

New, changed, or deprecated features

This document provides a summary of new and changed features that have been implemented in Microsoft Dynamics 'AX 7'. It also includes deprecated feature notices that describe features that have been removed.

White paper

July 2015

Send feedback.

www.microsoft.com/dynamics/ax



Contents

New or changed features	3
Financial management	3
Human capital management	6
Foundation	9
Deprecated features	9
Business Analyzer	9
Connector for Microsoft Dynamics	9
GL SSRS reports	9
X++ financial statements	10
eBilanz (XBRL for Germany)	10
Compliance center	10
Environmental Sustainability	11
Shipping Carrier Interface	11
Warehouse management II – already deprecated at release of AX 21012 R3	11
Payroll information in Human Resources	11
Worker Reminders in Human Resources	12
Enterprise Portal Client	12
Role Center Pages	12
Desktop Client	12
Form ActiveX and Managed Host Controls	12
InfoPart, FormPart Metadata	13
ShopFloor companion app	13
Cue Metadata	13
AX 2012 features that have not been implemented in 'AX 7,' but are not deprecated	14

New or changed features

Financial management

What can you do?	AX 2012	'AX 7'	Why is this important?
Export account structures to Excel	Not supported	You can now select an account structure and export that to Excel.	Many customers have requested the ability to export account structures to Excel for easier filtering.
View ledgers and advanced rule structures associated with an account structure on a single form	In AX 2012, the user has to navigate to multiple forms to see the ledger that the account structure is using.	Fact boxes have been added to the account structure form.	This allows for easier access to key information when defining and editing account structures.
Filter Management Reporter (labeled Financial reporting in 'AX 7') reports based on dimension, attributes, dates, and scenarios	All filtering of Management Reporter reports was handled through the design of the report. If a user with viewing privileges wanted to view a report for a different date, for example, this required a report designer to make the modification.	Report options have been added so when viewing a report, different filters can be applied and a new report is generated based on those filters.	Consumers of financial reports can apply different filters for dimensions, dates, attributes, and scenarios without the need for updates in report designs.
View Management Reporter (financial reports) within the 'AX 7' client	A separate web client was used for viewing Management Reporter reports.	A list of all financial reports can be accessed within the 'AX 7' client. The user selects a report to view, and the report is rendered within the 'AX 7' client.	You can now view financial reports without having to access a different client/application.

What can you do?	AX 2012	'AX 7'	Why is this important?
Monitor budget vs actuals and create ledger forecasts using the Ledger budgets and forecasts workspace and additional inquiry forms	Not available	The workspace can be accessed through the 'AX 7' dashboard. It includes links to a number of new inquiry forms: Actuals vs budget summary, Budget control statistic summary, Budget register entries, Budget plans.	New inquiry forms allow easy access to budget information. The workspace combines all budget maintenance and monitoring task in one place, which is easy to use by budget managers or accounting managers.
Create layouts for budget plans and forecasts	The Budget plan document is viewed as a list of lines with effective dates and amounts for financial dimension combinations. The user must create and use Excel templates to view budget plan data in a pivot.	<p>An unlimited number of layouts is available for budget plans and forecasts. You can combine selected financial dimensions, user defined columns, and other row attributes (such as comments, projects, assets, etc.) in the layout.</p> <p>Users can switch the layout for the budget plan document on the fly and edit data using any selected layout.</p> <p>Budget planning configuration is simplified by eliminating scenario constraints and using layouts to define which data can be viewed and edited in each budget plan document stage.</p>	<p>This feature gives flexibility to create and edit budget plans using both Microsoft Excel and the 'AX 7' client.</p> <p>Templates for Microsoft Excel workbooks can be generated using the Budget plan layout setup in 'AX 7.'</p>

What can you do?	AX 2012	'AX 7'	Why is this important?
Print the Vendor Invoice Transactions report with information from the Detailed Due Day List which includes the days past due.	In AX 2012, you had to print two different reports: the "Detailed Due Day List" and the "Vendor Invoice Transactions" report.	The information contained on the two reports were consolidated onto the "Vendor Invoice Transactions" report. The Detailed Due Day List was deprecated.	Eliminates the need to print two separate but yet related reports.

Human capital management

What can you do?	AX 2012	'AX 7'	Why is this important?
Transfer skills and certificates to class participants upon course completion	Manual process in AX 2012.	Upon completion of a course a new option will be available to update participant's records with the new skills and certificates.	This provides a new and efficient way to update employee records.
Quick employment verification capability	Manual process in AX 2012.	Accessed from a workspace or the employee form HR can quickly verify employment.	Your HR department no longer needs to access multiple forms to verify start date, manager, months in position, and compensation data.
Enable employees to view, update, and delete information from the system	Available in AX 2012 with limited view and update capability.	This feature is enabled for employees and contractors to view a wide range of personal data with optional workflow when creating new, updating existing, or deleting information from the system.	<p>This allows employees to take control of their information. Whether that is address contact information, applying for a job, taking a questionnaire, or updating their image.</p> <p>With workflow enabled, information can be reviewed by an approver or auto approved based on your business processes.</p>
Enable managers to view or edit employee information	Available in AX 2012 with limited view and update capability.	Managers are empowered based on configuration settings and security to view or edit employee information.	This allows managers key access to employee data to make better decisions around resourcing, performance, and employee development.

What can you do?	AX 2012	'AX 7'	Why is this important?
Encrypt ID numbers	Not Available	All Employee ID (SSN) numbers are encrypted.	Encrypted employee ID number is critical to secure data management.
Access compensation processing results	Available only at time of processing	Compensation processing results can now be accessed at any point after the process has run.	This feature provides an excellent audit of the process and outcome of the process. It also provides a comprehensive view of the data before updating employee records.
Access benefit processing results	Available only at time of processing	Benefits processing results can now be accessed at any point after the process has run.	This feature provides a comprehensive view of data updated by benefit enrollment and cost changes.
View Date Effective timeline changes	Not Available	This comparison tool is available for Employees, Positions, and Jobs. It provides a comprehensive view of changes from one version of a record to another.	This feature saves time when viewing changes that have occurred over time to employees, positions, and job records. It enables you to quickly compare two versions of a record, or all records, over the course of time.

What can you do?	AX 2012	'AX 7'	Why is this important?
View employees by company	Manual process in AX 2012 through filtering	Employee and Contractor lists are automatically filtered by the company you're logged into.	<p>This feature provides a filtered view of employees that are employed in the logged-in company.</p> <p>For an unfiltered view of all employees and contractors, the worker list is still available.</p> <p>In 'AX 7' the system will not change company based on the employee selected in the list.</p>
Update course participants list	Not Available	Course participants can be removed from the participants list.	This feature provides an easy way to update course participants that may have registered by mistake.
Manage compensation events in mass	Not Available	This feature provides a streamlined processing of compensation changes for employees.	This feature provides a simple, streamlined process for updating employee records through the compensation workspace and related forms.

Foundation

What can you do?	AX 2012	'AX 7'	Why is this important?
Access the client, anytime, anywhere	<p>The AX 2012 desktop client provided a full set of forms, but was limited to running on Windows machines and required installation. Terminal Server was often used with the desktop client to enable access over a WAN.</p> <p>The Enterprise Portal web client provided a reduced set of forms.</p>	The two AX 2012 clients have been replaced by a single, standards based web client that provides the full set of functionality of the desktop client with the reach of the Enterprise Portal client.	This prevents splitting development efforts between two UI platforms and eliminates the need for Terminal Server by using standard web interfaces.

Deprecated features

Business Analyzer

This is a mobile application for reviewing key business metrics.

Reason for deprecation	This functionality has been replaced by another feature.
Replaced by another feature	The "Monitor financial performance" content pack for PowerBI will include key financial metrics that were previously available in the Business Analyzer.
Modules affected	General Ledger

Connector for Microsoft Dynamics

This tool was used to integrate key data from Microsoft Dynamics CRM to Microsoft Dynamics ERP applications.

Reason for deprecation	This functionality has been replaced by another feature.
Replaced by another feature	Dynamics Integrator
Modules affected	Connector for Microsoft Dynamics

GL SSRS reports

Reports with the following menu items have been removed: Summary trial balance, Detailed trial balance, Chart of accounts, Audit trail, Balances, and Balance list.

Reason for deprecation	Financial SSRS reports have been replaced by Management Reporter capabilities and default reports.
Replaced by another feature	Management Reporter (Financial reporting in 'AX 7')
Modules affected	General Ledger

X++ financial statements

Reason for deprecation	This functionality has been replaced by another feature.
Replaced by another feature	Management Reporter (labeled Financial reporting in 'AX 7')
Modules affected	General Ledger

eBilanz (XBRL for Germany)

This functionality provides XBRL output specifically for the German eBilanz taxonomy.

Reason for deprecation	Lack of customer usage
Replaced by another feature	No
Modules affected	Management Reporter

Compliance center

The Compliance Center was an Enterprise Portal site for managing the documentation requirements for compliance initiatives the Sarbanes-Oxley law.

Reason for deprecation	Lack of customer usage SharePoint includes the same capability that was available in the Compliance Center
Replaced by another feature	No
Modules affected	Compliance and internal controls

Environmental Sustainability

Reason for deprecation	Low customer usage, limited feature set
Replaced by another feature	No
Modules affected	Compliance and internal controls; Accounts payable

Shipping Carrier Interface

Reason for deprecation	Duplicate functionality
Replaced by another feature	Yes – partly replaced by Transportation management, not for Warehouse management
Modules affected	Sales, Warehouse management

Warehouse management II – already deprecated at release of AX 21012 R3

Reason for deprecation	The Warehouse management II module duplicates functionality that is in the Warehouse management module released in AX 2012 R3.
Replaced by another feature	The Warehouse management module released in AX 2012 R3, in CU8 and CU9, including planned enhancements, will replace the current Warehouse management II features. The new module has more advanced features and flexible warehouse management processes than those offered in the Warehouse management II features
Modules affected	Inventory management, Sales and marketing, Procurement and sourcing.

Payroll information in Human Resources

Human Resources Payroll information

Reason for deprecation	Replaced by core Payroll and Human Resources forms
Replaced by another feature	Benefits, Earnings and other related forms, formerly in US Payroll have been reconfigured to be part of the core Human Resources configuration to help support external payroll processing. This functionality is accessed using the Human Resources 1 → Payroll configuration key.
Modules affected	Human Resources and Payroll

Worker Reminders in Human Resources

Human Resources Payroll information

Reason for deprecation	Low customer usage
Replaced by another feature	No
Modules affected	Human Resources.

Enterprise Portal Client

Reason for deprecation	Creating a single client platform that provides
Replaced by another feature	The new web client is based on the desktop form metadata and programming model that have been modified to provide a rich web platform.
Modules affected	All

Role Center Pages

Reason for deprecation	Role Center pages were built on the deprecated Enterprise Portal platform which has been replaced by the new Web Client platform in 'AX 7.'
Replaced by another feature	The new Workspace form pattern provides users with a process-centered design that provides easy access to commonly used tasks within that process
Modules affected	All

Desktop Client

Reason for deprecation	The 'AX 7' client experience has been redesigned to improve usability across multiple platforms and devices
Replaced by another feature	New web client is based on the desktop Form metadata and programming model that have been modified to provide a rich web platform.
Modules affected	All

Form ActiveX and Managed Host Controls

Reason for deprecation	The ActiveX and Managed Host controls are based on the deprecated desktop client
Replaced by another feature	The extensible control framework supports build new controls based on HTML, CSS, JavaScript and are a first class control in the Visual Studio Tooling.

Modules affected	All
-------------------------	-----

InfoPart, FormPart Metadata

Reason for deprecation	InfoPart and FormPart metadata enabled creating fact boxes for two different clients
Replaced by another feature	InfoPart metadata, which was a simplified form definition, is converted into a Form by upgrade tooling. FormPart metadata, which referenced a Form, is replaced by a more direct reference created by upgrade tooling
Modules affected	All

ShopFloor companion app

Reason for deprecation	The ShopFloor companion app enabled you to use a Windows phone or tablet to visualize or report on production jobs. The browser client now supports that functionality.
Replaced by another feature	No. An app will no longer be needed to view reports on supported mobile devices because the functionality will be directly supported by the browser client, providing a unique touch experience.
Modules affected	Mobile apps

Cue Metadata

Reason for deprecation	Cue metadata was limited to count or sum information
Replaced by another feature	Yes. Tile metadata was introduced to provide more flexibility in modeling. Currently this includes counts, navigation, and KPIs. Count Tile metadata is the direct replacement of the Cue metadata.
Modules affected	All

AX 2012 features that have not been implemented in 'AX 7,' but are not deprecated

Feature	Description
Graphics tab on the fixed asset value model and depreciation book profile forms	This graph shows the depreciation, accumulated depreciation, and net book value over time. Users can select the data tab to get more detailed information than the chart displayed. We plan to redesign the chart in a future release of 'AX 7'.
Generate electronic file to communicate the payment advice information, can be sent to a vendor.	From the vendor payment journal you could generate a payment advice as a report or as a file. The payment advice is used to communicate to the vendor the list of invoices being paid. The payment advice report is still available, but the ability to generate this information in an electronic file format will not be supported in the first release of 'AX 7". This functionality was dependent on AIF, which is deprecated for 'AX 7'.
Positive Pay	Enables the creation of a positive pay file used to transmit to a bank for the purpose of fraud prevention.
Cash Flow Forecasting	The creation of a cash flow forecast will be enhanced and included in a later release.
Vendor Portal	<p>Vendor and its user's onboarding, the ability to certify and validate suppliers as AAD federated users as well as support for unsolicited vendor signups.</p> <p>Vendor self-service, the ability to review purchase orders, to update own (supplier) data, to review product receipt to generate invoices and to upload and maintain own product catalog.</p> <p>Vendor portal, the ability to collaborate or notify a supplier, upload RFQ's and enable vendor to respond to them.</p>

Feature	Description
Employee self-service (ESS)	<p>Employee self-service included the ability to enter requisitions for employees through a shopping portal UI, view the status of orders (the status can be created, receipt, or confirmation of receipt) and enable configuration of security, as well as punch-out to external catalogs.</p> <p>It also included the ability to request an onboarding of a new vendor.</p>
Customer self-service (CSS)	<p>Customer self-service included the ability to create approved customers records, to allow these users to view selected product catalog, order items with usage of carts and sales orders, and view the status of invoices. It also included the ability to create and follow return orders.</p>
Cost accounting	<p>The cost accounting module included the ability to analyze and distribute costs based on financial transactions and additional input through Service transactions that can be mapped against organizational- or product-related hierarchies.</p>
Visual scheduling board for lean manufacturing	<p>The visual scheduling board for lean work cells is not supported in the first release of 'AX 7'. Scheduling of kanban jobs is done through a list page.</p>
RFID	<p>The ability to set up an RFID server with the current 'AX 7' infrastructure instead of the BizTalk server and to enable inbound and/or outbound processed for items tagged with RFID tags are not in the first release of 'AX 7'. RFID tagging was used for warehouses with WMSI and/or WHS functionality.</p>
Absence Management in Human Resources	<p>The ability to enter absence transactions, through both Employee Self-service and the client, along with the ability to approve those transactions as a manager is not in the first release of 'AX 7'. The ability provided will be enhanced to support a wider range of scenarios in a later release.</p> <p>Setup capabilities required for integration with other AX modules are available through the Human Resources 2 Configuration Key.</p>

Feature	Description
US Payroll	US Payroll is not included in the first release of 'AX 7'. Limited Initial setup capabilities will be available through the Human Resources 1 → Payroll configuration key.
External Questionnaire and Recruiting functionality	External posting of questionnaires and open jobs will be available later release.
Signing Limits	Signing limit functionality will be available in a later release.
Client Personalization	Personalization of the client is an important feature for user productivity and for enabling users to add the right content on the dashboard and workspace forms. Some customization capability will be included in the first release of 'AX 7", and we plan to extend this capability throughout subsequent releases.
Client Right to Left (RTL) Layout	The web client only uses Left to Right (LTR) layout of controls and labels for R1. The ability to use Right to Left (RTL) layout for Arabic and Hebrew languages will be added in a later release.
Client Drag and Drop	The web client controls have APIs for dragging and dropping but are based on the deprecated desktop client technology and need to be redesigned to work on the new web client platform. APIs to support drag and drop will be reviewed for inclusion in a later release.

[Send feedback.](#)

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

United States and Canada toll-free: (888) 477-7989

Worldwide: (1) (701) 281-6500

www.microsoft.com/dynamics

© 2015 Microsoft Corporation. All rights reserved.

This is a preliminary document and may be changed substantially prior to final commercial release of the software described herein.

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

This white paper is for informational purposes only. Microsoft makes no warranties, express or implied, in this document.

Complying with all applicable copyright laws is the responsibility of the user. Without limiting the rights under copyright, no part of this document may be reproduced, stored in, or introduced into a retrieval system, or transmitted in any form or by any means (electronic, mechanical, photocopying, recording, or otherwise), or for any purpose, without the express written permission of Microsoft Corporation.

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