

The RoleTailored user experience

Microsoft Dynamics NAV 2009
Tailored to your people and your business





Sammy
Shipping and Receiving

Sammy manages shipping and also receives goods and verifying them against purchase orders. He also supervises his warehouse colleagues.

His view



The RoleTailored story

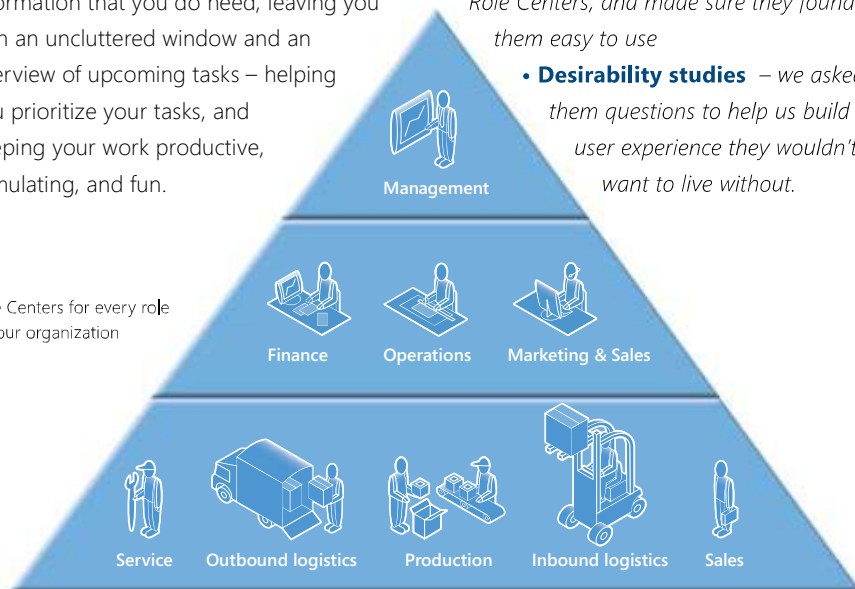
...starring your people

The RoleTailored user experience

In everyday life, how do you simplify things? Remove the clutter? Organize what's left? Put things where you can get to them easily and quickly?

That's exactly what Microsoft Dynamics® NAV 2009's RoleTailored User Experience does to your office workstation. It hides the 90 percent of the features you don't need to see. And it promotes the actions and information that you do need, leaving you with an uncluttered window and an overview of upcoming tasks – helping you prioritize your tasks, and keeping your work productive, stimulating, and fun.

Role Centers for every role in your organization



Based on a survey of 2,000+ people

How did we arrive at the RoleTailored user experience? Simple. We looked at companies like yours. In fact, we asked more than 2,000 people in:

- **Real-world work situations** – we watched people, like your people, to find out how they worked and why they did it that way
- **Usability studies** – we watched a randomly chosen group of people using our Role Centers, and made sure they found them easy to use
- **Desirability studies** – we asked them questions to help us build a user experience they wouldn't want to live without.

All this input went into creating the Microsoft Dynamics Customer Model. We were able to define 61 distinct “roles”, each representing a typical view of *real* people in *real* jobs covering essential business functions in the areas of Finance, Sales and Marketing, IT, Production, Logistics, and Customer Service.

Design Goals

Once we had defined the roles, we used them to produce the most intuitive, effective user experience yet created for a business management solution. Our principal design goals were to:

- Build the RoleTailored experience
- Reduce complexity
- Help users focus on important tasks
- Promote a quick overview of actions
- Increase collaboration
- Create an intuitive and familiar user interface

21 out-of-the-box Role Centers for a successful, modern business

When you open Microsoft Dynamics NAV, there are 21 ready-made Role Centers ready for action. Because most people have more than one ‘role’ in a company – especially if it’s quite a small operation – you can combine different roles to make up each user profile, which becomes a Role a Role Center.

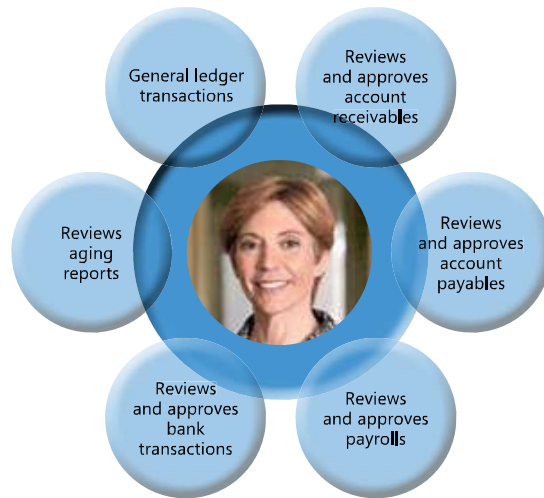
But I want to know exactly what a Role Center is.

Turn over and find out > >

What is a Role Center?

To use Microsoft Dynamics NAV, your employees log into a Role Center: their own user profile and personal place in your business management system. It displays the tasks and activities they need to perform, providing them with an overview of what they've done and what's next in line. In short, it enables them to focus on their tasks and organize their time – the way that works best for *your company*.

But that's not all.



The Tasks and Activities that make up Phyllis' Role Center

Personalizing your Role Center is easy

Another aspect of the RoleTailored approach that can have a great impact on your company's agility is that each Role Center is extremely easy to personalize – without the help of a programmer.

Take Phyllis the Accounting Manager. When she wants to *personalize* her Role Center, she can do it herself. By showing or hiding elements, she can choose the level of complexity she works with, perhaps adding more features as her own role expands, or removing things she doesn't use. On her own. No IT. No cost.

Phyllis' Role Center, along with the Role Centers of her colleagues who share her role, can be *configured* by her manager or a super-user. This controls the level of access Phyllis has to the system. High access gives her greater autonomy; more restricted access makes for greater security for the company. Again, no IT. No cost.

Sounds good – but I want to know what the benefits are for the individual.

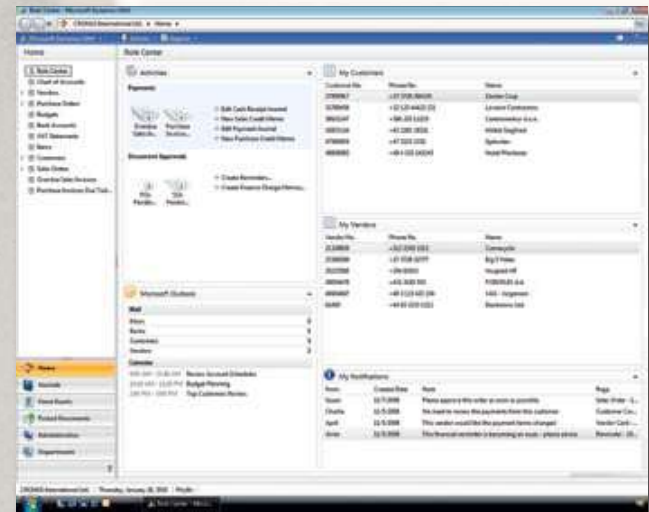
...Turn to the next page and find out. > > >



Phyllis
Accounting Manager

Phyllis manages the accounting department ensuring her team accurately completes financial procedures on time.

Her view



First, your people

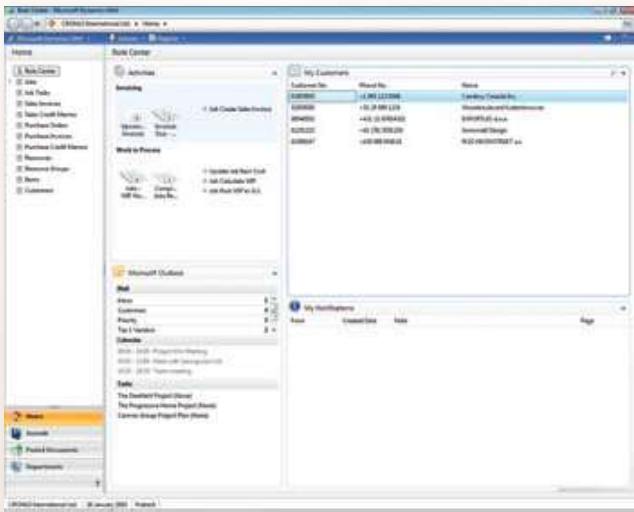
...and the roles they play

Prakash

Project Manager

Responsible for project delivery, Prakash works with the resource manager to provide adequate resources. He has authority for all project related charges.

His view



An exact fit

...for the roles your people play

Working from the Role Center

The RoleTailored user experience supports the roles your people play – to fit your organization. Whether it's for a bookkeeper or a warehouse worker, each user profile can have its own Role Center that helps users:

- **Perform tasks effectively and comfortably** by choosing the level of complexity that best fits the way they work
- **Take effective action** by easily finding and using the information they need
- **See the positive contributions they make** by seeing the tasks they've worked on and the work ahead of them in the context of the company's workflow

Feel at home in your Role Center

Carpenters say, 'love your lathe'. We say, 'feel at home in your Role Center' – and your productivity will always be high. This is the Microsoft Dynamics NAV User Experience – keeping you stimulated, informed, and comfortable at work.

Working from the Role Center

The user's main point of entry into Microsoft Dynamics NAV, the Role Center is made up of these key elements:

- Navigation pane
- Activities
- My Lists
- My notifications
- Microsoft Outlook interface
- Graphs and charts

But how does this Empower my Organization and push my company ahead?

Find out *on the next page > > >*

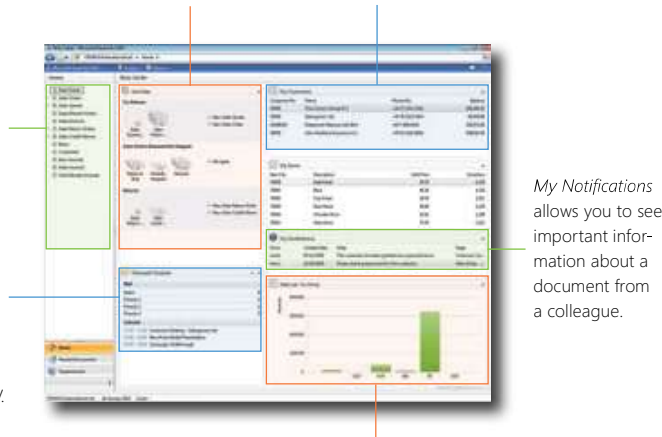
The key elements of the Role Centers.

Activities displays your work ahead in a stacks-of-paper icon to help you plan your work.

My Lists enables you to list useful items, such as your customers or vendors, to help you find the information you need quickly.

The *Navigation Pane* shows you the lists and application areas you use the most.

Microsoft Outlook Interface gives you a quick overview of appointments, tasks and emails without having to leave Microsoft Dynamics NAV.



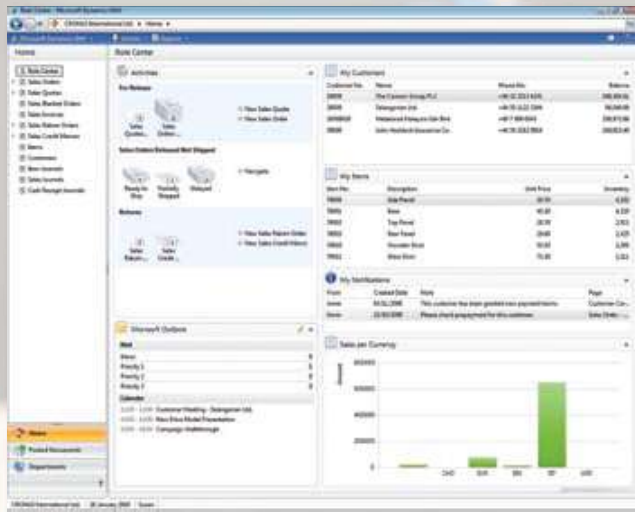
My Notifications allows you to see important information about a document from a colleague.

Graphs and Charts enables you to set up charts that show performance metrics and promote informed decisions in your organization.

Susan Order Processor

Susan takes orders from sales reps and repeat orders directly from customers. She works closely with the sales reps as she may talk to customers more often than they do.

Her view



Give them what they want

...and push your company ahead

A unique user experience

Microsoft Dynamics NAV is a business management solution that can be tailored to the role of the user. It offers a unique user experience – one that promotes efficiency and high productivity.

So let's take a look at what Susan the Order Processor has gotten out of her Role Center.

'This was designed for me'

Susan only sees what's relevant to her job. Her Role Center pushes the tasks she needs to focus on to fulfill her role in the company. Not only does it help her focus on *her* activities, but it also lets her:

- Get an overview of the work ahead so she can prioritize tasks
- Receive notifications from colleagues about urgent issues
- Monitor her performance over time to see how her work affects each order as it moves through the company
- Feel connected to her colleagues and to her company.

All this helps Susan feel comfortable and confident at work – a recipe for high productivity. She really can say, *"This looks as if it's been designed for me."*

A high degree of task focus

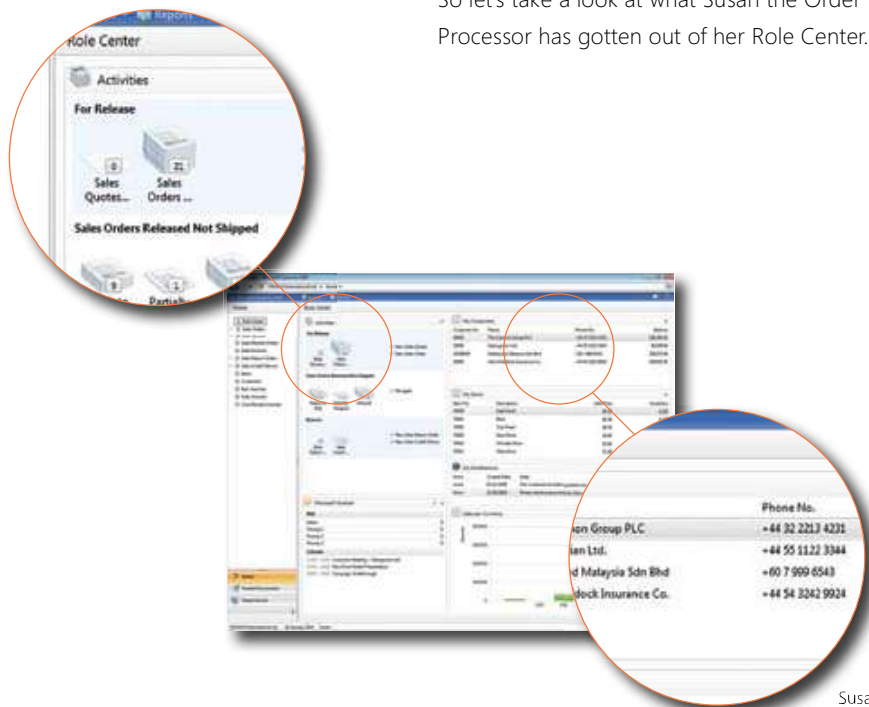
Every Role Center promotes a high degree of *focus*. For example, Susan might break off from a task to get a coffee. She returns to her desk with a steaming cup and picks up exactly where she left off. How?

When she begins a task, she opens a new window. The task name is clearly shown. And when she's done, she closes it. One glance at the pop-up window she left open when she went to get a coffee tells her exactly where she left off. And she can resume her work right away.

But what will Role-Centered Simplicity do for my business?

Turn to *the next page* > > >

Susan gets a clear overview of her activities and her work ahead



Susan's Role Center promotes a single-glance list of her most important customers and lets her open a customer's card with just one click

Greater simplicity for greater productivity

Business management software has simplified business processes. But the RoleTailored approach takes this one step further: it promotes *simplified processes* for each individual in your company. For example, in the Role Center, the "Activities" tab displays each process you are involved in at that particular moment, giving you a constant overview of the work in that process.

The result? Increased productivity and greater job satisfaction – a nice, positive feedback loop to have as an integral part of your work processes.

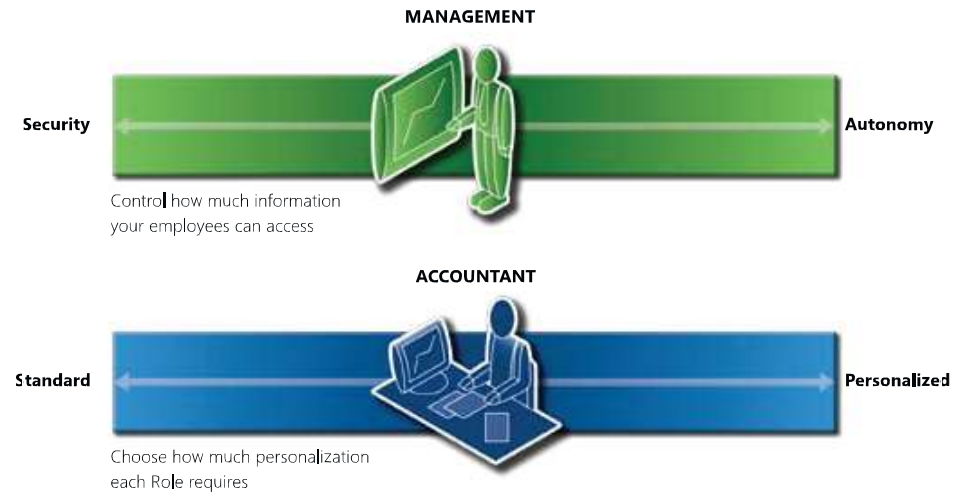
Easy to personalize for maximum agility

The benefits are clear. You can personalize Role Centers, lists and task pages very quickly to reflect changes in staff, shifts in employee responsibilities or an expansion in your company's activities – without having to use a member of your IT department, or pay for an external programmer.

You get a solution which is easy to use. It provides people with tools and information that can unleash their individual potential and, in turn, fuel new levels of business performance.

But how can I try out Microsoft Dynamics NAV for myself?

Turn over and find out > > >

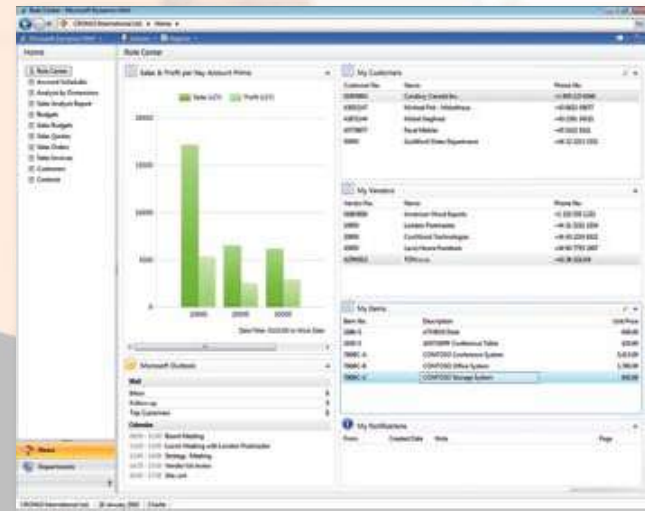




Charlie President

Charlie directs the, keeping the business competitive.
That's why he depends on accurate information from his staff.

His view



The role of simplicity

...and the simplicity of roles

Microsoft

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Microsoft Dynamics is a line of financial, customer relationship, and supply chain management solutions that help businesses work more effectively. Delivered through a network of channel partners providing specialized services, these integrated, adaptable business management solutions work like and with familiar Microsoft software to streamline processes across an entire business.

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