

# Inside Microsoft Dynamics® AX 2012



The Microsoft  
Dynamics AX Team

PUBLISHED BY  
Microsoft Press  
A Division of Microsoft Corporation  
One Microsoft Way  
Redmond, Washington 98052-6399

Copyright © 2012 by Microsoft Corporation

All rights reserved. No part of the contents of this book may be reproduced or transmitted in any form or by any means without the written permission of the publisher.

Library of Congress Control Number: 2012950241  
ISBN: 978-0-7356-6710-5

Printed and bound in the United States of America.

Third Printing

Microsoft Press books are available through booksellers and distributors worldwide. If you need support related to this book, email Microsoft Press Book Support at [mspinput@microsoft.com](mailto:mspinput@microsoft.com). Please tell us what you think of this book at <http://www.microsoft.com/learning/booksurvey>.

Microsoft and the trademarks listed at <http://www.microsoft.com/about/legal/en/us/IntellectualProperty/Trademarks/EN-US.aspx> are trademarks of the Microsoft group of companies. All other marks are property of their respective owners.

The example companies, organizations, products, domain names, email addresses, logos, people, places, and events depicted herein are fictitious. No association with any real company, organization, product, domain name, email address, logo, person, place, or event is intended or should be inferred.

This book expresses the author's views and opinions. The information contained in this book is provided without any express, statutory, or implied warranties. Neither the authors, Microsoft Corporation, nor its resellers, or distributors will be held liable for any damages caused or alleged to be caused either directly or indirectly by this book.

**Acquisitions Editor:** Anne Hamilton

**Developmental Editor:** Margaret Sherman with the Microsoft Dynamics AX Team

**Project Editor:** Valerie Woolley

**Editorial Production:** Christian Holdener, S4Carlisle Publishing Services

**Technical Reviewer:** Allan Iversen

**Copyeditor:** Andrew Jones

**Indexer:** Maureen Johnson, MoJo's Indexing Service

**Cover:** Twist Creative · Seattle

[LSI]

[2013-08-09]

# Contents at a glance

	Foreword	xxiii
	Introduction	xxv
<hr/>		
<b>PART I</b>	<b>A TOUR OF THE DEVELOPMENT ENVIRONMENT</b>	
<hr/>		
CHAPTER 1	Architectural overview	3
CHAPTER 2	The MorphX development environment and tools	19
CHAPTER 3	Microsoft Dynamics AX and .NET	73
CHAPTER 4	The X++ programming language	87
<hr/>		
<b>PART II</b>	<b>DEVELOPING WITH MICROSOFT DYNAMICS AX</b>	
<hr/>		
CHAPTER 5	Designing the user experience	137
CHAPTER 6	The Microsoft Dynamics AX client	159
CHAPTER 7	Enterprise Portal	195
CHAPTER 8	Workflow in Microsoft Dynamics AX	245
CHAPTER 9	Reporting in Microsoft Dynamics AX	275
CHAPTER 10	BI and analytics	299
CHAPTER 11	Security, licensing, and configuration	351
CHAPTER 12	Microsoft Dynamics AX services and integration	385
CHAPTER 13	Performance	417
CHAPTER 14	Extending Microsoft Dynamics AX	493
CHAPTER 15	Testing	527
CHAPTER 16	Customizing and adding help	545
<hr/>		
<b>PART III</b>	<b>UNDER THE HOOD</b>	
<hr/>		
CHAPTER 17	The database layer	577
CHAPTER 18	The Batch framework	613
CHAPTER 19	Application domain frameworks	633

CHAPTER 20	Reflection	669
CHAPTER 21	Application models	687
	<i>Appendix: Resources for code upgrade</i>	705
	<i>Index</i>	707

# Contents

Foreword	xxiii
Introduction	xxv
The history of Microsoft Dynamics AX	xxvi
Who should read this book	xxvii
Who should not read this book	xxviii
Organization of this book	xxviii
Conventions and features in this book	xxix
System requirements	xxix
Code samples	xxx
Acknowledgments	xxxi
Errata & book support	xxxii
We want to hear from you	xxxiii
Stay in touch	xxxiii

## **PART I     A TOUR OF THE DEVELOPMENT ENVIRONMENT**

---

<b>Chapter 1   Architectural overview</b>	<b>3</b>
Introduction	3
Microsoft Dynamics AX five-layer solution architecture	4
Microsoft Dynamics AX application platform architecture	6
Application development environments	6
Data tier of the Microsoft Dynamics AX platform	7
Middle tier of the Microsoft Dynamics AX platform	7
Presentation tier of the Microsoft Dynamics AX platform	8
Microsoft Dynamics AX application meta-model architecture	9
Application data element types	10
MorphX user interface control element types	11
Workflow element types	12

Code element types . . . . .	13
Services element types . . . . .	13
Role-based security element types . . . . .	14
Web client element types . . . . .	14
Documentation and resource element types . . . . .	16
License and configuration element types . . . . .	16

**Chapter 2 The MorphX development environment and tools 19**

Introduction . . . . .	19
Application Object Tree . . . . .	20
Navigate through the AOT . . . . .	21
Create elements in the AOT . . . . .	23
Modify elements in the AOT . . . . .	23
Refresh elements in the AOT . . . . .	25
Element actions in the AOT . . . . .	25
Element layers and models in the AOT . . . . .	26
Projects . . . . .	27
Create a project . . . . .	27
Automatically generate a project . . . . .	28
Project types . . . . .	30
Property sheet . . . . .	30
X++ code editor . . . . .	31
Shortcut keys . . . . .	32
Editor scripts . . . . .	33
Label editor . . . . .	33
Create a label . . . . .	35
Reference labels from X++ . . . . .	36
Code compiler . . . . .	37
Best Practices tool . . . . .	39
Rules . . . . .	40
Suppress errors and warnings . . . . .	41
Add custom rules . . . . .	42

Debugger . . . . .	43
Enable debugging . . . . .	43
Debugger user interface . . . . .	44
Debugger shortcut keys . . . . .	47
Reverse Engineering tool . . . . .	47
UML data model . . . . .	48
UML object model . . . . .	49
Entity relationship data model . . . . .	51
Table Browser tool . . . . .	52
Find tool . . . . .	53
Compare tool . . . . .	54
Start the Compare tool . . . . .	55
Use the Compare tool . . . . .	57
Compare APIs . . . . .	58
Cross-Reference tool . . . . .	60
Version control . . . . .	62
Element life cycle . . . . .	64
Common version control tasks . . . . .	65
Work with labels . . . . .	66
Synchronize elements . . . . .	67
View the synchronization log . . . . .	68
Show the history of an element . . . . .	69
Compare revisions . . . . .	70
View pending elements . . . . .	70
Create a build . . . . .	71
Integrate Microsoft Dynamics AX with other version control systems . . . . .	71

**Chapter 3 Microsoft Dynamics AX and .NET 73**

Introduction . . . . .	73
Use third-party assemblies . . . . .	74
Use strong-named assemblies . . . . .	74
Reference a managed DLL from Microsoft Dynamics AX . . . . .	75

Code against the assembly in X++ .....	76
Write managed code .....	77
Debug managed code .....	81
Proxies .....	82
Hot swap assemblies on the server .....	84
<b>Chapter 4 The X++ programming language</b>	<b>87</b>
Introduction .....	87
Jobs .....	88
The type system .....	88
Value types .....	88
Reference types .....	89
Type hierarchies .....	89
Syntax .....	93
Variable declarations .....	93
Expressions .....	95
Statements .....	96
Macros .....	113
Comments .....	115
XML documentation .....	116
Classes and interfaces .....	117
Fields .....	118
Methods .....	118
Delegates .....	120
Pre- and post-event handlers .....	122
Attributes .....	123
Code access security .....	124
Compiling and running X++ as .NET CIL .....	126
Design and implementation patterns .....	128
Class-level patterns .....	129
Table-level patterns .....	131



<b>Chapter 5    Designing the user experience</b>	<b>137</b>
Introduction . . . . .	137
A role-tailored design approach . . . . .	139
User experience components . . . . .	140
Navigation layer forms . . . . .	141
Work layer forms . . . . .	142
Role Center pages . . . . .	142
Cues . . . . .	143
Design Role Centers . . . . .	143
Area pages . . . . .	144
Design area pages . . . . .	145
List pages . . . . .	146
A simple scenario: taking a call from a customer . . . . .	146
Use a list page as an alternative to a report . . . . .	148
Design list pages . . . . .	149
Details forms . . . . .	150
Transaction details forms . . . . .	153
Enterprise Portal web client user experience . . . . .	155
Navigation layer forms . . . . .	156
Work layer forms . . . . .	157
Design for Enterprise Portal . . . . .	157
Design for your users . . . . .	157
<b>Chapter 6    The Microsoft Dynamics AX client</b>	<b>159</b>
Introduction . . . . .	159
Working with forms . . . . .	159
Form patterns . . . . .	160
Form metadata . . . . .	162

Form data sources . . . . .	164
Form queries . . . . .	170
Adding controls . . . . .	172
Control overrides . . . . .	173
Control data binding . . . . .	173
<i>Design</i> node properties . . . . .	173
Runtime modifications . . . . .	174
Action controls . . . . .	174
Layout controls . . . . .	176
Input controls . . . . .	178
<i>ManagedHost</i> control . . . . .	179
Other controls . . . . .	181
Using parts . . . . .	181
Types of parts . . . . .	181
Reference a part from a form . . . . .	182
Adding navigation items . . . . .	182
<i>MenuItem</i> . . . . .	182
<i>Menu</i> . . . . .	183
Menu definitions . . . . .	183
Customizing forms with code . . . . .	184
Method overrides . . . . .	184
<i>Auto</i> variables . . . . .	187
Business logic . . . . .	188
Custom lookups . . . . .	188
Integrating with the Microsoft Office client . . . . .	189
Make data sources available to Office Add-ins . . . . .	189
Build an Excel template . . . . .	190
Build a Word template . . . . .	191
Add templates for users . . . . .	192

## **Chapter 7 Enterprise Portal 195**

Introduction . . . . .	195
Enterprise Portal architecture . . . . .	196

Enterprise Portal components . . . . .	198
Web parts . . . . .	199
AOT elements . . . . .	201
Datasets . . . . .	201
Enterprise Portal framework controls . . . . .	203
Developing for Enterprise Portal . . . . .	216
Create a model-driven list page . . . . .	217
Create a details page . . . . .	219
AJAX . . . . .	222
Session disposal and caching . . . . .	223
Context . . . . .	223
Data . . . . .	225
Metadata . . . . .	225
Proxy classes . . . . .	226
<i>ViewState</i> . . . . .	228
Labels . . . . .	229
Formatting . . . . .	230
Validation . . . . .	231
Error handling . . . . .	231
Security . . . . .	232
Secure web elements . . . . .	233
Record context and encryption . . . . .	235
SharePoint integration . . . . .	235
Site navigation . . . . .	235
Site definitions, page templates, and web parts . . . . .	237
Import and deploy a web part page . . . . .	239
Enterprise Search . . . . .	240
Themes . . . . .	243

**Chapter 8 Workflow in Microsoft Dynamics AX 245**

Introduction . . . . .	245
Microsoft Dynamics AX 2012 workflow infrastructure . . . . .	246
Windows Workflow Foundation . . . . .	249

Key workflow concepts . . . . .	250
Workflow document and workflow document class . . . . .	250
Workflow categories . . . . .	251
Workflow types . . . . .	251
Event handlers . . . . .	252
Menu items . . . . .	252
Workflow elements . . . . .	252
Queues . . . . .	253
Providers . . . . .	254
Workflows . . . . .	255
Workflow instances . . . . .	256
Work items . . . . .	256
Workflow architecture . . . . .	256
Workflow runtime . . . . .	257
Workflow runtime interaction . . . . .	258
Logical approval and task workflows . . . . .	260
Workflow life cycle . . . . .	262
Implementing workflows . . . . .	263
Create workflow artifacts, dependent artifacts, and business logic . . . . .	264
State management . . . . .	266
Create a workflow category . . . . .	268
Create the workflow document class . . . . .	268
Add a workflow display menu item . . . . .	270
Activate the workflow . . . . .	270

**Chapter 9 Reporting in Microsoft Dynamics AX 275**

Introduction . . . . .	275
Inside the Microsoft Dynamics AX 2012 reporting framework . . . . .	276
Client-side reporting solutions . . . . .	276
Server-side reporting solutions . . . . .	277
Report execution sequence . . . . .	278
Plan your reporting solution . . . . .	279

Reporting and users .....	279
Roles in report development .....	280
Create production reports .....	281
Model elements for reports .....	282
SSRS extensions .....	285
Microsoft Dynamics AX extensions .....	286
Create charts for Enterprise Portal .....	289
Microsoft Dynamics AX chart development tools .....	289
Integration with Microsoft Dynamics AX .....	290
Data series .....	292
Add interactive functions to a chart .....	294
Override the default chart format .....	296
Troubleshoot the reporting framework .....	296
The report server cannot be validated .....	297
A report cannot be generated .....	297
A chart cannot be debugged because of SharePoint sandbox issues .....	297

## **Chapter 10 BI and analytics 299**

Introduction .....	299
Components of the Microsoft Dynamics AX 2012 BI solution .....	299
Implementing the prebuilt BI solution .....	301
Implement the prerequisites .....	302
Configure an SSAS server .....	302
Deploy cubes .....	303
Deploy cubes in an environment with multiple partitions .....	305
Process cubes .....	307
Provision users in Microsoft Dynamics AX .....	308
Customizing the prebuilt BI solution .....	309
Configure analytic content .....	310
Customize cubes .....	311
Extend cubes .....	319
Creating cubes .....	323

Identify requirements . . . . .	324
Define metadata. . . . .	325
Generate and deploy the cube . . . . .	328
Add KPIs and calculations. . . . .	333
Displaying analytic content in Role Centers. . . . .	333
Provide insights tailored to a persona . . . . .	334
Choose a presentation tool based on a persona . . . . .	335
SQL Server Power View reports. . . . .	335
Excel . . . . .	340
Business Overview web part and KPI List web part . . . . .	341
Develop reports with Report Builder . . . . .	346
Develop analytic reports by using Visual Studio tools for Microsoft Dynamics AX . . . . .	346

## **Chapter 11 Security, licensing, and configuration 351**

Introduction . . . . .	351
Security framework overview . . . . .	351
Authentication . . . . .	352
Authorization . . . . .	353
Data security. . . . .	356
Develop security artifacts . . . . .	356
Set permissions for a form . . . . .	356
Set permissions for server methods . . . . .	359
Set permissions for controls. . . . .	359
Create privileges. . . . .	359
Assign privileges and duties to security roles. . . . .	361
Use valid time state tables . . . . .	362
Validate security artifacts . . . . .	363
Create users. . . . .	363
Assign users to roles . . . . .	363
Set up segregation of duties rules . . . . .	364
Create extensible data security policies . . . . .	364
Data security policy concepts . . . . .	365

Develop an extensible data security policy . . . . .	365
Debug extensible data security policies . . . . .	368
Security coding . . . . .	369
Table permissions framework . . . . .	369
Code access security . . . . .	371
Best practice rules . . . . .	372
Security debugging . . . . .	373
Licensing and configuration . . . . .	376
Configuration hierarchy . . . . .	378
Configuration keys . . . . .	378
Use configuration keys . . . . .	380
Types of CALs . . . . .	381
Customization and licensing . . . . .	383

## **Chapter 12 Microsoft Dynamics AX services and integration      385**

Introduction . . . . .	385
Types of Microsoft Dynamics AX services . . . . .	387
System services . . . . .	387
Custom services . . . . .	388
Document services . . . . .	392
Security considerations . . . . .	400
Publish Microsoft Dynamics AX services . . . . .	400
Consume Microsoft Dynamics AX services . . . . .	401
Sample WCF client for <i>CustCustomerService</i> . . . . .	402
Consume system services . . . . .	404
Update business documents . . . . .	407
Invoke custom services asynchronously . . . . .	409
The Microsoft Dynamics AX send framework . . . . .	411
Implementing a trigger for transmission . . . . .	411
Configure transmission mechanisms . . . . .	414
Consume external web services from Microsoft Dynamics AX . . . . .	414
Performance considerations . . . . .	415

<b>Chapter 13 Performance</b>	<b>417</b>
Introduction . . . . .	417
Client/server performance . . . . .	417
Reduce round-trips between the client and the server. . . . .	418
Write tier-aware code . . . . .	422
Transaction performance. . . . .	426
Set-based data manipulation operators . . . . .	427
Restartable jobs and optimistic concurrency . . . . .	444
Caching . . . . .	446
Field lists . . . . .	456
Field justification . . . . .	462
Performance configuration options. . . . .	462
SQL Administration form . . . . .	462
Server Configuration form . . . . .	463
AOS configuration . . . . .	463
Client configuration . . . . .	464
Client performance . . . . .	465
Number sequence caching. . . . .	465
Extensive logging. . . . .	465
Master scheduling and inventory closing . . . . .	465
Coding patterns for performance . . . . .	465
Execute X++ code as CIL. . . . .	466
Use parallel execution effectively . . . . .	466
The SysOperation framework. . . . .	467
Patterns for checking to see whether a record exists . . . . .	472
Run a query only as often as necessary. . . . .	473
When to prefer two queries over a join. . . . .	474
Indexing tips and tricks. . . . .	475
When to use <i>firstfast</i> . . . . .	476
Optimize list pages . . . . .	476
Aggregate fields to reduce loop iterations . . . . .	477
Performance monitoring tools . . . . .	478
Microsoft Dynamics AX Trace Parser . . . . .	479



Monitor database activity. . . . .	488
Use the SQL Server connection context to find the SPID or user behind a client session. . . . .	489
The client access log . . . . .	490
Visual Studio Profiler . . . . .	490

**Chapter 14 Extending Microsoft Dynamics AX 493**

Introduction. . . . .	493
The SysOperation framework . . . . .	493
SysOperation framework classes . . . . .	494
SysOperation framework attributes . . . . .	495
Comparing the SysOperation and RunBase frameworks. . . . .	495
RunBase example: <i>SysOpSampleBasicRunbaseBatch</i> . . . . .	496
SysOperation example: <i>SysOpSampleBasicController</i> . . . . .	504
The RunBase framework . . . . .	510
Inheritance in the RunBase framework . . . . .	510
Property method pattern. . . . .	511
Pack-unpack pattern . . . . .	512
Client/server considerations. . . . .	516
The extension framework . . . . .	516
Create an extension. . . . .	517
Extension example. . . . .	518
Eventing . . . . .	520
Delegates. . . . .	521
<i>Pre</i> and <i>post</i> events . . . . .	522
Event handlers . . . . .	523
Eventing example. . . . .	524

**Chapter 15 Testing 527**

Introduction. . . . .	527
New unit testing features in Microsoft Dynamics AX 2012. . . . .	527
Use predefined test attributes . . . . .	528

Create test attributes and filters . . . . .	530
Microsoft Visual Studio 2010 test tools. . . . .	533
Use all aspects of the ALM solution . . . . .	534
Use an acceptance test driven development approach . . . . .	535
Use shared steps. . . . .	536
Record shared steps for fast forwarding . . . . .	537
Develop test cases in an evolutionary manner . . . . .	538
Use ordered test suites for long scenarios. . . . .	539
Putting everything together. . . . .	540
Execute tests as part of the build process . . . . .	540
Use the right tests for the job . . . . .	542

**Chapter 16 Customizing and adding help 545**

Introduction . . . . .	545
Help system overview . . . . .	546
Microsoft Dynamics AX client . . . . .	547
Help viewer . . . . .	547
Help server . . . . .	548
AOS. . . . .	549
Help content overview. . . . .	549
Topics . . . . .	549
Publisher . . . . .	550
Table of contents . . . . .	550
Summary page . . . . .	550
Create content. . . . .	550
Create a topic in HTML . . . . .	552
Add labels, fields, and menu items to a topic. . . . .	559
Make a topic context-sensitive . . . . .	561
Update content from other publishers. . . . .	562
Create a table of contents file . . . . .	563
Create non-HTML content . . . . .	565
Publish content . . . . .	567
Add a publisher to the <i>Web.config</i> file . . . . .	569

Publish content to the Help server . . . . .	570
Set Help document set properties . . . . .	571
Troubleshoot the Help system . . . . .	572
The Help viewer cannot display content . . . . .	572
The Help viewer cannot display the table of contents . . . . .	573

## PART III UNDER THE HOOD

---

### Chapter 17 The database layer 577

Introduction . . . . .	577
Temporary tables . . . . .	577
<i>InMemory</i> temporary tables . . . . .	578
<i>TempDB</i> temporary tables . . . . .	582
Creating temporary tables . . . . .	583
Surrogate keys . . . . .	585
Alternate keys . . . . .	587
Table relations . . . . .	588
EDT relations and table relations . . . . .	588
Foreign key relations . . . . .	590
The <i>CreateNavigationPropertyMethods</i> property . . . . .	591
Table inheritance . . . . .	594
Modeling table inheritance . . . . .	594
Table inheritance storage model . . . . .	596
Polymorphic behavior . . . . .	596
Performance considerations . . . . .	598
Unit of Work . . . . .	599
Date-effective framework . . . . .	601
Relational modeling of date-effective entities . . . . .	601
Support for data retrieval . . . . .	603
Run-time support for data consistency . . . . .	604
Full-text support . . . . .	606

The QueryFilter API. . . . .	607
Data partitions. . . . .	610
Partition management . . . . .	611
Development experience . . . . .	611
Run-time experience . . . . .	611

**Chapter 18 The batch framework 613**

Introduction. . . . .	613
Batch processing in Microsoft Dynamics AX 2012 . . . . .	613
Common uses of the batch framework . . . . .	614
Performance . . . . .	615
Create and execute a batch job . . . . .	615
Create a batch-executable class . . . . .	616
Create a batch job . . . . .	618
Use the Batch API. . . . .	623
Manage batch execution. . . . .	625
Configure the batch server. . . . .	625
Create a batch group. . . . .	626
Manage batch jobs . . . . .	628
Debug a batch task. . . . .	629
Configure AOS for batch debugging . . . . .	629
Configure Visual Studio for debugging X++ in a batch . . . . .	630

**Chapter 19 Application domain frameworks 633**

Introduction. . . . .	633
The organization model framework . . . . .	634
How the organization model framework works. . . . .	634
When to use the organization model framework . . . . .	636
The product model framework . . . . .	643
How the product model framework works. . . . .	643
When to use the product model framework . . . . .	647

Extending the product model framework . . . . .	.647
The operations resource framework . . . . .	.648
How the operations resource framework works . . . . .	.648
When to use the operations resource framework . . . . .	.652
Extensions to the operations resource framework . . . . .	.652
MorphX model element prefixes for the operations resource framework . . . . .	.654
The dimension framework . . . . .	.654
How the dimension framework works . . . . .	.654
Constrain combinations of values . . . . .	.656
Create values . . . . .	.656
Extend the dimension framework . . . . .	.657
Query data . . . . .	.658
Physical table references . . . . .	.659
The accounting framework . . . . .	.659
How the accounting framework works . . . . .	.660
When to use the accounting framework . . . . .	.662
Extensions to the accounting framework . . . . .	.662
Accounting framework process states . . . . .	.662
MorphX model element prefixes for the accounting framework . . . . .	.663
The source document framework . . . . .	.664
How the source document framework works . . . . .	.664
When to use the source document framework . . . . .	.665
Extensions to the source document framework . . . . .	.666
MorphX model element prefixes for the source document framework . . . . .	.667

**Chapter 20 Reflection 669**

Introduction . . . . .	.669
Reflection system functions . . . . .	.670
Intrinsic functions . . . . .	.670
<i>typeof</i> system function . . . . .	.671

<i>classIdGet</i> system function . . . . .	672
Reflection APIs . . . . .	673
Table data API . . . . .	673
Dictionary API . . . . .	676
Treenodes API . . . . .	680
TreeNodeType . . . . .	683

## **Chapter 21 Application models 687**

Introduction . . . . .	687
Layers . . . . .	688
Models . . . . .	690
Element IDs . . . . .	692
Create a model . . . . .	693
Prepare a model for publication . . . . .	694
Set the model manifest . . . . .	694
Export the model . . . . .	695
Sign the model . . . . .	696
Import model files . . . . .	697
Upgrade a model . . . . .	699
Move a model from test to production . . . . .	700
Create a test environment . . . . .	701
Prepare the test environment . . . . .	701
Deploy the model to production . . . . .	701
Element ID considerations . . . . .	702
Model store API . . . . .	703
<i>Appendix: Resources for code upgrade</i> . . . . .	705
<i>Index</i> . . . . .	707

# Foreword

Microsoft Dynamics AX and its predecessor, Axapta, have always benefited from a very active and enthusiastic developer community. Some of those developers are employed by mid-size to large firms that build their business selling solutions built on Microsoft Dynamics AX. Others are in the IT departments of companies using Microsoft Dynamics AX as mission-critical infrastructure.

One of the consistent pieces of feedback I've received from those developers over the years is how the raw power and agility provided by the Microsoft Dynamics AX toolset and metadata environment make them more productive than any other line of business application framework. With Microsoft Dynamics AX 2012, we have taken the productivity and power of that toolset to a whole new level; delivering event-based customization, delta customization of forms, a new editor, date effectivity, and subtype/supertype support, to name just a few.

We continued the journey to expose the power of Microsoft SQL Server Reporting Services (SSRS) and Analysis Services directly within Microsoft Dynamics AX, moving all of the out-of-the-box reports and business intelligence inside the platform.

We back all of that up with almost three times the application footprint of prior versions of Microsoft Dynamics AX, truly making Microsoft Dynamics AX both a powerful developer environment and a rich out-of-the-box suite of applications.

This book focuses on the enhancements in the Microsoft Dynamics AX 2012 toolset and is written by the team that brought you those tools. It's truly an insider's view of the entire Microsoft Dynamics AX development and run-time environment. I hope you enjoy it as much as we enjoyed writing the book and creating the product.

Thanks,

Hal Howard

*Head of Product Development, Microsoft Dynamics AX*

*Corporate Vice President, Microsoft Dynamics Research and Development*





# Introduction

Microsoft Dynamics AX 2012 represents a new generation of enterprise resource planning (ERP) software. With over 1,000 new features and prebuilt industry capabilities for manufacturing, distribution, services, retail, and public sector, Microsoft Dynamics AX 2012 provides a robust platform for developers to deliver specialized functionality more efficiently to the industries that they support.

Microsoft Dynamics AX 2012 is a truly global solution, able to scale with any business as it grows. It is simple enough to deploy for a single business unit in a single country/region, yet robust enough to support the unique requirements for business systems in 36 countries/regions—all from a single-instance deployment of the software.

For this version of Microsoft Dynamics AX, the entire codebase was analyzed and, where necessary, reengineered, so that the application is built more holistically around a set of unified principles. As Microsoft Technical Fellow Mike Ehrenberg explains:

The heart of Microsoft Dynamics AX 2012 is a set of unified, natural models that let you see, measure, and change your business. In developing this release, every application concept involved in representing the business in software was reexamined. In each case, limitations that forced workarounds and compromises in older ERP products were lifted, and new capabilities were added to provide an even richer software representation of a business and its structure, processes, and policies. Unified, natural Microsoft Dynamics AX 2012 models make modeling simple businesses fast and easy and yet still provide the richness and flexibility to represent the most complex organizations.

Early adopters have also weighed in on the benefits of Microsoft Dynamics AX 2012:

Microsoft Dynamics AX 2012 allows us to collaborate within our organization and with our constituents . . . using built-in controls and fund/encumbrance accounting capabilities to ensure compliance with Public Sector requirements . . . and using out-of-the-box Business Analytics and Intelligence . . . so executives can make effective decisions in real time.

Mike Bailey

Director of Finance and Information Services

City of Redmond (WA)

With the latest release, developing for and customizing Microsoft Dynamics AX will be easier than ever. Developers will be able to work with X++ directly from within Microsoft Visual Studio and enjoy more sophisticated features in the X++ editor, for example. Also, the release includes more prebuilt interoperability with Microsoft SharePoint Server and SQL Server Reporting Services, so that developers spend less time on mundane work when setting up customer systems.

Guido Van de Velde

Director of MECOMS™

Ferranti Computer Systems

Microsoft Dynamics AX 2012 is substantially different from its predecessor, which can mean a steep learning curve for developers and system implementers who have worked with previous versions. However, by providing a broad overview of the architectural changes, new technologies, and tools for this release, the authors of *Inside Microsoft Dynamics AX 2012* have created a resource that will help reduce the time that it takes for developers to become productive with this version of Microsoft Dynamics AX.

## The history of Microsoft Dynamics AX

---

Historically, Microsoft Dynamics AX encompasses more than 25 years of experience in business application innovation and developer productivity. Microsoft acquired the predecessor of Microsoft Dynamics AX, called Axapta, in 2002, with its purchase of the Danish company Navision A/S. The success of the product has spurred an increasing commitment of research and development resources, which allows Microsoft Dynamics AX to grow and strengthen its offering continuously.

The development team that created Microsoft Dynamics AX 2012 consists of three large teams, two that are based in the United States (Fargo, North Dakota, and Redmond, Washington) and one that is based in Denmark (Copenhagen). The Fargo team focuses on finance and human resources (HR), the Redmond team concentrates on project management and accounting and customer relationship management (CRM), and the Copenhagen team delivers supply chain management (SCM). In addition, a framework team develops infrastructure components, and a worldwide distributed team localizes the Microsoft Dynamics AX features to meet national regulations or local differences in business practices in numerous languages and markets around the world.

To clarify a few aspects of the origins of Microsoft Dynamics AX, the authors contacted people who participated in the early stages of the Microsoft Dynamics AX development cycle. The first question we asked was, “How was the idea of using X++ as the programming language for Microsoft Dynamics AX conceived?”

We had been working with an upgraded version of XAL for a while called OO XAL back in 1996/1997. At some point in time, we stopped and reviewed our approach and looked at other new languages like Java. After working one long night, I decided that our approach had to change to align with the latest trends in programming languages, and we started with X++.

Erik Damgaard

Cofounder of Damgaard Data

Of course, the developers had several perspectives on this breakthrough event.

One morning when we came to work, nothing was working. Later in the morning, we realized that we had changed programming languages! But we did not have any tools, so for months we were programming in Notepad without compiler or editor support.

Anonymous developer

Many hypotheses exist regarding the origin of the original product name, Axapta. Axapta was a constructed name, and the only requirement was that the letter X be included, to mark the association with its predecessor, XAL. The X association carries over in the name Microsoft Dynamics AX.

## Who should read this book

---

This book explores the technology and development tools in Microsoft Dynamics AX 2012. It is designed to help new and existing Microsoft Dynamics AX developers by providing holistic and in-depth information about developing for Microsoft Dynamics AX 2012—information that may not be available from other resources, such as SDK documentation, blogs, or forums. It aids developers who are either customizing Microsoft Dynamics AX 2012 for a specific implementation or building modules or applications that blend seamlessly with Microsoft Dynamics AX 2012. System implementers and consultants will also find much of the information useful.

## Assumptions

To get full value from this book, you should have knowledge of common object-oriented concepts from languages such as C++, C#, and Java. You should also have knowledge of relational database concepts. Knowledge of Structured Query Language (SQL) and Microsoft .NET technology are also advantageous. Transact-SQL statements are used to perform relational database tasks, such as data updates and data retrieval.

## Who should not read this book

---

This book is not aimed at those who install, upgrade, or deploy Microsoft Dynamics AX 2012. It is also beyond the scope of this book to include details about the sizing of production environments. For more information about these topics, refer to the extensive installation and implementation documentation that is supplied with the product or available on TechNet, MSDN, and other websites.

The book also does not provide instructions for those who configure parameter options within Microsoft Dynamics AX 2012 or the business users who use the application in their day-to-day work. For assistance with these activities, refer to the help that is shipped with the product and available on TechNet at <http://technet.microsoft.com/en-us/library/gg852966.aspx>.

## Organization of this book

---

Although *Inside Microsoft Dynamics AX 2012* does not provide exhaustive coverage of every feature in Microsoft Dynamics AX 2012, it does offer a broad view that will benefit developers as they develop for the product.

This book is divided into three sections, each of which focuses on Microsoft Dynamics AX 2012 from a different angle. Part I, “A tour of the development environment,” provides an overview of the Microsoft Dynamics AX 2012 architecture that has been written with developers in mind. The chapters in Part I also provide a tour of the internal Microsoft Dynamics AX 2012 development environment to help new developers familiarize themselves with the designers and tools that they will use to implement their customizations, extensions, and integrations.

Part II, “Developing with Microsoft Dynamics AX 2012,” provides the information that developers need in order to customize and extend Microsoft Dynamics AX 2012. In addition to explanations of the features, many chapters include examples, some of which are available as downloadable files that can help you learn how to code for

Microsoft Dynamics AX. For information about how to access these files, see the “Code samples” section, later in this introduction.

Part III, “Under the hood,” is largely devoted to illustrating how developers can use the underlying foundation of the Microsoft Dynamics AX 2012 application frameworks to develop their solutions, with a focus on the database layer, system and application frameworks, reflection, and models.

## Conventions and features in this book

---

This book presents information using the following conventions, which are designed to make the information readable and easy to follow.

- Application Object Tree (AOT) paths use backslashes to separate nodes, such as `Forms\AccountingDistribution\Methods`.
- The names of methods, functions, properties and property values, fields, and nodes appear in italics.
- Registry keys and T-SQL commands appear in capital letters.
- User interface (UI) paths use angle brackets to indicate actions—for example, “On the File menu, point to Tools > Options.”
- Boxed elements with labels such as “Note” provide additional information or alternative methods for completing a step successfully.
- Text that you type (apart from code blocks) appears in bold.
- A plus sign (+) between two key names means that you must press those keys at the same time. For example, “Press Alt+Tab” means that you hold down the Alt key while you press the Tab key.

## System requirements

---

To work with sample code, you must have the RTM version of Microsoft Dynamics AX 2012 installed. For information about the system requirements for installing Microsoft Dynamics AX 2012, see the Microsoft Dynamics AX 2012 Installation Guide at <http://www.microsoft.com/en-us/download/details.aspx?id=12687>.

You must also have an Internet connection to download the sample files that are provided as supplements to many of the chapters.



**Note** Some of the features described in this book, such as data partitioning and the EP Chart Control, apply only to the Microsoft Dynamics AX 2012 R2. That is noted where those features are discussed.

## Code samples

---

Most of the chapters in this book include code examples that let you interactively try out the new material presented in the main text. You can download the example code from the following page:

*<http://go.microsoft.com/fwlink/?Linkid=263524>*

Follow the instructions to download the `InsideDynaAX2012_667105_CompanionContent.zip` file.

## Installing the code samples

Follow these steps to install the code samples on your computer:

1. Unzip the `InsideDynaAX2012_667105_CompanionContent.zip` file that you downloaded from the book's website.
2. If prompted, review the displayed end user license agreement. If you accept the terms, select the accept option, and then click Next.



**Note** If the license agreement doesn't appear, you can access it from the same webpage from which you downloaded the `InsideDynaAX2012_667105_CompanionContent.zip` file.

## Using the code samples

The code examples referenced in each chapter are provided as both `.xpo` files that you can import into Microsoft Dynamics AX and Visual Studio projects that you can open through the corresponding `.csproj` files. Many of these examples are incomplete, and you cannot import and run them successfully without following the steps indicated in the associated chapter.

# Acknowledgments

---

We want to thank all the people who assisted us in bringing this book to press. We apologize for anyone whose name we missed.

## Microsoft Dynamics product team

Special thanks go to the following colleagues, whom we're fortunate to work with.

Margaret Sherman, who pitched the book to Microsoft Press, provided us with training in how to use templates and style sheets, created a schedule for writing, prodded us when we needed prodding to keep the writing process moving along, and provided editorial feedback on every chapter. Thank you, Margaret. This book absolutely would not have seen the light of day without you!

Mark Baker and Steve Kubis, who contributed ace project management and editing work.

Hal Howard, Richard Barnwell, and Ann Beebe, who sponsored the project and provided resources for it.

We're also grateful to the following members of the product team, who provided us with the reviews and research that helped us refine this book:

Ned Baker	Igor Menshutkin
Ian Beck	Jatan Modi
Andy Blehm	Sasha Nazarov
Jim Brotherton	Adrian Orth
Ed Budrys	Christopher Read (Entirenet)
Gregory Christiaens	Bruce Rivard
Ahmad El Hussein	Gana Sadasivam
Josh Honeyman	Alex Samoylenko
Hitesh Jawa	Karen Scipi
Vijeta Johri	Ramesh Shankar
Bo Kampmann	Tao Wang
Vinod Kumar	Lance Wheelwright
Josh Lange	Chunke Yang
Mey Meenakshisundaram	Arif Kureshy

In addition, we want to thank Joris de Gruyter of Streamline Systems LLC. His SysTestListenerTRX code samples on CodePlex (<http://dynamicsaxbuild.codeplex.com/releases>), with supporting documentation on his blog (<http://daxmusings.blogspot.com/>), and his collaboration as we investigated this approach for executing SysTests from Microsoft Dynamics AX were valuable resources as we prepared the chapter on testing.

## Microsoft Press

Another big thank-you goes to the great people at Microsoft Press for their support and expertise throughout the writing and publishing process.

Valerie Woolley, the Content Project Manager for the book, who provided ongoing support and guidance throughout the life of the project.

Anne Hamilton—Acquisitions Editor

Christian Holdener—Production Project Manager with S4Carlisle Publishing Services

Allan Iversen—Technical Reviewer

Andrew Jones—Copy Editor

## New arrivals

Finally, we would like to welcome the following youngest members of the Microsoft extended family, the children and grandchildren of the authors who arrived during the months that we were laboring on this book:

Charlie Hendrix Bird

Grace Elizabeth Marie Garty

Gavin Roy Healy

Kayden John Healy

Amrita Nalla

Nilay Pandya

## Errata & book support

---

We've made every effort to ensure the accuracy of this book and its companion content. Any errors that have been reported since this book was published are listed on our Microsoft Press site at [oreilly.com](http://oreilly.com):

*<http://go.microsoft.com/fwlink/?Linkid=263523>*

If you find an error that is not already listed, you can report it to us through the same page.

If you need additional support, email Microsoft Press Book Support at [mspinput@microsoft.com](mailto:mspinput@microsoft.com).

Please note that product support for Microsoft software is not offered through the addresses above.



## **We want to hear from you**

---

At Microsoft Press, your satisfaction is our top priority, and your feedback our most valuable asset. Please tell us what you think of this book at

*<http://www.microsoft.com/learning/booksurvey>*

The survey is short, and we read every one of your comments and ideas. Thanks in advance for your input!

## **Stay in touch**

---

Let's keep the conversation going! We're on Twitter: *<http://twitter.com/MicrosoftPress>*



# Microsoft Dynamics AX and .NET

## In this chapter

Introduction.....	73
Use third-party assemblies.....	74
Write managed code.....	77
Hot swap assemblies on the server.....	84

## Introduction

---

Complex systems, such as Microsoft Dynamics AX 2012, are often deployed in heterogeneous environments that contain several disparate systems. Often, these systems contain legacy data that might be required for running Microsoft Dynamics AX, or they might offer functionality that is vital for running the organization.

Microsoft Dynamics AX 2012 offers several ways of integrating with other systems. For example, your organization might need to harvest information from old Microsoft Excel files. To do this, you could write a simple add-on in Microsoft Visual Studio and easily integrate it with Microsoft Dynamics AX. Or your organization might have a legacy system that is physically located in a distant location that requires invoice information to be sent to it in a fail-safe manner. In this case, you could set up a message queue to perform the transfers. You could use the Microsoft .NET Framework to interact with the message queue from within Microsoft Dynamics AX.

This chapter focuses on some of the ways that you can integrate Microsoft Dynamics AX with other systems by taking advantage of managed code through X++ code. One way is to consume managed code directly from X++ code; another way is to author or extend existing business logic in managed code by using the Visual Studio environment. To facilitate this interoperability, Microsoft Dynamics AX provides the managed code with managed classes (called *proxies*) that represent X++ artifacts. This allows you to write managed code that uses the functionality these proxies provide in a type-safe and convenient manner.

In both cases, the .NET Framework provides access to the functionality, and this functionality is used in Microsoft Dynamics AX.



**Note** You can also make Microsoft Dynamics AX functionality available to other systems by using services. For more information, see Chapter 12, “Microsoft Dynamics AX services and integration.”

## Use third-party assemblies

---

Sometimes, you can implement the functionality that you are looking to provide by using a managed component (a .NET assembly) that you purchase from a third-party vendor. Using these dynamic-link libraries (DLLs) can be—and often is—more cost effective than writing the code yourself. These components are wrapped in managed assemblies in the form of .dll files, along with their Program Database (PDB) files, which contain symbol information that is used in debugging, and their XML files, which contain documentation that is used for IntelliSense in Visual Studio. Typically, these assemblies come with an installation program that often installs the assemblies in the global assembly cache (GAC) on the computer that consumes the functionality. This computer can be either on the client tier, on the server tier, or both. Only assemblies with strong names can be installed in the GAC.

### Use strong-named assemblies

It is always a good idea to use a DLL that has a strong name, which means that the DLL is signed by the author, regardless of whether the assembly is stored in the GAC. This is true for assemblies that are installed on both the client tier and the server tier. A strong name defines the assembly's identity by its simple text name, version number, and culture information (if provided)—plus a public key and a digital signature. Assemblies with the same strong name are expected to be identical.

Strong names satisfy the following requirements:

- **Guarantee name uniqueness by relying on unique key pairs.** No one can generate the same assembly name that you can, because an assembly generated with one private key has a different name than an assembly generated with another private key.
- **Protect the version lineage of an assembly.** A strong name can ensure that no one can produce a subsequent version of your assembly. Users can be sure that the version of the assembly that they are loading comes from the same publisher that created the version the application was built with.
- **Provide a strong integrity check.** Passing the .NET Framework security checks guarantees that the contents of the assembly have not been changed since it was built. Note, however, that by themselves, strong names do not imply a level of trust such as that provided by a digital signature and supporting certificate.

When you reference a strong-named assembly, you can expect certain benefits, such as versioning and naming protection. If the strong-named assembly references an assembly with a simple name, which does not have these benefits, you lose the benefits that you derive by using a strong-named assembly and open the door to possible DLL conflicts. Therefore, strong-named assemblies can reference only other strong-named assemblies.

If the assembly that you are consuming does not have a strong name, and is therefore not installed in the GAC, you must manually copy the assembly (and the assemblies it depends on, if applicable) to a directory where the .NET Framework can find it when it needs to load the assembly for execution.

It is a good practice to place the assembly in the same directory as the executable that will ultimately load it (in other words, the folder on the client or the server in which the application is located). You might also want to store the assembly in the Client\Bin directory (even if it is used on the server exclusively), so that the client can pick it up and use it for IntelliSense.

## Reference a managed DLL from Microsoft Dynamics AX

Microsoft Dynamics AX 2012 does not have a built-in mechanism for bulk deployment or installation of a particular DLL on client or server computers, because each third-party DLL has its own installation process. You must do this manually by using the installation script that the vendor provides or by placing the assemblies in the appropriate folders.

After you install the assembly on the client or server computer, you must add a reference to the assembly in Microsoft Dynamics AX, so that you can program against it in X++. You do this by adding the assembly to the *References* node in the Application Object Tree (AOT).

To do this, right-click the *References* node, and then click Add Reference. A dialog box like the one shown in Figure 3-1 appears.

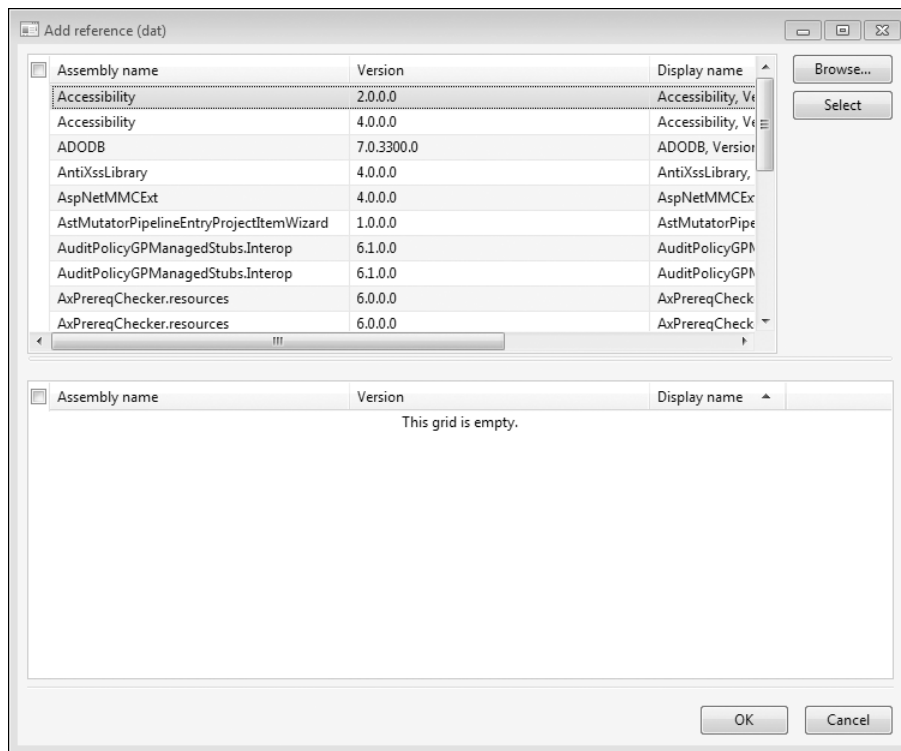


FIGURE 3-1 Adding a reference to a third-party assembly.

The top pane of the dialog box shows the assemblies that are installed in the GAC. If your assembly is installed in the GAC, click **Select** to add the reference to the *References* node. If the assembly is located in either the `Client\Bin` or the `Server\Bin` binary directory, click **Browse**. A file browser dialog box will appear where you can select your assembly. After you choose your assembly, it will appear in the bottom pane and will be added when you click **OK**.

## Code against the assembly in X++

After you add the assembly, you are ready to use it from X++. If you install the code in the `Client\Bin` directory, IntelliSense features are available to help you edit the code. You can now use the managed code features of X++ to instantiate public managed classes, call methods on them, and so on. For more information, see Chapter 4, “The X++ programming language.”

Note that there are some limitations to what you can achieve in X++ when calling managed code. One such limitation is that you cannot easily code against generic types (or execute generic methods). Another stems from the way the X++ interpreter works. Any managed object is represented as an instance of type *ClrObject*, and this has some surprising manifestations. For instance, consider the following code:

```
static void TestClr(Args _args)
{
    if (System.Int32::Parse("0"))
    {
        print "Do not expect to get here";
    }
    pause;
}
```

Obviously, you wouldn't expect the code in the *if* statement to execute because the result of the managed call is *0*, which is interpreted as *false*. However, the code actually prints the string literal because the return value of the call is a *ClrObject* instance that is not null (in other words, *true*). You can solve these problems by storing results in variables before use: the assignment operator will correctly unpack the value, as shown in the following example:

```
static void TestClr(Args _args)
{
    int i = System.Int32::Parse("0");
    if (i)
    {
        print "Do not expect to get here";
    }
    pause;
}
```

# Write managed code

Sometimes your requirements cannot be satisfied by using an existing component and you have to roll up your sleeves and develop some code—in either C# or VB.NET. Microsoft Dynamics AX has great provisions for this: the integration features between Microsoft Dynamics AX and Visual Studio give you the luxury of dealing with X++ artifacts (classes, tables, and enumerations) as managed classes that behave the way that a developer of managed code would expect. The Microsoft Dynamics AX Business Connector manages the interaction between the two environments. Broadly speaking, you can create a project in Visual Studio as you normally would, and then add that project to the Visual Studio *Projects* node in the AOT. This section walks you through the process.

This example shows how to create managed code in C# (VB.NET could also be used) that reads the contents of an Excel spreadsheet and inserts the contents into a table in Microsoft Dynamics AX. This example is chosen to illustrate the concepts described in this chapter rather than for the functionality it provides.



**Note** The example in this section requires the Microsoft.ACE.OLEDB.12.0 provider to read data from Excel. You can download the provider from <http://www.microsoft.com/en-us/download/confirmation.aspx?id=23734>.

The process is simple: you author the code in Visual Studio, and then add the solution to Application Explorer, which is just the name for the AOT in Visual Studio. Then, functionality from Microsoft Dynamics AX is made available for consumption by the C# code, which illustrates the proxy feature.

Assume that the Excel file contains the names of customers and the date that they registered as customers with your organization, as shown in Figure 3-2.

	A	B	C	D	E	F
1	Name	Date				
2	Abercrombie, Kim	04/28/74				
3	Abolrous, Hazem	06/22/49				
4	Abrus, Luka	03/19/47				
5	Abu-Dayah, Ahmad	08/11/65				
6	Acevedo, Humberto	04/17/85				
7	Achong, Gustavo	09/09/80				
8	Ackerman, Pilar	09/08/81				
9	Adalsteinnsson, Gudmundur	04/17/86				
10	Adams, Terry	06/22/49				
11	Affronti, Mirhael					

**FIGURE 3-2** Excel spreadsheet that contains a customer list.

Also assume that you’ve defined a table (called, say, CustomersFromExcel) in the AOT that will end up containing the information, subject to further processing. You could go about reading the information from the Excel files from X++ in several ways: one is by using the Excel automation model; another is by manipulating the Office Open XML document by using the XML classes.

However, because it is so easy to read the contents of Excel files by using ADO.NET, that is what you decide to do. You start Visual Studio, create a C# class library called *ReadFromExcel*, and then write the following code:

```
using System;
using System.Collections.Generic;
using System.Text;

namespace Contoso
{
    using System.Data;
    using System.Data.OleDb;
    public class ExcelReader
    {
        static public void ReadDataFromExcel(string filename)
        {
            string connectionString;
            OleDbDataAdapter adapter;
            connectionString = @"Provider=Microsoft.ACE.OLEDB.12.0;"
                + "Data Source=" + filename + ";"
                + "Extended Properties='Excel 12.0 Xml';"

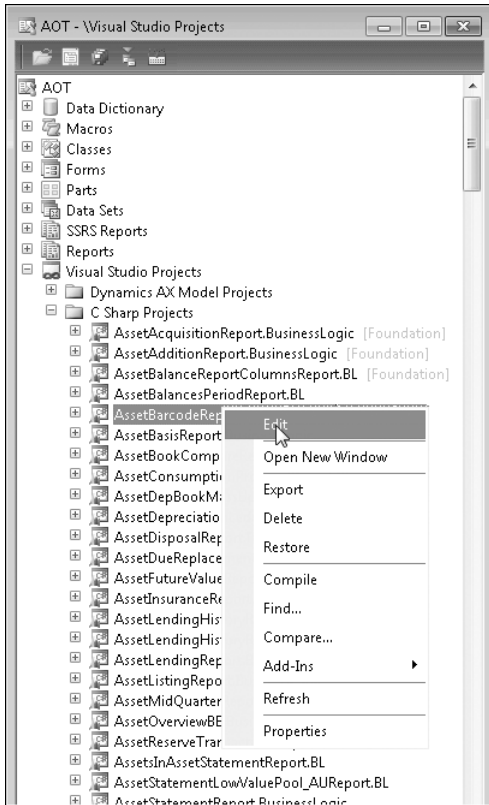
            + "HDR=YES"; // Since sheet has row with column titles

            adapter = new OleDbDataAdapter(
                "SELECT * FROM [sheet1$]",
                connectionString);
            DataSet ds = new DataSet();
            // Get the data from the spreadsheet:
            adapter.Fill(ds, "Customers");
            DataTable table = ds.Tables["Customers"];
            foreach (DataRow row in table.Rows)
            {
                string name = row["Name"] as string;
                DateTime d = (DateTime)row["Date"];
            }
        }
    }
}
```

The *ReadDataFromExcel* method reads the data from the Excel file given as a parameter, but it does not currently do anything with that data. You still need to establish a connection to the Microsoft Dynamics AX system to store the values in the table. There are several ways of doing this, but in this case, you will simply use the Microsoft Dynamics AX table from the C# code by using the proxy feature.

The first step is to make the Visual Studio project (that contains the code) into a Microsoft Dynamics AX “citizen.” You do this by selecting the Add ReadFromExcel To AOT menu item on the Visual Studio project. When this is done, the project is stored in the AOT and can use all of the functionality that is available for nodes in the AOT. The project can be stored in separate layers, be imported and exported, and so on. The project is stored in its entirety, and you can open Visual Studio to edit the project by clicking Edit on the context menu, as shown in Figure 3-3.



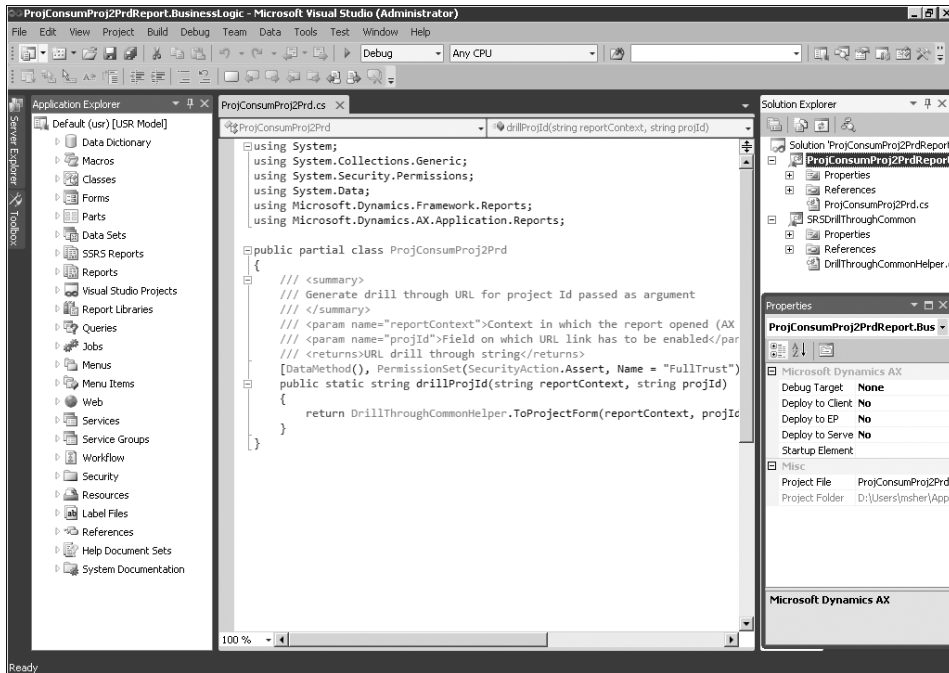


**FIGURE 3-3** Context menu for Visual Studio projects that are stored in the AOT.



**Tip** You can tell that a project has been added to the AOT because the Visual Studio project icon is updated with a small Microsoft Dynamics AX icon in the lower-left corner.

With that step out of the way, you can use the version of the AOT that is available in Application Explorer in Visual Studio to fetch the table to use in the C# code (see Figure 3-4). If the Application Explorer window is not already open, you can open it by clicking Application Explorer on the View menu.



**FIGURE 3-4** Application Explorer with a Microsoft Dynamics AX project open.

You can then create a C# representation of the table by dragging the table node from Application Explorer into the project.

After you drag the table node into the Visual Studio project, you will find an entry in the project that represents the table. The items that you drag into the project in this way are now available to code against in C#, just as though they had been written in C#. This happens because the drag operation creates a proxy for the table under the covers; this proxy takes care of the plumbing required to communicate with the Microsoft Dynamics AX system, while presenting a high-fidelity managed interface to the developer.

You can now proceed by putting the missing pieces into the C# code to write the data into the table. Modify the code as shown in the following example:

```

DataTable table = ds.Tables["Customers"];
var customers = new ReadFromExcel.CustomersFromExcel();
foreach (DataRow row in table.Rows)
{
    string name = row["Name"] as string;
    DateTime d = (DateTime)row["Date"];
    customers.Name = name;
    customers.Date = d;
    customers.Write();
}

```



**Note** The table from Microsoft Dynamics AX is represented just like any other type in C#. It supports IntelliSense, and the documentation comments that were added to methods in X++ are available to guide you as you edit.

The data will be inserted into the CustomersFromExcel table as it is read from the ADO.NET table that represents the contents of the spreadsheet. However, before either the client or the server can use this code, you must deploy it. You can do this by setting the properties in the Properties window for the Microsoft Dynamics AX project in Visual Studio. In this case, the code will run on the client, so you set the *Deploy to Client* property to *Yes*. There is a catch, though: you cannot deploy the assembly to the client when the client is running, so you must close any Microsoft Dynamics AX clients prior to deployment.

To deploy the code, right-click the Visual Studio project, and then click *Deploy*. If all goes well, a *Deploy Succeeded* message will appear in the status line.



**Note** You do not have to add a reference to the assembly because a reference is added implicitly to projects that you add to the AOT. You only need to add references to assemblies that are not the product of a project that has been added to the AOT.

As soon as you deploy the assembly, you can code against it in X++. The following example illustrates a simple snippet in an X++ job:

```
static void ReadCustomers(Args _args)
{
    ttsBegin;
    Contoso.ExcelReader::ReadDataFromExcel(@"c:\Test\customers.xlsx");
    ttsCommit;
}
```

When this job runs, it calls into the managed code and insert the records into the Microsoft Dynamics AX database.

## Debug managed code

To ease the process of deploying after building, Visual Studio properties let you define what happens when you run the Microsoft Dynamics AX project. You manage this by using the *Debug Target* and *Startup Element* properties. You can enter the name of an element to execute—typically, a class with a suitable main method or a job. When you start the project in Visual Studio, it will create a new instance of the client and execute the class or job. The X++ code then calls back into the C# code where breakpoints are set. For more information, see “Debugging Managed Code in Microsoft Dynamics AX” at <http://msdn.microsoft.com/en-us/library/gg889265.aspx>.

An alternative to using this feature is to attach the Visual Studio debugger to the running Microsoft Dynamics AX client (by using the Attach To Process menu item on the Debug menu in Visual Studio). You can then set breakpoints and use all of the functionality of the debugger that you normally would. If you are running the Application Object Server (AOS) on your own computer, you can attach to that as well, but you must have administrator privileges to do so.



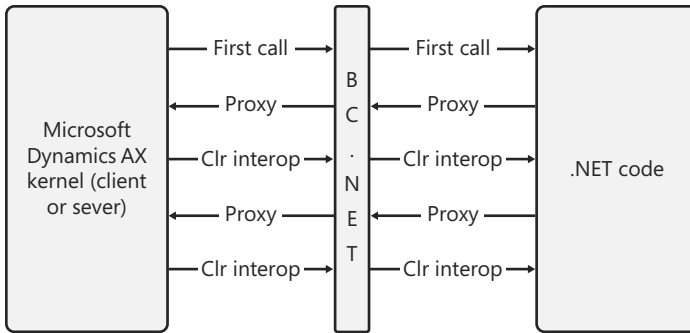
**Important** Do not debug in a production environment.

## Proxies

As you can see, wiring up managed code to work with Microsoft Dynamics AX is quite simple because of the proxies that are generated behind the scenes to represent the Microsoft Dynamics AX tables, enumerations, and classes. In developer situations, it is standard to develop the artifacts in Microsoft Dynamics AX iteratively and then code against them in C#. This process is seamless because the proxies are regenerated by Visual Studio at build time, so that they are always synchronized with the corresponding artifacts in the AOT; in other words, the proxies never become out of date. In this way, proxies for Microsoft Dynamics AX artifacts differ from Visual Studio proxies for web services. These proxies are expected to have a stable application programming interface (API) so that the server hosting the web service is not contacted every time the project is built. Proxies are generated not only for the items that the user has chosen to drop onto the *Project* node as described previously. For instance, when a proxy is generated for a class, proxies will also be generated for all of its base classes, along with all artifacts that are part of the parameters for any methods, and so on.

To see what the proxies look like, place the cursor on a given proxy name in the code editor, such as *CustomersFromExcel* in the example, right-click, and then click Go To Definition (or use the convenient keyboard shortcut F12). All of the proxies are stored in the Obj/Debug folder for the project. If you look carefully, you will notice that the proxies use the Microsoft Dynamics AX Business Connector to do the work of interfacing with the Microsoft Dynamics AX system. The Business Connector has been completely rewritten from the previous version to support this scenario; in older versions of the product, the Business Connector invariably created a new session through which the interaction occurred. This is not the case for the new version of the Business Connector (at least when it is used as demonstrated here). That is why the transaction that was started in the job shown earlier is active when the records are inserted into the table. In fact, all aspects of the user's session are available to the managed code. This is the crucial difference between authoring business logic in managed code and consuming the business logic from managed code. When you author business logic, the managed code becomes an extension to the X++ code, which means that you can crisscross between Microsoft Dynamics AX and managed code in a consistent environment. When consuming business logic, you are better off using the services framework that Microsoft Dynamics AX provides, and then consuming the service from your application. This has big benefits in terms of scalability and deployment flexibility.

Figure 3-5 shows how the Business Connector relates to Microsoft Dynamics AX and .NET application code.



**FIGURE 3-5** Interoperability between Microsoft Dynamics AX and .NET code through the Business Connector.

To demonstrate the new role of the Business Connector, the following example opens a form in the client that called the code:

```
using System;
using System.Collections.Generic;
using System.Text;

namespace OpenFormInClient
{
    public class OpenFormClass
    {
        public void DoOpenForm(string formName)
        {
            Args a = new Args();
            a.name = formName;
            var fr = new FormRun(a);
            fr.run();
            fr.detach();
        }
    }
}
```

In the following example, a job is used to call managed code to open the CustTable form:

```
static void OpenFormFromDotNet(Args _args)
{
    OpenFormInClient.OpenFormClass opener;
    opener = new OpenFormInClient.OpenFormClass();
    opener.DoOpenForm("CustTable");
}
```



**Note** The *FormRun* class in this example is a kernel class. Because only an application class is represented in Application Explorer, you cannot add this proxy by dragging and dropping as described earlier. Instead, drop any class from Application Explorer onto the Visual Studio project, and then set the file name property of the class to *Class.<kernelclassname>.axproxy*. In this example, the name would be *Class.FormRun.axproxy*.

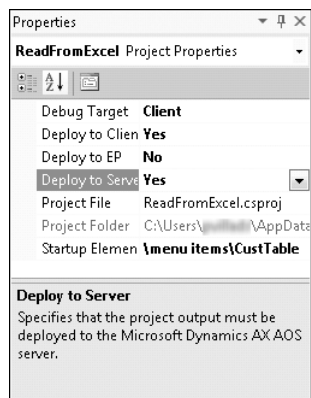
This would not have been possible with older versions of the Business Connector because they were basically faceless clients that could not display any user interface. Now, the Business Connector is actually part of the client (or server), and therefore, it can do anything they can. In Microsoft Dynamics AX 2012 R2, you can still use the Business Connector as a stand-alone client, but that is not recommended because that functionality is now better implemented by using services (see Chapter 12). The Business Connector that is included with Microsoft Dynamics AX is built with .NET Framework 3.5. That means that it is easier to build the business logic with this version of .NET; if you cannot do that for some reason, you must add markup to the App.config file to compensate. If you are using a program that is running .NET Framework 4.0 and you need to use the Business Connector through the proxies as described, you would typically add the following markup to the App.config file for your application:

```
<configuration>
  <startup useLegacyV2RuntimeActivationPolicy="true">
    <supportedRuntime version="v4.0" sku=".NETFramework,Version=v4.0"/>
  </startup>
</configuration>
```

## Hot swap assemblies on the server

The previous section described how to express business logic in managed code. To simplify the scenario, code running on the client was used as an example. This section describes managed code running on the server.

You designate managed code to run on the server by setting the *Deploy to Server* property for the project to Yes, as shown in Figure 3-6.

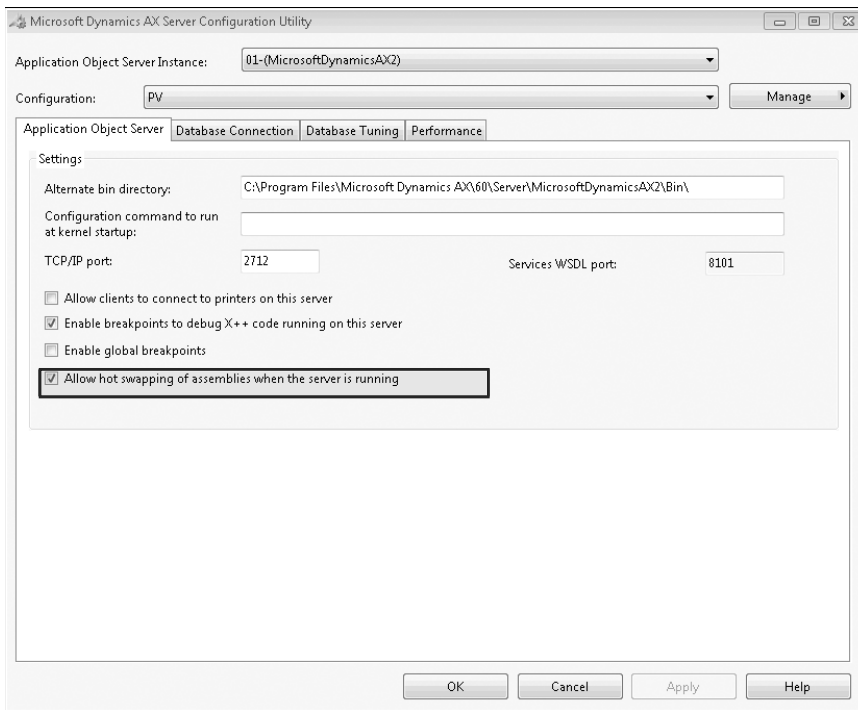


**FIGURE 3-6** Property sheet showing the *Deploy to Server* property set to Yes.

When you set this property as shown in Figure 3-6, the assembly is deployed to the server directory. If the server has been running for a while, it will typically have loaded the assemblies into the current application domain. If Visual Studio were to deploy a new version of an existing assembly, the deployment would fail because the assembly would already be loaded into the current application domain.

To avoid this situation, the server has the option to start a new application domain in which it executes code from the new assembly. When a new client connects to the server, it will execute the updated code in a new application domain, while already connected clients continue to use the old version.

To use the hot-swapping feature, you must enable the option in the Microsoft Dynamics AX Server Configuration Utility by selecting the Allow Hot Swapping of Assemblies When The Server Is Running check box, as shown in Figure 3-7. To open the Microsoft Dynamics AX Server Configuration Utility, on the Start menu, point to Administrative Tools, and then click Microsoft Dynamics AX 2012 Server Configuration.



**FIGURE 3-7** Allow hot swapping by using the Microsoft Dynamics AX Server Configuration Utility.



**Note** The example in the previous section illustrated how to run and debug managed code on the client, which is safe because the code runs only on a development computer. You can debug code that is running on the server (by starting Visual Studio as a privileged user and attaching to the server process as described in the “Debug managed code” section). However, you should never do this on a production server because any breakpoints that are encountered will stop all of the managed code from running, essentially blocking any users who are logged on to the server and processes that are running. Another reason you should not use hot swapping in a production scenario is that calling into another application domain extracts a performance overhead. The feature is intended only for development scenarios, where the performance of the application is irrelevant.





# Index

## Symbols and Numbers

- .chm files, 545
- .NET AJAX, 222
- .NET Business Connector
  - Enterprise Portal architecture, 8, 197–198
  - Enterprise Portal security, 232–235
  - Enterprise Portal, developing for, 231–232
  - proxies, Enterprise Portal, 226–228
- .NET CIL (common intermediate language), compile and run X++, 126–128
- .NET CLR interoperability statement, X++ syntax, 96
- .NET Framework. *See also* Windows Workflow Foundation (WF)
  - assemblies, hot-swapping, 84–85
  - author managed code, 77–84
  - chart control mark-up elements, 291–292
  - EP Chart Control tool, overview, 289
  - legacy systems, overview, 73
  - plug-ins, developing, 7
  - processing architecture, 4–6, 8
  - third-party assemblies, use of, 73–76
- .NET Framework Common Language Runtime (CLR), 13
- .rsds (data connection file), PowerPivot, 336
- .xpo files, create a build, 71

## A

- abstract, method modifier, 119
- acceptance test driven development (ATDD), 535–536
- access control. *See also* security
  - form permissions, 356–359
  - privileges, creating, 359–361
  - security framework overview, 353–356
  - security roles, privileges and duties, 361–362
- access operators, X++ expressions, 95
- accounting framework
  - extensions, 662
  - MorphX model element prefixes, 663
  - overview, 659–662
  - process states, 662–663
  - when to use, 662
- Accounting Journalization Rule, 660
- Accounting Policy, 659
- accounting, element naming prefix, 22
- acknowledgement message, workflows, 260
- action menu items, workflow artifacts, 266
- Action pane
  - controls, creating, 174–176
  - details form design, 151–152
  - Enterprise Portal, navigation form design, 156–157
  - Enterprise Portal, web parts, 199
  - model-driven list pages, creating, 218
  - transaction details form design, 155
- Action pane, list page design, 149
- ActionMenuItemClicked, 212–213
- ActionMenuItemClicking, 212–213
- actions, element actions in AOT, 25–26
- Active Directory
  - Integrated Windows Authentication, 352–353
  - security role assignments, 355
- ActiveMode, 204
- ActiveSectionIndex, 204
- Activity, operations resource framework, 650–653
- add-ins, Microsoft Office, 189–190
- add-on functionalities
  - delegates, X++ syntax, 120–122
  - naming of, 21–22
- address bar, navigation layer forms, 141
- address book, 637
- addresses, element prefix, 22
- addRuntimeTask, 624
- addTask, batch jobs, 624
- aggregate, X++ select statements, 102
- Aggregation property, associations, 48–49

## AIF (Application Integration Framework)

- AIF (Application Integration Framework)
  - custom services, creating, 388–391
  - overview, 386
  - send framework, 411–414
  - services, publishing, 400–401
- AIF Document Service Wizard
  - artifacts, creating, 393
  - creating document services, 395–397
  - opening, 29
- AifCollectionTypeAttribute, 391
- AifDocumentService, 393
- AifEntityKeys, 394
- AJAX, Enterprise Portal development, 222
- AllowDelete, AxGridView, 207
- AllowEdit, AxGridView, 207
- AllowFormCompanyChange, window type, 174
- AllowGroupCollapse, AxGridView, 207
- AllowGrouping, AxGridView, 207
- AllowSelections, AxGridView, 207
- ALM, Visual Studio, 534, 540–543
- alternate keys
  - date-effective framework, 602–603
  - overview, 587–588
- AmountMST, 316–317, 328–332
- Analysis Currency, 329–332
- Analysis Services Projects, modifying prebuilt projects, 319–323
- AnalysisDimensionLabel, 326–327
- AnalysisIdentifier, 326–327
- AnalysisKeyAttributeLabel, 326–327
- AnalysisMeasureGroupLabel, 326–327
- analytics. *See also* Business Intelligence (BI)
  - analytic content, configuring, 310–311
  - Business Overview and KPI List web parts, 341–345
  - Excel reports, 340
  - overview, 333–335
  - presentation tools, choice of, 335
  - Report Builder, 346
  - SQL Server Power View, 335–340
  - Visual Studio tools, 346–349
- anytype, 90, 93
- AOD (Application Object Data)
  - files, 687–688
- AOS (Application Object Server)
  - architecture, 7
  - batch jobs, debugging, 629–630
  - configuration, performance and, 463–464
  - Help system, 549
  - processing architecture, 3–5, 7
- AOSAuthorization, coding table permissions, 369–371
- aosValidateDelete, 436
- aosValidateInsert, 438–439
- aosValidateRead, 433–434, 436
- aosValidateUpdate, 433–434
- AOT (Application Object Tree) modeling tool
  - AxDataSource, 203–204
  - creating elements, 23
  - element actions in, 25–26
  - element layers and models, 26
  - Enterprise Portal, developing for, 217
  - Jobs, overview, 88
  - modifying elements, 23–25
  - navigation in, 21–23
  - overview, 20
  - PageTitle, 200
  - processing architecture, 6–7
  - publishing services, 400–401
  - refreshing elements in, 25
  - security artifacts, developing, 356–363
  - Table Browser, overview, 52–53
  - third-party DLLs, referencing, 75–76
  - Toolbar, Enterprise Portal web part, 200
- APIs (application programming interfaces)
  - AIF Send, 411–414
  - Batch API, 623–625
  - code access security (CAS), 124–126, 371–372
  - document services, overview, 392
  - Enterprise Portal architecture, 196–198
  - model store, 703–704
  - reflection, overview, 669–670
  - table data, reflection API, 673–676
  - treenodes, 680–685
- API exceptions, dangerous, 41
- application development environment, 6–7
- application domain frameworks
  - accounting framework
    - extensions, 662
    - MorphX model element prefixes, 663
    - overview, 659–662
    - process states, 662–663
    - when to use, 662
  - dimension framework
    - constrain combinations of values, 656
    - create values, 656–657
    - extensions, 657
    - overview, 654–656
    - physical table references, 659
    - query data, 658–659

- operations resource framework
  - extensions, 652–653
  - MorphX model element prefixes, 654
  - overview of, 648–652
  - when to use, 652
- organization model framework
  - custom operating units, creating, 639–640
  - hierarchy designer, extending, 642
  - integration with other frameworks
    - application modules, 637–638
  - organization hierarchies, 635–637
  - organization types, 634–635
  - overview, 634
  - scenarios, modeling, 638–639
- overview, 633–634
- product model framework
  - extension of, 647–648
  - overview, 643–647
  - when to use, 647
- source document framework
  - extensions, 666–667
  - MorphX model element prefixes, 667
  - overview, 664–665
  - when to use, 665
- application frameworks, element naming prefix, 23
- Application Integration Framework
  - custom services, creating, 388–391
  - overview, 386
  - send framework, 411–414
  - services, publishing, 400–401
- application integration services, architecture, 8
- application meta-model architecture
  - application data element types, 10–11
  - code element types, 13
  - documentation and resource element types, 16
  - license and configuration element types, 16–17
  - MorphX user interface control element types, 11–12
  - overview, 9
  - role-based security element types, 14
  - services element types, 13
  - web client element types, 14–15
  - workflow element types, 12–13
- application models
  - creating models, 693–694
  - element IDs, 692–693
  - layers, 688–690
  - model store API, 703–704
  - models, overview, 690–692
  - moving from test to production, 700–703
  - overview, 687–688
  - publishing, preparing for, 694–699
  - upgrading, 699–700
- Application Object Data (AOD) files, 687–688
- Application Object Server (AOS)
  - architecture, 7
  - batch jobs, debugging, 629–630
  - configuration, performance and, 463–464
  - Enterprise Portal architecture, 197–198
  - Help system, 549
  - processing architecture, 3, 5, 7
- Application Object Tree (AOT) modeling tool
  - AxDataSource, 203–204
  - creating elements, 23
  - element actions in, 25–26
  - element layers and models, 26
  - Enterprise Portal, developing for, 217
  - Jobs, overview, 88
  - modifying elements, 23–25
  - navigation in, 21–23
  - overview, 20
  - PageTitle, 200
  - processing architecture, 6–7
  - publishing services, 400–401
  - refreshing elements in, 25
  - security artifacts, developing, 356–363
  - Table Browser, overview, 52–53
  - third-party DLLs, referencing, 75–76
  - Toolbar, Enterprise Portal web part, 200
- application platform, architecture of, 4–9
- application programming interfaces (APIs)
  - AIF Send, 411–414
  - Batch API, 623–625
  - code access security (CAS), 124–126, 371–372
  - document services, overview, 392
  - Enterprise Portal architecture, 196–198
  - model store, 703–704
  - reflection, overview, 669–670
  - table data, reflection API, 673–676
  - treenodes, 680–685
- ApplicationHelpOnTheWeb, 548
- applications, processing architecture, 4–5
- approvals, workflow artifacts, 264
- approvals, workflow elements, 252
- architecture
  - application platform, 6–9
  - Business Intelligence (BI), 299–300
  - Enterprise Portal, 196–198

## area pages, designing

- architecture (*continued*)
  - five-layer solution architecture, overview, 4–6
  - overview, 3–4
  - report execution sequence, 278–279
  - security framework, overview, 351–356
  - service-oriented architecture, 386
  - workflow architecture, 256–262
- area pages, designing, 144–146
- arithmetic operators, X++ expressions, 95
- artifacts, workflows, 264–265
- ASP.NET
  - AxDataSource, 203–204
  - chart control mark-up elements, 291–292
  - datasets, Enterprise Portal, 201–203
  - Enterprise Portal architecture, 196–198
  - Enterprise Portal, AJAX, 222
  - EP Chart Control Tool, overview, 289
  - error handling, 231–232
  - GridView, 207
  - processing architecture, 4–6
  - UpdatePanel, 215
  - User control web part, 201
  - validation, 231
  - ViewState, Enterprise Portal, 228–229
- assemblies, hot-swapping, 84–85
- assert, code access security, 126
- Asset, element prefix, 22
- assignment statements, X++ syntax, 96
- associated forms, permissions, 358
- associations, metadata, 163
- asynchronous mode, SysOperations, 468
- ATDD (acceptance test driven development), 535–536
- attributes
  - SysTest framework, new features, 527–533
  - UML associations, 48–49
  - X++ syntax, 123–124
- Attributes, product model framework, 646
- authentication
  - Enterprise Portal architecture, 197
  - Enterprise Portal, security, 232–235
  - models, signing, 696–697
  - security framework overview, 351–356
- Authenticode, 696–697
- authorization, security framework overview, 351–356
- Auto variables, overview, 187
- autogeneration, buttons, 220
- auto-inference, form permissions, 356–359
- AutoLookup, coding, 188–189
- automated decisions, workflow elements, 253
- automated tasks, workflow artifacts, 265
- automated tasks, workflow elements, 253
- AutoQuery, 170–172
- autorefresh, 25
- AutoSearch, metadata property, 170
- avg
  - sample select statement code, 102
  - X++ select statements, 102
- Ax, element prefix, 22
- AxActionPanel, 211–212
- AxaptaObjectAdapter, 204
- AxBaseValidator, 231
- AxBaseWebPart, 224–225
- AxColumn, 205
- AxCommon, 393–394
- AxContentPanel, 215
- AxContext, 223–225
- AxContextMenu, 209
- Axd documents
  - business document updates, 407–409
  - document services artifacts, 392–393
  - overview, 392
- Axd, element naming prefix, 22
- AxDataSource, 201–204, 225
- AxDataSourceView, 203, 209
- AxDatePicker, 216
- AxDateSource, 219–221
- AxDateTimeValueFormatter, 230
- AxDateValueFormatter, 230
- AxdDocument class, 393–394
- AxdSend API, 412–414
- AxEnumValueFormatter, 230
- AxExceptionCategory, 231–232
- AxFatal, exception handling, 231
- AxFilter, 209–210
- AxForm, 204, 231
- AxFormPart, 216
- AxGridView, 207, 210, 215, 231
- AxGroup, 205–206, 215
- AxGuidValueFormatter, 230
- AxHierarchicalGridView, 208
- AxInfoPart, 216
- AxInternalBase, 395
- AxLabel, 229–230
- AxLookup, 210–211
- axmodel, 687. *See also* model store
- axmodelstore, 688. *See also* model store
- AxMultiColumn, 205

- AxMultiSection, 204
- AxNumberValueFormatter, 230
- AxPartContentArea, 216
- AxPopup controls, 213–215
- AxPopupBaseControl, 213–215
- AxPopupChildControl, 213–215
- AxPopupField, 214–215
- AxPopupParentControl, 213–215
- AxRealValueFormatter, 230
- AxReportViewer, 216
- AxSection, 204
- AxStringValueFormatter, 230
- AxTable class, 393–395
- AxTableContext, 223–225
- AxTableDataKey, 224–225
- AxTimeValueFormatter, 230
- AxToolBar, 212–213
- AxToolBarButton, 212
- AxToolBarMenu, 212
- AxUpdate Portal, 239–240
- AXUtil
  - element IDs, 692
  - importing models, 697–699
  - model store API, 703–704
  - models, upgrading, 699–700
- AxValueFormatter, 230
- AxValueFormatterFactory, 230
- AxValueFormatValidator, 231
- AxViewContext, 223–225
- AxViewDataKey, 224–225

## B

- backing entity type, adding, 657
- base enum elements, defined, 10
- base enumeration types, 88, 93
- Batch API, 623–625
- Batch class, 49–50
- batch framework
  - Batch API, using, 623–625
  - batch group, creating, 626–627
  - batch jobs, creating, 618–625
  - batch server, configuring, 625–626
  - batch-executable class, creating, 616–617
  - common uses of, 614–615
  - debugging batch jobs, 629–631
  - managing batch jobs, 628–629
  - overview, 613–614
  - performance and, 466–467, 615
- Batch Job Form
  - creating batch jobs, 619–622
  - overview, 613
- Batch Tasks form, 621–622
- BatchHeader, 623–625
- BatchRunnable interface, 495–496
- best practices
  - exception handling, 105
  - variable declaration syntax, 94
  - X++ syntax, 93
- Best Practices tool
  - custom rules, 42–43
  - errors and warnings, suppressing, 41–42
  - overview, 20, 39–40
  - rules, 40–41
  - Trustworthy Computing, 372–373
  - XML documentation, 116
- BI. *See* Business Intelligence (BI)
- bill of materials, element prefix, 22
- binding
  - AxToolBar, 212
  - BoundField, 215
  - chart controls, binding data series, 292–294
  - chart controls, binding to dataset, 292
  - control data binding, 173
  - datasets, Enterprise Portal, 201
  - field-bound controls, 178–179
  - method-bound controls, 179
  - object type, 92
- bitwise operators, X++ expressions, 95
- BOM, element prefix, 22
- boolean
  - value types, overview, 88
  - variable declaration syntax, 93
- BoundField, overview, 215
- boxing, 110
- break statement, X++ syntax, 96
- Break, exception handling, 106
- breakpoint
  - AOS configuration, performance and, 463–464
  - breakpoint statement, X++ syntax, 96
  - shortcut keys, X++ code editor, 32
- browsers, Enterprise Portal architecture, 197–198
- buf2con, 425–426
- built-in collection types, 88
- built-in primitive type, 88
- Business Connector, authoring managed
  - code, 77–84
- business documents, element prefix, 22

## Business Intelligence (BI)

- Business Intelligence (BI)
    - analytic content, configuring, 310–311
    - components of, 299–300
    - cubes, creating
      - generate and deploy cubes, 328–333
      - KPIs and calculations, adding, 333
      - metadata, defining, 325–328
      - requirements, identifying, 324–325
    - cubes, customizing, 311–319
    - cubes, extending, 319–323
    - customizing, overview, 309–310
    - displaying content in Role Centers
      - Business Overview and KPI List web parts, 341–345
      - Excel reports, 340
      - overview, 333–335
      - presentation tools, choice of, 335
      - Report Builder, 346
      - SQL Server Power View reports, 335–340
      - Visual Studio tools, 346–349
    - Enterprise Portal, web parts, 199
    - overview, 299
    - prebuilt BI solution, implementing, 301–309
    - properties, 326–327
  - Business Intelligence Development Studio, 323
  - business logic
    - overview, 188
    - workflows, creating, 264–265
  - Business Overview
    - Enterprise Portal, web parts, 199
    - Role Center displays, 341–345
  - business processes, defined, 245–246. *See also* workflow
  - business unit, defined, 635
  - buttons
    - action controls, creating, 174–176
    - action controls, overview, 175
    - AxToolBarButton, 212
    - details page, autogeneration, 220
    - Enterprise Portal, AJAX, 222
    - model-driven list pages, creating, 218–219
  - bytecode, overview, 87
- ## C
- C#, authoring managed code, 77–84
  - caching
    - cacheAddMethod, 418–419
    - CacheDataMethod, 419
    - CacheLookup, 421, 446–452
    - declarative display method caching, 419
    - elements, refreshing, 25
    - Enterprise Portal, developing for, 223
    - EntireTable cache, 453–454
    - indexing and, 421
    - labels, 230
    - MetadataCache, 225–226
    - number sequence caching, 465
    - performance
      - overview, 446
      - record caching, 446–452
      - unique index join cache, 452
    - RecordViewCache, 454–455
    - Server Configuration form, 463
    - SysGlobalCache, 456
    - SysGlobalObjectCache, 456
    - update conflicts, 409
  - CAL (client access license), 376–383
  - calculated measures, adding to cubes, 333
  - calendars, customizing cubes, 314–315
  - call stack, 88, 125–126
  - CallContext, consuming system services, 404–407
  - Called From, 420
  - camel casing, 93
  - cancel selection, shortcut key, 32
  - candidate key, alternate keys, 587–588
  - canGoBatchJournal, 617
  - canSubmitToWorkflow, 274
  - canSubmitToWorkflow, workflow artifacts, 266
  - Capability, 649–650
  - Caption property, forms, 160, 174
  - card sort, 145–146
  - CAS (code access security), 124–126, 371–372
  - casting statements, X++ syntax, 97
  - categories, product model framework, 646
  - changeCompany statement, X++ syntax, 98
  - ChangeGroupMode, 167
  - chart development tools, overview, 289
  - charts. *See* reporting
  - CIL (common intermediate language)
    - executing X++ as CIL, 466
    - troubleshooting, tracing, 487–488
  - claims-based authentication, 352–353
  - class element type, 13
  - class type, reference types, 89
  - Class Wizard, opening, 29
  - classDeclaration, attributes, 123–124

- classes
  - attributes, X++ syntax, 123–124
  - fields, X++ syntax, 118
  - UML object models, 49–50
  - X++ syntax, overview, 117–118
- classIdGet system function, reflection, 669, 672–673
- ClearFieldValues, 214–215
- client access license (CAL), 376–383
- client access log, 490
- client callbacks, eliminating, 424–425
- client configuration, performance and, 464–465
- client, method modifier, 119
- Close button, autogeneration, 220
- ClosePopup, 214–215
- CLR (Common Language Runtime)
  - reference element types, 13
  - type conversions, 111
  - X++ interoperability, 108–112
- CLRError, exception handling, 106
- ClrObject, calling managed code, 76
- code access security (CAS), 124–126, 371–372
- code element types, overview, 13
- code permission element type, 14
- CodeAccessPermission, 125, 371–372
- CodeAccessPermission.copy, 372
- CodeAccessPermission.demand, 372
- CodeAccessPermission.isSubsetOf, 372
- CodeAccessSecurity, exception handling, 106, 372
- coding. *See also* X++ programming language (code)
  - Auto variables, 187
  - business logic, 188
  - custom lookups, 188–189
  - form customization, overview, 184
  - method overrides, 184–186
- collections list page example, 148–149
- columns
  - AxColumn, 205
  - AxMultiColumn, 205
  - computed columns, creating views, 333
- CombineXPOs, 71
- CommandButton, 175
- comments
  - inserting, shortcut key for, 32
  - X++ syntax, 115
- common intermediate language (CIL)
  - executing X++ as CIL, 466
  - troubleshooting, tracing, 487–488
- Common Language Runtime (CLR)
  - reference element types, 13
  - type conversions, 111
  - X++ interoperability, 108–112
- common type, 90–91
- Common, Area Page design, 145
- Compare tool, 20, 54–59
- compilation
  - Compiler output window, 38
  - compiling and running X++ as .NET CIL, 126–128
  - EB Web Applications, 220
  - errors, shortcut keys, 32
  - errors, use of semicolon, 95
  - intrinsic functions, reflection, 670–671
  - overview, 37–39
  - shortcut keys, X++ code editor, 32
- Compiler tool, 20
- compound statement, X++ syntax, 97
- computed columns, views, 333
- con2buf, 425–426
- ConceptNum, 671
- ConceptStr, 671
- Concrete Source Documents, 664–665
- conditional operators, X++ expressions, 95
- conditions, workflow document classes, 268–270
- configuration hierarchy, license codes, 378
- configuration key element type, 16–17
- configuration keys
  - Business Intelligence (BI), 309
  - license codes, 378–380
  - table inheritance hierarchy, 595
- ConfigurationKey, temporary tables, 584
- conflict resolution, project upgrades and, 29
- Connect, Enterprise Portal web parts, 199
- constrained table
  - data security policies, developing, 365–369
  - defined, 365
- constructor encapsulation pattern, 129–130
- constructor, defined, 120
- consumer, eventing, 520
- containers
  - converting table buffers, 425–426
  - variable declaration syntax, 93
- content pane, navigation form design, 156–157
- content pane, navigation layer forms, 142
- ContentPage, window type, 174
- context menu, AxContextMenu, 209
- Context, Enterprise Portal development, 223–225
- ContextMenuName, AxGridView, 207
- context-sensitive Help topics, 561–562

## ContextString, data security policies

- ContextString, data security policies, 367
- continue statement, X++ syntax, 97
- controls
  - adding, overview, 172–173
  - control data binding, 173
  - Design node properties, 173–174
  - dialog box controls, 494
  - form permissions, 359
  - input controls, overview, 178–179
  - layout controls, overview, 176–178
  - ManagedHost control, 179–181
  - report elements, 282–285
  - runtime modifications, 174
- conversationId, 412
- CopyCallerQuery property, form queries, 172
- Correction, date-effective tables, 605–606
- CorrectPermissions, 360
- COS, element prefix, 22
- cost accounting, element prefix, 22
- cost center, defined, 635
- count, select statements, 102
- Create New Document Service Wizard, 393
- create, read, update, and delete (CRUD) permissions
  - forms, 356–359
  - menu items, 360
- CreateNavigationPropertyMethods, 591–593
- CreateNewTimePeriod, 605–606
- CreatePermissions, 360
- createRecord, 167
- CRM, element prefix, 23
- crossCompany, 99
- CrossCompanyAutoQuery, metadata property, 169
- Cross-reference tool
  - overview, 60–61
- Cross-reference tool, overview, 20
- CRUD (create, read, update, and delete) permissions
  - forms, 356–359
  - menu items, 360
- cubes
  - calendars, customizing, 314–315
  - creating
    - generate and deploy cubes, 328–333
    - metadata, defining, 325–328
    - requirements, identifying, 324–325
  - currency conversion, 316–317
  - customizing, 311–319
  - extending, data source, 321
  - extending, DSV, 321
  - extending, external data sources, 322–323
  - extending, KPIs and calculations, 321
  - extending, measures and dimensions, 321
  - extending, overview, 319–321
  - financial dimensions, 313–314
  - languages, selecting, 315–316
  - SSAS deployment, 303–309
- cues
  - cue element type, MorphX, 12
  - cue group element type, MorphX, 12
  - Cue Groups, creating, 218
  - CueGroupPartControl, 216
  - Enterprise Portal web part, 199
  - parts overview, 181
  - Role Center page design, 143
- culture, Enterprise Portal formatting, 230
- currency conversion
  - cubes, adding logic, 328–332
  - overview, 316–317
  - surrogate keys, 586–587
- CurrentContextChanged, 224–225
- CurrentContextProviderView, 224–225
- CurrentDataAccess, 363
- CurrentDate, time period filters, 345
- Cust, element naming prefix, 22
- custom rules, adding, 42–43
- custom workflow providers, workflow artifacts, 266
- customer contact, list page sample design, 146–148
- Customer Group lookup, 210–211
- customer relationship management, element
  - prefix, 23
- customers, element prefix, 22
- customization
  - Business Intelligence (BI), 309–319
  - chart reporting, default override, 296
  - custom services, 388–391
  - delegates, X++ syntax, 120–122
  - deploying, 700
  - document services, overview, 392, 397–399
  - Enterprise Portal architecture, 196–198
  - model store API, 703–704
  - using code, overview, 184
  - web parts, 199–201

## D

- dangerous API exceptions, 41
- data. *See also* metadata; also transaction performance
  - access to, Enterprise Portal, 225–226
  - Axd queries, creating, 395–396



- chart controls, binding to, 292–294
- consistency, date-effective framework, 604–606
- control data binding, 173
- cubes, metadata selection, 325–328
- data contracts, custom services, 389–390
- data contracts, X++ collections as, 391
- extensible data security policies, creating, 364–369
- external data source integration, 322–323
- form data sources, 164–169
- form method overrides, 185–186
- metadata, form data source properties, 168–169
- Microsoft Office add-ins, 189–190
- report elements, design of, 282–285
- security framework overview, 351–356
- valid time state tables, use of, 362–363
- data binding
  - BoundField, 215
  - datasets, Enterprise Portal, 201
- Data DictionaryPerspectives, 325–326
- data model, Cross-reference tool, 60
- data object, document services, 393
- data processing extensions, reports, 288
- data source, element prefix, 22
- data tier
  - architecture, 7
  - Business Intelligence (BI), 299–300
- dataArealD, indexing tips, 475–476
- data-aware statements, X++ syntax, 99–104
- database statements, X++ syntax, 99–104
- database tier. *See also* transaction performance
  - alternate keys, 587–588
  - date-effective framework, 601–606
  - full-text support, 606–607
  - overview, 577
  - QueryFilter API, 607–612
  - surrogate keys, 585–587
  - table inheritance, 594–599
  - table relations, 588–593
  - temporary tables
    - creating, 583–585
    - InMemory tables, 578–582
    - TembDB temporary tables, 582–583
  - Unit of Work, 599–601
- DataBound, AxGridView, 207
- DataContractAttribute, 390, 495
- DataKeyNames, AxForm, 204
- DataMember, 203–204, 207
- DataMemberAttribute, 390, 495
- DataSet, details page, 219–221
- datasets
  - AxGridView, 207
  - Enterprise Portal, 201–203
- DataSetView, 204, 209, 225
- DataSetViewRow, 204
- DataSourceControl, 203–204
- DataSourceID
  - AxDataSource, 203–204
  - AxForm, 204
  - AxGridView, 207
- DataSourceName, Auto variables, 187
- DataSourceView, 203
- date-effective framework
  - data consistency, run-time support, 604–606
  - data retrieval support, 603–604
  - overview, 601
  - relational modeling, 601–603
- dates
  - AxDatePicker, 216
  - calendars, customizing, 314–315
  - currency conversion logic, 330–332
  - DATE, 314
  - Date Dimensions, 314–315
  - date effectivity, overview, 168
  - date, value types, 88
  - date, variable declaration syntax, 94
  - valid time state tables, 355
- DDEError, exception handling, 106
- Deadlock, 106
- debugging
  - batch jobs, 629–631
  - Debug Target, 81–82
  - Debugger tool, MorphX, 20, 43–47
  - extensible data security policies, 368–369
  - managed code, 81–82
  - security, 373–375
  - Table Browser tool, 52–53
- declarations, Help topics, 552–553
- declarative display method caching, 419
- decoupling, events, 521
- Default Account, defined, 655–656
- Default Dimensions, defined, 655
- defaulting logic, document services, 399
- delegate, eventing, 521–524
- delegate, method modifier, 119
- delegates, X++ syntax, 120–122
- delete
  - current selection, shortcut keys, 32
  - InMemory temporary tables, 582
  - table relations, 588–593

## delete permissions

- delete permissions
  - forms, 356–359
  - menu items, 360
- delete, deleting, and deleted methods, 168
- delete\_from, 104, 428, 435–436
- DeletePermissions, 360
- department, defined, 635
- dependent workflow artifacts, 264–265
- deployment. *See also* Microsoft Dynamics AX services
  - assemblies, hot-swapping, 84–85
  - cubes, 328–333
  - models, 700–703
  - third-party DLLs, 75–76
  - Version Control, 63–64
  - web part pages, 239–240
- Derived Data Sources, 165–167
- derived table, creating, 594
- design definition, report elements, 282–285
- Design node, control properties, 173–174
- design patterns, X++, 128–133
- details form
  - designing, 150–153
  - transaction details form, designing, 153–155
- details page, creating, 219–221
- DetailsFormMaster template, 161
- DetailsFormTransaction template, 161
- DeveloperDocumentation, 548
- development environment. *See* application
  - meta-model architecture; MorphX
- development tools, element prefix, 23
- device CAL, 376–383
- dialog box controls, 494
- Dialog template, 161
- dictionary, reflection API, 670, 676–680
- digital signature, assembly names, 74–75
- Dimension Attribute
  - dimension framework overview, 654–656
  - query data, 658–659
- Dimension Attribute Sets, defined, 655
- Dimension Derivation Rule, 660
- dimension framework
  - constrain combinations of values, 656
  - create values, 656–657
  - extensions, 657
  - overview of, 654–656
  - physical table references, 659
  - query data, 658–659
- Dimension Sets, defined, 655
- DimensionConstraintNode, 656
- DimensionDefaultingService, 656–657
- dimensions, cubes, 321
- DimensionStorage, 656–657
- DimensionValidation
  - validateByTree, 656
- Dir, element prefix, 22
- directory, element prefix, 22
- DirPartyTable\_FK, 592
- DirPersonName, 601–603
- disableCache, 450
- display menu items, workflow artifacts, 266
- display, method modifier, 119
- DisplayGroupFieldName, AxGridView, 207
- DLLs (dynamic-link libraries)
  - referencing managed DLLs, 75–76
  - using third-party assemblies, 73–76
- do while statement, X++ syntax, 97
- document class, workflows, 268–270
- document files, Help server, 547–549
- document head, Help content, 553–556
- document services
  - artifacts, 392–393
  - AxdDocument class, 393–394
  - AxTable classes, 395
  - creating, 395–397
  - customizing, 397–399
  - overview, 392
- document set, Help system, 571
- documentation element type, 16
- documents
  - element naming conventions, 22
  - processing architecture, 5
- doDelete, 428
- doInsert, 428
- doUpdate, 428
- DropDialog template, 161
- DropDialogButton, 175
- DSV, overview, 321
- DuplicateKeyException, 107
- DuplicateKeyException-NotRecovered, 107
- duties, security framework overview, 353–356
- duty element type, overview, 14
- dynamalinked data sources
  - LinkType, metadata property, 169
  - Microsoft Dynamics AX client, 164–169
- Dynamic Account, defined, 656
- dynamic role assignment, 355
- dynamic-link libraries (DLLs)
  - referencing managed DLLs, 75–76
  - using third-party assemblies, 73–76

DynamicsAxEnterprisePortal, 237  
 DynamicsAxEnterprisePortalMOSS, 237  
 DynamicsAxWebParts, 237  
 DynamicsLeftNavProvider, 235  
 DynamicsMOSSTopNavProvider, 235  
 DynamicsSearch, 237  
 DynamicsTopNavProvider, 235

## E

economic resources, element prefix, 22  
 EcoRes, element prefix, 22, 647–648  
 editing
 

- AllowEdit, AxGridView, 207
- details form design, 152
- edit permissions, menu items, 360
- edit, method modifier, 119

 EDT. *See* extended data type (EDT)  
 EDT Relation Migration tool, 589  
 EffectiveAccess, form permissions, 358  
 EffectiveBased, date-effective tables, 605–606  
 element IDs
 

- application models, 692–693
- model deployment, 702–703

 element, Auto variables, 187  
 elements
 

- actions in AOT, 25–26
- Compare tool, 54–59
- creating in AOT, 23
- Cross-reference tool, overview, 60–61
- history of, viewing, 69
- layers and models in AOT, 26
- modifying in AOT, 23–25
- naming conventions, 21–22
- pending, Version control, 70
- Projects, creating, 27
- property sheet, overview, 30–31
- refreshing elements, AOT, 25
- upgrades, conflict resolution, 29
- version control system life cycle, 64–65
- Version Control tool, overview, 62–64
- workflow elements, 252–253

 Enable block selection, 32  
 encryption, Enterprise Portal, 235  
 endpoints, associations, 49  
 Enterprise Portal. *See also* Enterprise Portal, developing for
 

- AOT elements, 201
- architecture, 8, 196–198
- authentication, overview, 352–353
- AxActionPanel, 211–212
- AxColumn, 205
- AxContentPanel, 215
- AxContextMenu, 209
- AxDataSource, 203–204
- AxDatePicker, 216
- AxFilter, 209–210
- AxForm, 204
- AxFormPart, 216
- AxGridView, 207
- AxGroup, 205–206
- AxHierarchicalGridView, 208
- AxInfoPart, 216
- AxLookup, 210–211
- AxMultiColumn, 205
- AxMultiSection, 204
- AxPartContentArea, 216
- AxPopup controls, 213–215
- AxReportViewer, 216
- AxSection, 204
- AxToolbar, 212–213
- BoundField, 215
- charting controls
  - chart development tools, 289
  - data series, binding, 292–294
  - EP Chart Control, creating, 290–291
  - mark-up elements, 291–292
  - overview, 289
- CueGroupPartControl, 216
- datasets, 201–203
- overview, 195
- presentation tier architecture, 8
- processing architecture, 5
- Visual Studio development environment, 7
- web client experience, designing, 155–157
- web parts, overview of, 199–201
- workflow menu items, 252

 Enterprise Portal, developing for
 

- AJAX, 222
- Context, 223–225
- data, access, 225
- details page, creating, 219–221
- Enterprise Search, 240–243
- error handling, 231–232
- formatting, 230
- labels, 229–230
- metadata, access to, 225–226
- model-driven list page, creating, 217–219
- overview, 216–217

## Enterprise Search

- Enterprise Portal, developing for, (*continued*)
  - proxy classes, 226–228
  - security, 232–235
  - session disposal and caching, 223
  - SharePoint integration
    - Enterprise Search, 240–243
    - site definitions, page templates, and web parts, 237–239
    - site navigation, 235–236
    - themes, 243
    - web part page, import and deploy, 239–240
  - validation, 231
  - ViewState, 228–229
- Enterprise Search
  - Enterprise Portal and SharePoint integration, 240–243
- EntireTable caching, 421, 453–454, 463
- entity relationship data model, 51
- enumeration types, 88
- EPApplicationProxies, 226–228
- EP Chart Control
  - creating, 290–291
  - data series binding, 292–294
  - mark-up elements, 291–292
  - overview, 289
- EPSetupParams, 237
- EP User Control with Form template, 219–221
- EP Web Application Project template, 219–221
- Error, exception handling, 107
- errors
  - compiler errors, 37–39
  - error handling, Enterprise Portal development, 231–232
  - error warnings, Enterprise Portal web parts, 200
  - suppressing, Best Practices tool, 41–42
- Esc key, 32
- evalBuf, code access security, 124–126
- event handlers
  - InMemory temporary tables, 582
  - pre- and post-, X++ syntax, 122–123
  - pre- and post-events, overview, 522–523
  - workflow artifacts, 266
  - workflows, 252
  - workflows, state management, 266–267
- event logging, processing architecture, 5
- event payload, defined, 521
- eventhandler, delegate subscription, 121–122
- eventing extensibility pattern
  - delegates, 521–522
  - event handlers, 523–524
  - eventing example, 524–525
  - overview, 520–521
  - pre and post events, 522–523
- Excel
  - architecture, 9
  - authoring managed code example, 77–84
  - PowerPivot, SQL Server Power View, 335–340
  - reports, displaying in Role Centers, 340
  - templates, building, 190–193
- Excel Services for SharePoint, report display, 340
- Excel Services web part, report display, 340
- exception handling, X++ syntax, 105–108
- exceptions, dangerous APIs, 41
- exchange rates, 329–332
- Exchange Rates By Day, 331–332
- execute current element, 32
- execute editor script, 32
- ExecutePermission, 371–372
- executeQuery method, 172
- ExecuteQuery, AxFilter, 209
- ExistJoin, 164
- exists, 103
- exists method, 131–132
- ExpansionColumnIndexesHidden, 207
- ExpansionTooltip, AxGridView, 207
- expense reports, 638
- ExplicitCreate, 168
- exporting elements, Compare tool, 56
- exporting models, 695–696
- expressions
  - expression builder, workflow document, 250, 269
  - X++ syntax, 95
- extended data type (EDT)
  - AmountMST, currency conversions, 316–317
  - AxLookup, 210–211
  - defined, 10
  - overview, 88, 92–93
  - table relations, 588–590
  - value types, overview, 88
  - variable declaration syntax, 94
- extensible data security framework (XDS)
  - debugging data security policies, 368–369
  - organization model framework integration, 638
  - policies, creating, 364–369
  - temporary table constructs, 368
- extension framework
  - creating extensions, 517–518
  - extension example, 518–520
- extensions, SQL Server Reporting Services (SSRS), 8

external name, service contracts, 389–390  
 ExternalContextChanged, 224–225  
 ExternalContextProviderView, 224–225

## F

F1, context-sensitive Help, 561–562

### FactBox

- AxPartContentArea, 216
- details form design, 152
- Enterprise Portal, navigation form design, 156–157
- form parts, overview, 182
- list page design, 150
- model-driven list pages, creating, 218
- MorphX user interface control element type, 12
- navigation layer forms, 142
- transaction details form design, 155

FastTabs, details form design, 150–153

FastTabs, TabPage controls, 177–178

field level properties, 327–328

field lists, performance and, 456–462

field-bound controls, 178–179. *See also* controls

fields, Help topics, 559–561

fields, X++ syntax, 118

file transfers. *See also* .NET Framework  
 legacy systems, overview, 73

FileOPermission, 371–372

### filters

- AxDataSource, 203–204
- AxFilter, 209–210
- Projects, automatic generation of, 28
- QueryFilter, 172, 607–612
- ResetFilter, 209
- ShowFilter, AxGridView, 208
- SystemFilter, 209
- SysTest framework, new features, 530–533
- time period, Business Overview web part, 344–345
- UserFilter, 209

final, method modifier, 119

financial dimensions, cubes, 313–314

financial dimensions, organization model  
 framework, 637

find method, 131–132

Find tool, 20  
 overview, 53–54

finished goods management. *See* product  
 model framework

FireCurrentContextChanged, 224–225

FireExternalContextChanged, 224–225

firstFast, 99, 476

firstOnly, 100

firstOnly10, 100

firstOnly100, 100

firstOnly1000, 100

FISCALPERIODDATEDIMENSION, 314

flexible authentication, overview, 352–353

flush statement, X++ syntax, 97

### folders

- Help content, publishing, 567–571

- Projects, automatic generation of, 27–29

for statement, X++ syntax, 97

forceLiterals, 100

forceNestedLoop, 100

forcePlaceholders, 100

forceSelectOrder, 100

foreign key relations, 590–593

foreign keys, surrogate, 168

form element type, MorphX, 12

form part element type, MorphX, 12

Form Parts, model-driven list pages, 218

form parts, overview, 182

form rendering, MorphX user interface  
 controls, 11–12

Form.DataSources, 162

Form.Designs.Design, 162

Form.Parts, 162

formatting, Enterprise Portal, 230

FormDataSource.AutoQuery, 170

FormDataSource.cacheAddMethod, 418–419

FormDataSource.create method, 166

FormDataSource.init, 172

FormDataSource.query, 172

FormDataSource.queryRun.query, 172

forms. *See also* details form; also Enterprise Portal,  
 developing for; also Purchase Order  
 form; also Sales Order form; also user  
 experience, designing

- debugging security, 373–375

- display and edit methods, cacheAddMethod,  
 418–419

- form metadata, 162–164

- form patterns, 160–162

- form queries, overview, 170–172

- method overrides, 184–186

- navigation layer forms, design basics, 141–142

- navigation layer forms, Enterprise Portal  
 design, 156–157

## FormTemplate

- forms (*continued*)
  - permissions, setting, 356–359
  - working with, overview, 159–160
- FormTemplate, 218
- forUpdate, 100, 446–452
- Found, record caching, 446–452
- FoundAndEmpty, record caching, 446–452
- foundation application domain partition, 4–6
- FutureDataAccess, 363

## G

- General Journal, 660
- general ledger, element prefix, 23
- generateOnly, 100, 368–369
- generic group reference, 132–133
- Generic Test Case, 541
- GetClosePopupEventReference, 214–215
- GetCurrent, 204
- getDataContractInfo, 494
- GetDataSet, 204
- GetFieldValue, AxPopup, 214–215
- GetOpenPopupEventReference, 213–215
- getQueryName, 269
- getServiceInfo, 494
- getter methods, 592
- global address book, element prefix, 22
- Glossary, Help system, 548
- Go to implementation, 32
- Go to next method, 32
- Grid control, overview of, 176, 178
- GridColumnIndexesHidden, 207
- GridView
  - AxGridView and, 207
  - BoundField, 215
- group by, select statement code sample, 102
- Group control, overview of, 176
- GroupField, 207
- GroupFieldDisplayName, 207
- grouping, AxGridView, 207
- GroupMask, 28–29
- Groups, automatic project generation, 27–29
- Guest accounts, Enterprise Portal, 232–235
- GUID, AxGuidValueFormatter, 230

## H

- header view, transaction details form, 154
- headers, XML insert shortcut key, 32

- help documentation set element type, 16
- Help system
  - creating content
    - add labels, fields, and menu items, 559–561
    - context-sensitive topics, 561–562
    - non-HTML topics, 565–567
    - overview, 550–552
    - table of contents, creating, 563–565
    - topics, create in HTML, 552–559
    - updating content, 562–563
  - Help server, 546–549
  - help text, label file, 229–230
  - help text, SysOperationHelpTextAttribute, 495
  - Help viewer, 546–547
  - Microsoft Dynamics AX client, 547
  - overview, 545–549
  - processing architecture, 8
  - publisher, 550
  - publishing content, 567–571
  - shortcut keys, X++ code editor, 32
  - summary page, 550–551
  - table of contents, 550
  - topics, 549–550
  - troubleshooting, 572–573
- HiddenField, AxPopupField, 214–215
- hierarchy
  - organizational model framework, 635–637
  - type hierarchies, 89–93
- hierarchy designer, extending, 642
- HierarchyIDFieldName, 208
- HierarchyParentIdFieldName, 208
- history, batch jobs, 629
- horizontal application domain partition, 4–6
- hot-swapping assemblies, 84–85, 463–464
- HRM/HCM, element prefix, 22
- human resources management processes
  - element prefix, 22
  - organization model framework integration, 638
- human workflows, defined, 246–249. *See also* workflow
- HyperLinkMenuItem, model-driven list pages, 218

## I

- ICustomFormatter, 230
- identifierStr, 671
- if statement, X++ syntax, 97
- IFormatProvider, 230
- IIS (Internet Information Services), 8, 197–198

- implementation patterns, X++, 128–133
- ImplicitCreate, 168
- ImplicitInnerOuter, 167
- importing elements
  - Compare tool, 56
  - web part pages, 239–240
- importing models, 697–699
- Included Columns, indexing tips, 475–476
- incremental search, shortcut key, 32
- index
  - ActiveSectionIndex, 204
  - alternate keys, 587–588
  - caching and, 421
  - database query sample, 101
  - Enterprise Search, 240–243
  - ExpansionColumnIndexesHidden, 207
  - GridColumnIndexesHidden, 207
  - inMemory temporary tables, 423
  - performance tips, 475–476
  - record caching, 448–449
  - SelectedIndexChanged, 208
  - unique index join cache, 452
- indexed sequential access method (ISAM), 577–582
- IndexTabs, TabPage controls, 176–178
- industry application domain partition, 4–6
- info part element type, MorphX, 12
- Info Parts, model-driven list pages, 218
- info parts, overview, 181
- Infolog
  - Enterprise Portal, web parts, 200
  - validation, 231
- information dissemination, events, 521
- information messages, Enterprise Portal web parts, 200
- infrastructure callback, workflow, 261
- inheritance
  - RunBase, 510–511
  - tables, 91, 165–167, 594–599
- inheritance, metadata, 163–164
- init method, Enterprise Portal datasets, 202
- initializing, SysListPageInteractionBase, 218
- Inline, WindowMode, 220
- InMemory temporary tables, 422–423, 428, 578–585
- InnerJoin, 164
- input controls, overview, 178–179. *See also* controls
- Inquiries, Area Page design, 145
- insert method, transaction statement, 104
- insert\_recordset
  - RowCount, 104
  - sample statement, 104
  - table hierarchies and, 428
  - transaction performance and, 429–432
  - transferring code into set-based operations, 442–444
- insertDatabase, transaction performance, 437–439
- InsertIfEmpty, metadata property, 169
- installation, third-party DLLs, 75–76
- InstanceRelationType, 594
- int
  - value types, overview, 88
  - variable declaration syntax, 94
- int64
  - value types, overview, 88
  - variable declaration syntax, 94
- Integrated Windows Authentication, 352–353
- integration tier, Business Intelligence, 299–300
- IntelliMorph, 8, 33
- IntelliSense, 73–76
- InteractionClass, 218–219
- interactive functions, reports, 294–295
- interfaces
  - code access security (CAS), 124–126
  - fields, syntax, 118
  - label file, 229–230
  - methods, syntax, 118–120
  - reference types, overview, 89
  - UML object models, 49–50
  - X++ syntax, overview, 117–118
- inter-form dynalinks, 165
- Internal, exception handling, 107
- International Financial Reporting Standards, segregation of duties, 354
- Internet Information Services (IIS), 8, 197–198
- InteropPermission, 371–372
- intra-form dynalinks, 165
- intrinsic function, reflection, 669–671
- Invent, element prefix, 22
- inventory management, 22, 465. *See also* product model framework
- Inventory Model Group, 645
- is operator, 92
- ISAM (indexed sequential access method), 577–582
- IsConsumingMemory, 684
- IsGetNodeInLayerSupported, 684
- IsLayerAware, 684
- IsLookUp, 327

## IsModelElement

- IsModelElement, 684
- IsRootElement, 684
- isTmp, 582
- IsUtilElement, 684
- IsVCSControllableElement, 684
- Item Group, 645

## J

- JMG, element prefix, 23
- job element types, 13
- Jobs, overview of, 88
- joined data sources, Microsoft Dynamics AX client, 164–169
- joins
  - LinkType, metadata property, 169
  - maximum number, 463
  - select statement code sample, 102
- JoinSource, metadata property, 169
- Journalization Processor, 660–662
- Journalization Rules, 660–662
- Journals, Area Page design, 145

## K

- keywords, data-aware statement options, 99
- KM, element prefix, 23
- knowledge management, element prefix, 23
- KPI
  - adding to KPI List web part, 342–344
  - cubes, creating, 333
  - SSAS projects, 321
- KPI List web part, Role Center displays, 341–345

## L

- Label editor tool
  - creating labels, 35–36
  - overview, 20, 33–35
  - referencing X++ labels, 36–37
  - shortcut keys, X++ code editor, 32
- labels
  - Enterprise Portal, developing for, 229–230
  - Help topics, 559–561
  - label file element type, 16
  - Label Files, 33–34
  - Label Files Wizard, 35

- language
  - cubes, customizing, 315–316
  - formatting, Enterprise Portal, 230
  - label editor, 33
  - label editor, creating labels, 36
- layer comparison, Project development tools, 29
- layers, metadata
  - models, overview, 690–692
  - overview, 688–690
- layout controls
  - input controls, overview, 178–179
  - overview of, 176–178
- layout, hiding report columns, 286–288
- Ledger Dimensions
  - creating, 656–657
  - defined, 655
- Ledger, element prefix, 23
- Left navigation, Enterprise Portal web part, 200
- legacy systems. *See also* .NET Framework
  - legacy data source integration, 323
  - working with, 73
- LegacyID, 692
- legal entity, defined, 634
- license code element type, 16–17
- license keys, generating, 703–704
- licensing
  - CALs, types of, 381–382
  - customization and, 383
  - overview, 376–383
- line view, transaction details form, 154
- line-item workflows, overview, 253
- links
  - data sources, Microsoft Dynamics AX client, 164–169
  - Help content, 558
  - hiding, ShowLink, 236
  - HyperLinkMenuItem, 218
- LinkType, 164, 169
- list definition element type, 15
- list pages
  - designing, 146–150
  - model-driven list page, creating, 217–219
  - performance optimization, 476
- ListPage template, 161
- ListPage, window type, 174
- ListPageInteraction, 218
- literalStr, 36–37, 671
- loadData, 653



- local function statement, X++ syntax, 98
- localization
  - label editor, 33
  - label editor, creating labels, 36
- logging, InMemory temporary tables, 582
- logical operators
  - logical approval and task workflows, 260–262
  - X++ expressions, 95
- LogonAs, Enterprise Portal security, 232–235
- LogonAsGuest, Enterprise Portal security, 232–235
- lookups
  - AxLookup, 210–211
  - custom, coding, 188–189
  - table relations, 588–593
- LookupType, 211
- loop iterations, reducing, 477–478

## M

- macro element types, overview, 13
- macros, X++ syntax, 113–115
- Main Account Derivation Rule, 660
- Main Account Dimension Attribute, 658–659
- Main Account Dimension List Provider, 660
- MainMenu, adding menus, 183. *See also* menus
- MaintainUserLicense, 383
- managed code
  - assemblies, hot-swapping, 84–85
  - authoring, 77–84
  - third-party assemblies, 76
- ManagedHost control, 179–181
- manifest, models, 694–695
- manual decisions, workflow elements, 253
- map element type, defined, 10
- map type, reference types, 89
- marketing management, element prefix, 23
- master data sources, 164–169
- master scheduling, performance and, 465
- maxOf, X++ select statements, 102
- measures, cubes, 321, 333
- memory heap, defined, 88
- MenuItem, 175
- MenuItem
  - adding, 182
  - AxToolBar, 212
  - CopyCallerQuery, 172
  - overview, 175
- MenuItemButton
  - CopyCallerQuery, 172
  - overview, 174–175

- menus
  - adding, overview, 183
  - batch jobs, creating, 618
  - customizing, 383
  - Enterprise Portal, security, 233–235
  - form permissions, 360
  - Help topic labels, 561
  - Help topics, 559–561
  - menu definitions, 183
  - menu element type, MorphX, 11
  - menu item element type, MorphX, 11
  - model-driven list pages, creating, 218
  - SharePoint navigation, 236
  - web, AxActionPanel, 211–212
  - workflow artifacts, 266
  - workflow menu items, 252, 270
- messages
  - Enterprise Portal, web parts, 200
  - send framework, 411–414
- metadata
  - access to, Enterprise Portal, 225–226
  - associations, 163
  - cubes, metadata selection, 311–312, 325–328
  - custom service artifacts, 388
  - document service, artifacts, 392–393
  - element IDs, 692–693
  - form data source properties, 168–169
  - form metadata, Microsoft Dynamics AX client, 162–164
  - Help topic updates, 563
  - Help topics, 566–567
  - inheritance, 163–164
  - layers, 688–690
  - managing artifacts, overview, 687–688
  - model store API, 703–704
- models
  - creating, 693–694
  - moving to production, 700–703
  - overview, 690–692
  - preparing for publication, 694–699
  - upgrading, 699–700
  - providers, workflow, 254–255
  - system services, 388
  - system services, consuming, 404–407
  - X++ collections as data contracts, 391
- Metadata service, Enterprise Search, 240–243
- MetadataCache, Enterprise Portal, 225–226
- meta-model architecture. *See* application meta-model architecture
- method invocations, X++ expressions, 95

## method overrides

- method overrides, 184–186
- method-bound controls, overview, 179
- methods, X++ syntax, 118–120
- Microsoft Dynamics AX Reporting Project, 282
- Microsoft .NET Framework. *See* .NET Framework
- Microsoft ASP.NET, processing architecture, 4–6
- Microsoft Dynamics AX
  - introduction to, 3–4
  - model and application database, 7
- Microsoft Dynamics AX Application Object Server (AOS). *See* AOS (Microsoft Dynamics AX Application Object Server)
- Microsoft Dynamics AX Business Connector
  - authoring managed code, 77–84
- Microsoft Dynamics AX client
  - action controls, 174–176
  - Auto variables, 187
  - business logic, 188
  - control data binding, 173
  - control overrides, 172–173
  - controls, Design node properties, 173–174
  - controls, run-time modifications, 174
  - custom lookups, 188–189
  - customizing forms, overview, 184
  - Excel templates, building, 190–191
  - form data sources, 164–169
  - form metadata, 162–164
  - form patterns, 160–162
  - form queries, 170–172
  - forms, overview, 159–160
  - Help system interaction, 547
  - input controls, 178–179
  - layout controls, 176–178
  - ManagedHost control, 179–181
  - method overrides, 184–186
  - Microsoft Office client integration, 189–193
  - navigation items, overview, 182–183
  - overview of, 159
  - parts, overview, 181–182
  - user templates, adding, 192–193
  - Word templates, 191–192
- Microsoft Dynamics AX Enterprise Portal. *See* Enterprise Portal
- Microsoft Dynamics AX Report Definition Customization Extension (RDCE), 286–288
- Microsoft Dynamics AX services
  - asynchronous invocations, 409–411
  - consuming
    - business document updates, 407–409
    - external web services, 414
    - system services, 404–407
    - WCF client sample, 402–404
  - custom services, 388–391
  - document services
    - artifacts, 392–393
    - AxDDocument class, 393–394
    - AxTable classes, 395
    - creating, 395–397
    - customizing, 397–399
    - overview, 392
  - overview of, 385–387
  - performance considerations, 415
  - publishing, 400–401
  - security, 400
  - send framework, 411–414
  - system services, 387–388
- Microsoft Dynamics AX Trace Parser, 479–488
- Microsoft Dynamics AX Windows, 3–4
- Microsoft Dynamics Public, security, 232–235
- Microsoft Excel. *See* Excel
- Microsoft Office
  - architecture, 4–6
  - presentation tier architecture, 9
  - processing architecture, 3–4
- Microsoft Office client
  - Excel templates, 190–191
  - integration with, 189–193
- Microsoft SharePoint Server. *See* SharePoint Server
- Microsoft SQL Server. *See* SQL Server
- Microsoft SQL Server Analysis Services. *See* SQL Server Analysis Services (SSAS)
- Microsoft SQL Server Reporting Services. *See* SQL Server Reporting Services (SSRS)
- Microsoft Technology platform, architecture
  - overview, 4–6
- Microsoft Test Manager
  - acceptance test driven development (ATDD), 535–536
  - ALM solution, 534
  - ordered test suites, 539–540
  - overview, 533–534
  - shared steps, 536–539
  - Team Foundation Build, 540–543
  - test case evolution, 538
  - test selection, 542–544
- Microsoft Visio
  - Reverse Engineering tool, MorphX, 47–51
- Microsoft Visual SourceSafe (VSS), 62–64
- Microsoft Visual Studio Integrated Development Environment (IDE), 4–6

Microsoft Visual Studio Team Foundation Server (TFS), 62–64

Microsoft Windows client, architecture, 4–6, 8

Microsoft Windows Server, architecture, 4–6

Microsoft Word client  
 architecture, 9  
 templates, building, 191–193

migration, EDT Relation Migration tool, 589

minOf, X++ select statements, 102

modal dialog settings, details page, 220–221

Modal, WindowMode, 221

Model Editor, production reports and, 282

Model Manifest, 694–695

model store  
 APIs, 703–704  
 element IDs, 692–693  
 layers, overview, 688–690  
 models, creating, 693–694  
 models, overview, 690–692  
 models, preparing for publication, 694–699  
 moving from test to production, 700–703  
 overview, 687–688  
 upgrading models, 699–700

model-driven list page, creating, 217–219

Model-View-Controller (MVC), 494

Month\_LastMonth, time period filters, 345

MorphX  
 accounting framework, model element prefixes, 663  
 Application Object Tree  
 creating elements, 23  
 element actions, 25–26  
 element layers and models, 26  
 modifying elements, 23–25  
 navigation, 21–23  
 refresh elements, 25  
 Best Practices tool, overview, 39–43  
 client-side reporting solutions, 276–277  
 code compiler tool, overview, 37–39  
 Compare tool, overview, 54–59  
 Cross-reference tool, overview, 60–61  
 datasets, creating, 201  
 debugger tool, overview, 43–47  
 Enterprise Portal architecture, 196–198  
 Enterprise Portal, developing for, 216  
 Find tool, overview, 53–54  
 Label editor, overview, 33–37  
 models, preparing for publication, 694–699  
 operations resource framework, element prefixes, 654

overview of, 6–7, 19–21  
 processing architecture, 5, 7–9  
 Projects, overview, 27–30  
 property sheet, 30–31  
 reference element types, 13  
 Reverse Engineering tool, overview, 47–51  
 source document model element prefixes, 667  
 Table Browser tool, overview, 52–53  
 tools, overview, 20  
 user interface control element types, 11–12  
 Version Control tool, overview, 62–71  
 X++ code editor, 31–33

MVC (Model-View-Controller), 494

## N

Name, metadata property, 169

Named User license, 376–383

namespace, creating service contracts, 389–390

naming conventions  
 assemblies, 74–75  
 elements, 21–22  
 label files, 35  
 temporary tables, 584

navigation  
 adding navigation items, overview, 182–183  
 CreateNavigationPropertyMethods, 591–593  
 Enterprise Portal and SharePoint integration, 235–236  
 Enterprise Portal, web parts, 200  
 navigation bar, Enterprise Portal form design, 156–157  
 navigation layer forms  
 design basics, 141–142  
 Enterprise Portal design, 156–157  
 navigation pane, navigation layer forms, 141, 156–157

NetTcpBinding  
 publishing services, 401  
 system services, consuming, 404–407

NewModal, WindowMode, 221

NewWindow, WindowMode, 221

noFetch, 100

nonExists, 103

NonFatal, exception handling, 231

NotExistJoin, 164

NotInTTS cache, 446–452

NumberSeq  
 getNextNumForRefParmId method, 425

Numeric, exception handling, 107

## object creation operators, X++ expressions

### O

- object creation operators, X++ expressions, 96
- object models, UML, 49–50
- object type
  - overview, 91–92
  - variable declaration syntax, 94
- objects
  - assemblies, calling managed code, 76
  - RunOn properties, 422
- observation, events, 521
- OCC (optimistic concurrency control), 409
  - Microsoft library resources, 577
  - update\_recordset, 434
- OccEnabled, 100
- OData feeds, SQL Server Power View reports, 335–340
- ODC files, defining, 343
- Office client integration applications, development of, 6–9
- OLAP (online analytical processing) databases
  - cubes, deploying, 303–309
    - currency conversion logic, adding to cubes, 328–332
    - DSV, overview of, 321
    - Report Builder, 346
- OnClick
  - pop-up controls, 213–215
  - validation, 231
- OnlyFetchActive, metadata property, 170, 460
- OpenPopup, 214–215
- operating unit, defined, 634
- operational persona, 334–335
- operations resource framework
  - extensions, 652–653
  - MorphX model element prefixes, 654
  - overview of, 648–652
  - when to use, 652
- optimistic concurrency control (OCC), 409
- optimistic concurrency, performance, 444–446
- optimisticlock
  - performance and, 445–446
  - select statements, 100
- OptionalRecord, 168
- organizational model framework
  - custom operating units, creating, 639–640
  - hierarchy designer, extending, 642
  - integration with other frameworks application modules, 637–638
  - organization hierarchies, 635–637

- organization types, 634–635
- overview, 634
- scenarios, modeling, 638–639
- Origin, element IDs, 692
- outer, 103
- OuterJoin, joined data sources, 164
- overrides, coding for, 184–186, 430

### P

- pack and unpack methods, 130–131, 202, 617
- page definition element type, 15
- Page Definition, Enterprise Portal web parts, 200
- page rendering, Enterprise Portal architecture, 196–198
- page templates, Enterprise Portal and SharePoint integration, 237–239
- page title, Enterprise Portal web parts, 200
- Page Viewer web part, 336–339
- Page.IsValid, 231
- pages, Enterprise Portal and SharePoint integration, 237–239
- PageTitle, Enterprise Portal web parts, 200
- parallel activities
  - batch framework overview, 615
  - workflow elements, 253
- parameter methods, X++ syntax, 129
- parentheses, X++ expressions, 96
- parm methods, workflow classes, 269–270
- Parse, formatting, 230
- partitioned tables
  - map element type, 10
  - QueryFilter, 611–612
- partitions
  - architecture overview, 4–6
  - cubes, deploying, 305–309
- parts
  - referencing from a form, 182
  - types of, 181–182
- Pascal casing, 93
- PassClrObjectAcrossTiers, exception handling, 107
- PastDataAccess, 363
- patterns, X++ design and implementation, 128–133
- pause statement, X++ syntax, 98
- PBA, element prefix, 23
- PDB (Program Database) files, third-party assemblies, 73–76
- performance
  - batch framework and, 466–467, 615
  - caching

- EntireTable cache, 453–454
- overview, 446
- record caching, 446–452
- RecordViewCache, 454–455
- SysGlobalObjectCache and SysGlobalCache, 456
- unique index join cache, 452
- client/server performance
  - reducing round-trips, 418–421
  - write tier-aware code, 422–426
- coding patterns
  - execute X++ code as CIL, 466
  - firstfast, 476
  - indexing tips, 475–476
  - list page optimization, 476
  - loop iterations, reducing, 477–478
  - parallel execution, use of, 466–467
  - patterns for record existence checks, 472–473
  - repeat queries, avoiding, 473–474
  - SysOperation framework, 467–472
  - two queries vs. join, 474–475
- compile and running X++ as .NET CIL, 126–128
- configuration
  - AOS configuration, 463–464
  - client configuration, 464–465
  - extensive logging, 465
  - number sequence caching, 465
  - Server Configuration form, 463–464
  - SQL Administration form, 462
- field lists, 456–462
- InMemory temporary tables, 577–582
- label file, 230
- master scheduling and inventory closing, 465
- Microsoft Dynamics AX services, overview, 415
- monitoring tools
  - client access log, 490
  - database activities, monitoring, 488–489
  - Microsoft Dynamics AX Trace Parser, 479–488
  - Server Process ID (SPID), identifying, 489
  - Visual Studio Profiler, 490–491
- overview, 417
- restartable jobs and optimistic concurrency, 444–446
- surrogate keys, 586
- table inheritance and, 598–599
- transaction performance
  - delete\_from operator, 435–436
  - insert\_recordset operator, 429–432
  - overview, 426–427
  - RecordInsertList and RecordSortedList, 437–439
  - set-based data operators, overview, 427–428
  - set-based operations and table hierarchies, 428
  - transferring code into set-based operations, 439–444
  - update\_recordset operator, 432–435
  - Unit of Work, 599–601
- PerInvocation, extensible data security, 367
- period templates, time period filters, 344–345
- Periodic, Area Page design, 145
- permissions
  - debugging security, 373–375
  - form controls, 359
  - forms, 356–359
  - privileges, creating, 359–361
  - security framework overview, 353–356
  - table permissions, coding, 369–371
- PerSession, extensible data security, 367
- personas, defined, 334–335
- perspective element type, defined, 11
- perspectives, metadata, 325–326
- pessimisticlock, select statements, 100
- pessimisticlock, update\_recordset, 434
- PivotTables, displaying in Role Centers, 340
- placeholders, labels, 36–37
- policies
  - debugging security, 373–375
  - extensible data security policies, creating, 364–369
  - extensible data security policies, debugging, 368–369
  - organization model framework, 637
  - policy context, defined, 365
  - policy query, defined, 365
  - queries, data security policies, 365–369
  - security framework overview, 353–356
- policy modeling, 5
- polymorphic associations, 91, 132, 596–598
- pop-up controls, AxPopup, 213–215
- Popup, window type, 174
- PopupClosed, 213–215
- ports, publishing services, 401
- post event handlers, 522–523
- postback
  - updates, 204
  - validation, 231

## PostBackTrigger

- PostBackTrigger, 222
- postBuild, 494
- postRun, 494
- Power View, SQL Server
  - reports, displaying, 335–340
  - reports, editing, 339–340
- PowerPivot, 335–340
- pre-event handlers, 522–523
- prefix, element naming conventions, 21–22
- PreRender, chart reporting override, 296
- presentation tier
  - architecture, 8–9
  - Business Intelligence (BI), 299–300
- primary entities, details form, 151
- primary table, 365–369
- PrimaryIndex
  - record caching, 447
  - surrogate keys, 586–587
- print statement, X++ syntax, 98
- Private and Shared Projects, 27
- privilege element type, 14
- privileges
  - creating, 359–361
  - security framework overview, 353–356
- process cycle element type, 14
- process cycles, defined, 355
- Process State
  - accounting, 662–663
  - source document framework, 664–665
- processingMode, 412
- procurement and sourcing, organization model
  - framework, 638
- Prod, element prefix, 23
- Producer, eventing, 520
- product builder, element prefix, 23
- Product Configuration, 646–647
- Product Dimensions, 643
- Product Master, 643, 646–647
- product model framework
  - extension of, 647–648
  - overview, 643–647
  - when to use, 647
- Product Variant, 643, 646–647
- production, element prefix, 23
- Program Database (PDB) files, third-party
  - assemblies, 73–76
- project, element prefix, 23, 23
- Projects
  - authoring managed code, 77–84
  - automatic generation of, 27–29
  - creating, 27
  - development tools for, 29
  - project types, 30
  - upgrades, Compare tool, 56
- Projects tool, 20
- property sheet, 30–31
- Property sheet tool, 20
- providers, workflows, 254–255, 260–261
- ProviderView, 203
- proxies. *See also* .NET Framework
  - authoring managed code, 77–84
  - Enterprise Portal, developing for, 226–228, 231–232
  - Enterprise Portal, security, 232–235
  - working with, overview, 73
- public key, assembly names, 74–75
- PublicPage, 239
- publisher, Help system, 550
- publishing services, 400–401
- publishing, models, 694–699
- Purch, element prefix, 23
- Purchase Order form, designing, 153–155
- purchase, element prefix, 23
- purpose, organizational hierarchy, 636

## Q

- quality checks, Version control tool, 65
- queries
  - Axd queries, creating, 395–396
  - AxFilter, 209–210
  - cues, Role Center page design, 143
  - data-aware statements, X++ syntax, 99–104
  - dimension framework query data, 658–659
  - Enterprise Search, 240–243
  - field lists, performance and, 456–462
  - form queries, overview, 170–172
  - full-text support, 606–607
  - Microsoft Office client integration, 190
  - performance, indexing tips, 475–476
  - policy queries, data security, 365–369
  - polymorphic, table inheritance and, 165–167
  - query element type, 11
  - Query object, form queries, 172
  - Query service, Enterprise Search, 240–243
  - QueryBuildDataSource, 170–172
  - QueryBuildRange, 172
  - QueryFilter, 172, 607–612
  - QueryRun object, form queries, 172

- QueryRunQueryBuildDataSource, 171
  - repeat queries, avoiding, 473–474
  - system services, 388, 404–407
  - table inheritance, 594–599
  - table relations, 588–593
  - timeout, 463
  - two queries vs. join, 474–475
  - workflow documents, 250
  - Workflow wizard, 251–252
  - queues
    - workflow message queue, 257
    - workflows, overview, 253–254
  - Quick links, Enterprise Portal, web parts, 200
  - QuickLaunch, Enterprise Portal web parts, 200
  - QuickLaunchDataSource, 235
  - QuickLink, Role Center, 143
  - quid
    - value types, overview, 88
    - variable declaration syntax, 94
- ## R
- RDCE (Microsoft Dynamics AX Report Definition Customization Extension), 286–288
  - RDL (report design definition), 287–288
  - read permissions
    - forms, 356–359
    - menu items, 360
  - ReadPermissions, 360
  - real value types, overview, 88
  - real variable declaration syntax, 94
  - ReclD, table inheritance storage model, 596
  - record buffers
    - InMemory temporary tables, 578–582
    - run-time temporary tables, 585
  - record caching, 446–452
  - record context, Enterprise Portal security, 235
  - record types
    - reference types, overview, 89
    - variable declaration syntax, 94
  - RecordInsertList, 437–439
  - record-level security (RLS), 430
  - RecordSortedList, 437–439
  - RecordViewCache, 454–455
  - reference types, 13, 89
  - References, third-party DLLs, 75–76
  - reflection
    - classIdGet system function, 672–673
    - common type, 91
    - dictionary API, 676–680
    - intrinsic functions, 670–671
    - overview, 669–670
    - table data API, 673–676
    - treenodes API, 680–685
    - typeof system function, 671–672
  - RefReclD, 132–133
  - refresh
    - cacheAddMethod, 419
    - elements, 25
  - RefreshFrequency, 367
  - RefTableId, 133
  - regulatory requirements, segregation of duties, 354
  - RelatedTableRole, 593
  - relational operators, X++ expressions, 96
  - relations, table, 588
  - relationships, entity relationship data model, 51
  - RELATIONTYPE, 596
  - Released Product, 645
  - reliable asynchronous mode, SysOperations, 468
  - Remote Procedure Call (RPC)
    - grouping calls, 425
    - MorphX development environment, 6–7
    - passing table buffers, 425–426
  - repeatableRead, 100
  - reporting. *See also* Role Center pages
    - AxReportViewer, 216
    - client-side solutions, 276–277
    - data processing extensions, 288
    - default chart format, override, 296
    - Enterprise Portal charts
      - binding chart control to dataset, 292
      - chart development tools, 289
      - data series binding, 292–294
      - EP Chart Control, creating, 290–291
      - mark-up elements, 291–292
      - overview, 289
    - execution sequence, overview, 278–279
    - interactive functions, adding, 294–295
    - list pages as alternatives, 148–149
    - Microsoft Dynamics AX extensions, 286–288
    - model elements for reports, 282–285
    - overview, 275–276
    - planning for, 279–281
    - production reports, overview, 281–282
    - rendering, MorphX user interface control
      - element types, 11–12
    - Report Builder reports, 346

## requirements, element prefix

- reporting (*continued*)
  - Report Definition Language (RDL), 282
  - Report Deployment Settings form, 288
  - report design definition (RDL), 287–288
  - report element type, MorphX, 12
  - Report, Enterprise Portal web part, 200
  - Reporting Services, data connection file (.rds), 336
  - Reports, Area Page design, 145
  - requirements, identifying, 324–325
  - server-side solutions, 277–278
  - SQL Server Power View, displaying data, 335–340
  - SQL Server Reporting Services (SSRS), 3–6, 8
  - SSRS extensions, 285
  - troubleshooting, 296–297
  - Visual Studio tools, 346–349
- requirements, element prefix, 23, 23
- Requirements, operations resource framework, 650–651
- ResetFilter, 209
- resource element types, 16, 22
- Resource Group, operations resource framework, 648–652
- resource modeling, processing architecture, 5
- Resource, operations resource framework, 648–652
- REST API, Excel report display, 340
- restartable jobs, performance, 444–446
- restore, refreshing elements, 25
- retail channel, defined, 635
- retries, batch jobs, 628
- retry statement, X++ syntax, 98
- return statement, X++ syntax, 98
- Reverse Engineering tool, 20, 47–51, 669
- reverse, data-aware statements, 100
- Role Center pages
  - designing, 142–144
  - displaying analytic content
    - Business Overview and KPI List web parts, 341–345
    - Excel reports, 340
    - overview, 333–335
    - presentation tools, choice of, 335
    - Report Builder, 346
    - SQL Server Power View, 335–340
    - Visual Studio tools, 346–349
  - Quick links, 200
  - user profiles, 308–309
- role element type, 14
- role-based access control, 353–356
- role-based security element types, 14
- RoleName, 367
- RoleProperty, 367
- roles, security
  - assigning privileges and duties, 361–362
  - assigning to users, 363–364
  - customization and licensing, 383
  - debugging, 373–375
  - security framework overview, 353–356
- role-tailored design, overview, 139–140
- root data sources, 164–169
- root table, creating, 594
- RootTableContext, 223–225
- Row, AxGridView, 208
- RowCount, 104
- RPC (Remote Procedure Call)
  - grouping calls, 425
  - MorphX development environment, 6–7
  - passing table buffers, 425–426
- rules, Best Practices tool, 40–43
- run method
  - batch class, creating, 616
  - datasets, Enterprise Portal, 202
- RunAsPermission, 371–372
- RunBase. *See also* SysOperations
  - client/server considerations, 516
  - inheritance, 510–511
  - overview, 510
  - pack-unpack pattern, 512–516
  - performance and, 420–421
  - property method pattern, 511–512
  - SysOperation comparison, 495–510, 613
  - UML object model, 49–50
- RunBaseBatch, 495–496, 616–617
- runBuf, code access security, 124–126
- RunOn, object instantiation, 422
- run-time
  - control modifications, 174
  - QueryFilter API, 611–612
  - table relations, 588–593
  - workflow, 257–260

## S

- sales and marketing management, element prefix, 23
- Sales Order form, designing, 153–155
- Sales, element prefix, 23



- Sarbanes-Oxley, segregation of duties, 354
- Save button, autogeneration, 220
- saveData, 653
- SaveDataPerPartition, 611
- scheduled batch mode, SysOperations, 468
- scheduling, batch framework, 614
- schema
  - AxdDocument class, 393–394
  - prebuilt cubes, analytic data, 310
  - reusing tables and fields, creating cubes, 333
  - XML schema definitions for message envelopes, 410–411
- Script icon, X++ Code Editor, 33
- scripts
  - execute editor script, 32
  - running, shortcut keys X++ code editor, 32
  - X++ Code Editor, overview, 33
- search
  - Enterprise Portal, navigation form design, 156–157
  - Find tool, overview, 53–54
  - incremental, shortcut key, 32
  - search bar, navigation layer forms, 141
  - Search Configuration Wizard, 241–243
- Secure Sockets Layer (SSL), Enterprise Portal, 232–235
- security
  - assembly names, 74–75
  - best practices, overview, 372–373
  - code access security (CAS), 124–126, 371–372
  - configuration key element types, 16–17
  - debugging, 373–375
  - Enterprise Portal, developing for, 232–235
  - extensible data security policies, creating, 364–369
  - hiding report columns, 286–288
  - insert\_recordset operator, 430
  - license code element types, 16–17
  - permissions, controls, 359
  - permissions, forms, 356–359
  - permissions, server methods, 359
  - privileges, assigning to security roles, 361–362
  - privileges, creating, 359–361
  - role-based security element types, 14
  - RunBase, 420
  - security artifacts, developing, 356–363
  - security framework overview, 351–356
  - security role assignments, 355
  - service operations, overview, 400
  - table permissions, coding, 369–371
  - valid time state tables, use of, 362–363
  - validate security artifacts, 363–364
- security policy element type, 14
- security roles
  - assigning privileges and duties, 361–362
  - assigning to users, 363–364
  - customization and licensing, 383
  - debugging security, 373–375
- segregation of duties, 354
- select
  - data-aware statements, X++ syntax, 99–104
  - field lists, performance and, 460
  - select query, sample code, 101
- select forUpdate, 104
- SelectedIndexChanged, 208
- selection, shortcut keys, 32
- selectionChanged, SysListPageInteractionBase, 218
- semicolon, use in X++, 95
- Send API, 411–414
- Sequence, exception handling, 107
- serialization, pack and unpack methods, 130–131
- Server Configuration form
  - batch server, configuring, 625–626
  - performance and, 463–464
- Server Configuration Utility, hot-swapping
  - assemblies, 84–85
- server license, 376–383
- server methods, permissions for, 359
- Server Process ID (SPID), 489
- server, method modifier, 119
- service contracts, creating, 389–390, 392–393
- service group element type, 13
- service implementation class, 388–391
- service management, element prefix, 23
- service-oriented architecture, 386
- Service References, 387
- services. *See* Microsoft Dynamics AX services
- services element types, 13
- session caching, Enterprise Portal, 223
- session disposal, Enterprise Portal, 223
- SetAsChanged, AxFilter, 209
- set-based data operators
  - delete\_from operator, 435–436
  - InMemory temporary tables, 578
  - overview, 427–428
  - table hierarchies and, 428
  - transferring code into, tips for, 439–444
  - update\_recordset operator, 432–435

## setButtonEnabled, SysListPageInteractionBase

- setButtonEnabled, SysListPageInteractionBase, 218
- setButtonVisibility, SysListPageInteractionBase, 219
- SetFieldValue, AxPopupField, 214–215
- setGridFieldVisibility, SysListPageInteractionBase, 219
- SetMenuItemProperties, AxToolBar, 212
- setter method, 592
- setTmp, run-time temporary tables, 585
- setTmpData, 579–582
- Setup, Area Page design, 145
- Shared Projects, overview of, 27
- shared steps, 536–539
- SharePoint
  - Enterprise Portal, developing for, 216–217
  - Enterprise Portal, integration with
    - Enterprise Search, 240–243
    - site definitions, page templates, and web parts, 237–239
    - site navigation, 235–236
    - themes, 243
    - web part page, import and deploy, 239–240
  - KPIs, adding to KPI List web part, 342–344
  - reporting, troubleshooting, 297
- SharePoint Server
  - architecture, 8
  - Enterprise Portal architecture and, 196–198
  - Power View reports, displaying, 336–339
  - processing architecture, 3–7
- SharePoint Services server, 336–340
- SharePoint web client applications, development of, 6–9
- shift operators, X++ expressions, 96
- shop floor controls, element prefix, 23
- shortcut keys
  - debugger tool, 47
  - X++ code editor, 32
- ShowContextMenu, AxGridView, 208
- ShowExpansion, AxGridView, 208
- ShowFilter, AxGridView, 208
- ShowLink, 236
- signatures, digital
  - assembly names, 74–75
  - models, signing, 696–697
- SimpleList template, 162
- SimpleListDetails template, 162
- site definitions, Enterprise Portal and SharePoint integration, 237–239
- skipAosValidation, 431–432, 434, 436
- SkipAOSValidationPermission, 371–372
- skipDatabaseLog, 431–432, 434, 436
- skipDataMethods, 431–432, 434, 436
- skipDeleteMethod, 436
- skipEvents, 431–432, 434, 436
- SMA, element prefix, 23
- SMM, element prefix, 23
- source code files, 688
- Source Code, Titlecase Update tool, 93
- source document framework
  - MorphX model element prefixes, 667
  - overview, 664–665
  - when to use, 665
- sourcing and procurement, organization model framework, 638
- specialized base enumerations, value types, 88
- specialized primitive types, value types, 88
- SPID (Server Process ID), 489
- SPLinkButton, 212
- SQL Administration form, performance and, 462
- SQL Server
  - architecture, 7
  - processing architecture, 3–6
- SQL Server Analysis Services (SSAS)
  - prebuilt BI solutions, implementing, 301–309
  - prebuilt projects, modifying, 319–323
  - processing architecture, 3–8
  - SSAS server, configuring, 302
- SQL Server Analysis Services Project Wizard
  - cubes, customizing, 311–319
  - cubes, generating and deploying, 303–309, 328–333
  - currency conversions, 316–317
  - deploying projects, 301
- SQL Server Power View
  - reports, displaying, 335–340
  - reports, editing, 339–340
- SQL Server Reporting Services (SSRS)
  - architecture, 3–8
  - AxReportViewer, 216
  - client-side reporting solutions, 276–277
  - data processing extensions, 288
  - default chart format, override, 296
  - Enterprise Portal, web parts, 200
  - interactive functions, adding, 294–295
  - Microsoft Dynamics AX extensions, 286–288
  - model elements for reports, 282–285
  - processing architecture, 3–6, 8
  - production reports, overview, 281–282
  - report execution sequence, overview, 278–279
  - report solutions, planning for, 279–281
  - reporting, overview, 275–276
  - server-side reporting solutions, 277–278

- SSRS extensions, creating, 285
- troubleshooting, reporting framework, 296–297
- SqlDataDictionaryPermission, 372
- SqlStatementExecutePermission, 372
- SSAS (SQL Server Analysis Services)
  - prebuilt BI solutions, implementing, 301–309
  - prebuilt BI solutions, modifying, 319–323
  - SSAS server, configuring, 302
- SSL (Secure Sockets Layer), Enterprise Portal security, 232–235
- SSRS report element type, MorphX, 12
- Standard, TabPage controls, 176–178
- Standard, window type, 174
- startOperation, 494
- Startup Element, debugging managed code, 81–82
- state model, workflows, 266–267
- StateManager, 266–267
- statements, X++ syntax, 96, 99–104. *See also* X++ programming language (code)
- static CLR elements, invoking, 109
- static file element type, 15
- Static Files, Enterprise Portal and SharePoint
  - integration, 237
- static RDL reports, 288
- Static Report Design, 288
- static, method modifier, 119
- status bar, navigation layer forms, 142
- Storage Dimension Group, 645
- str
  - value types, overview, 88
  - variable declaration syntax, 94
- strategic persona, 334–335
- strFmt, 36–37
- string concatenation, X++ expressions, 96
- style sheet themes, Enterprise Portal and SharePoint
  - integration, 243
- Subledger Journal, 660–662
- SubMenu, AxToolbar, 212
- SubmitToWorkflow, action menu items, 272
- SubmitToWorkflow, workflow artifacts, 265
- subworkflows, workflow elements, 253
- sum, X++ select statements, 102
- summary page, Help system, 550–551
- SupportInheritance, 594
- surrogate foreign keys
  - CreateNavigationPropertyMethods, 591–593
  - performance and, 168, 586–587
  - table relations, 590–591
- surrogate keys, overview of, 585–587
- SvcConfigUtil, publishing services, 401
- switch statement, X++ syntax, 98
- synchronization
  - AxFilter, 209
  - elements, refreshing, 25
  - proxies, 82–84
  - temporary tables, 584
  - Version control tool, 67–68
- synchronization log, viewing, 68
- synchronous mode, SysOperations, 468
- Sys, element prefix, 23
- SysAnyType, 90
- SysBPCheck, 42–43
- SysBPCheckMemberFunction, 42–43
- SysClientAccessLog, 490
- SysDatabaseLogPermission, 372
- SysEntryPointAttribute, 359, 371, 400
- SysGlobalCache, performance and, 456
- SysGlobalObjectCache, performance and, 456
- SysListPageInteractionBase, 218–219
- SysModel, reflection table, 675
- SysModelElement, reflection table, 675
- SysModelElementData, reflection table, 675
- SysModelElementLabel, reflection table, 675
- SysModelElementSource, reflection table, 675
- SysModelElementType, reflection table, 675
- SysModelLayer, reflection table, 676
- SysModelManifest, reflection table, 676
- SysModelManifestCategory, reflection table, 676
- SysOperation
  - attributes, 495
  - classes, 494
  - creating batch-executable class, 616–617
  - overview, 493–494
  - RunBase comparison, 495–510
- SysOperationAutomaticUIBuilder, 494
- SysOperationContractProcessingAttribute, 495
- SysOperationController, 495–496
- SysOperationDisplayOrderAttribute, 495
- SysOperationHelpTextAttribute, 495
- SysOperationLabelAttribute, 495
- SysOperations
  - overview, 420, 613
  - performance, 467–472
- SysOperationUIBuilder, 494
- SysPackable interface, 495–496
- SysQueryForm, timeout settings, 463
- SysTableBrowser, 52–53
- system documentation element type, 16

## system function statement, X++ syntax

- system function statement, X++ syntax, 98
- system services
  - consuming, 404–407
  - overview, 387–388
- system workflows, defined, 246–249. *See also* workflow
- SystemAdministratorHelpOnTheWeb, 549
- SystemFatal, exception handling, 232
- SystemFilter, 209
- SystemManaged, form permissions, 358
- SystemTable, 611
- SysTest framework, new features, 527–533
- SysTestCheckInTestAttribute, 528–533
- SysTestFilterStrategyType, 531–533
- SysTestInactiveTestAttribute, 528–533
- SysTestListenerTRX, 541
- SysTestMethodAttributes, 528
- SysTestNonCheckInTestAttribute, 528–533
- SysTestTargetAttribute, 528
- SysVersionControlFileBasedBackEnd interface, 71

## T

- table. *See also* temporary tables
  - buffers, passing by value, 425–426
  - buffers, set-based data operators, 428
  - document services, customizing, 397
  - inheritance, overview, 165–167
  - permissions, coding, 369–371
  - reference types, overview, 89
  - table data, reflection API, 669–670, 673–676
  - table hierarchies and set-based operators, 428
  - table index, database query sample, 101
  - table maps, common type, 91
  - table relations, overview, 588
  - table-level patterns, 131–133
- Table Browser tool, 20, 52–53
- table collection element type, defined, 11
- table element type, defined, 10
- table inheritance
  - modeling, 594–595
  - performance and, 598–599
  - polymorphic behavior, 596–598
  - storage model, 596
- table of contents, Help system, 550, 563–565
- Table References, 589
- Table, metadata property, 169
- TableContextList, Enterprise Portal, 223–225
- TableDataKeys, Enterprise Portal, 224–225
- TableOfContents template, 162
- TabPage control, 176–178
- tabular models, PowerPivot, 336–340
- tactical persona, 334–335
- TargetClassTest, 528
- TargetControl, AxPopup, 215
- TargetControlID, AxLookup, 211
- TargetId, AxPopupField, 214–215
- tasks
  - code compiler, 37–39
  - logical approval and task workflows, 260–262
  - task modeling, performance and, 466–467
  - workflow artifacts, 265
  - workflow elements, 252
- Tax, element prefix, 23
- Team Foundation Build, 540–543
- team, defined, 635
- TempDB
  - creating temporary tables, 583–585
  - extensible data security constructs, 367
  - overview, 582–583
  - performance and, 423–424
  - transferring code into set-based operations, 442–444
- templates
  - Dynamics AX Reporting Project, 282
  - Enterprise Portal and SharePoint integration, 237–239
  - EP Chart Control, 290–291
  - Excel, 190–191
  - form patterns, 160–162
  - Help content, 551–552
  - time period filters, 344–345
  - user templates, adding, 192–193
  - Word, 191–192
  - workflow types, 251–252
- temporary tables
  - creating, 583–585
  - EntireTable cache, 453–454
  - inMemory, 422–423, 428
  - InMemory, 578–582
  - insert\_recordset operator, 429–432
  - TempDB, overview, 582–583
  - TempDB, performance and, 423–424
  - transferring code into set-based operations, 442–444
- Terminal Services, performance, 464
- Test Listeners, 541
- Test Manager. *See* Microsoft Test Manager

- testing
    - new features, 527–533
    - test selection, 542–544
    - Visual Studio tools
      - acceptance test driven development (ATDD), 535–536
      - ALM solution, 534
      - ordered test suites, 539–540
      - overview, 533–534
      - shared steps, 536–539
      - Team Foundation Build, 540–543
      - test case evolution, 538
  - testsElementName, 528
  - TextBox, AxPopupField, 214–215
  - TFS (Visual Studio Team Foundation Server), 62–64
  - themes, Enterprise Portal and SharePoint integration, 243
  - third-party assemblies, .NET Framework and, 73–76
  - third-party integration applications
    - development of, 6–9
    - presentation tier architecture, 9
  - throw statement
    - exception handling, 105–106
    - X++ syntax, 98
  - time
    - date-effective framework, 601–606
    - time period filters, Business Overview web part, 344–345
    - TimeOfDay, value types, 88
    - TimeOfDay, variable declaration syntax, 94
    - valid time state tables, 355, 362–363
  - Timeout
    - exception handling, 107
    - Server Configuration form, 463
  - title, Enterprise Portal web parts, 200
  - Titlecase Update tool, 93
  - TitleDateSource, form properties, 174
  - TODO tasks, code compiler, 37–39
  - Toolbar, Enterprise Portal web part, 200, 212–213
  - topics, Help system
    - add labels, fields, and menu items, 559–561
    - context-sensitive topics, 561–562
    - create in HTML, 552–559
    - non-HTML topics, creating, 565–567
    - overview, 549–550
  - TopNavigationDataSource, 235
  - Trace Parser, 479–488
  - Tracking Dimension Group, 645
  - transaction details form, designing, 153–155
  - transaction performance
    - delete\_from operator, 435–436
    - overview, 426–427
    - set-based data operators, overview, 427–428
    - update\_recordset operator, 432–435
  - transaction tracking system (TTS), grouping calls, 425
  - Transact-SQL
    - tracing statements, 488–489
    - transferring code into set-based operations, 442–444
  - TransDate, currency conversion logic, 330–332
  - Translations, customizing cubes, 315–316
  - travel and expense, organization model
    - framework, 638
  - treenodes, reflection API, 670, 680–685
  - TreeNodeType, 683–685
  - troubleshooting
    - Help system, 572–573
    - reporting framework, 296–297
    - tracing code, 487–488
  - Trustworthy Computing, 372–373
  - try statement, X++ syntax, 98
  - TTS (transaction tracking system), grouping calls, 425
  - ttsAbort, 104
    - InMemory temporary tables, 581–582
  - ttsBegin, 104
    - InMemory temporary tables, 581
  - ttsCommit, 104
    - InMemory temporary tables, 581
  - Tutorial\_CompareContextProvider, 58–59
  - Type Hierarchy Browser tool
    - overview, 20
    - table inheritance hierarchy, 594–595
    - type hierarchies, 89–93
  - Type Hierarchy Context tool, 20, 89–93
  - type hierarchy, Cross-reference tool, 60
  - typed data source, element prefix, 22
  - typeof system function, reflection, 669, 671–672
- ## U
- Unified Modeling Language (UML)
    - object models, 49–50
    - Reverse Engineering tool, overview, 47–51
  - Unified worklist web part, 201, 256
  - unique index join cache, 452
  - Unit of Work
    - form data overview, 167–168
    - overview of, 599–601

## unpack method

- unpack method, 130–131, 203, 617
  - update method, field lists, 458
  - update permissions
    - forms, 356–359
    - menu items, 360
  - update\_recordset
    - table hierarchies and, 428
    - transaction performance, 104–105, 432–435
    - transferring code into set-based operations, 442–444
  - UpdateConflict, 107
  - UpdateConflictException, 107
  - UpdateConflictNotRecovered, 107
  - UpdateOnPostback, 204
  - UpdatePanel
    - AxContentPanel, 215
    - Enterprise Portal, AJAX, 222
  - UpdatePermissions, 360
  - updates
    - business documents, consuming services, 407–409
    - date-effective framework, 605–606
    - Help content, 562–563
    - User control web part, 201
  - upgrades
    - Compare tool, 56
    - Project and, 29
  - URL
    - Excel reports, displaying, 340
    - Help system, AOS, 549
    - Power View reports, displaying, 336–339
  - URL web menu item, 218
  - U.S. Food and Drug Administration regulations, 354
  - UseIntList, 391
  - user access
    - security framework overview, 351–356
    - validate security artifacts, 363–364
  - user client access license (CAL), overview, 376–383
  - User control web part
    - Enterprise Portal architecture, 196–197
    - Enterprise Portal, AJAX, 222
    - Enterprise Portal, overview, 201
  - user experience, designing
    - area pages, 144–146
    - details form, 150–153
    - Enterprise Portal web client experience, 155–157
    - list pages, 146–150
    - navigation layer forms, 141–142
    - overview, 137–139
    - Role Center pages, 142–144
    - role-tailored design, 139–140
    - transaction details forms, 153–155
    - user feedback, importance of, 157–158
    - work layer forms, 142
  - user interface
    - control element types, MorphX, 11–12
    - Enterprise Portal architecture, 196–198
    - labels, localization of, 33
    - SysOperationUIBuilder, 494
  - user profiles, deploying cubes, 308–309
  - user session info service, 388
  - user-defined class types, 89
  - UserDocumentation, Help system, 549, 571
  - UserFilter, 209
  - users
    - creating, 363
    - roles, assigning, 363–364
  - utcDateTime
    - relational modeling, 602–603
    - value types, overview, 88
    - variable declaration syntax, 94
  - UtilElements, reflection table, 676
  - UtilIdElements, reflection table, 676
  - UtilModels, reflection table, 676
- ## V
- validation
    - Validate property, associations, 48–49
  - valid time state tables, security, 362–363
  - validation
    - aosValidateDelete, 436
    - aosValidateInsert, 438–439
    - aosValidateRead, 433
    - aosValidateUpdate, 433
    - AxDDocument class, 394
    - cross-table, document services, 393
    - document services, customizing, 397–399
    - Enterprise Portal, developing for, 231
    - registering methods, postRun, 494
    - report server validation, troubleshooting, 297
    - skipAosValidation, 431–432, 434, 436
    - Table Browser tool, 52–53
    - table permissions coding, 370–371
    - validateByTree, 656
  - ValidFrom
    - date-effective tables, consistency, 604–606

- valid time state tables, 362–363
  - ValidTimeStateFieldType, 601–603
- validTimeState, 100
- validtimestate key, 602–603
- ValidTimeStateFieldType, 362–363, 601–603
- ValidTimeStateMode, 604–606
- ValidTo, 362–363, 601–606
- value stream, defined, 635
- value types, 88
- ValueFormatter, Enterprise Portal, 230
- values, X++ expressions, 95
- variables
  - Auto variables, overview, 187
  - common type, 91
  - declarations, X++ syntax, 93–95
  - expressions, X++ syntax, 95
  - extended data type, 92–93
  - object type, 91–92
  - reference types, overview, 89
  - value types, overview, 88
  - X++ syntax, camel casing, 93
- variant configuration technology, Product Master, 646–647
- Vend, element prefix, 23
- vendors, element prefix, 23
- Version Control tool
  - common tasks, 65
  - create a build, 71
  - element history, 69
  - element life cycle, 64–65
  - integrating with other version control systems, 71
  - overview, 20, 62–64
  - pending elements, viewing, 70
  - revisions, comparing, 70
- vertical application domain partition, 4–6
- VerticalTabs, TabPage controls, 176–178
- view element type, defined, 10
- view type, reference types, 89
- ViewState, Enterprise Portal, 228–229
- ViewUserLicense, 383
- Visio, Reverse Engineering tool, 47–51
- Visual SourceSafe (VSS), 62–64
- Visual Studio
  - analytic reports, tools for, 346–349
  - authoring managed code, 77–84
  - batch jobs, debugging, 630–631
  - details page, creating, 219–221
  - Enterprise Portal architecture, 196–198

- Enterprise Portal, developing for, 216
- model elements for reports, 282–285
- prebuilt projects, modifying, 319–323
- presentation tier architecture, 8–9
- proxies, Enterprise Portal, 226–228
- report execution sequence, overview, 278–279
- reporting
  - chart controls, 291–292
  - client-side solutions, 276–277
  - data processing extensions, 288
  - default chart format, override, 296
  - interactive functions, adding, 294–295
  - Microsoft Dynamics AX extensions, 286–288
  - overview, 275–276
  - production reports, overview, 281–282
  - report solutions, planning for, 279–281
  - server-side solutions, 277–278
  - SSRS extensions, creating, 285
  - troubleshooting, reporting framework, 296–297
- test tools
  - acceptance test driven development (ATDD), 535–536
  - ALM solution, 534
  - ordered test suites, 539–540
  - overview, 533–534
  - shared steps, 536–539
  - Team Foundation Build, 540–543
  - test case evolution, 538
  - test selection, 542–544
- third-party assemblies, using, 73–76
- Visual Studio Integrated Development Environment (IDE)
  - overview, 7
  - processing architecture, 4–6
- Visual Studio Profiler, performance monitoring, 490–491
- Visual Studio Team Foundation Server (TFS), 62–64
- VSS (Visual SourceSafe), 62–64

## W

- warehouse management, element prefix, 23
- warehouses, external data integration, 322–323
- warnings, compiler
  - overview, 37–39
  - suppressing, Best Practices tool, 41–42
- WCF (Windows Communication Foundation), 7–8
- web client element types, overview, 14–15

## web content element type

- web content element type, 15
- web control element type, 15
- web frameworks, element prefix, 23
- web menu
  - AxActionPanel, 211–212
  - web menu element type, 14
  - web menu item type, 14
  - workflow menu items, 252
- web module element type, 15
- web part element type, 15
- web part page
  - Enterprise Portal and SharePoint integration, 239–240
  - Enterprise Portal architecture, 196–197
- web parts
  - Enterprise Portal and SharePoint integration, 237–239
  - Enterprise Portal, overview, 199–201
  - Enterprise Portal, security, 233–235
- web platforms. *See* Enterprise Portal
- web services
  - external, consuming, 414
  - Microsoft Internet Information Services, 8
- Web, element prefix, 23
- web.config
  - publisher, adding, 569–570
  - session disposal and caching, 223
- WebLink, SharePoint site navigation, 236
- WebMenuItem, 211–212
- WF (Windows Workflow Foundation), 249–250
- while statement, 99, 103
- Window Performance Monitor, 482–483
- window statement, X++ syntax, 99
- WindowMode, 220–221
- Windows client applications
  - development of, 6–9
  - presentation tier architecture, 8
- Windows Communication Foundation (WCF), 7–8
- Windows Search Service, Help system, 549
- Windows Server AppFabric, 223
- Windows Workflow Foundation (WF), 249–250
- WindowSize, 220–221
- WindowType, 174
- Wizard wizard, 29
- wizards
  - Create New Document Service Wizard, 393
  - Label Files wizard, 35
  - Project development tools, 29
  - Search Configuration Wizard, 241–243
  - SQL Server Analysis Services Project Wizard, 301, 303–309
  - Wizard wizard, 29
  - Workflow wizard, 251–252
- WKEY, Enterprise Portal security, 235
- WMS, element prefix, 23
- Word
  - architecture, 9
  - templates, building, 191–193
- work layer forms
  - Enterprise Portal design, 157
  - overview of, 142
- workflow
  - activation of, 270–274
  - architecture, 256–262
  - categories, creating, 268
  - creating artifacts, and business logic, 264–265
  - display menu item, adding, 270
  - document class, creating, 268–270
  - elements of, 252–253
  - event handlers, 252
  - implementation, overview, 263–264
  - infrastructure for, 246–249
  - logical approval and task workflows, 260–262
  - menu items, 252
  - overview, 245–246
  - providers, 254–255
  - queues, 253–254
  - state management, 266–267
  - Windows Workflow Foundation (WF), overview, 249–250
  - work items, 256
  - workflow categories, 251
  - workflow document and workflow document class, 250
  - workflow editor, 255–256
  - workflow instances, 256
  - workflow life cycle, 262–263
  - workflow run time, 257–260
  - workflow types, 251–252
- Workflow
  - activatefromWorkflowConfiguration, 273
  - activatefromWorkflowSequenceNumber, 273
  - activatefromWorkflowType, 273
  - workflow approval element type, MorphX, 12
  - workflow category, workflow artifact, 264
  - workflow document class, workflow artifacts, 265
  - workflow document query, workflow artifacts, 265
  - workflow element types, MorphX, 12–13



workflow provider element type, MorphX, 13  
 workflow started message, 259–260  
 workflow task element type, MorphX, 12  
 workflow type element type, MorphX, 12  
 workflow type, workflow artifacts, 265  
 Workflow wizard, 251–252  
 WorkflowDataSource, 271  
 WorkflowDocument, 269  
 WorkflowEnabled, 271  
 WorkflowType, 271  
 Workspace, window type, 174  
 WREC, Enterprise Portal security, 235  
 write method, 168  
 write tier-aware code, performance and, 422–426  
 writing method, 168  
 written method, 168  
 WSS (Windows Search Service), 549  
 WTID, Enterprise Portal security, 235

## **X**

X++ code editor tool  
     overview, 20, 31–33  
     shortcut keys, 32  
 X++ collections, data contracts, 391  
 X++ programming language (code). *See also* MorphX  
     assemblies, calling managed code, 76  
     attributes, 123–124  
     batch jobs, debugging, 630–631  
     classes and interfaces, overview, 117–118  
     CLR interoperability, 108–112  
     code access security (CAS), 124–126  
     code element types, 13  
     COM interoperability, 112  
     comments, syntax for, 115  
     compiler, overview, 37–39  
     compiling and running X++ as .NET CIL,  
         126–128  
     data-aware statements, 99–104  
     date-effective tables, data retrieval, 603–604  
     debugger tool, overview, 43–47  
     delete\_from operator, 435–436  
     delgates, 120–122  
     design and implementation patterns, 128–133  
     dictionary, reflection API, 676–680  
     exception handling, 105–108  
     executing as CIL, 466  
     expressions, 95  
     fields, 118

intrinsic function, reflection, 670–671  
 introduction to, 87  
 Jobs, 88  
 macros, 113–115  
 methods, 118–120  
 MorphX development environment, 6–7  
 pre- and post-event handlers, 122–123  
 processing architecture, 5  
 proxies, Enterprise Portal, 226–228  
 RecordSortedList and RecordInsertList classes,  
     438–439  
 reference types, 89  
 referencing labels from, 36–37  
 reflection, overview, 669–670  
 set-based data operators, overview, 427–428  
 set-based data operators, transferring code into,  
     439–444  
 statements, overview, 96  
 syntax, overview, 93  
 table data, reflection API, 673–676  
 table element type, 10  
 treenodes, reflection API, 680–685  
 troubleshooting, tracing, 487–488  
 type hierarchies, 89–93  
 type system, 88–93  
 update\_recordset operator, 432–435  
 value types, 88  
 variable declarations, 93–95  
 XML documentation, 116  
 xClassTrace, 483  
 XDS (extensible data security framework)  
     debugging data security policies, 368–369  
     organization model framework integration, 356  
     policies, creating, 364–369  
     temporary table constructs, 368  
 XML documentation  
     AxdDocument class, 393–394  
     EPSetupParams, 237  
     header insert, shortcut key, 32  
     Help system, table of contents, 563–565  
     schema definitions for message envelopes,  
         410–411  
     system services, consuming, 406–407  
     third-party assemblies, using, 73–76  
     X++ syntax, 116  
 XMLHttpRequest, 222  
 XPO files, 688  
 Xpp-PrePostArgs, 122–123  
 xRecord type, reference types, overview, 89