

# Role Centers

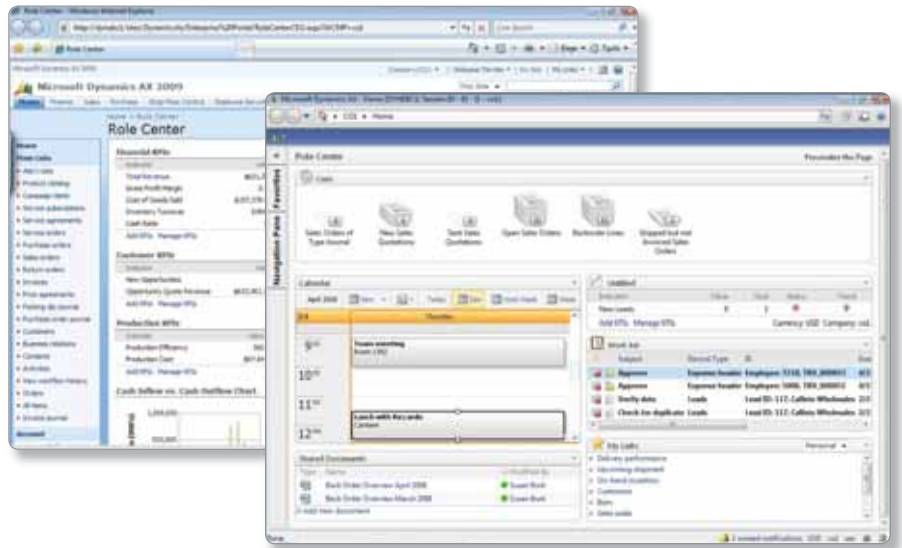
## Role Centers in Microsoft Dynamics AX 2009

### BENEFITS

- **View business data at a glance.** Monitor and analyze business performance using actionable BI, such as key performance indicators (KPIs), charts, and reports directly in your Role Center. Take action quickly with the ability to drill down into details and transactions.
- **Boost productivity and improve effectiveness.** Provide a single, integrated view of the job-specific information and tasks employees need to make informed business decisions.
- **Help people prioritize tasks.** Keep critical tasks, projects, and orders on track with notifications and alerts initiated by automated workflows that are displayed in your Role Center.
- **Get up to speed quickly.** The familiar user interface offers intuitive navigation and makes it easy to find information, helping to minimize training time. People see the value of working from their Role Centers right away, so user adoption is fast.
- **Adaptable user experience.** Employees can easily personalize Role Centers to fit their own unique work style and information needs. In addition, developers can quickly customize Role Centers to add business- and industry-specific content.

**Help people work smart and fast with RoleTailored access to information, tasks, and business processes. Role Centers in Microsoft Dynamics® AX present job-specific information based on roles within the organization to help people easily prioritize tasks and make quick business decisions.**

With an intuitive user interface similar to that of the Microsoft® Office system, Role Centers help people navigate quickly to the information, reports, and actions they need. This information-rich environment delivers out-of-the-box content, predefined cubes, and analytical views to help you extend business intelligence to every level of your organization.



*Monitor work and respond quickly and effectively as conditions change with visual cues for specific tasks and graphical displays of KPIs.*

You can access Role Centers from the Microsoft Dynamics AX client or with Enterprise Portal in Microsoft Dynamics AX, and easily personalize the content based on business needs. In addition, developers can build analytical content using integrated BI and reporting tools in Microsoft Dynamics AX, and customize the Web parts in Role Centers or in Enterprise Portal using state-of-the-art development tools and technologies.

## FEATURES

### Preconfigured Role Centers\*

- CEO
- Operations: Operations Manager
- Logistics: Warehouse Manager, Warehouse Worker, Shipping and Receiving, Purchasing Manager, Purchasing Agent
- Production: Production Manager, Shop Supervisor
- Customer Service: Customer Service Manager
- Sales and Marketing: Marketing Executive, Marketing Staffer, Sales Manager, Super Sales Rep, Dedicated Sales Rep, Account Manager, Order Processor
- HR: HR Director/Manager, Training and Development Manager/Specialist; Recruiting and Staffing Manager/Specialist
- Finance: CFO, Accounting Manager, Controller, Accounts Payable Coordinator, Accounts Receivable Administrator, Bookkeeper, Credit and Collections Manager, Accountant
- Professional Services: Project Manager, Project Team Member

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### Business intelligence

- Select predefined performance indicators using out-of-the-box Microsoft SQL Server® Analysis Services data cubes for display in Role Centers.
- Provide personalized report navigation and easily publish reports and KPIs.
- Enable people to build and share specialized reports in a wide range of formats with integration with SQL Server Reporting Services.
- Display and view graphs, charts, lists, and reports, and monitor processes in a dashboard view.

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### Personalization features

- All content provided in Role Centers is determined by user profiles.
- Easily personalize Role Centers to fit individual work styles by adding specific data, reports, alerts, or tasks.
- Add out-of-the-box Role Center Web parts, including:
  - Cues that provide a visual representation of records according to status, such as pending sales orders or items on backorder.
  - KPIs that offer information from predefined data cubes to monitor business performance against a defined goal.
  - A Report Web part that provides access to SQL Server Reporting Services reports.
  - A Business Overview Web part to compare historical performance, such as year over year or month over month.
  - A Work list that presents action items generated by a workflow or alert according to business needs.
  - Community links that provide items published on community sites for Finance, Services, and Sales and Marketing.
  - Links that provide access to important internal and external sites.
- Add any Microsoft SharePoint® Web parts.

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### Custom Role Centers

- Developers can create Role Centers or use Web parts to modify existing Role Centers with the power of ASP.NET and the Enterprise Portal Framework.
- Businesses can create industry-specific Role Centers to target specific customers.
- Build new data cubes and reports using integrated BI and reporting tools.

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*\*Role Center availability varies by Business Ready Licensing edition.*

**For more information about Role Centers or Enterprise Portal in Microsoft Dynamics AX, visit [www.microsoft.com/dynamics/ax](http://www.microsoft.com/dynamics/ax).**