

Microsoft Dynamics® AX

# Documentation resources for Microsoft Dynamics AX 2012

White Paper

This white paper provides an overview of the Microsoft Dynamics AX documentation for IT administrators, developers, and users. This document contains links to documentation resources.

Date: August 2011

<http://go.microsoft.com/fwlink/?LinkId=182418>



---

## Table of Contents

<b>Introduction.....</b>	<b>3</b>
<b>Documentation resources for users .....</b>	<b>3</b>
<b>Documentation resources for IT administrators.....</b>	<b>5</b>
<b>Documentation for developers .....</b>	<b>8</b>

## Introduction

This document provides an overview of Microsoft Dynamics® AX documentation and related links for the documentation artifacts that are mentioned. You can use this document to obtain information about documentation resources for users, IT administrators, and developers.

Microsoft Dynamics AX documentation is currently available from the Help menu in the Microsoft Dynamics AX client, from the [TechNet](#) library, and from [MSDN](#). Additional technical documentation, including technical white papers and Knowledge Base articles, is available on [CustomerSource](#) and [PartnerSource](#).

## Documentation resources for users

All documentation for users is available on the TechNet library site. Some of this information is also available in the Microsoft Dynamics AX client and in Enterprise Portal for Microsoft Dynamics AX. User documentation is updated with new content periodically and is available through [TechNet](#), [CustomerSource](#), and [PartnerSource](#).

Microsoft Dynamics AX 2012 documentation	Location	Description
TechNet Library for the application user	<a href="#">TechNet</a> library	Use the TechNet library to find comprehensive help for Microsoft Dynamics AX 2012.  The TechNet library provides the most up-to-date content for application users. Content is updated in response to feedback.
New, Changed, and Deprecated Features for Microsoft Dynamics AX 2012	PDF – Download from <a href="#">Download Center</a>	Lists enhancements to accounting and business process functionality, organized by module, as well as overall technology and user interface improvements. This document is a one-stop, high-level guide to the improvements in Microsoft Dynamics AX 2012.
Application user help	Help menu (Application user Help)	Includes business process overviews, concepts, how-to topics, and form help.
Glossary	Help menu (Glossary)	Defines the key terms and concepts in the Microsoft Dynamics AX product.
Introduction to Microsoft Dynamics AX 2012	Help menu (Application user Help)	Provides information about working with the Microsoft Dynamics AX user interface and Enterprise Portal. Accessibility features are also discussed.
About Help in Microsoft Dynamics AX		Describes the features of the Help system for users.
Configuring product-wide features		Explains how to set up features that are used throughout Microsoft Dynamics AX, including number sequences, organizational hierarchies, calendars, dates, time zones, alerts, workflow, email, address books, document management, electronic signatures, foreign trade, and processing batch jobs.
Productivity tools for end users		Explains how to use tools such as shortcut keys, search, Role Centers, list pages, directory views, records and record templates, integration with Microsoft Office®, automatic documentation, reporting and analytics, alerts, workflow, questionnaires, and printing and sending documents.
Accounts payable		Provides information about how to set up and use Accounts payable. This includes parameters, vendors, vendor invoices, vendor payments, and settlements.

Accounts receivable	Help menu (Application user Help)	Provides information about how to set up and use Accounts receivable. This includes parameters, customers, customer invoices, free text invoices, customer payments, settlements, and collections.
General ledger		Provides information about how to set up and use General ledger. This includes parameters, the chart of accounts, financial dimensions, journals, and closing.
Budgeting		Provides information about how to set up and use Budgeting. This includes basic budgeting, budget control, encumbrances and pre-encumbrances.
Cost accounting		Provides information about how to set up and use Cost accounting. This includes normal costing, standard costing, and absorption costing.
Fixed assets		Provides information about how to set up and use Fixed assets. This includes acquisitions, depreciation, capitalization, disposal, lifetimes, write-ups and write-downs of fixed assets.
Cash and bank management		Provides information about how to set up and use Cash and bank management. This includes bank accounts, deposit slips, checks, bills of exchange, and promissory notes.
Procurement and sourcing		Provides information about how to set up and use Procurement and sourcing. This includes vendor onboarding, purchasing policies, purchase agreements, purchase requisitions, purchase orders, product receipts, and vendor analysis.
Human resources		Provides information about how to set up and use Human resources. This includes organizational structures, worker information, time clock, performance improvement, training, recruitment, onboarding, and offboarding.
Sales and marketing		Provides information about how to set up and use Sales and marketing. This includes prospects, leads, opportunities, sales personnel, electronic correspondence, marketing campaigns, sales orders, picking lists, and packing slips.
Travel and expense		Provides information about how to set up and use Travel and expense. This includes workflow for employee spending on business-related expenses, expense policies, and reimbursement.
Compliance and internal controls		Provides information about how to set up and use Compliance and internal controls. This includes environmental sustainability and audit cases.
Project management and accounting		Provides information about how to set up and use Project management and accounting. This includes project quotations, projects, project contracts, funding sources, project budgets, timesheets, expense reports, and project analysis.
Inventory and warehouse management		Provides information about how to set up and use Inventory and warehouse management. This includes inbound and outbound operations, quality assurance, warehouse activities, and inventory control.
Product information management		Provides information about how to set up and use Product information management. This includes defining products and product variants, items, services and Product configurator.

Master planning	Help menu (Application user Help)	Provides information about how to set up and use Master planning. This includes forecast scheduling, master scheduling, planned orders, and kanbans.
Production control		Provides information about how to set up and use Production control. This includes production schedules, material and route consumption, production feedback, production costs, kanbans for lean manufacturing, and batch orders for process industries.
Service management		Provides information about how to set up and use Service management. This includes service agreements, service subscriptions, service orders, customer inquiries, and analysis of the delivery of services to customers.
Public sector		Provides information about how to set up and use Public sector functionality. This includes fund accounting, preliminary budgets, apportionments, commitments, billing codes, billing classifications, encumbrances and commitments on purchase orders, electronic payments to vendors, signature pages for payment reports, and invoice payment holds.
Enterprise Portal Help	Enterprise Portal Help icon	Includes concepts and how-to topics for each page in Enterprise Portal. Also includes configuration information for the Compliance site.

## Documentation resources for IT administrators

Comprehensive documentation for IT administrators is available on the TechNet Library. Additional information is also available in the Microsoft Dynamics AX client, downloadable PDF guides, and on online web pages. The TechNet Library is updated with new content periodically.

Microsoft Dynamics AX 2012 documentation	Location	Description
TechNet Library for the system administrator	<a href="#">TechNet</a> library	Use the TechNet library as your first “go to” resource for the documentation for IT administrators. The TechNet library provides comprehensive information for the IT administrator. This includes implementation planning, installation, configuration, and maintenance of Microsoft Dynamics AX.
Implementation Guide	PDF – Download from <a href="#">Download Center</a>	Provides information about system architecture, implementation planning, and system topologies.
Installation Guide	PDF – Download from <a href="#">Download Center</a>	Provides step-by-step instructions for installing Microsoft Dynamics AX 2012 components.
Upgrade Guide	PDF – Download from <a href="#">Download Center</a>	Provides instructions for upgrading to Microsoft Dynamics AX 2012 from earlier versions.

Microsoft Dynamics AX 2012  
white papers

PDF – Download  
from Download  
Center

[Code Upgrade Overview for Microsoft Dynamics AX 2012](#)

[Consuming Web Services in Microsoft Dynamics AX 2012](#)

[Credit Card Processing for Microsoft Dynamics AX 2012](#)

[Date effective patterns in Microsoft Dynamics AX 2012](#)

[Deploying customizations across Microsoft Dynamics AX 2012 environments](#)

[Developing solutions in a shared AOS development environment](#)

[Developing with Table Inheritance in Microsoft Dynamics AX 2012](#)

[Eventing in Microsoft Dynamics AX 2012](#)

[Implementing and Extending the Organization Model in Microsoft Dynamics AX 2012](#)

[Implementing and Updating the Human Resources Framework for Microsoft Dynamics AX 2012 Applications](#)

[Implementing Budgeting for Microsoft Dynamics AX 2012 Applications](#)

[Implementing InventTrans Refactoring for Microsoft Dynamics AX 2012 Applications](#)

[Implementing the Account and Financial Dimensions Framework for Microsoft Dynamics AX 2012 Applications](#)

[Implementing the Address Book Framework for Microsoft Dynamics AX 2012 Applications](#)

[Implementing the Budget Control Framework for Microsoft Dynamics AX 2012 Applications](#)

[Implementing the Item-Product Data Management Framework for Microsoft Dynamics AX 2012 Applications](#)

[Implementing the Operations Resource Model for Microsoft Dynamics AX 2012 Applications](#)

[Implementing the tax framework in Microsoft Dynamics AX 2012](#)

[Integrating Microsoft Dynamics AX 2012 with Microsoft BizTalk Server 2010](#)

[Lean Manufacturing: Kanban](#)

[Lean Manufacturing: Production Flows and Activities](#)

[Mapping the LedgerTrans table to general journal tables](#)

[Microsoft Project Server 2010 Integration with Microsoft Dynamics AX 2012](#)

[Migrating Extended Data Type Relations in Microsoft Dynamics AX 2012](#)

[Securing data by dimension value by using extensible data security \(XDS\)](#)

[Services in Microsoft Dynamics AX 2012](#)

Microsoft Dynamics AX 2012 white papers, continued	PDF – Download from Download Center	<a href="#">Shared Currencies and Exchange Rates for Microsoft Dynamics AX 2012</a> <a href="#">Updating the Uses of the Ledger Posting Framework for Microsoft Dynamics AX 2012</a> <a href="#">Using the Enhanced Number Sequence Framework in Microsoft Dynamics AX 2012</a> <a href="#">Using the Policy Framework in Microsoft Dynamics AX 2012</a> <a href="#">Using the refactored formletter framework</a>
Knowledge Base articles	Online	Searching for the <a href="#">Knowledge Base</a> articles requires access to <a href="#">PartnerSource</a> or <a href="#">CustomerSource</a> . CustomerSource is a password-protected site for customers using Microsoft Dynamics and related business products. PartnerSource is a password-protected site for partners who focus on Microsoft Dynamics and related products. Both sites require you to log on.
Discussion lists	<a href="#">Microsoft Dynamics AX community</a> web page	Visit the Microsoft Dynamics community for Microsoft Dynamics AX.
Microsoft Dynamics AX blogs	<a href="#">Community</a> tab in the Developer Center  Click <b>Blogs</b> on the <a href="#">Microsoft Dynamics AX community</a> Web page	The Community page lists some blogs owned by feature teams and individuals in the Microsoft Dynamics AX product team, and also some blogs owned by community members.  Blogs are also highlighted on the <a href="#">Home page</a> of the Developer Center.  The community blogs are authored by Microsoft employees, Microsoft Dynamics AX Most Valuable Professionals (MVPs), and other community members.

## Documentation resources for developers

All documentation for developers is available on MSDN.

The [Microsoft Dynamics AX Developer Center](#) provides access to the MSDN Library for Microsoft Dynamics AX, and to whitepapers, forums, and blogs. The library is updated with new content periodically, and you can subscribe to a notification of these updates using the RSS feed available on the home page of the Developer Center.

Microsoft Dynamics AX 2012 documentation	Location	Description
MSDN Library for Microsoft Dynamics AX 2012	<a href="#">Library</a> tab in the Developer Center	The MSDN library contains documentation for developers who want to customize or extend Microsoft Dynamics AX. The content includes a description of how to work with forms, reports, navigation pages, Enterprise Portal, Services & Application Integration Framework (AIF), Workflow, and Business Intelligence. There is also an X++ Language Programming Guide, and a Programming Reference section that describes APIs, tables, and data types.
What's New in Microsoft Dynamics AX 2012 for Developers	<a href="#">Download Center</a>	Describes new and changed developer features in Microsoft Dynamics AX 2012.
Readiness white papers for developers	Download Center	<a href="#">Developing Extensible Data Security Policies for Microsoft Dynamics AX 2012</a> <a href="#">Selecting the Best Development Technology for Your Application Development Scenario</a> <a href="#">Consuming Web Services in Microsoft Dynamics AX 2012</a> <a href="#">Services in Microsoft Dynamics AX 2012</a> <a href="#">Enterprise Portal Development Cookbook for Microsoft Dynamics AX 2012</a> <a href="#">Microsoft Dynamics AX Tables and Table Groups</a>
White papers for developers	<a href="#">Downloads</a> tab in the Developer Center	The Downloads tab lists the white papers that are available for developers and that supplement the content available in the MSDN library.
Discussion lists	<a href="#">Community</a> tab in the Developer Center	Provides access to the Microsoft Dynamics AX forum and a number of community discussion lists and forums.
Microsoft Dynamics AX blogs	<a href="#">Community</a> tab in the Developer Center	The Community page lists some blogs owned by feature teams and individuals on the Microsoft Dynamics AX product team, and also some blogs owned by community members and MVPs.  Blogs are also highlighted on the <a href="#">Home page</a> of the Developer Center.

---

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

U.S. and Canada Toll Free 1-888-477-7989

Worldwide +1-701-281-6500

[www.microsoft.com/dynamics](http://www.microsoft.com/dynamics)

This document is provided for informational purposes only and Microsoft makes no warranties, either express or implied, in this document. Information in this document, including URL and other Internet Web site references, is subject to change without notice. The entire risk of the use or the results from the use of this document remains with the user. Unless otherwise noted, the companies, organizations, products, domain names, e-mail addresses, logos, people, places, and events depicted in examples herein are fictitious. No association with any real company, organization, product, domain name, e-mail address, logo, person, place, or event is intended or should be inferred. Complying with all applicable copyright laws is the responsibility of the user. Without limiting the rights under copyright, no part of this document may be reproduced, stored in or introduced into a retrieval system, or transmitted in any form or by any means (electronic, mechanical, photocopying, recording, or otherwise), or for any purpose, without the express written permission of Microsoft Corporation.

Microsoft may have patents, patent applications, trademarks, copyrights, or other intellectual property rights covering subject matter in this document. Except as expressly provided in any written license agreement from Microsoft, the furnishing of this document does not give you any license to these patents, trademarks, copyrights, or other intellectual property.

© 2011 Microsoft Corporation. All rights reserved.

Microsoft, the Microsoft Dynamics Logo, Microsoft Dynamics are either registered trademarks or trademarks of the Microsoft group of companies.

All other trademarks are property of their respective owners.

**Microsoft**