



Configuration Mode in the Role Tailored Client

November 18, 2014



Customer Connect 2014

Innovate. Invigorate. Inspire.

Our Goal: Uniformly Configure the Client for groups of end users

- Benefits of the Role Tailored Client
- Our tools:
 - Customization, Configuration, Personalization



HOME ACTIONS NAVIGATE

View Edit New Delete Manage Picking List by Order Report Release Reopen Release Post... Post and Print... Test Report... Posting Copy Document... Order Promising Prepare Statistics Assembly Orders Archive Document Order Shipments Invoices Documents Order Confirmation... Print Email as Attachment Send To Notes Links Show Attached Refresh Clear Filter Go to Previous Next Page

101015 · Autohaus Mielberg KG

General

No.:	<input type="text" value="101015"/>	Order Date:	<input type="text" value="1/18/2015"/>
Customer Search:	<input type="text"/>	Document Date:	<input type="text" value="1/18/2015"/>
Sell-to Customer No.:	<input type="text" value="49633663"/>	Requested Delivery Date:	<input type="text"/>
Sell-to Contact No.:	<input type="text"/>	Promised Delivery Date:	<input type="text"/>
Sell-to Customer Name:	<input type="text" value="Autohaus Mielberg KG"/>	Quote No.:	<input type="text"/>
Sell-to Address:	<input type="text" value="Porschestraße 911"/>	External Document No.:	<input type="text"/>
Sell-to Address 2:	<input type="text"/>	Salesperson Code:	<input type="text" value="JR"/>
Sell-to City:	<input type="text" value="Hamburg 36"/>	Campaign No.:	<input type="text"/>
Sell-to State / ZIP Code:	<input type="text"/>	Opportunity No.:	<input type="text"/>
Sell-to ZIP Code:	<input type="text" value="DE-22417"/>	Responsibility Center:	<input type="text"/>
Sell-to Contact:	<input type="text"/>	Assigned User ID:	<input type="text"/>
No. of Archived Versions:	<input type="text" value="0"/>	Job Queue Status:	<input type="text"/>
Posting Date:	<input type="text" value="1/23/2015"/>	Status:	<input type="text" value="Released"/>

Sell-to Customer Sal...

Customer No.:	49633663
Quotes:	0
Blanket Orders:	0
Orders:	4
Invoices:	0
Return Orders:	0
Credit Memos:	0
Pstd. Shipments:	2
Pstd. Invoices:	1
Pstd. Return Rece...:	1
Pstd. Credit Mem...:	1

Sales Line Details

Item No.:	1972-S
Availability:	-7
Substitutions:	0
Sales Prices:	0
Sales Line Discou...:	0

Notes

[Click here to create a new note.](#)

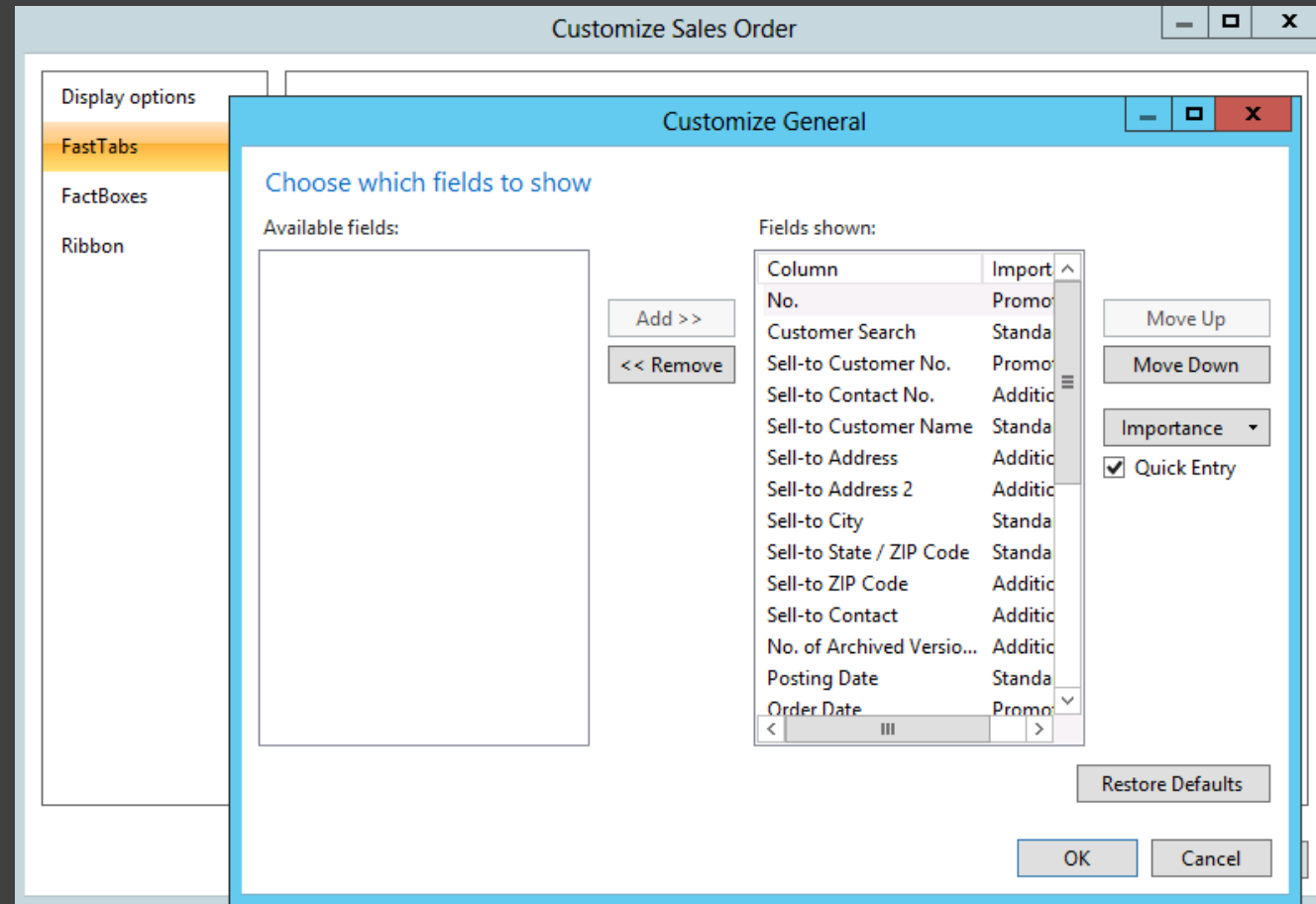
Lines

Line Functions Order Find Filter Clear Filter

Type	No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Exc Tax
Item	1972-S	MUNICH Swivel Chair, yellow	RED	6			PCS	153.67

OK

Personalize a Fast Tab



Customization vs. Personalization

- Finer control
- Changes applied across all Profiles
- Magic Code
- Personalization is partially preserved
- Upgrade



Profiles

Profiles ▾

Profile ID	Description	Role Center ID	Default Role Center	Disable Personalization
ACCOUNTING MANAGER	Accounting Manager	9001	<input type="checkbox"/>	<input type="checkbox"/>
AP COORDINATOR	Accounts Payable Coordinator	9002	<input type="checkbox"/>	<input type="checkbox"/>
AR ADMINISTRATOR	Accounts Receivable Administrator	9003	<input type="checkbox"/>	<input type="checkbox"/>
BOOKKEEPER	Bookkeeper	9004	<input type="checkbox"/>	<input type="checkbox"/>
DISPATCHER	Dispatcher - Customer Service	9016	<input type="checkbox"/>	<input type="checkbox"/>
IT MANAGER	IT Manager	9018	<input type="checkbox"/>	<input type="checkbox"/>
MACHINE OPERATOR	Machine Operator - Manufacturi...	9013	<input type="checkbox"/>	<input type="checkbox"/>
ORDER PROCESSOR	Sales Order Processor	9006	<input checked="" type="checkbox"/>	<input type="checkbox"/>
ORDER PROCESSOR - NC	Sales Order Processor - Non-conf...	9006	<input type="checkbox"/>	<input type="checkbox"/>
OUTBOUND TECHNICIAN	Outbound Technician - Custome...	9017	<input type="checkbox"/>	<input type="checkbox"/>
PRESIDENT	President	9019	<input type="checkbox"/>	<input type="checkbox"/>



User Personalization

- Assign a User to a Profile

User Personalization ▾

User ID	Profile ID	Language ID	Company
		1033	CRONUS USA, Inc.
ALS\ROZ	ORDER PROCESSOR	1033	CRONUS USA, Inc.
ALS\JIMM		1033	CRONUS USA, Inc.
ALS\TELOSE	ACCOUNTING MANAGER	1033	CRONUS USA, Inc.
ALS\EGESTA	ACCOUNTING MANAGER	1033	CRONUS USA, Inc.



User Personalization

Edit - User Personalization Card - ALS\ROZ

HOME ACTIONS NAVIGATE ***** CRONUS... ?

Clear Personalized Pages Functions

ALS\ROZ

General

User ID: ALS\ROZ ... Language ID: 1033 v

Profile ID: ORDER PROCESSOR v Company: CRONUS USA, Inc. v

OK



Delete User Personalization

- When that page is really broken

Delete User Personalization ▾

User SID	User ID	Page ID ▲	Description
{98862138-b6db-44d8-b985-b442f...}	ALS\TELOSE	9171	Profile List
{ccb4a4a8-c0b1-4d8c-a30c-c50aa...}	ALS\EGESTA	9006	Role Center
{ccb4a4a8-c0b1-4d8c-a30c-c50aa...}	ALS\EGESTA	9305	Sales Orders

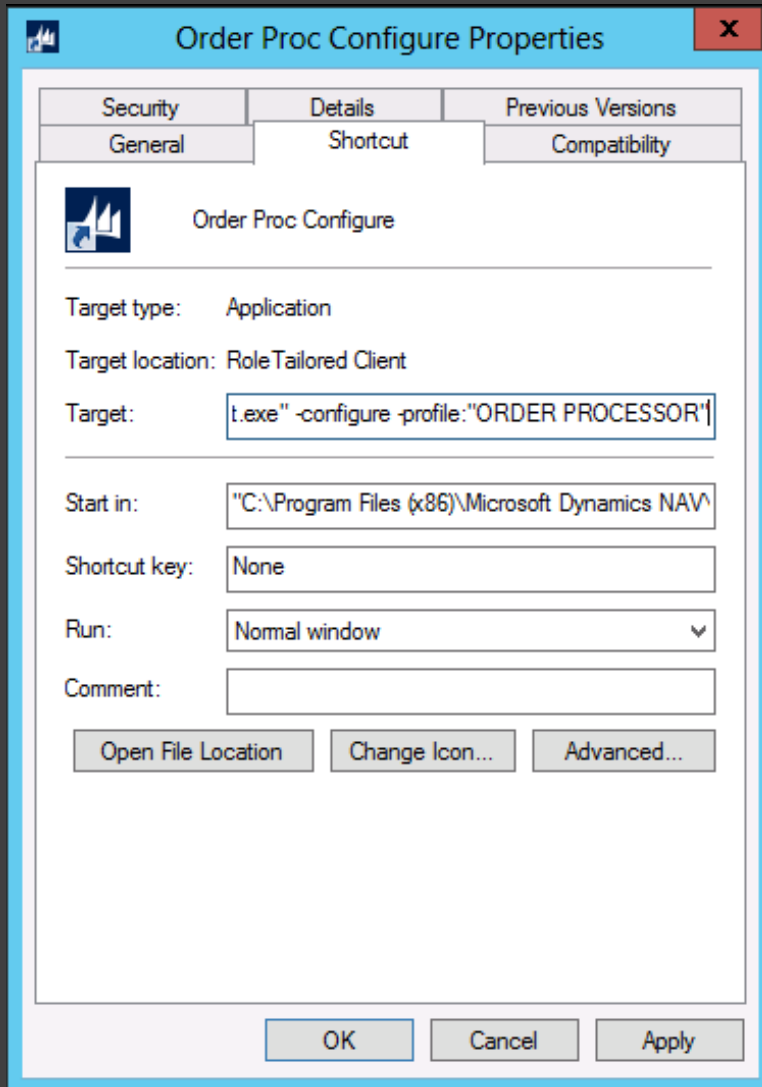
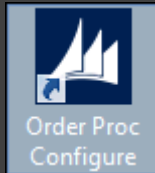


Configuration Mode

- Launching the Client with Parameters
- Command Prompt
- Shortcut



Configuration Shortcut



- Target

- "C:\Program Files (x86)\Microsoft Dynamics NAV\71\RoleTailored Client\Microsoft.Dynamics.Nav.Client.exe" -configure -profile:"ORDER PROCESSOR"

- Start In

- "C:\Program Files (x86)\Microsoft Dynamics NAV\71\RoleTailored Client"



Client Launched In Configuration Mode

The screenshot shows the Microsoft Dynamics NAV Role Center for a Sales Order Processor. The window title is "Role Center - Sales Order Processor - Microsoft Dynamics NAV". The breadcrumb navigation shows "CRONUS USA, Inc. > Home". A search bar is present with the text "Search (Ctrl+F3)".

The top navigation bar includes "ACTIONS" and "REPORT" tabs. A green banner indicates "Configuration Mode | ***** CRONUS USA *****". The ribbon contains various icons for document creation (Sales Quote, Invoice, Sales Return Order, Sales Credit Memo), general management (Sales Line Discounts, Credit Management, Sales Journal, Order Status), price management (Sales Price Worksheet, Sales Prices, List Price Sheet), navigation, and reports (Inventory - Sales Back Orders, Customer - Order Summary, Refresh).

The main content area is titled "Role Center - Sales Order Processor" and is divided into several sections:

- Activities:** A central area with several key performance indicators (KPIs) represented by blue tiles:
 - For Release:** Sales Quotes - Open (0), Sales Orders - Open (28).
 - Sales Orders Released Not Shipped:** Ready to Ship (2), Partially Shipped (0), Delayed (15).
 - Returns:** Sales Return Orders - Open (0), Sales Credit Memos - Open (1).
- Trailing Sales Orders:** A bar chart showing the number of sales orders over time. The status text is "All Orders[Month][No. of Orders]. (Updated at 1:10:04 AM.)". The x-axis shows months from Jun 2015 to Oct 2015. The y-axis ranges from 0 to 50. The bars are stacked with blue and purple segments.
- My Customers:** A table with columns for "Phone No." and "Name".
- My Items:** A table with columns for "Item No.", "Description", and "Unit Price".
- My Notifications:** A table with columns for "From", "Created ...", "Note", and "Page".

The left-hand navigation pane lists various role center components: Sales Orders, Sales Quotes, Blanket Sales Orders, Sales Invoices, Sales Return Orders, Sales Credit Memos, Items, Customers, Item Journals, Sales Journals, and Cash Receipt Journals. At the bottom of the pane are "Home", "Posted Documents", and "Departments".

The status bar at the bottom of the window displays "CRONUS USA, Inc. Thursday, January 22, 2015 ALS\TELOSE".

Security Issues

- Configuration and Personalization
- About This Page
- Departments
- Disabling Personalization



Further Research

- YouTube
- MSDN



In Practice

- How do you use security
- Do you allow personalization
- Do you allow Departments
- Role Tailored Client – Do you hide all unwanted fields

