Updated: 03 June 2026

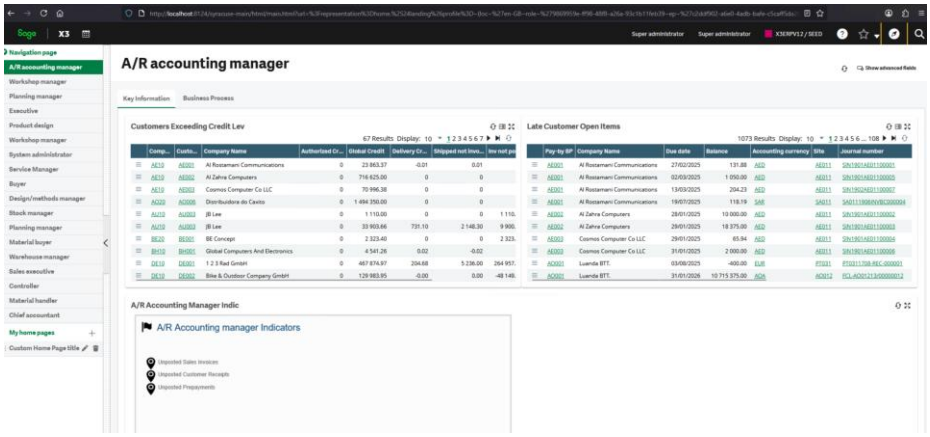
Home pages and Navigation pages

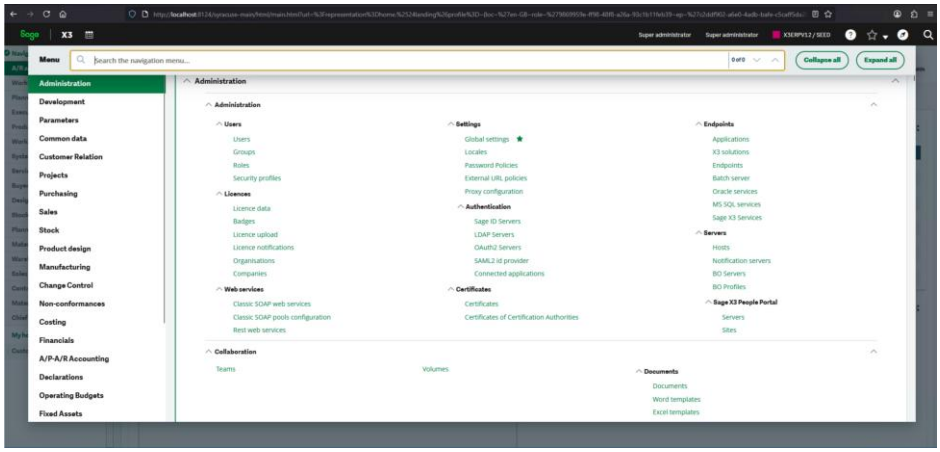
These notes use a standard SEED folder on Sage X3 version 2025 R2 (12.0.38) for demonstration purposes. The features described here will also apply to earlier versions, but 2026 R1 introduces new features for Home Pages.

Introduction

When X3 users sign in, they are presented with various home pages, according to their configuration. They can also navigate through a menu system via the Compass icon which is tailored to their configuration also.

This session aims to explain how these Home Pages and Navigation Pages can be created, edited and assigned to users.



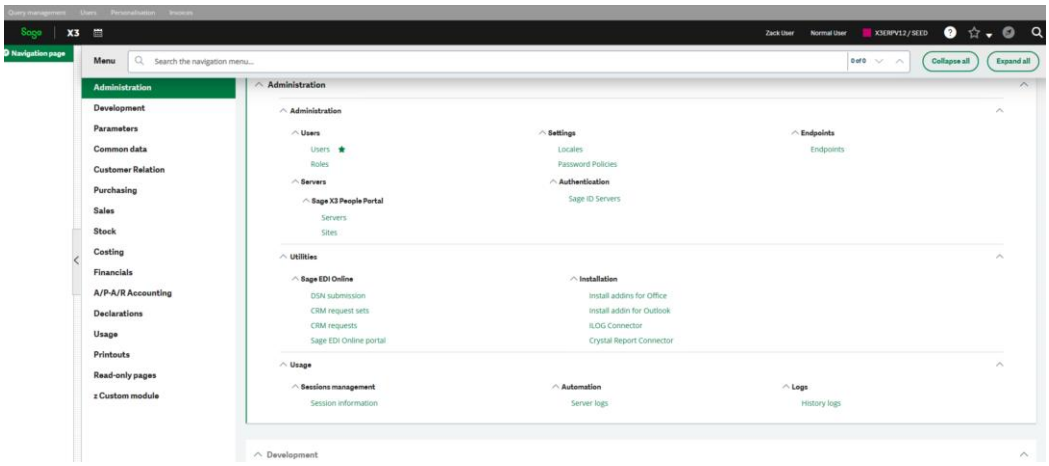


Introduction to Authorisation

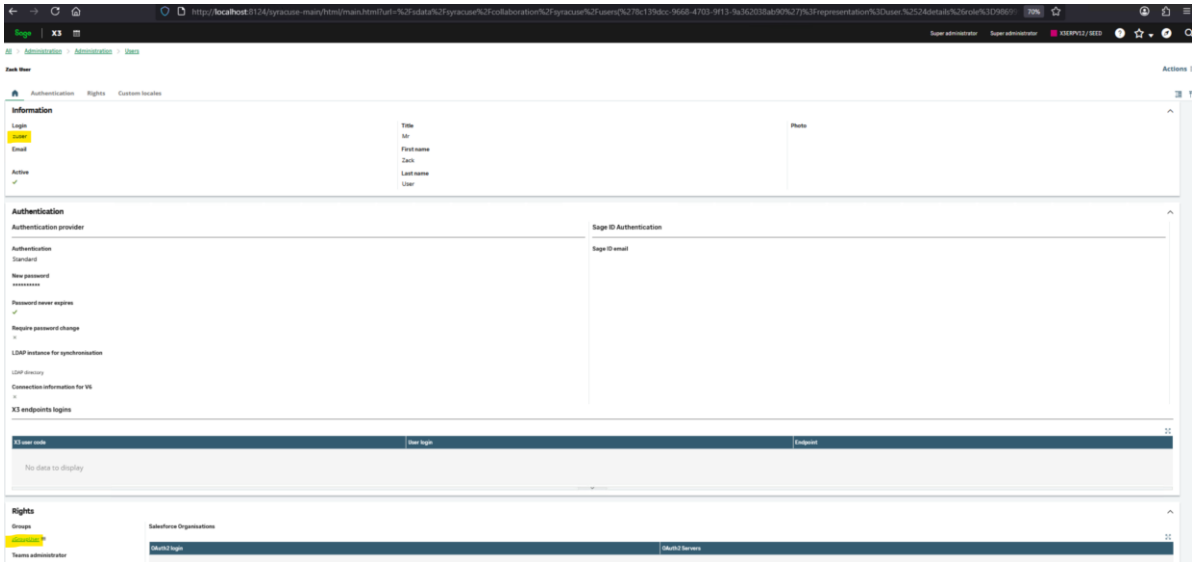
After an X3 user has Authenticated (logged in), the menu options available to the specific user is controlled by how Authorisation (what the user has access to) has been configured.

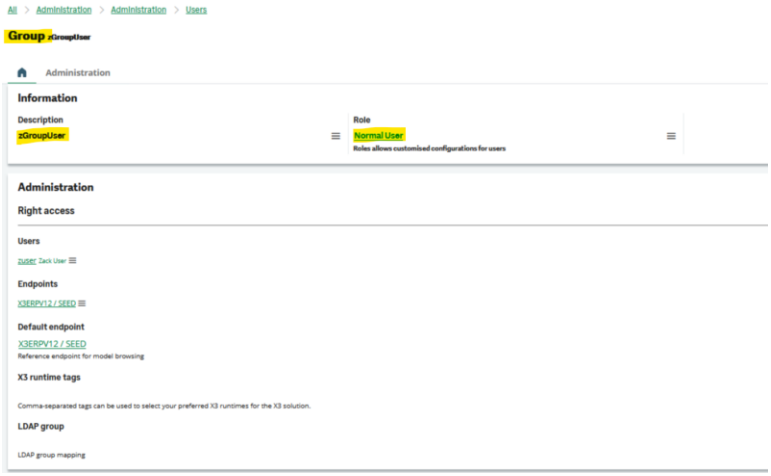
In X3, the Role-based Authorisation is mostly controlled by the **User function profile**/**Functional profile** for the classic layer (covered in a previous Tips & Tricks session) and **Security Profiles** for the Syracuse layer (Administration) functions. I will be primarily focussing on the Syracuse layer for this presentation. There are other areas that could impact users Authorisation such as Row level permissions, Access Codes, Activity codes, Parameter values, etc. but we won't be discussing these today.

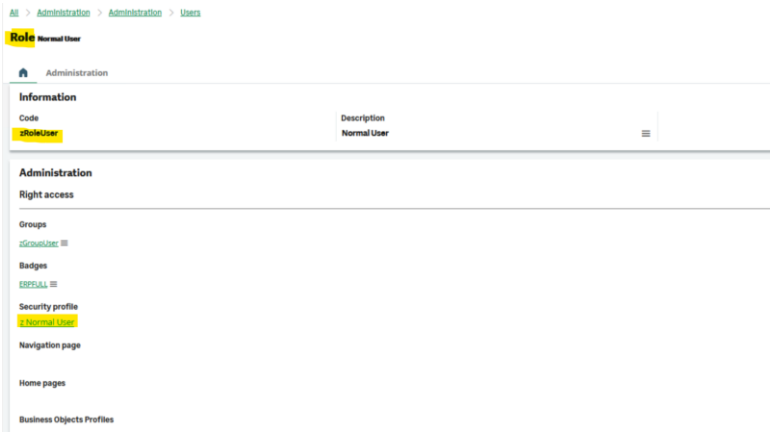
If I login as my preconfigured user "zuser" I see the following options:

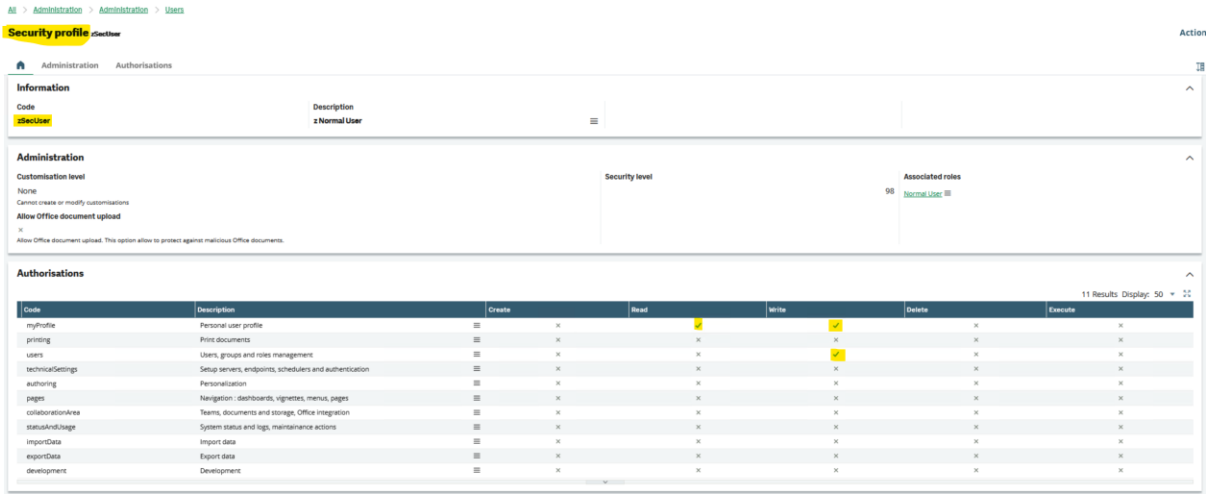


Let's look at this users setup to understand how and why these menu options (and lack of home pages) are available.





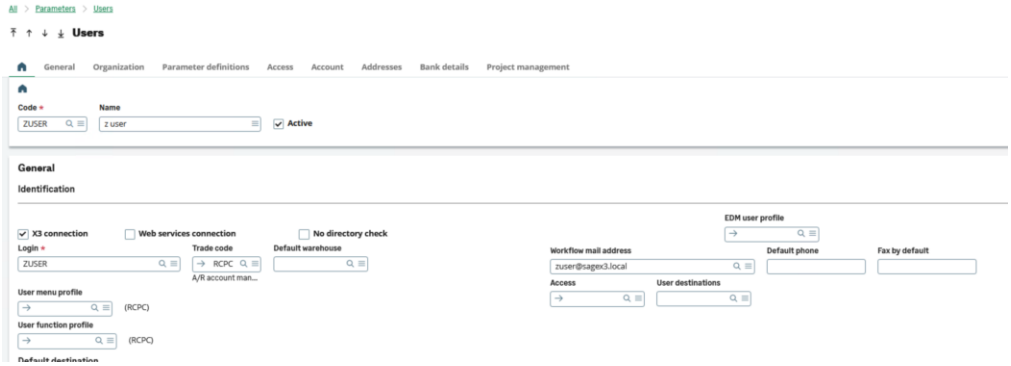




The details of the Authorisations are listed in the online help for this page https://online-help.sagex3.com/erp/12/en-us/Content/V7DEV/administration-reference_security-profiles.html

This security profile has minimum configuration. You could remove the “write” option from “MyProfile” and “users” but then the user cannot change their own password, etc.

NOTE: It is important to change the users security profile to limit the options for the user in Administration section before doing anything else.



NOTE: The User menu profile is only used to create a User function profile (if you want to use it at all) It has NO effect on the users Authorisation rights otherwise.

"Zuser" can see some "Administration" options, but has restricted access to the data shown, being only data that relates to their own user and the only write access is in "Users" function (Can change their own email and password for example)

Navigation pages

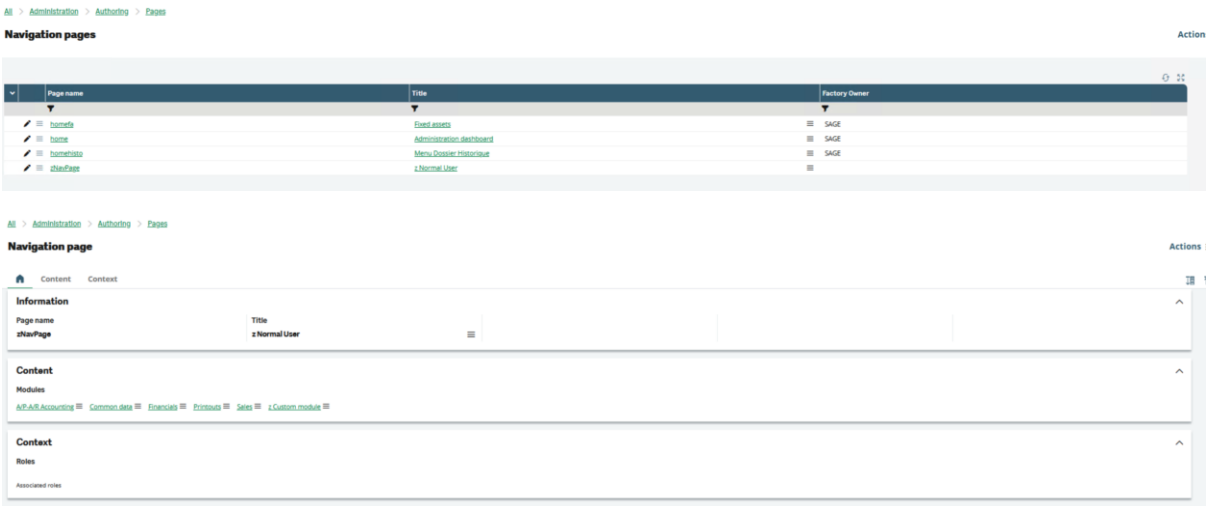
Online help https://online-help.sagex3.com/erp/12/en-us/Content/V7DEV/administration-reference_navigation-pages.html

The default navigation page is "home". Sadly, it is not possible to clone a navigation page but firmly advise NOT to change the default ones provided when changes are needed.

You can either create a new page manually, or potentially export, rename then import an existing page definition (albeit this is trickier than it sounds!)

NOTE: removing a menu item from the Navigation page does NOT prevent a user with Authorisation from accessing that function, nor does adding a menu they are not authorised to use give access.

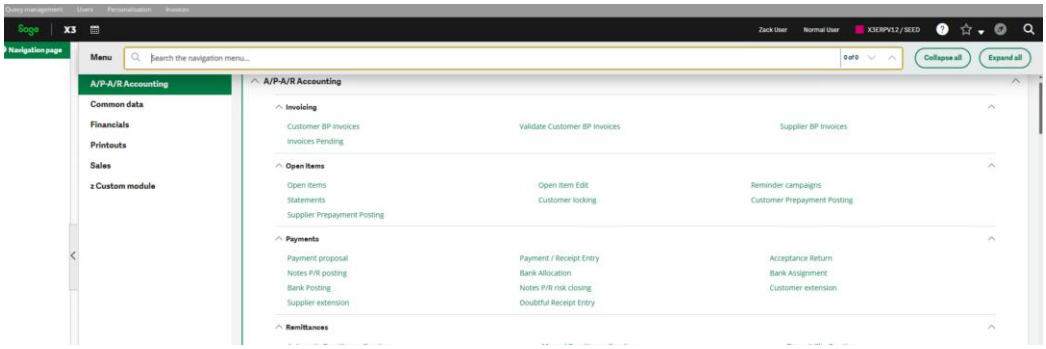
I have created a simple custom page "zNavPage" with some specific changes.

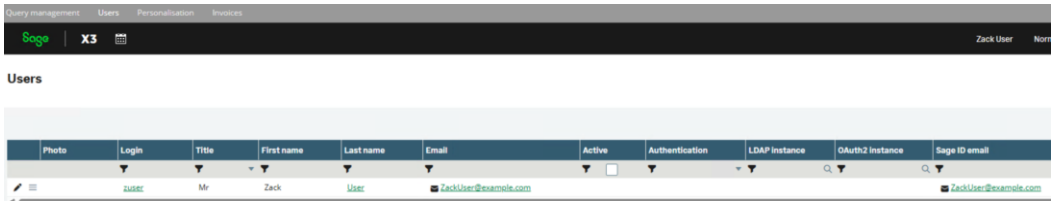


I can remove (Sales), add more (zCustom module) and re-order these Modules as needed.

I can now add the appropriate “zRoleUser” Role to use this for my zuser account

The zuser now sees the new menu, but can still launch items not on the menu (that the user has authorisation for) if it has been bookmarked. You cannot use the “search navigation menu” option to find any functions that are authorised for the user but not included in the navigation menu (e.g. “Sales Orders” GESSOH)

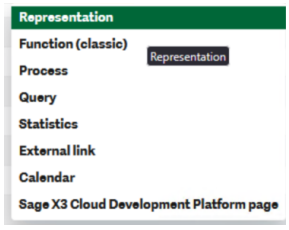




Home pages (aka landing page)

Online help https://online-help.sagex3.com/erp/12/en-us/Content/V7DEV/administration-reference_home-pages.html also https://online-help.sagex3.com/erp/12/en-us/Content/V7DEV/ui-definition_home-page.html

You can add different types to a new or existing home page



NOTE: whilst you can add requesters Query tool (GESALH) or Graphical query tool (GESALT) to the home page, you cannot add SQL Query tool (GESALQ)

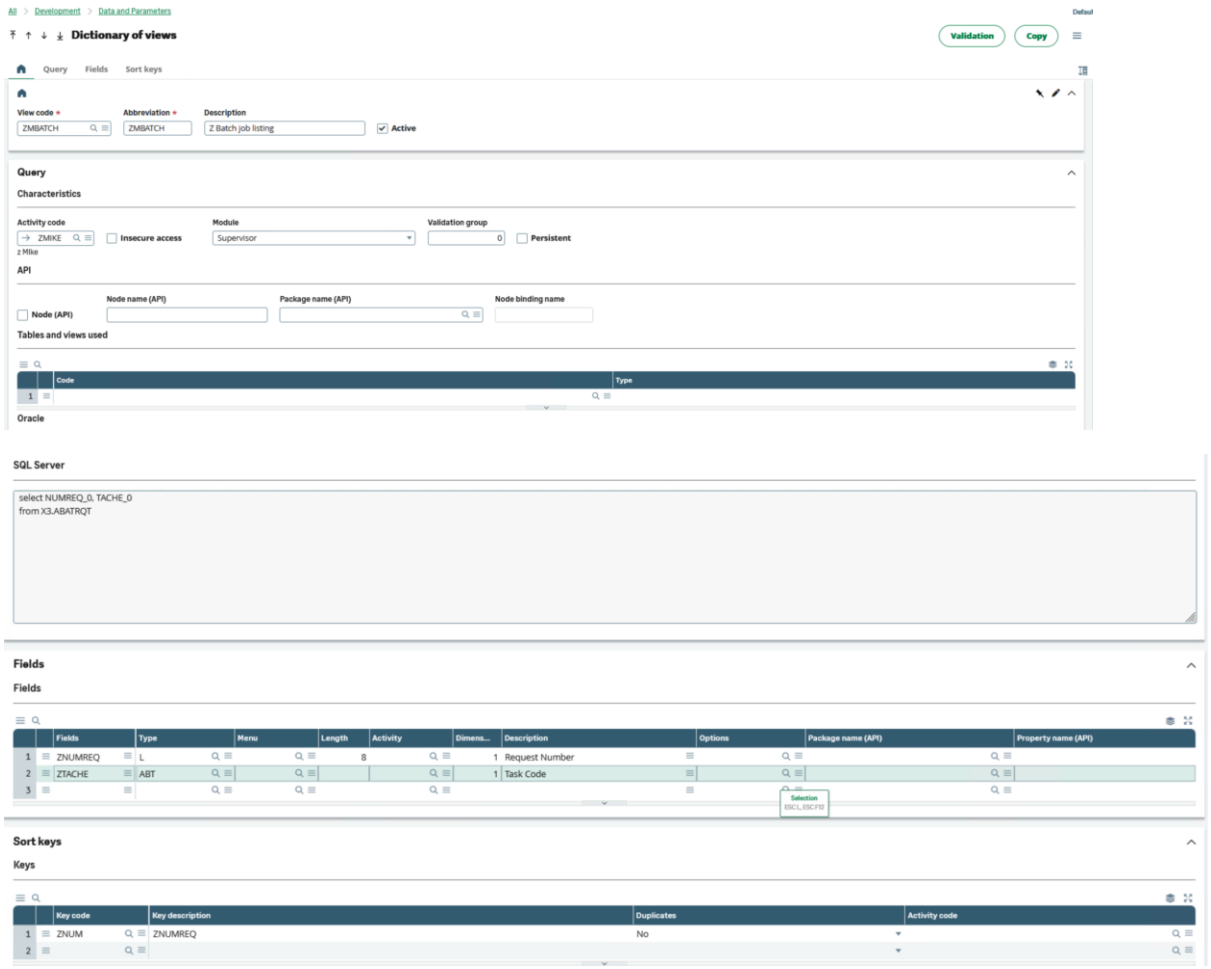
Login as MIKE user.

For my first example of widgets you can add to a home page, I am going to overcome this limitation by using a Query tool based on a custom SQL query stored in a View.

I have various batch jobs running and want to see a dynamic list of the quests that are in the queue (regardless of status) I will therefore create a view based on the SQL statement:

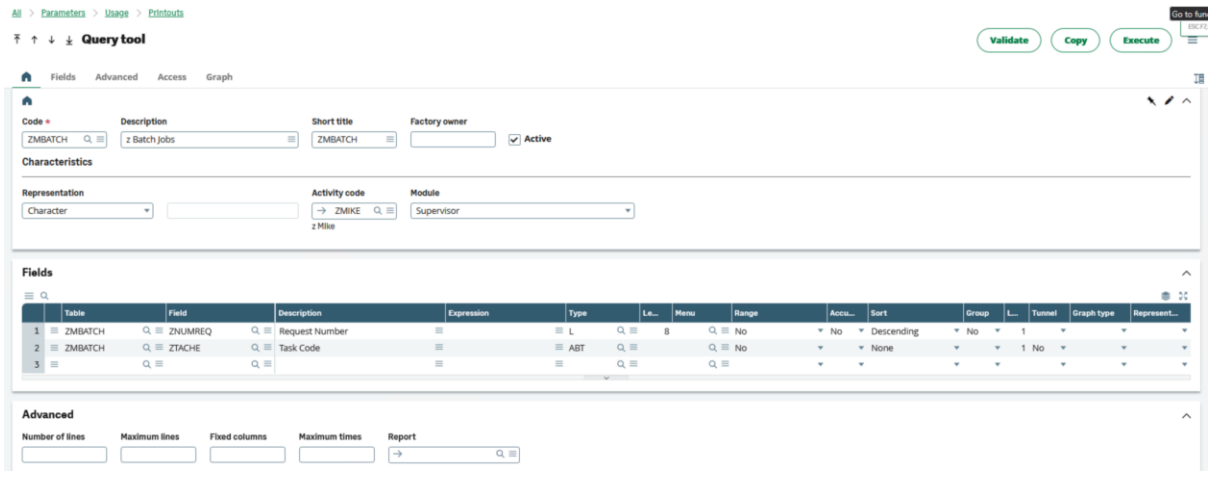
```
select NUMREQ_0, TACHE_0 from X3.ABATRQT
```

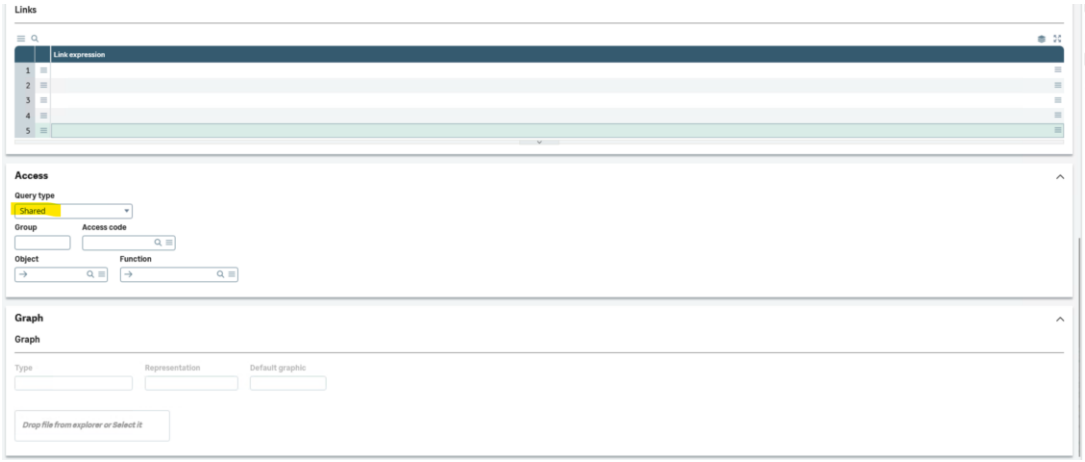
This is obviously simpler than is really useful in the real world, but hope will demonstrate the concept.



SAVE, then VALIDATION

Next create a Query tool requester (as simple as possible in this example)





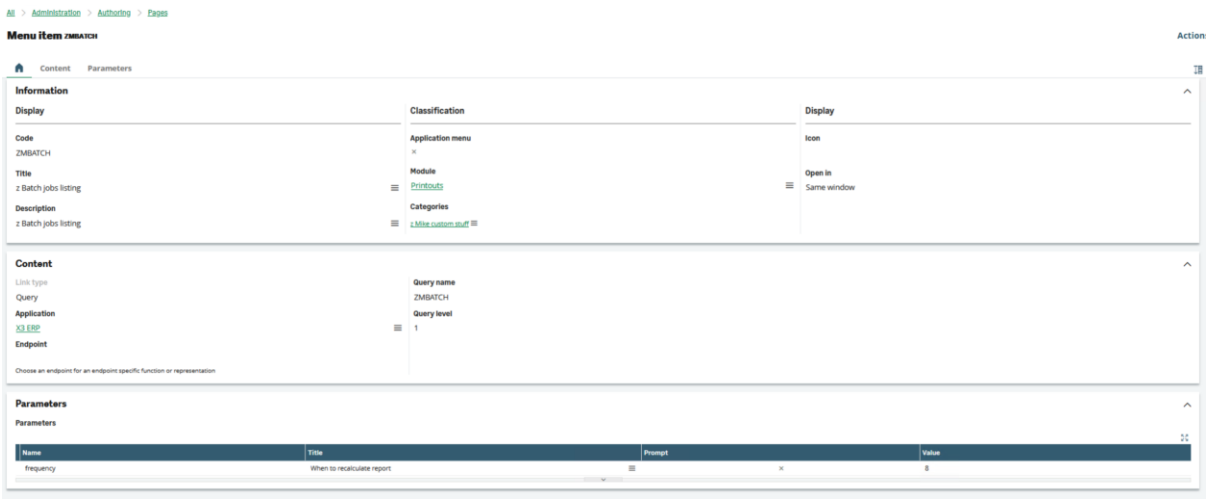
Note the Query type has been changed from default.

SAVE then VALIDATE

Also EXECUTE to ensure the expected data is being returned.

Create Menu item for the requester

- Menu item https://online-help.sagex3.com/erp/12/en-us/Content/V7DEV/administration-reference_menu-items.html
- Requester parameters https://online-help.sagex3.com/erp/12/en-us/Content/V7DEV/administration-reference_supervisor-administration-requester.html#addparam

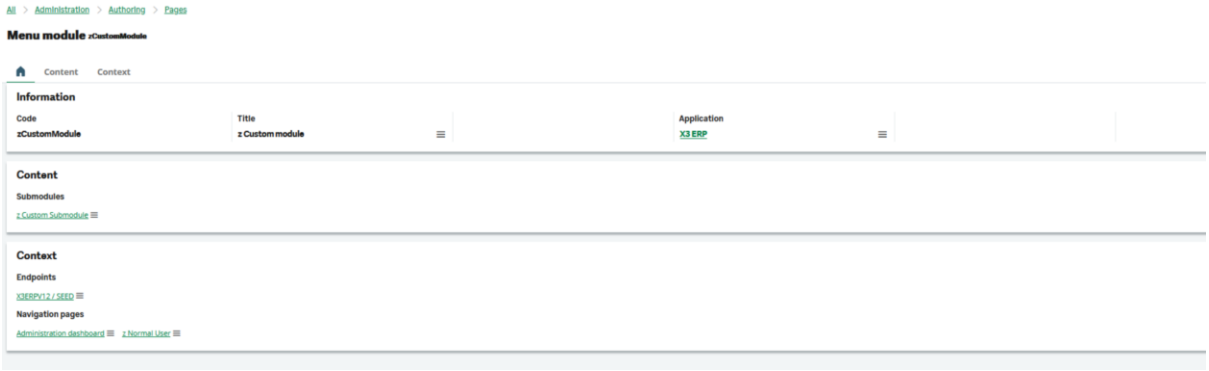


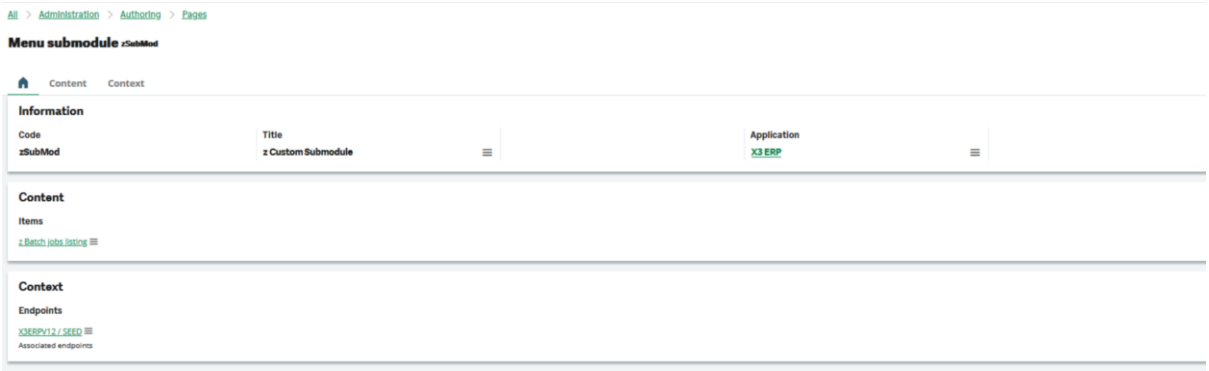
NOTE: Frequency = 8 means automatically refresh every minute.

Launch from Actions in the Menu Item to check results are as expected.

We can add to a menu and/or add to home page.

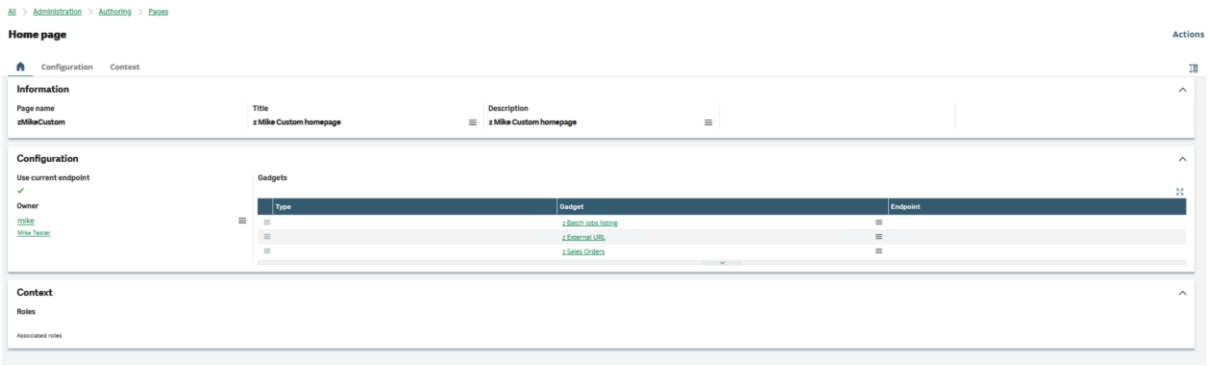
Menu



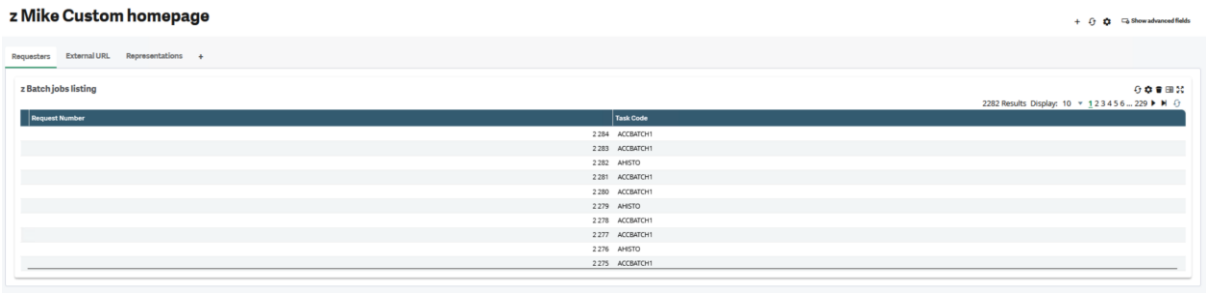


Add the custom module to the custom navigation page

Home page

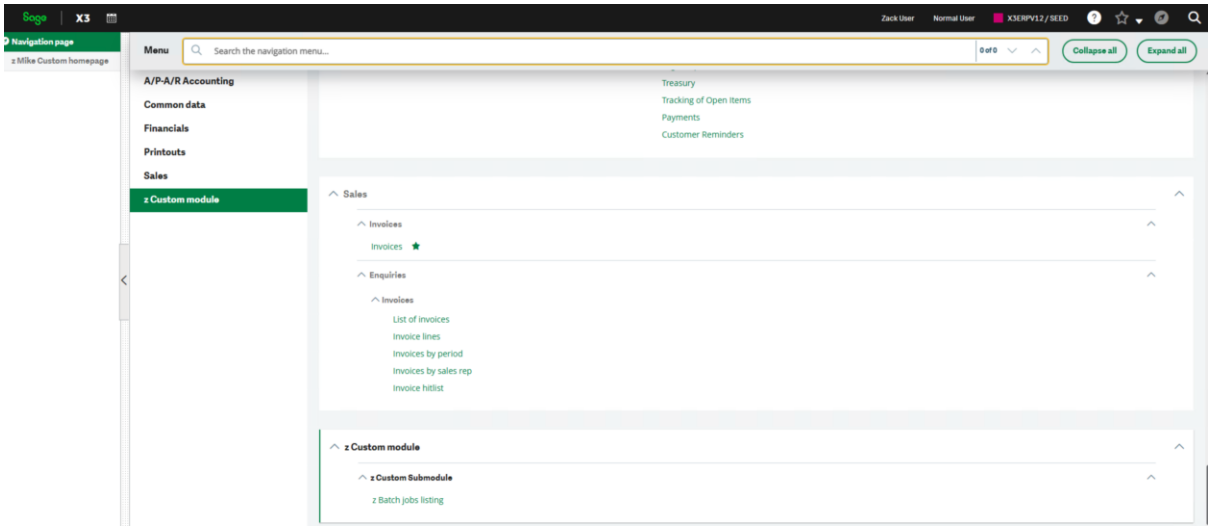


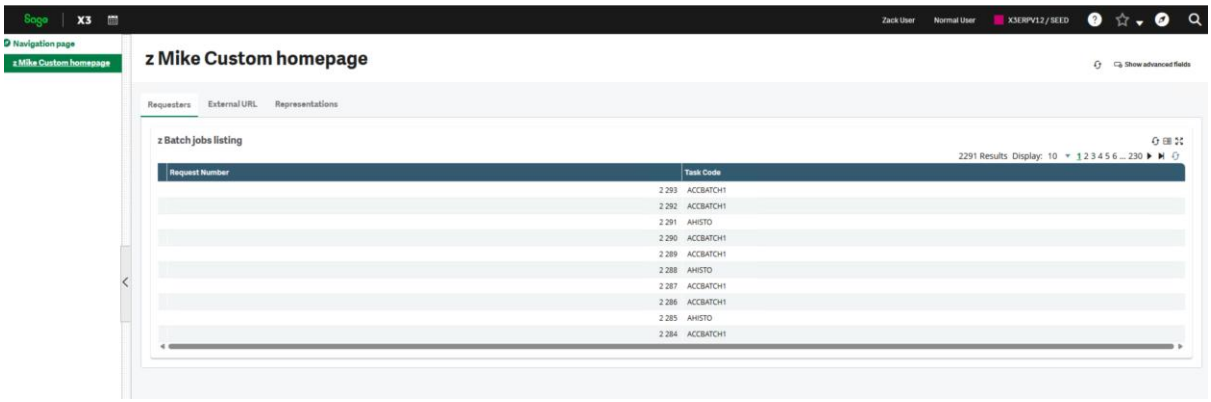
Actions, Edit page content shows:



Add the appropriate “zRoleUser” role to the custom home page. Put “owner” back as “mike”

Our “zuser” will now see the custom home page and also the custom module in the navigation page



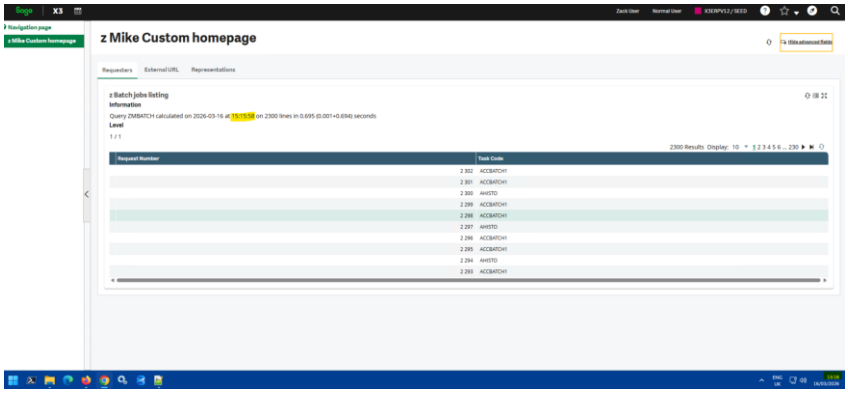


Checking the refresh works for the requester (refresh every 1 minute).

NOTES:

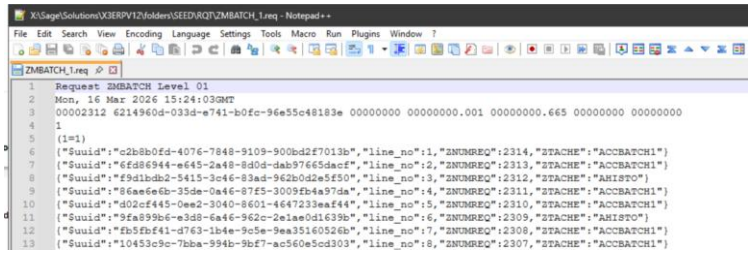
- If the user is sitting on the home page looking at the requester data all day doing nothing the data will not refresh, as there must be some interaction within the browser to trigger a re-read of the data.
- The user will see the updated data if they refresh the browser (F5) or go into an option then return to the home page for example.
- If the user clicks the "Refresh" icon on the home page or in the widget itself, this forces a refresh regardless of the refresh frequency
- You can check the "ZMBATCH_1.req" file in the "X:\Sage\Solutions\X3ERPV12\folders\SEED\RQT" directory reflects the same data, as this file is the source of the data being shown on the landing page.

Show the Advanced Fields to see the last refresh date/time



Wait less than 1 minute, then use the BROWSER refresh button (or F5) to refresh the page. This will NOT show any updated data. Next launch any function, wait a minute then return to the home page, the data will now reflect the updated data. You can also click the Widget or Home Page refresh icon to force an immediate refresh if you wish.

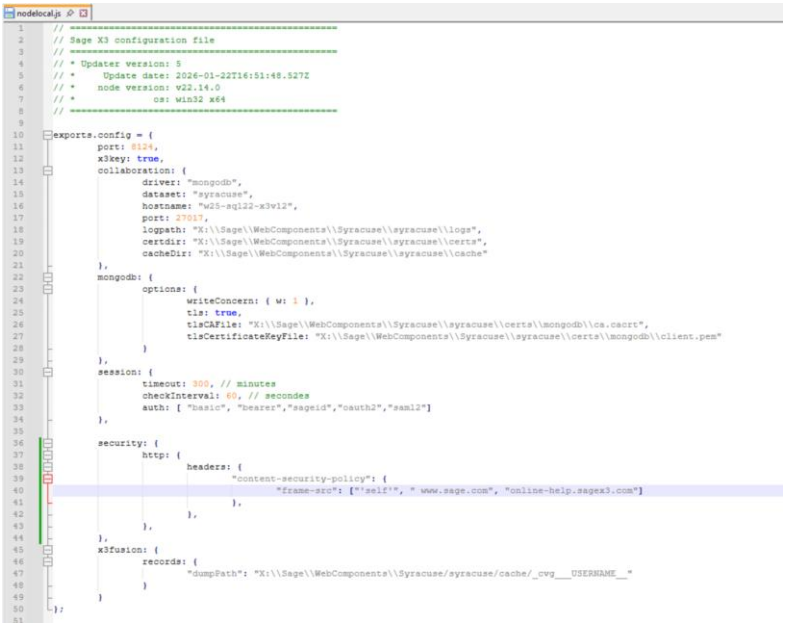
The latest data is shown in the req file



Adding External URL

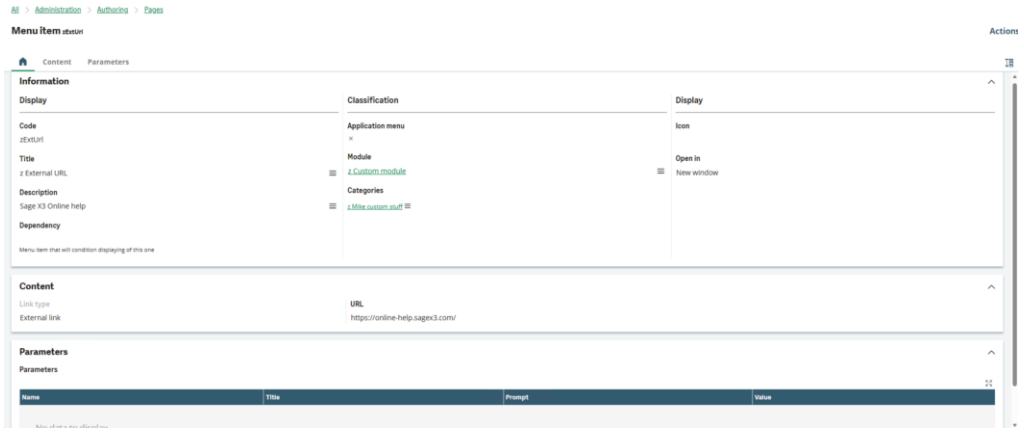
There are a couple of “tricks” to adding external url

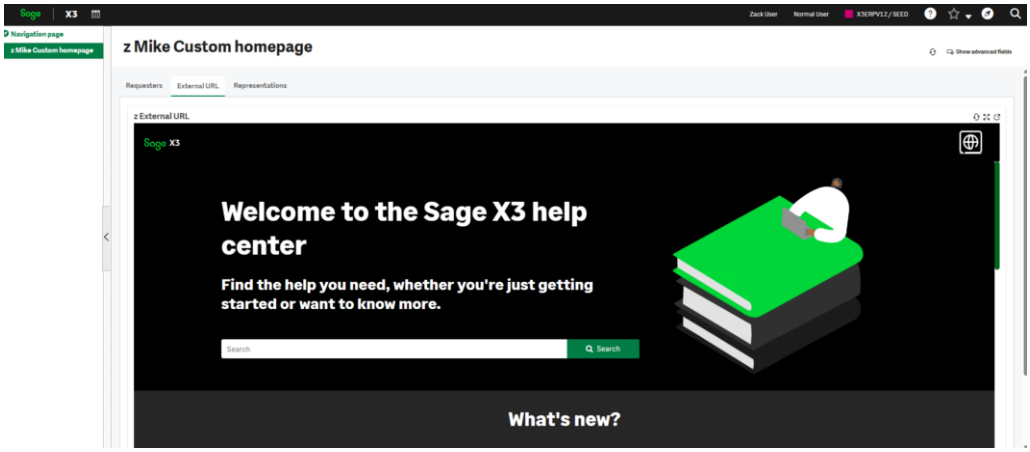
1. You need to allow embedded frames for the specific urls you wish to use (Nodelocal.js change)



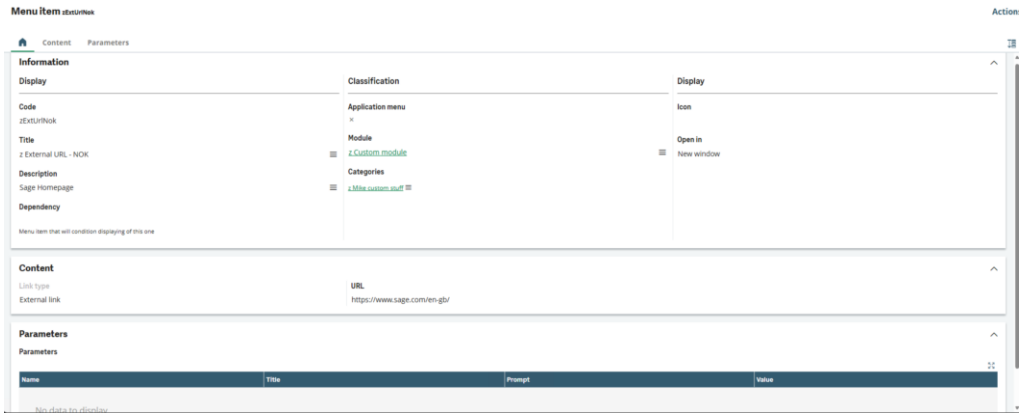
2. After all this you may get stuck due to server side directives forbidding the page to be displayed in a frame. (No workaround, the user has to manually click the link which opens the URL specified in a new tab. e.g. Firefox allows you to right click and open in new tab)

This is my example, which displays OK without further user intervention



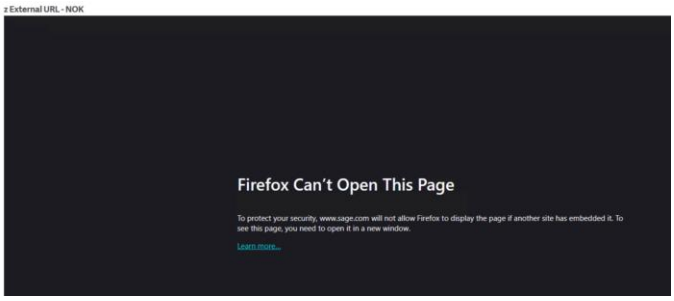


This example shows that despite the same setup, the remote server is refusing to allow the page to display in a frame.



Edge / Chrome

Firefox

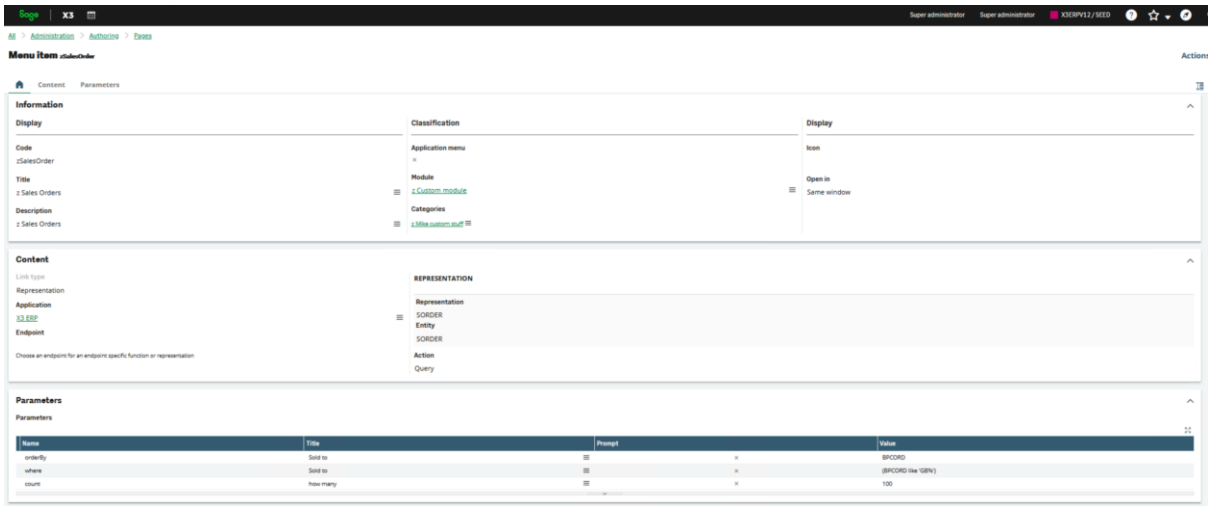


NOTE: You can use a third party tool like https://iframetester.com/ to confirm if a URL should be able to be displayed in an iFrame or not

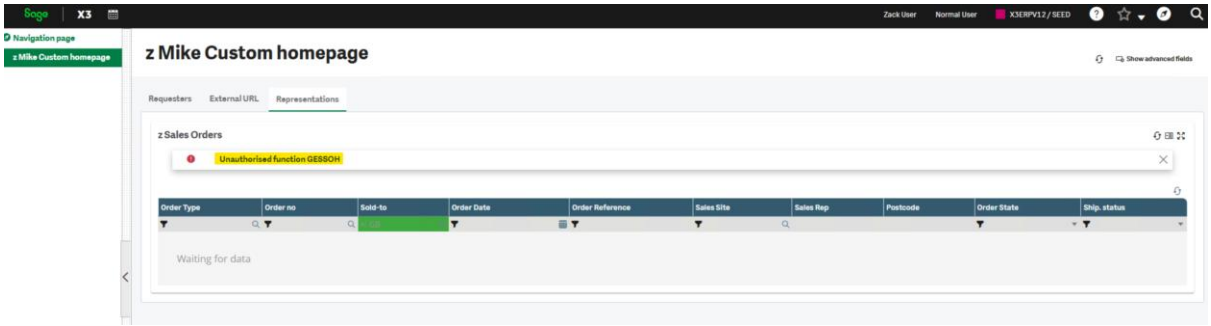
Representations

You can configure representations with suitable parameters to make it more relevant for users requirements.

Representation parameters https://online-help.sagex3.com/erp/12/en-us/Content/V7DEV/developer-guide_item-menu-parameters.html

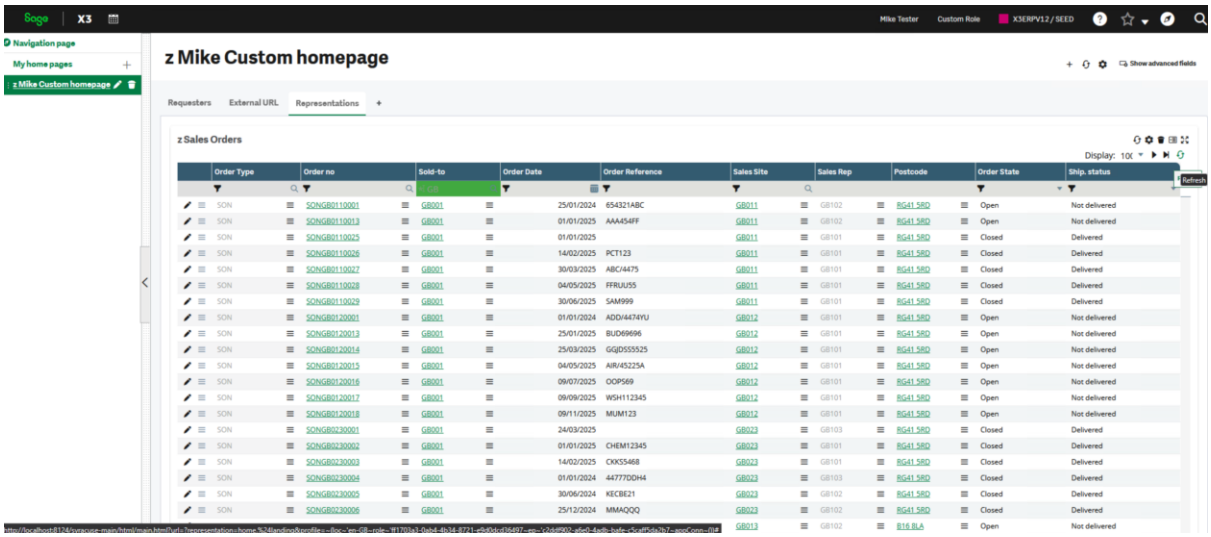


This displays as below for my zuser:



Of course, this user does not have Authorisation for this function.

My “mike” user does have authorisation so will show 100 rows of data, ordered by Sales Site where Sales Site starts with GB:



Additional reading

Online Help

How to setup a Requester as a menu item or onto a landing page https://gb-kb.sage.com/portal/app/portlets/results/viewsolution.jsp?solutionid=220924760108758

How to setup a requester on a landing page to refresh the data in background? https://communityhub.sage.com/gb/sage-x3/b/sage-x3-uk-support-insights/posts/how-to-setup-a-requester-on-a-landing-page-to-refresh-the-data-in-background

Conclusion

This presentation has hopefully helped you understand a bit more about the features and capabilities of Home pages and Navigation pages.

If you have any questions, comments, corrections, or suggestions how this session can be improved please free to contact me.