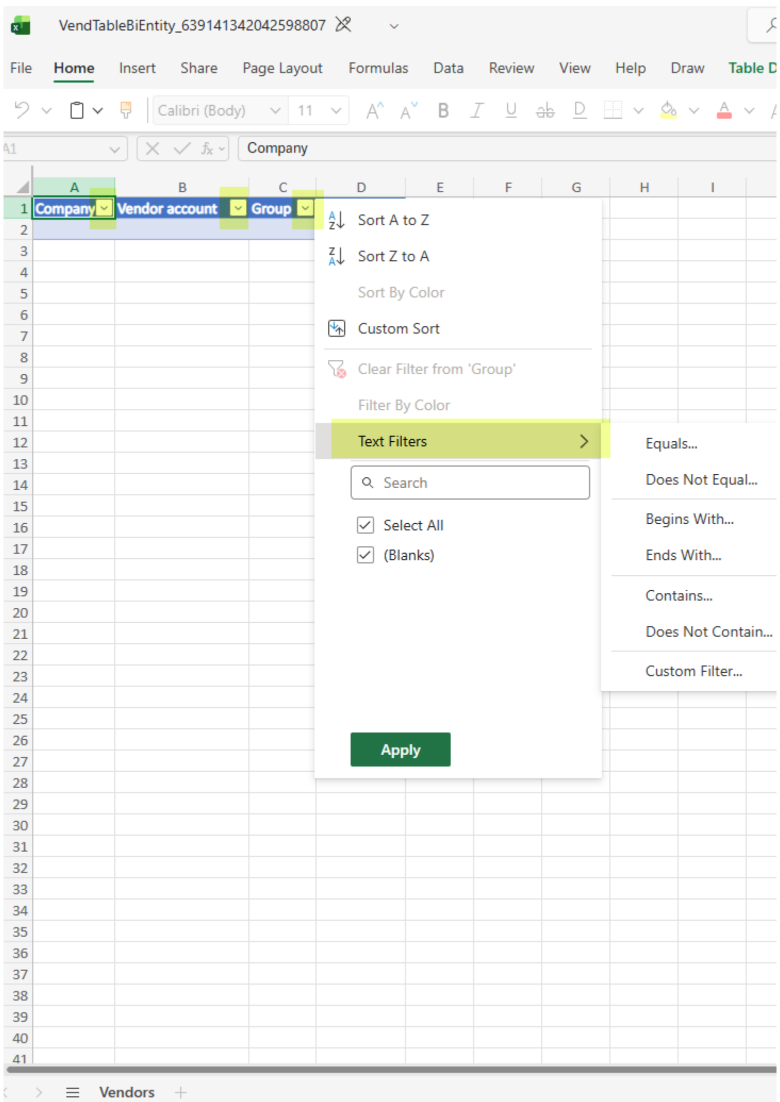


Open in Excel
Excel will download a workbook containing, binding information for the entity, a pointer to your environment, and a pointer to the Excel Add-In. Note: Option ***SAVE TO*** OneDrive for Business and SharePoint are greyed out if you have the TNN-Inquiry Only role. 4. Click the ***Download*** button (or Cancel to exit).

Open in Excel

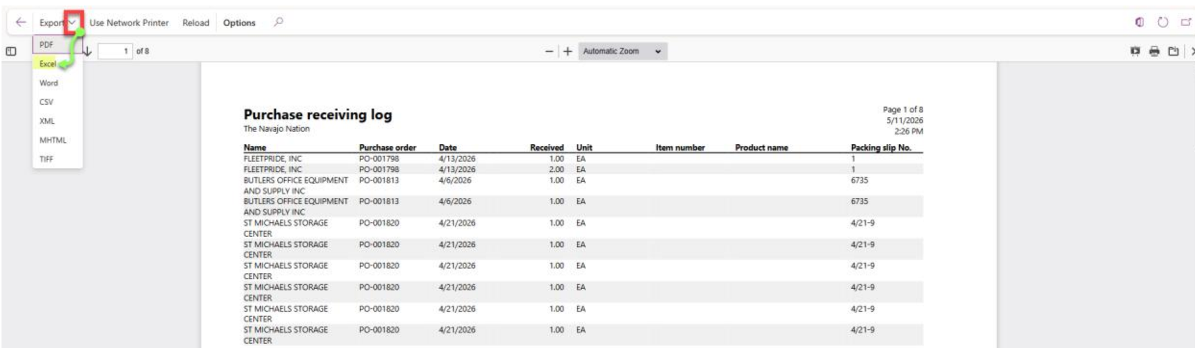
A workbook is generated containing all grid data for the current filter. Excel is open and all the grid data for the current filter is placed into a workbook.

1. Click the ***Edit a copy*** button.

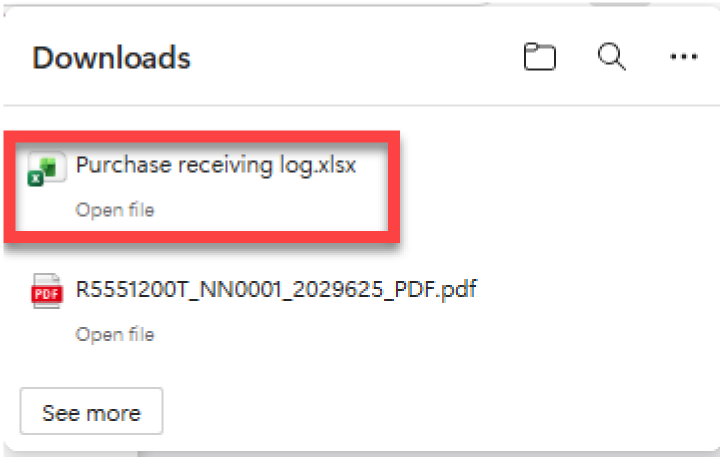


Open in Excel
The Excel add-in workbook is generated based on a predefined template, you can filter data, design the workbook by add, remove columns and refresh the data. 2. To edit a record, change the cell value. 3. Click ***Publish*** to send changes back to F&SCM.

Export Report



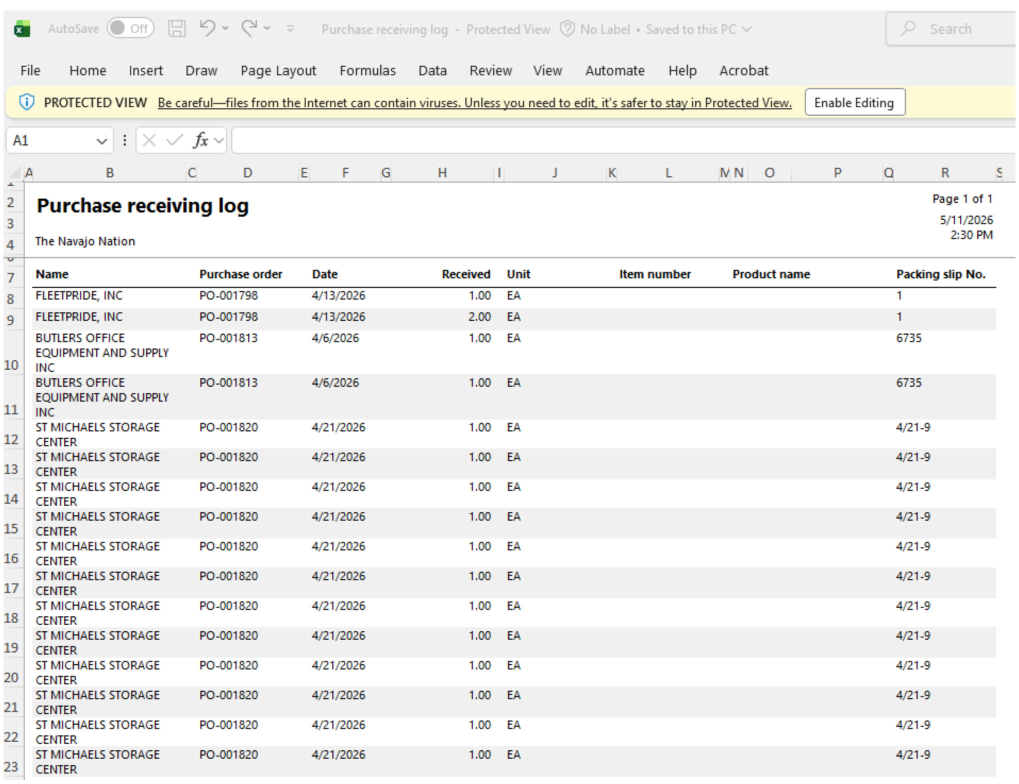
Report - Export to Excel
The Export to Excel options are static exports of grid data. 1. Select the Export *down-arrow* list button. 2. Select *Excel*.



Report - Export to Excel

Each one corresponds to a visible grid.

3. Click the ***Open file*** workbook name *Purchase receiving log.xlsx*.



Purchase receiving log

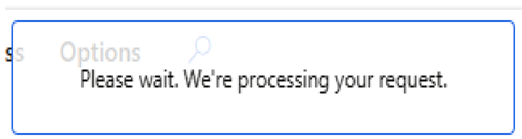
The Navajo Nation

Page 1 of 1
5/11/2026
2:30 PM

Name	Purchase order	Date	Received	Unit	Item number	Product name	Packing slip No.
FLEETPRIDE, INC	PO-001798	4/13/2026	1.00	EA			1
FLEETPRIDE, INC	PO-001798	4/13/2026	2.00	EA			1
BUTLERS OFFICE EQUIPMENT AND SUPPLY INC	PO-001813	4/6/2026	1.00	EA			6735
BUTLERS OFFICE EQUIPMENT AND SUPPLY INC	PO-001813	4/6/2026	1.00	EA			6735
ST MICHAELS STORAGE CENTER	PO-001820	4/21/2026	1.00	EA			4/21-9
ST MICHAELS STORAGE CENTER	PO-001820	4/21/2026	1.00	EA			4/21-9
ST MICHAELS STORAGE CENTER	PO-001820	4/21/2026	1.00	EA			4/21-9
ST MICHAELS STORAGE CENTER	PO-001820	4/21/2026	1.00	EA			4/21-9
ST MICHAELS STORAGE CENTER	PO-001820	4/21/2026	1.00	EA			4/21-9
ST MICHAELS STORAGE CENTER	PO-001820	4/21/2026	1.00	EA			4/21-9
ST MICHAELS STORAGE CENTER	PO-001820	4/21/2026	1.00	EA			4/21-9
ST MICHAELS STORAGE CENTER	PO-001820	4/21/2026	1.00	EA			4/21-9
ST MICHAELS STORAGE CENTER	PO-001820	4/21/2026	1.00	EA			4/21-9
ST MICHAELS STORAGE CENTER	PO-001820	4/21/2026	1.00	EA			4/21-9
ST MICHAELS STORAGE CENTER	PO-001820	4/21/2026	1.00	EA			4/21-9
ST MICHAELS STORAGE CENTER	PO-001820	4/21/2026	1.00	EA			4/21-9

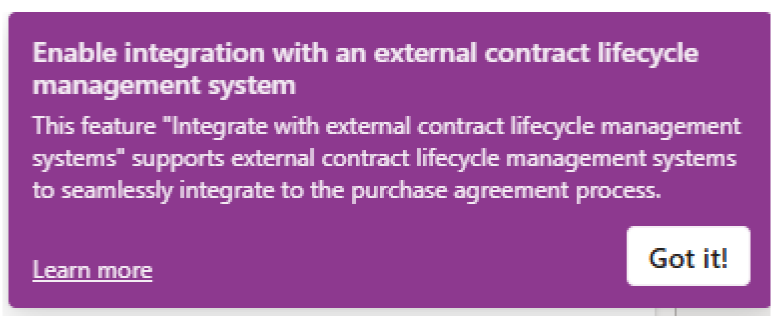
Report - Export to Excel
You can *Enable Editing* to the exported excel file workbook.

Data Processing



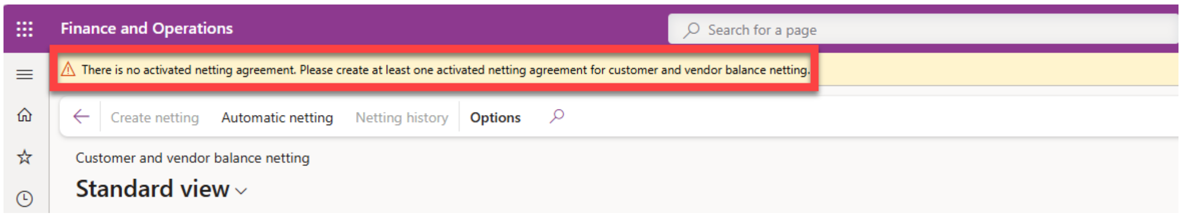
Processing data to retrieve
This screen indicates the system is retrieving data transaction and will display it shortly.

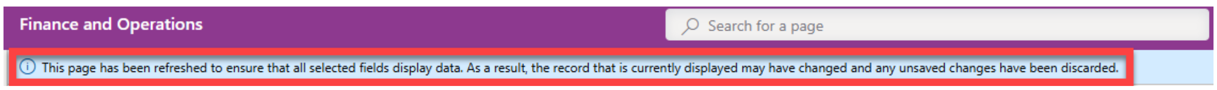
Feature Callouts



Feature Callouts
In F&O a feature callout is a built-in user interface mechanism. ***Feature callouts*** point out new capabilities to raise awareness. Users encounter them while using the application. Optionally provides a “Learn more” hyperlink to documentation or help content. 1. To dismiss the popup, simply click the ***Got it!*** button.

Notifications

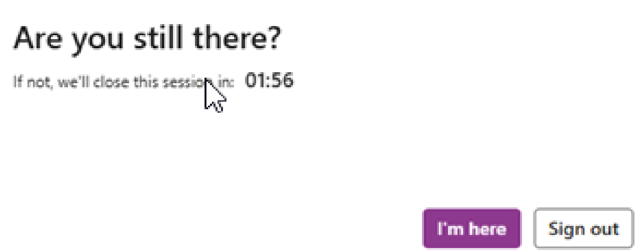




Notifications – Message Bar

Notifications are alerts or messages sent to the users when specific events orrur in the system. They help keep users informed about important changes, deadlines, or compliance issues so they can repond promptly.

Examples of two messages shown above as message strings that appear over the interface. Users can dismiss the message by clicking the **X** at the end of the message.

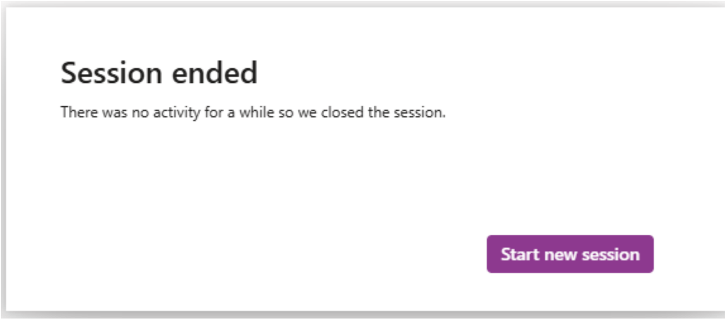


Notifications – Message Box

Are you still there? message is a presence check. It appears when the interface becomes idle. To continue you must interacted with the message before you can continue.

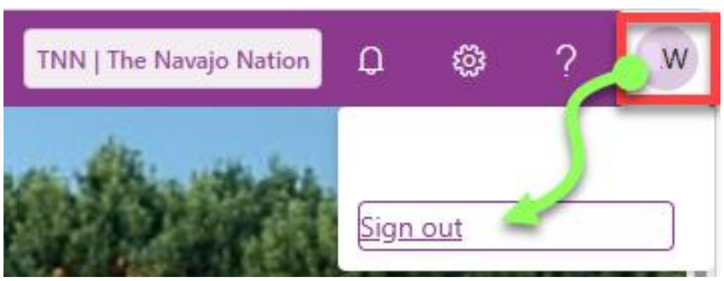
1. Click the ***I'm here*** button to continue session in F&O.

2. Click ***Sign out*** to exit the F&O system.

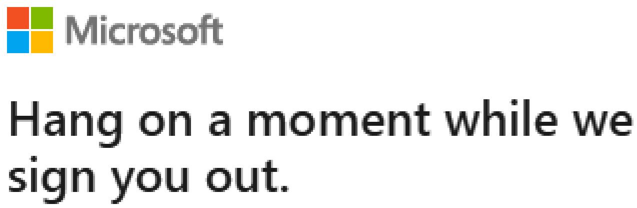


Notifications – Message Box
Session ended message appears over the interface when your F&O terminates with no activity. To continue you must interacted with the message before you can continue. 1. Click the ***Start new session*** button to continue session.

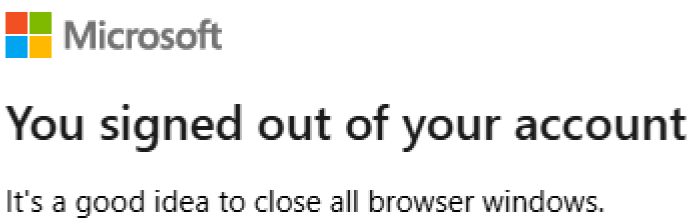
Signing Out



Notifications – Sign Out
By following these steps, you will securely disconnect from F&SCM and ensure your session terminated. Look for the user account in the top-right corner, a circle with your initials. To sign out of the Finance and Operations: 1. ***Click*** the circle with your initials on the navigation bar. 2. Select ***Sign out***.



Notifications – Sign Out
3. Follow the prompt message to ensure you are fully logged out.



Notifications – Sign Out
4. Microsoft confirms you have successfully sign out of your active session in *TNN Finance & Operations acc*ount.

Note: Some of the topics described in this manual may be limited for you based on your F&SCM users' role or because certain content was recorded from a previous environment.

Environment Differences:
F&SCM uses multiple system environments, each designed for a specific purpose. While they may look similar, each environment serves a different function and contains different data, settings or configurations.

Other Resources

- Training Manuals
- Quick Reference Guides (QRG) Handouts
- Online How to Guides

Visit our OOC website: F&SCM/FMIS

- Division Train-the-Trainer List
- F&SCM Presentations

FMIS Technical Support email

- ooc.fmissupportteam@navajo-nsn.gov