

A stylized logo graphic consisting of two overlapping chevron-like shapes. The top shape is a dark brown line pointing upwards and to the right, while the bottom shape is a white line pointing upwards and to the left, creating a central negative space.

STONERIDGE CONNECT

2016 Client Conference



Role Center Effectiveness



About the Speaker

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Stoneridge: 2 years

Total Industry Experience: 14 years

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More about :

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RTC Capabilities – what can we exploit?

- Profiles divide the users into groups that experience different views of the system
- Customization is available at the Company, Profile and User level
- Customization provides users situational awareness by reducing clutter and organizing data
- One person's clutter is another's must have
- Add complex data back into the Page with FactBoxes
- Send Notifications or Page Links to other users
- Display data with Charts

Profiles

Profiles - Microsoft Dynamics NAV

CRONUS USA, Inc. > Departments > Administration > Application Setup > RoleTailored Client > Profiles

Search (Ctrl+F3)

HOME ACTIONS

Copy Profile... Import Profile... New Edit View Delete Import Translated Profile Resources From Folder... Import Translated Profile Resources From Zip File... Export Translated Profile Resources... Remove Translated Profile Resources... Show as List Show as Chart Notes Links Refresh Clear Filter Find

Departments

- Financial Management
- Sales & Marketing
- Purchase
- Warehouse
- Manufacturing
- Jobs
- Resource Planning
- Service
- Human Resources
- Administration
 - IT Administration
 - Application Setup
 - General
 - Users
- Financial Management
- Sales & Marketing
- Purchase
- Warehouse
- Manufacturing
- Resource Planning
- Service
- Human Resources

Home

Posted Documents

Departments

Profiles

Type to filter (F3) Profile ID

No filters applied

Profile ID	Description	Role Center ID	Default Role Center	Disable Persona...
ACCOUNTING MANAGER	Accounting Manager	9001	<input type="checkbox"/>	<input type="checkbox"/>
ACCOUNTING SERVICES	Profile for users that have outsour...	9023	<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"/>
PRESIDENT - SMALL BUSI...	President - Small Business	9020	<input type="checkbox"/>	<input type="checkbox"/>
PRODUCTION PLANNER	Production Planner	9010	<input type="checkbox"/>	<input type="checkbox"/>
PROJECT MANAGER	Project Manager	9015	<input type="checkbox"/>	<input type="checkbox"/>
PURCHASING AGENT	Purchasing Agent	9007	<input type="checkbox"/>	<input type="checkbox"/>
RAPIDSTART SERVICES	RapidStart Services Implementer	9021	<input type="checkbox"/>	<input type="checkbox"/>
RESOURCE MANAGER	Resource Manager	9014	<input type="checkbox"/>	<input type="checkbox"/>
SALES MANAGER	Sales Manager	9005	<input type="checkbox"/>	<input type="checkbox"/>
SHIPPING AND RECEIVING	Shipping and Receiving - Order-b...	9008	<input type="checkbox"/>	<input type="checkbox"/>
SHIPPING AND RECEIVIN...	Shipping and Receiving - Wareho...	9000	<input type="checkbox"/>	<input type="checkbox"/>
SHIP SUPERVISOR	Ship Supervisor - Manufacturi...	9012	<input type="checkbox"/>	<input type="checkbox"/>

CRONUS USA, Inc. Thursday, January 26, 2017 SSI-NAV90\STONERIDGE

Page Customization – This is Development

- Benefits

- Fine Control
- Changes are across all Profiles
- Add Code to respect the phases of the moon
- Fall back behavior, no jammed up pages

- Drawbacks

- Execution cost
- Upgrade cost
- Required Skills
- Tips – Don't delete fields, just change visibility

Page Configuration at the Profile or User Level

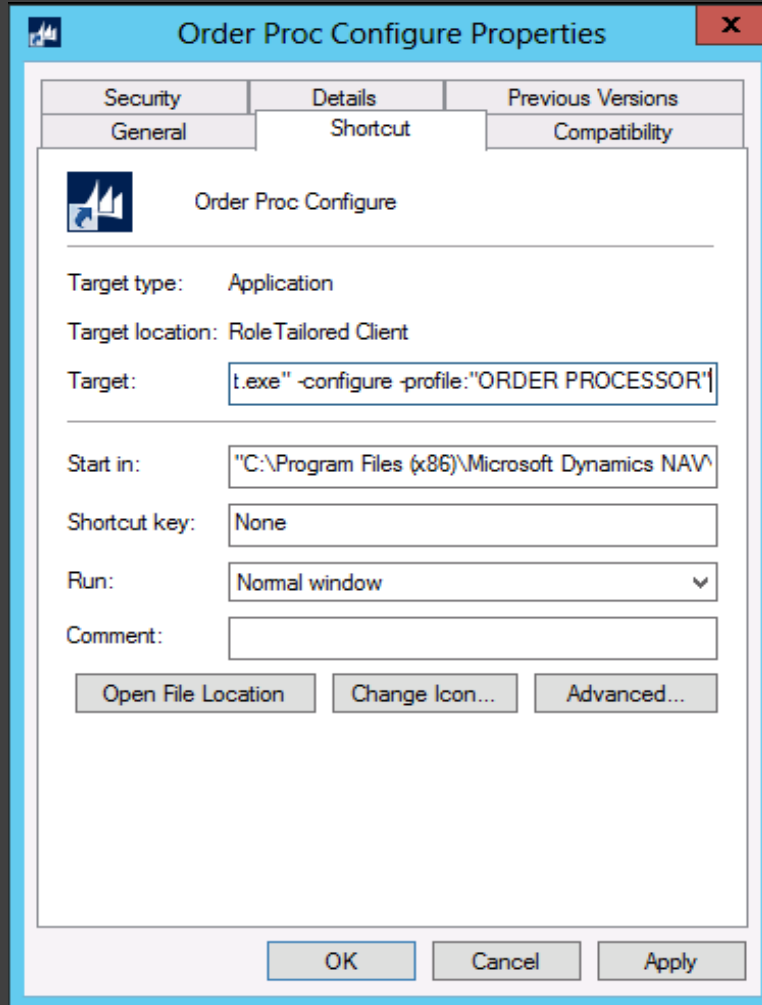
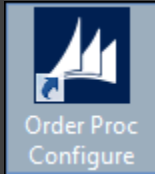
- Benefits

- Low cost
- Easy to learn
- Enables Users and Managers

- Drawbacks

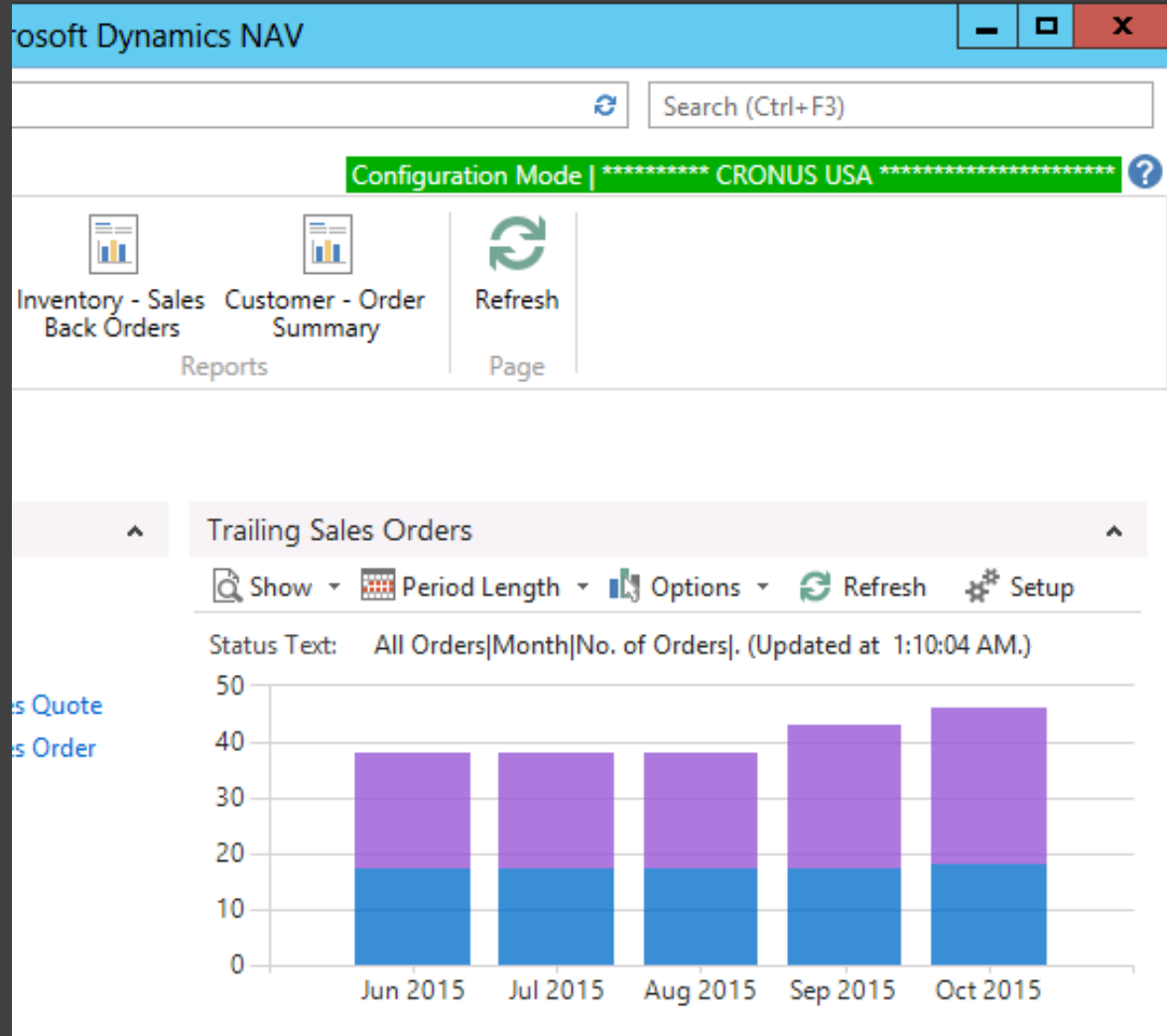
- Limitations on control
- Possible need for Deletion

Configuration Mode



- Target
 - "C:\Program Files\Microsoft Dynamics NAV\90\RoleTailored Client\Microsoft.Dynamics.Nav.Client.exe" -configure -profile:"ORDER PROCESSOR"
- Start In
 - "C:\Program Files\Microsoft Dynamics NAV\90\RoleTailored Client"

Configuration Mode



Profiles are not Security Groups

- Profiles help to control what is presented to the user
- The Departments Menu may be used to launch most of NAV – watch out
- Different users may share the same profile and have completely different security needs
- The penalties for using many Profiles are minimal
- The penalties for using many Security Groups are high

The Security component - User Card

The screenshot displays the Microsoft Dynamics NAV interface. On the left, the 'Users' list shows several users, with 'SSI-NAV90\MTYLKO' selected. The main window is the 'Edit - User Card' for this user. The 'General' tab is active, showing fields for User Name, Full Name, License Type (set to 'Full User'), State, Expiry Date, and Contact Email. The 'Windows Authentication' section shows the Windows User Name. The 'Access Control Service Authentication' section shows the ACS Access Status as 'Disabled'. The 'Microsoft Dynamics NAV Password Authentication' section shows the Password field and a checkbox for 'User must change password at next log...'. The 'Web Service Access' section is expanded, showing 'Office 365 Authentication' and 'User Groups'. The 'User Permission Sets' section is also expanded, showing a table with columns 'Permissions', 'Set', 'Description', 'Company', and 'NAV App Name'. The table contains one row: 'SUPER' with the description 'This role has all per...'. The 'Links' section is also expanded, showing a table with columns 'Link Address' and 'De'. A dropdown menu is open on the right, showing the 'Full User' license type options: 'Full User', 'Limited User', 'Device Only User', 'Windows Group', and 'External User'.

Users - Microsoft Dynamics NAV

CRONUS USA, Inc. > Departments > Administration > IT Administration > General > Users

HOME NAVIGATE

New Edit View Delete

Permission Sets

Permission Set by User

Permission Set by User Group

Users

User Name Full Name

SSI-NAV90\MGAWRONSKI

SSI-NAV90\SFRAPPIER

SSI-NAV90\STONERIDGE

SSI-NAV90\SSOLBERG

SSI-NAV90\STONERIDGE2

SSI-NAV90\RSOUTHWO...

SSI-NAV90\MTYLKO

SSI-NAV90\RANDREWS

SSI-NAV90\WYOUNG

SSI-NAV90\MBATALDEN

CRONUS USA, Inc. Thursday, January 26, 2017 SSI-NAV90\STONERIDGE

Edit - User Card

CRONUS USA, Inc.

HOME

View Edit New View Delete

ACS Setup Change Password Change Web Service Key

Notes Links Refresh Clear Filter

Go to Previous Next

User Card

General

User Name: SSI-NAV90\MTYLKO State: Enabled

Full Name: Expiry Date:

License Type: Full User Contact Email:

Windows Authentication

Windows User Na... SSI-NAV90\mtylko

Access Control Service Authentication

ACS Access Status: Disabled

Microsoft Dynamics NAV Password Authentication

Password: User must change password at next log... ☐

Web Service Access

Office 365 Authentication

User Groups

User Permission Sets

Permissions New Find Filter Clear Filter

Permis... Set Description Company NAV App Name

SUPER This role has all per...

Links

Link Address De

Notes

Click here to create a new note.

Full User

Full User

Limited User

Device Only User

Windows Group

External User

OK

Permission Set by User or User Group

HOME

ACTIONS

NAVIGATE

Copy Permission Set...

New

Permissions

Process

All Columns Left

Column Left

Column Right

All Columns Right

Browse

Refresh

Find

Page

CRONUS USA, Inc.

General

Company Name: Show Domain Name: ☐

Role ID	Name	Nav App Name	All Users	MB...	MG...	MT...	RAN...	RSO...	SFR...	SSO...	STO...	STO...	WY...
SEPA CRED. ...	SEPA Credit Transf...		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SEPA DIR. DE...	SEPA Direct Debit		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SM-CONTR...	Read service contra...		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SM-CONTR...	Create Service Cont...		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SM-PERIODIC	SM periodic activities		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SM-POSTED ...	Read posted servic...		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SM-Q/O/I/C	Create orders,quot...		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SM-Q/O/I/C...	Post service orders ...		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SM-SERVITEM	Read service items		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SM-SERVITE...	Create service items		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SM-SETUP	SM setup		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SMTP-SETUP	SMTP Mail Setup		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
STAX-SETUP	Sales Tax Setup		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SUPER	This role has all per...		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SUPER (DATA)	Superuser of data		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SUPER (NAVI...	Navigation Pane D...		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TAX-RC-LO...	Delete Tax Rate Ch...		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
USERGROUPS	User Groups Setup		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
VATREPORT	Tax Reports		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Permissions

New

C

T

..

..

Object Name

Tab... 7700 Miniform Header

Tab... 7701 Miniform Line

Tab... 7702 Miniform Functio...

Tab... 7703 Miniform Function

Tab... 7704 Item Identifier

Tab... 7710 ADCS User

Tenant Permissions

C

T


..

..

Object Name


OK


Record Permissions


 Edit - Permissions CRONUS USA, Inc. ?


HOME


ACTIONS


 Allow Read
Read Permission


 Allow Insertion
Insert Permission


 Allow Modification
Modify Permission

 Allow Deletion
Delete Permission

 Allow Execution
Execute Permission

 Allow All
All Permissions

 Manage Permission Sets

 Record Permissions

Permissions Type to filter (F3) Object Type No filters applied

General

Role ID: ADCS ALL

Show: Only In Permission Set

Add Read Permission to Related Tables: ☐

Object Type	Object ID	Object Name	Read Permission	Insert Permission	Modify Permission	Delete Permission	Run Permission	Security Filter
Table Data	7700	Miniform Header	Yes					
Table Data	7701	Miniform Line	Yes					
Table Data	7702	Miniform Function Group	Yes					
Table Data	7703	Miniform Function	Yes					
Table Data	7704	Item Identifier	Yes					
Table Data	7710	ADCS User	Yes					

OK

Notifications

109004 · Designstudio Gmunden

HOME

ACTIONS

NAVIGATE

CRONUS USA, Inc.

View

Release

Post...

Copy Document...

Statistics

Shipments

Email Confirmation...

Reopen

Order Promising

Assembly Orders

Invoices

Print Confirmation...

Archive Document

Request Approval

Show Attached

Page

Manage

Release

Posting

Prepare

Order

Documents

Order Confirmation

Request Approval

Show Attached

Page

109004 · Designstudio Gmunden

General

Sell-to Customer No.: 43687129

Sell-to Customer Name: Designstudio Gmunden

Sell-to City: Gmunden

Sell-to State / ZIP Code:

Posting Date: 9/22/2017

Order Date: 9/22/2017

Document Date: 9/22/2017

Requested Delivery Date:

External Document No.:

Salesperson Code: JR

Status: Open

Show more fields

Lines

Line

Functions

Order

New

Find

Filter

Clear Filter

Type	No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reser Quan
Item	1000	Bicycle		20		
Item	1120	Spokes		10		

Invoice Discount Amount: 0.00

Invoice Discount %: 0

Total Excl. Tax (EUR): 48,504.45

Total Tax (EUR): 0.00

Total Incl. Tax (EUR): 48,504.45

Reserved Receipt: 0

Gross Requireme... 72

Reserved Requir... 0

Item

Unit of Measure ... PCS

Qty. per Unit of ... 1

Substitutions: 0

Sales Prices: 0

Sales Line Disco... 2

Notes

Click here to create a new note.

OK

Notifications – Create a new Note

Sales Prices: 0
Sales Line Disco... 2

Notes

It was a dark and stormy night

To: SSI-NAV90\SSOLBE...


Notify: ☒

Save Cancel

OK

Notifications – Notes on a Sales Order

Sales Prices: 0
Sales Line Disco... 2

Notes  ^

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

From: SSI-NAV90
\\STONERIDGE To: SSI-NAV90
\\SSOLBERG Date: 5/5/2016

From: SSI-NAV90
\\STONERIDGE To: SSI-NAV90
\\SSOLBERG Date: 5/5/2016

From: SSI-NAV90
\\STONERIDGE To: SSI-NAV90
\\MTYLKO Date: 5/5/2016

OK

Notifications – Receiving a Notification

Sales Order Processor - Microsoft Dynamics NAV

CRONUS USA, Inc. Home

Search (Ctrl+F3)

CRONUS USA, Inc.

ACTIONS **REPORT**

Sales Quote Sales Invoice Sales Order Sales Return Order Sales Credit Memo Sales Journal Sales Line Discounts Credit Management Sales Price Worksheet Sales Prices List Price Sheet Navigate Inventory - Sales Back Orders Customer - Order Summary Refresh

New Document General Price History Reports Page

Role Center

Sales Orders

- Shipped Not Invoiced
- Completely Shipped Not Inv...
- Pending Approval
- Approved
- Sales Orders - Open
- Ready To Ship
- Partially Shipped
- Delayed
- Dynamics CRM Sales Orders

Sales Quotes

Blanket Sales Orders

Sales Invoices

Sales Return Orders

Sales Credit Memos

Items

Customers

Item Journals

Sales Journals

Cash Receipt Journals

Home

Posted Documents

Departments

Sales Order Processor

Sales Orders Released Not Shipped

Ready To Ship 6 Partially Shipped 0 Delayed 14 Average Days Delayed 7.5

Returns

Sales Return Orders - Open 0 Sales Credit Memos - Open 1

My Customers

Manage List Open New Find

Customer No.	Name	Phone No.	Balance
01445544	Progressive Home Furnishings		2,461.00
10000	The Cannon Group PLC		255,797.35
20000	Selangorian Ltd.		147,258.97
30000	John Haddock Insurance Co		537,067.00

New Sales Order

Navigate

New Sales Return Order

New Sales Credit Memo

My Items

Manage List Open New Find

Item No.	Description	Unit Price
1000	Bicycle	4,000.00
1001	Touring Bicycle	4,000.00
1100	Front Wheel	1,000.00

Report Inbox

Show Unread Reports All Reports Delete Show Queue Find

Created Date-Time	Description	Output Type
-------------------	-------------	-------------

My Notifications

From	Created Date	Note	Page
SSI-NAV90\ST...	5/5/2016	Test Note	Sales Order - ...

CRONUS USA, Inc. Thursday, January 26, 2017 SSI-NAV90\STONERIDGE

Notifications Summary

- Benefits
 - Links are generated to specific records
 - Date and User are recorded
 - If Security Groups are used then multiple recipients may be used
- Drawbacks
 - Minimal visibility of history
 - Not integrated with Comments
 - Copy Link to Page may be what you need

Copy Link to Page

Edit - Sales Order - 101017 - Selangorian Ltd.

CRONUS USA, Inc. ?

Page ▶ Copy Link to Page

Print & Send ▶

Customize ▶

Help ▶

HOME ACTIONS NAVIGATE

Release Reopen Post... Copy Document... Order Promising Statistics Assembly Orders Archive Document Shipments Invoices Email Confirmation... Print Confirmation... Request Approval Show Attached Page

101017 - Selangorian Ltd.

to Customer No.: 20000 Document Date: 1/27/2017

to Customer Name: Selangorian Ltd. Requested Delivery Date:

to City: Chicago External Document No.:

Sell-to State / ZIP Code: IL Salesperson Code: PS

Posting Date: 1/27/2017 Status: Open

Order Date: 1/27/2017

▼ Show more fields

Lines

Line	Type	No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reser Quan
Item	1928-W	ST.MORITZ Storage Unit/Drawers	GREEN	2			
Item	1964-W	INNSBRUCK Storage Unit/G.Door	GREEN	1			

Invoice Discount Amount: 0.00 Total Excl. Tax (USD): 0.00

Invoice Discount %: 0 Total Tax (USD): 0.00

Total Incl. Tax (USD): 0.00

Sell-to Customer Sal...

Customer No.: 20000

Quotes: 0

Blanket Orders: 0

Orders: 4

Invoices: 0

Return Orders: 0

Credit Memos: 0

Pstd. Shipments: 4

Pstd. Invoices: 4

Pstd. Return Recei...: 2

Pstd. Credit Mem...: 2

Sales Line Details

Item No.: 1928-W

Required Quantity: 2

Availability

Shipment Date: 1/27/2017

Item Availability: 20

Available Invent...: 23

Scheduled Recei...: 0

Reserved Receipt: 0

Gross Requireme...: 3

Reserved Requir: 0

OK

Charts in the Role Center

- Predefined complicated charts such as Trailing Sales Orders
- Generic Charts – Quick and in your control

Customize the Role Center Page – Add a Blank Chart

Customize the Role Center

Choose parts and layout for the Role Center

Available parts:

- Chart Part
- My Job Queue
- Connect Online

Role Center layout:

Left Column:

- Activities
- My Customers

Right Column:

- Blank Chart
- Trailing Sales Orders
- My Items
- Report Inbox
- My Notifications

Buttons: Add >>, << Remove, Move Up, Move Down, Move Left, Move Right, Customize Part..., Restore Defaults, OK, Cancel

Sales Order Processor - Microsoft Dynamics NAV

CRONUS USA, Inc. | Home

ACTIONS

- Sales Quote
- Sales Invoice
- Sales Order
- Sales Return Order
- Sales Credit Memo

REPORT

Role Center

- Sales Orders
 - Shipped Not Invoiced
 - Completely Shipped Not Invoiced
 - Pending Approval
 - Approved
 - Sales Orders - Open
 - Ready To Ship
 - Partially Shipped
 - Delayed
 - Dynamics CRM Sales Orders
- Sales Quotes
 - Blanket Sales Orders
- Sales Invoices
- Sales Return Orders
- Sales Credit Memos
- Items
- Customers
- Item Journals
- Sales Journals

Home | Posted Documents | Departments

Sales Return Orders - Open (0) | Sales Credit Memos - Open (1)

1001 Touring Bicycle 4,000.00

1100 Front Wheel 1,000.00

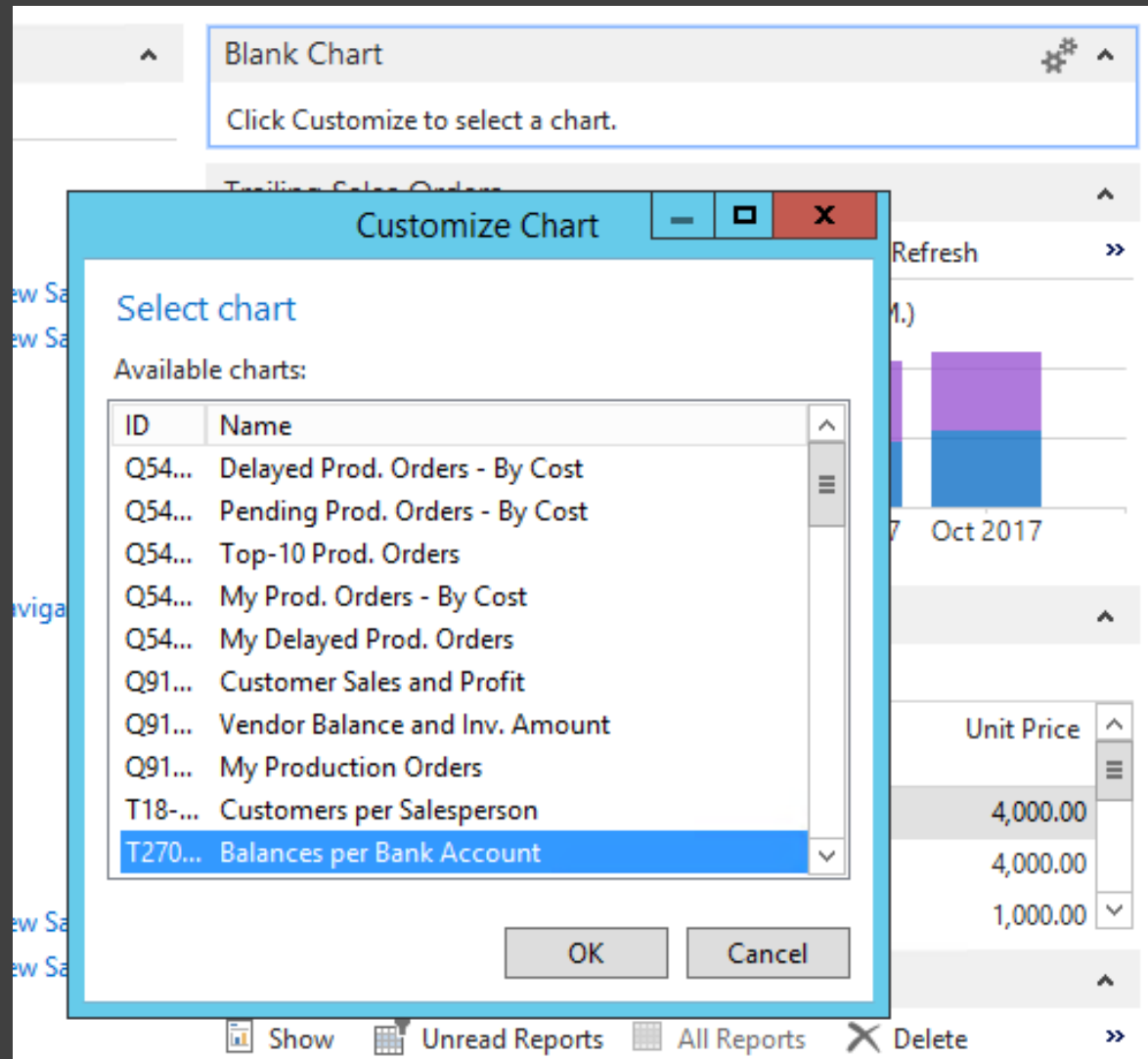
Report Inbox

Show | Unread Reports | All Reports | Delete

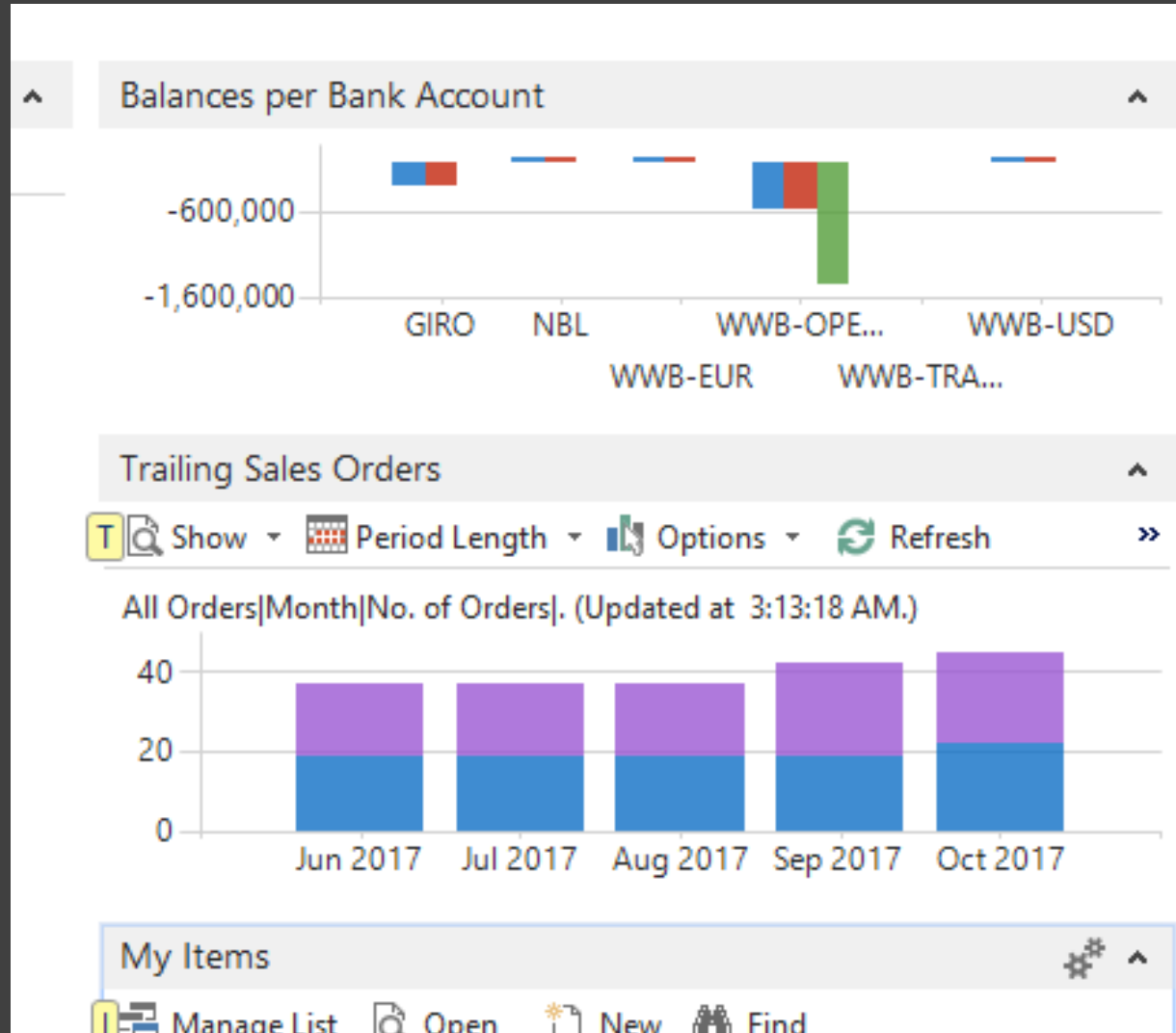
Created | Description | Output

CRONUS USA, Inc. Thursday, January 26, 2017 SSI-NAV90\STONERIDGE

Selecting a Generic Chart to put in the Chart Part



The Selected Chart



The Generic Charts List

The screenshot shows the 'Generic Charts' window in Microsoft Dynamics NAV. The window title is 'Generic Charts - Microsoft Dynamics NAV'. The breadcrumb navigation path is 'Departments > Administration > Application Setup > RoleTailored Client > Generic Charts'. The search bar contains 'Search (Ctrl+F3)'. The ribbon has tabs for 'HOME' and 'ACTIONS'. The 'HOME' tab is active, showing a 'New' button and a 'Manage' group with 'View', 'Edit List', and 'Delete' buttons. The 'ACTIONS' tab shows 'Show as List', 'Show as Chart', 'Notes', 'Links', 'Refresh', 'Clear Filter', and 'Find' buttons. The left sidebar shows a tree view of the application structure, with 'Departments' expanded and 'Application Setup' selected. The main area displays a list of generic charts with columns for ID, Name, Data, and Description. The list is filtered by 'ID' and shows 15 items. The status bar at the bottom indicates 'CRONUS USA, Inc. Thursday, January 26, 2017 SSI-NAV90\STONERIDGE'.

Generic Charts - Microsoft Dynamics NAV

Departments > Administration > Application Setup > RoleTailored Client > Generic Charts

Search (Ctrl+F3)

HOME ACTIONS CRONUS USA, Inc. ?

New Edit View Edit List Delete Show as List Show as Chart Notes Links Refresh Clear Filter Find

New Manage View Show Attached Page

Departments

- Financial Management
- Sales & Marketing
- Purchase
- Warehouse
- Manufacturing
- Jobs
- Resource Planning
- Service
- Human Resources
- Administration
- IT Administration
- Application Setup
- General

Home

Posted Documents

Departments

Generic Charts

Type to filter (F3) ID No filters applied

ID	Name	Data	Description
Q5400-01	Delayed Prod. Orders - By Cost	<input checked="" type="checkbox"/>	Items on delayed production orders with
Q5401-01	Pending Prod. Orders - By Cost	<input checked="" type="checkbox"/>	Items on pending production orders with
Q5402-01	Top-10 Prod. Orders	<input checked="" type="checkbox"/>	Top-10 items on production orders with
Q5403-01	My Prod. Orders - By Cost	<input checked="" type="checkbox"/>	My items on production orders with
Q5404-01	My Delayed Prod. Orders	<input checked="" type="checkbox"/>	My items on delayed production orders
Q9150-01	Customer Sales and Profit	<input checked="" type="checkbox"/>	Sales and profit figures on a timeline for
Q9151-01	Vendor Balance and Inv. Amo...	<input checked="" type="checkbox"/>	Balance and invoice amounts on a
Q9152-01	My Production Orders	<input checked="" type="checkbox"/>	My items on production orders with
T18-01	Customers per Salesperson	<input checked="" type="checkbox"/>	
T270-01	Balances per Bank Account	<input checked="" type="checkbox"/>	
T272-01	Open Checks per Bank Account	<input checked="" type="checkbox"/>	
T36-01	SO per Currency	<input checked="" type="checkbox"/>	
T36-02	SO per Status	<input checked="" type="checkbox"/>	
T36-03	Sales Crdt Memos per Status	<input checked="" type="checkbox"/>	

CRONUS USA, Inc. Thursday, January 26, 2017 SSI-NAV90\STONERIDGE

Setting Up a Chart

Edit - Generic Chart Setup - T270-01

CRONUS USA, Inc.

HOME ACTIONS NAVIGATE

View Edit New Delete Import Chart... Export Chart... Copy Chart... Filters Notes Links Refresh Clear Filter Go to Previous Next

Manage Process Show Attached Page

T270-01

General

ID: T270-01 Name: Balances per Bank Acc...

Data Source

Source Type: Table Source Name: Bank Account

Source ID: 270 Filters: (No filters selected)

Measures (Y-Axis)

	Data Column	Aggregation	Graph Type	Data Point Label
Required Measure:	Balance	Sum	Column	
Optional Measure:	Balance (LCY)	Sum	Column	
Optional Measure:	Min. Balance	Sum	Column	
Optional Measure:		None	Column	
Optional Measure:		None	Column	
Optional Measure:		None	Column	

Y-Axis Title: Show Y-Axis Title: ☐

Dimensions (X- and Z-Axes)

X-Axis Field: No. X-Axis Title: Show X-Axis Title: ☒

Data Point X Label: No. Z-Axis Field: Data Point Z Label:

OK

Aggregation

- Sum
- None
- Count
- Sum
- Min
- Max
- Avg

Graph Type

- Column
- Column
- Point
- Line
- ColumnStacked
- ColumnStacked100
- Area
- AreaStacked
- AreaStacked100
- StepLine
- Pie
- Doughnut
- Range
- Radar
- Funnel

In Conclusion

- Profiles and Security Groups are the key to a manageable system
- Understand the difference between them
- There are lots of nice toys in RTC
- Other user's expectations and needs are in no way obvious

Questions?

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