APPENDIX B: TERMINOLOGY LIST

The section contains an alphabetical list of some of the common terms used in Microsoft® Business Solutions–Navision® and within this manual.

Active – Used to describe the window or button that is being used or is selected. Only one window or one button can be active at a time. When a window is active, the color of the title bar changes to assist you in determining which window is active. When a button is active, the name changes color.

Application Area – One of the main functional areas of the program in which a user selects to work, e.g. General Ledger, Inventory, etc.

Application Window – The window in the program on which the rest of the work in the program is based. In Navision, it is the empty area where all windows are opened, and where the program, company and database names appear, as well as the menu bar and Toolbar.

Arrow Keys – A group of keys on the keyboard used to move up, down, to the right and to the left; these keys can be used instead of the mouse to move through the program.

AssistButton – One of four buttons that are accessed using the F6 function key; Drill-down, Look Up, Options and Ellipsis.

Backup – A file you create which contains a copy of your data.

Batch job – A routine that processes selected entries according to general or specific guidelines. Examples include Close Income Statement.

BLOB – An acronym for Binary Large Object, used to store bitmaps such as a logo.

Boolean – A data type that is used to indicate one of two values: TRUE or FALSE; a typical use may be in a Check Box field.

Browse – Move within a window or from window to window on the screen, one way to browse would be to use the recorder buttons.

Button – Buttons are found in almost all of the windows and dialog boxes in the program. They may be Ordinary buttons such as OK, Yes and No. They may be Function buttons which initiate a function, batch job or report. In addition, there are Menu buttons which have a downward-pointing triangle on them and they are found on the majority of windows. When clicked, they display a menu from which you can, for example, select a function, open a different window or open a submenu.

Card Windows – A data view which shows information about one customer, vendor, item, etc. Card Windows generally have a series of tabs at the top. See Tabular Window.

Check Boxes – Boolean fields that are used to indicate a function is turned on when checked and not turned on if left blank.

Clear – To clear something means to delete it; it may be used for a field or a complete line.

Close – Used to exit a window or the program; accessed by pressing ESC, clicking FILE→CLOSE or by clicking the X button in the upper right hand corner of a window.

C/OCX – An interface used to expand the C/Side development environment. This may include OLE or OCX controls.

C/ODBC – A tool used to export accounting information from into other programs that then are used to perform graphical analysis and word processing functions; Open Database Connectivity.

Codeunit – A function that performs a process, such as posting or creating orders. One of seven Object types in Navision.

Command Button – Buttons which initiate a function, batch job or report.

C/SIDE – The Navision development environment.

Database – Where all the information in is stored; it includes customizations for your company.

Dataport – A method of importing or exporting information in and/or out of Navision. One of seven Object types in Navision.

Debugger – A tool used to diagnose where an error message or error is occurring in Navision. Accessed under TOOLS→DEBUGGER.

Designer – The interface used to modify or design additional forms, reports, tables, dataports, XMLports, codeunits, and menusuites for Navision. You must purchase special permissions to be able to use designer.

Dialog Box – Windows that display to obtain more information on an action that you want to start.

Dimension – Data that you can add to an entry so that Navision can group entries with similar characteristics and easily retrieve these groups for analysis purposes.

Documents – A report that prints one transaction at a time. Documents are normally sent outside your company to Vendors, Customers or Tax Reporting Authorities.

Drill Down – One of four types of AssistButtons. The downward arrow indicates the value in the field is calculated from another table; clicking on the arrow allows you to view that table.

Ellipsis Button – One of the four types of AssistButtons. Ellipsis Buttons are used to view system-filtered options.

Field – Used to enter or display information; consists of a field name, definition and field contents.

Field Filter – A filter that is set on a single field in a table, limiting the amount of information displayed or printed.

Filters – A tool that allows the user to limit the scope of information presented online or in printed format; the three filters are Field, Table and Flow.

Flow Filter – A filter which limits the amount of information presented based on a value that posted with the entries. Flow Filters are set on fields that end with the word Filter.

Focus – Where the cursor is placed in Navision, also see Insertion Point.

Form – Displays information on the screen and gives access for editing, deleting and adding data in either a card or tabular form. One of seven Object types in Navision.

Function Keys – Each of the function keys has a shortcut assigned to it and using the combination of the CONTROL or SHIFT key with a Function key provides additional shortcuts. The availability of the various shortcuts is screen dependent, this may be reviewed by accessing Help, Overview of F Keys (ALT+F1).

Granule – A basic building block of Navision allowing firms to purchase only the functionality they need.

HTML – An acronym for hypertext markup language, a format widely used on the web.

Inline Editing – Used to change the contents of selected fields in posted entries; accessed by clicking F2 twice.

Insertion Point – The spot where text is entered when it is typed. Normally appears as a blinking vertical line in a window or a dialog box. Also called the cursor because the blinking vertical line is one form the cursor can take.

Invoice − An original entry document in Purchases and Sales allowing information to be recorded and posted for purposes of recording amounts due to/from Vendors and Customers. Invoices differ from Orders in that Receiving and/or Shipping are not done from an Invoice.

Key − A field or combination of fields in a table that may be used to sort the table.

Ledger Entries − Posted activity linked to a table.

License − A file containing a record of the Navision granules purchased by your company; may be viewed by selecting TOOLS→LICENSE INFORMATION.

List − A data view which has multiple records per window, displaying information about several customers, vendors, items, etc. at one time; another way of describing a Tabular Window. The List button is accessed from a Card view by selecting the List button from the Toolbar. See also Tabular Window.

Look Up − One of four types of AssistButtons. The upward arrow indicates this is a way to view another table; once viewed, data may be retrieved and inserted into the field you accessed the table from.

Master Item − The primary table in a granule, around which that granule functions. For instance, Customers are the Master Item in Sales; Vendors in Purchases; and Contacts in Marketing.

Menu Bar − Located just below the Title Bar; this standard Windows feature contains pull-down menus to select functions such as creating new companies, design tools, and help.

Menu Button − Have a downward-pointing triangle on them and they are found on the majority of windows. When clicked, they display a menu from which you can, for example, select a function, open a different window or open a submenu.

MenuSuite − The MenuSuite object contains the menus that are displayed in the Navigation Pane and in the Navigation Pane Designer. Each menu contains content for a specific departmental area, for example, Finance or Manufacturing. One of seven Object types in Navision.

Navigate − A function that allows the user to view a summary of the number and type of entries related to the document. When you select the entry you want in the table and click Navigate, you will see a list of the records - grouped according to table - that have the same document number and the same posting date as the entry you selected.

Navigation Pane − When you open Navision, the Navigation Pane will appear on the left side of the Application Window. The Navigation Pane lists options that allow you to choose the application area, such as Financial Management and Sales & Marketing.

Object Designer − The interface used to modify or design additional forms, reports, tables, dataports and codeunits.

Objects − The building blocks of Navision. There are seven types of objects: Forms, Tables, Reports, Dataports, Codeunits, XMLports, and the MenuSuite.

ODBC − An acronym for Open Database Connectivity. ODBC enables Navision to be linked and data copied to Excel, Crystal Reports, etc.

Option Button − A circular field which serves to select only one option from those listed. Clicking in this field indicates the desired choice.

Option List − One of four types of AssistButtons. The Option List is a short, predefined list from which the user selects the desired choice.

Order − An original entry document in Purchases and Sales allowing information to be recorded and posted for purposes of recording amounts due to/from Vendors and Customers. Orders differ from Invoices in that Receiving and/or Shipping are done from an Order.

Passwords − Necessary when security has been setup; used in combination with the User Id to log into Navision. Data entry in Navision is case sensitive in the Password field.

Primary Key − A field in a table that is used to identify the record in the table and is therefore required to have a unique value.

Pull-Down Menu − A listing of options available from a menu button or menu item.

Purchase Invoice − Used to record vendor bills that do not have inventory items on them, vouchers would be recorded here.

Record − One line of a table, for example a single Customer in a listing. A record contains multiple fields and a table contains multiple records.

Record Indicator − Appears to the left of the record you are focused on in a List or Tabular Window.

Recorder Buttons − A series of buttons on the Tool Bar that are used to move through a list of records.

Reports − A printout of information from the database; reports are generally used internally by management. One of seven Object types in Navision.

Restore − A process whereby you create a database and populate it with the information held in your backup file.

Request Form − The form that is displayed prior to printing or previewing a report that allows the user to set filters and select options prior to printing.

Shortcut Key − A keystroke or keystroke combination that moves to another screen or function within Navision.

Sort − The ability to change the order in which records are displayed or printed.

SQL − Structured Query Language.

Status Bar − Located at bottom of the application window; it shows the name and contents of the active field, work date, user ID, and whether a filter (FILTER), insert (INS), or overwrite (OVR) mode is on.

System Date − The date of your computer.

Table − A table consists of a group of related records, each record is made up of fields and each field holds one piece of information; one example of a table is the entire listing of Vendor records. One of seven Object types in Navision.

Table Filter − This option enables you to set multiple Field Filters on a table, limiting the amount of information displayed or printed.

Tabular Window − A data view that has multiple records per window, displaying information about several customers, vendors, items, etc. at one time. See also Card Window and List.

Text Box − A small box in a dialog box or window; it is used for entering information necessary for the execution of a command.

Title Bar − Located at the top of the screen; displays the name of the company you are currently working in and the name of program (Navision).

Toggle Mark (CTRL+F1) − A function that allows you select certain records for viewing, posting, etc. When selected, a diamond appears in front of the Record Indicator of the record you are on. If you move off of the record, the diamond remains. You may limit your view by selecting VIEW→MARKED ONLY.

Toolbar − Located just below the Menu Bar; contains a row of iconic buttons to give quick access to frequently used functions such as editing, filtering and locating data.

TrendScape Window − A form in Navision that allows the user to view a summary of data by a time period, such as by day, week, month, quarter or year or Accounting Period.

Work Date − The date displayed in the Status Bar; may be set by accessing TOOLS→WORK DATE. If you do not change the Work Date, it will default to be your system date.

XMLports – The XMLport object is conceptually related to a dataport; you also use XMLports to import and export data, but in XML format. XMLports make the process of exchanging data in XML between systems more simple and streamlined. One of seven Object types in Navision.

Zoom (CTRL+F8) – Allows you to view fields and the values for those fields which are not included in the current screen display.

ZUP File – A file in which a user's specific screen modifications are stored, the file is named FIN.ZUP.