

Microsoft Dynamics® AX

Documentation resources for Microsoft Dynamics AX 2009

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: September 12, 2009

<http://www.microsoft.com/dynamics/en/us/using/ax-using.aspx>



Table of Contents

Introduction.....	3
Documentation resources for users	3
Documentation resources for IT administrators.....	4
Documentation for developers	6

Introduction

This document provides an overview for Microsoft Dynamics AX documentation and related links for documentation artifacts 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, on the [Using Microsoft Dynamics AX](#) site, from the [TechNet](#) library, and from the [MSDN](#). Additional technical documentation, including technical white papers and KnowledgeBase articles, is available on the [Using Microsoft Dynamics AX](#) site, [CustomerSource](#) and [PartnerSource](#).

Documentation resources for users

All documentation for users is available on the Using Microsoft Dynamics AX Web site. Some of this information is also available in the Microsoft Dynamics AX client and in Enterprise Portal. User documentation is updated with new content periodically and is available through CustomerSource and PartnerSource.

Microsoft Dynamics AX 2009 documentation	Location	Description
What's New in Microsoft Dynamics AX 2009	PDF or XPS – Download from the Using Microsoft Dynamics AX site	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 2009.
Application and Business Processes help	Help menu (Applications and Business Processes)	Includes business process overviews, concepts, how-to topics, form help, and report help. Updated versions are available on CustomerSource and PartnerSource .
Enterprise Portal Administration	Help menu (Enterprise Portal Administration)	Includes information related to configuration settings for Enterprise Portal that are entered in the Microsoft Dynamics AX client. Updated versions are available on CustomerSource and Partner Source .
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.
Financial setup	Help menu (System and application setup)	Provides information about how to set up the Finance modules, which include Accounts payable, Accounts receivable, Bank, Fixed assets, and General ledger.
Supply chain management setup		Provides information about how to set up the modules that are used for managing the supply chain. These include Inventory management, Purchasing, Production, Master planning, Product builder, Shop floor control, and Customer service.
Human resources setup		Provides information about how to set up the Human Resources module.
Sales and marketing setup		Provides information about how to set up the Sales and marketing module, also known as CRM.
Expense management setup		Provides information about how to set up the Expense management module.
Project accounting		Provides information about how to set up the Project module.

Questionnaire setup		Provides information about how to set up the Questionnaire module.
Role Center Reference	Web page on the Using Microsoft Dynamics AX site	Includes information about the default Role Centers that are included with Microsoft Dynamics AX. You can view a brief overview of the roles, and then download a document that includes details about the default information that is displayed on the Role Center for specific roles.
Known issues	Web page on CustomerSource and PartnerSource .	Lists late-breaking issues with the Microsoft Dynamics AX 2009 release.
Technical white papers	PDF or XPS - Download from the Using Microsoft Dynamics AX site, CustomerSource , or PartnerSource	Links for most white papers are available from the Resources for installing, upgrading, and administering Microsoft Dynamics AX 2009 page on the Using Microsoft Dynamics AX 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 2009 documentation	Location	Description
System requirements	Web page	Available from the Using Microsoft Dynamics AX site.
TechNet Library for the system administrator	TechNet 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 or XPS - Download from the Using Microsoft Dynamics AX site	Provides information about system architecture, implementation planning, and system topologies.
Installation Guide		Provides step-by-step instructions for installing Microsoft Dynamics AX 2009 components.
Server and Database Administration Guide		Provides information about administering Microsoft Dynamics AX.
Enterprise Portal Administration Guide		Describes how to set up and administer Enterprise Portal after it has been installed.
Upgrade Guide		Provides instructions for upgrading to Microsoft Dynamics AX 2009 from earlier versions.
Known issues		Lists late-breaking issues with the Microsoft Dynamics AX 2009 release.
Setting up and maintaining system parameters	Help menu (System and application setup)	Provides information about configuring the data crawler, user defaults, alerts, and print management.

Setting up and maintaining security		Provides information about managing users, groups, and security permissions.
Business intelligence and reporting setup		Provides instructions to set up and manage business intelligence and reporting.
Enterprise Portal setup		Provides instructions to set up and manage Enterprise Portal.
Setting up and maintaining Role Centers		Provides instructions to set up and manage Role Centers.
Setting up and maintaining Workflow		Provides instructions to set up and manage Workflow.
Enterprise Portal Administration	Help menu (Enterprise Portal Administration)	Includes information related to configuration settings for Enterprise Portal that are entered in the Microsoft Dynamics AX client. Updated versions are available on CustomerSource and Partner Source .
Managing Application Object Server (AOS)	Server and Database Administration Guide PDF or XPS – Download from the Using Microsoft Dynamics AX site	Provides instructions and topics for each component or subject listed in this section.
Managing Microsoft Dynamics AX Windows client		
Managing Business Connector		
Importing and exporting data		
Maintenance and data recovery		
Optimizing performance		
Modifying or uninstalling Microsoft Dynamics AX		
Configuring and managing AIF		
Microsoft Dynamics AX Cube Reference	PDF or XPS – Download from the Using Microsoft Dynamics AX site	Provides reference information about the default analysis cubes that are included with Microsoft Dynamics AX.
Technical white papers on Microsoft Download Center	PDF or XPS Download from the Using Microsoft Dynamics AX site, CustomerSource , or PartnerSource	Provides links for most white papers that are available from the Using Microsoft Dynamics AX site.
Knowledge Base articles	Online	Searching for the Knowledge Base articles requires access to PartnerSource or CustomerSource . 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	Microsoft Dynamics AX community Web page	Visit the Microsoft Dynamics community for Microsoft Dynamics AX.
Microsoft Dynamics AX blogs	Community tab in the Developer Center	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 Home page of the Developer Center.
	Click Blogs on the Microsoft Dynamics AX community Web page	The community blogs are authored by Microsoft employees, Microsoft Dynamics AX Most Valuable Professionals (MVPs), and other community members.
Implementation methodology	Online	The Microsoft Dynamics AX implementation methodology, SureStep, describes implementation and process best practices for partners working with Microsoft Dynamics AX. Download SureStep from PartnerSource .

Documentation for developers

All documentation for developers is available on MSDN. Some of this information is also available in the Microsoft Dynamics AX client and in Microsoft Visual Studio.

The [Microsoft Dynamics AX Developer Center](#) provides access to the MSDN Library for Microsoft Dynamics AX, and to whitepapers, videos, discussion lists, 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 2009 documentation	Location	Description
MSDN Library for Microsoft Dynamics AX 2009	Library 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, 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.
White papers for developers	Downloads tab in the Developer Center	The Downloads tab lists the white papers available for developers. These supplement the content available in the MSDN library. The Downloads tab also lists other resources that can be downloaded, such as the Changed Elements list, which lists the elements that have changed between Microsoft Dynamics AX 4.0 SP2 and Microsoft Dynamics AX 2009, User Experience Guidelines for AX 2009, and the <i>Inside Microsoft Dynamics AX 4.0</i> eBook.

Videos for developers	The How Do I Video Series page available from the Learn tab in the Developer Center	The "How Do I" videos are short presentations that describe diverse features in Microsoft Dynamics AX 2009, such as: <ul style="list-style-type: none"> • How do I: Create a Custom AIF Pipeline Components? • How do I: Use X++ SQL Statements? • How do I: Create a Simple List Page in Enterprise Portal? • How do I: Troubleshoot Role Center Reporting Errors?
Discussion lists	Community tab in the Developer Center	There are five Microsoft Dynamics AX newsgroups, and also a number of community discussion lists.
Microsoft Dynamics AX blogs	Community 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. Blogs are also highlighted on the Home page 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

The information contained in this document represents the current view of Microsoft Corporation on the issues discussed as of the date of publication. Because Microsoft must respond to changing market conditions, this document should not be interpreted to be a commitment on the part of Microsoft, and Microsoft cannot guarantee the accuracy of any information presented after the date of publication.

This document is for informational purposes only. MICROSOFT MAKES NO WARRANTIES, EXPRESS, IMPLIED, OR STATUTORY, AS TO THE INFORMATION IN THIS DOCUMENT.

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.

© 2009 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.

The Microsoft logo, consisting of the word "Microsoft" in a bold, sans-serif font.