

Managing Cues in AX

Cues allow you to quickly organise filtered data into quick preview icons which offer a visual representation of a user's workload and the user's remaining work items, such as sales leads or overdue activities.

View Cues

To View Cues, open AX and navigate to Home > RoleCentre. By default, Cues will be listed under the “Activities” web part.

The screenshot displays the Microsoft Dynamics AX Role Centre interface. The breadcrumb navigation shows 'PLA > Home > Role centre'. The main content area is titled 'Role centre' and features a 'Personalise this p...' link. The 'Activities' web part is active, showing several cue cards: 'Test' (5396), 'Test1' (16462), 'My open cases' (0), 'My overdue cases' (0), 'My open service orders' (0), 'My open activities' (3), and 'My activities past due' (3). Below these are 'Add Cue' and 'Manage Cues' options. The 'Connect' section displays 'Microsoft Dynamics AX News' with a 'Sign in |' link and several news items. The 'Work list' section shows a table with columns for Subject, Document type, ID, Due date, and From. A tooltip for the 'Work list' web part is visible, stating: 'Work list - Web Part that provides a centralized work for a Dynamics user.'

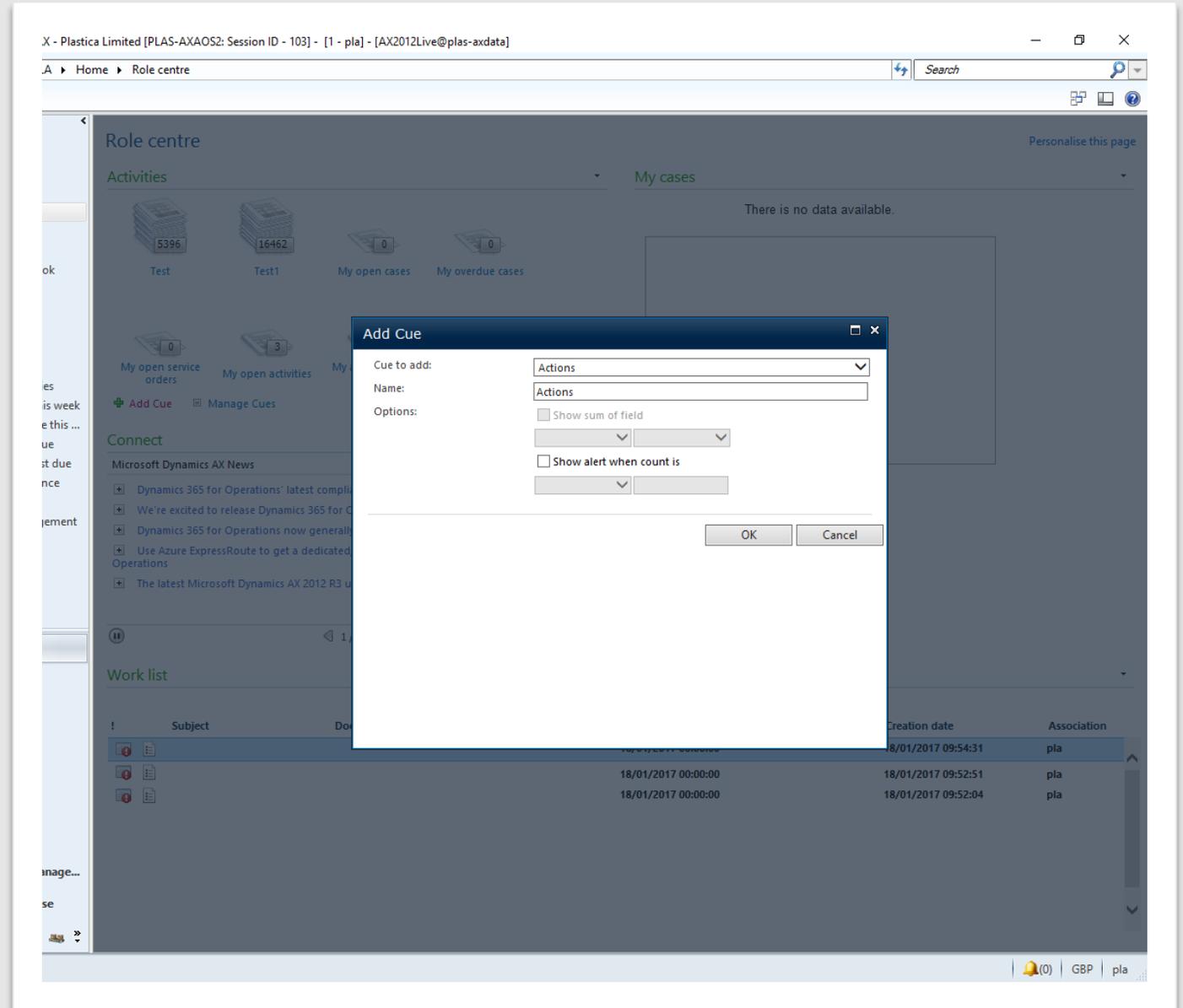
Subject	Document type	ID	Due date	From
			18/01/2017 00:00:00	18/01/2017 09:54:31 pla
			18/01/2017 00:00:00	18/01/2017 09:52:51 pla
			18/01/2017 00:00:00	18/01/2017 09:52:04 pla

Adding Cues

To add a default Cue to your RoleCentre, click the “add Cue” link and select the desired item from the drop down.

Once selected, you can change the name and setup alerts to notify you when certain criteria is met. Press OK and the Cue should be added to your RoleCentre.

To add a custom Cue to your RoleCentre, click the “Manage Cues” link, ensure the cue is listed, then press OK.



Creating Custom Cues

Custom cues can be created from data that has already been filtered. In this example I want to create a cue for all activities completed in the last week.

After setting up your filters, click the drop down list in the top left and select “Save as Cue”. Give the Cue a name and decide if you'd like it to be viewable by other staff, then click OK. The newly created Cue will now be available for you to add in your RoleCentre.

The screenshot shows a software interface with a top navigation bar and a main data table. The top bar includes a breadcrumb trail: Home > Common > Activities > All activities. Below this is a toolbar with icons for Task, Edit, Set as complete, Delete, Maintain, Attendees, Recurrence pattern, Refresh, Export to Microsoft Excel List, and Attachments. The main area displays a table of activities with columns: Date and time closed (DayRange(-7)), Date, Purpose, Priority, Category, Type, Responsible, and Completed. A context menu is open over the 'All activities (Unsaved filter)' dropdown, showing options: Save Filter, Save As Filter..., Save As Cue..., Remove Filter/Sort (Ctrl+Shift+F3), Filter, Sort, and Delete Filter. The table contains multiple rows of activity data, including dates, times, purposes like 'Quotation expires', and responsible staff members.

Date and time closed (DayRange(-7))	Date	Purpose	Priority	Category	Type	Responsible	Completed
04/05/2017 10:56:21	30/05/2017	Quotation expires	Normal	Task		Natalie Maurice	
04/05/2017 10:37:31	30/05/2017	Quotation expires	Normal	Task		Natalie Maurice	
04/05/2017 10:27:26	30/05/2017	Quotation expires	Normal	Task		Natalie Maurice	
03/05/2017 12:46:14	29/05/2017	Quotation expires	Normal	Task		Louisa Weddle	
03/05/2017 15:42:55	29/05/2017	Quotation expires	Normal	Task		Natalie Maurice	
03/05/2017 15:17:25	04/05/2017	09:28:31	29/05/2017	Quotation expires	Normal	Task	
02/05/2017 10:49:58	02/05/2017	13:45:49	26/05/2017	Quotation expires	Normal	Task	
02/05/2017 12:07:23	03/05/2017	12:00:32	26/05/2017	Quotation expires	Normal	Task	
02/05/2017 12:49:07	04/05/2017	12:19:56	26/05/2017	Quotation expires	Normal	Task	
02/05/2017 14:21:29	02/05/2017	15:03:33	26/05/2017	Quotation expires	Normal	Task	
02/05/2017 14:40:06	04/05/2017	10:25:06	26/05/2017	Quotation expires	Normal	Task	
02/05/2017 16:44:16	04/05/2017	11:09:37	26/05/2017	Quotation expires	Normal	Task	
28/04/2017 10:14:28	28/04/2017	11:13:56	24/05/2017	Quotation expires	Normal	Task	
28/04/2017 10:44:25	28/04/2017	11:13:13	24/05/2017	Quotation expires	Normal	Task	
28/04/2017 12:32:46	02/05/2017	10:58:28	24/05/2017	Quotation expires	Normal	Task	
28/04/2017 12:40:14	28/04/2017	13:05:32	24/05/2017	Quotation expires	Normal	Task	
28/04/2017 16:20:47	02/05/2017	09:18:57	24/05/2017	Quotation expires	Normal	Task	
27/04/2017 09:12:35	27/04/2017	12:18:16	23/05/2017	Quotation expires	Normal	Task	
27/04/2017 09:40:08	03/05/2017	16:39:52	23/05/2017	Quotation expires	Normal	Task	
27/04/2017 10:28:19	27/04/2017	10:44:15	23/05/2017	Quotation expires	Normal	Task	
27/04/2017 10:59:23	02/05/2017	13:04:41	23/05/2017	Quotation expires	Normal	Task	
27/04/2017 11:28:59	27/04/2017	14:17:01	23/05/2017	Quotation expires	Normal	Task	
27/04/2017 14:32:34	28/04/2017	14:21:58	23/05/2017	Quotation expires	Normal	Task	
27/04/2017 14:35:05	28/04/2017	12:49:56	23/05/2017	Quotation expires	Normal	Task	
26/04/2017 09:59:26	02/05/2017	15:54:48	22/05/2017	Quotation expires	Normal	Task	
26/04/2017 11:01:31	27/04/2017	14:44:16	22/05/2017	Quotation expires	Normal	Task	
26/04/2017 15:29:42	02/05/2017	09:38:35	22/05/2017	Quotation expires	Normal	Task	
26/04/2017 15:57:14	27/04/2017	14:12:36	22/05/2017	Quotation expires	Normal	Task	
26/04/2017 15:58:41	27/04/2017	16:17:51	22/05/2017	Quotation expires	Normal	Task	

PLA-018876 : Quotation expires
Closed: Yes Notes:
Responsible: Natalie Maurice
Start time: 00:00
End date: 30/05/2017
End time: 00:00

Deleting / Amending Cues

To delete / amend a cue, go to Organisation Administration > Setup > Role Centre > Edit Cues.

From this screen you can edit the configuration by selecting the cue in question and altering the appropriate fields.

To delete a cue, simply highlight the row and click delete.

The screenshot shows the 'Edit cues (1)' window. The left pane displays a list of cues with columns for 'User ID' and 'Name'. The selected cue is 'Confirmed Orders Delayed Shipments' by user 'Daniel.S'. The right pane shows configuration options for this cue, including 'User ID', 'Name', 'Options', and 'Visibility'. A table of profiles is visible under 'Specified profiles'.

Profile ID	Description
<input type="checkbox"/> Accountant	Accountant
<input type="checkbox"/> AccountingManager	Accounting Manager
<input type="checkbox"/> AccountManager	Account Manager
<input type="checkbox"/> APCoordinator	Accounts Payable Coordinator