

# Tailor your ERP for every user's role

Microsoft goes after line of business employees with the launch of Dynamics NAV 2009, which adds Outlook integration and Office-like features

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Everyone needs something from the company's enterprise resource planning system, whether they recognize the abbreviation "ERP" or not.

Sales managers need updates on who bought what. Marketing execs want to know how much of their advertising budget is left. CFOs might have to update the payroll module when raises are given out. Until recently, however, ERP systems tended to treat all users the same way, forcing them to pore through data to find what they need.

This is the issue Microsoft is addressing this week with the launch of Dynamics NAV 2009. The ERP system, aimed at mid-market firms, will offer what the company describes as a "role-tailored user experience." In other words, depending on what you do at a company, the NAV interface you see will display information that's relevant to your particular line of business.

"From a business perspective, role-tailored user experience is giving a boost to users' productivity," said Jan Sillemann, director of global product management for Microsoft Dynamics NAV in Copenhagen.

"Let's say you're a person managing sales orders. When you open your NAV you will see an overview of those orders, the quotes that are out there, the delays and so on."

Nigel Wallis, a research director with Toronto-based IDC Canada, said Microsoft has improved its market share in ERP year over year, and NAV 2009 may offer the company another strong boost.

"As Microsoft gets deeper into the enterprise and B2B, Dynamics has got to be the spearhead for that," he said. "It makes sense to move into the line of business decision-makers, that this is the way they see the business data, this is what keeps business running."

Depending on how companies install it, many users might end up tapping into this kind of data without ever seeing the front end of the ERP product, according to Sillemann.

"You will have immediate integration with Outlook. You will see your inbox or calendar," he said. "When you want to see your customers, you see them on a list. When you scroll down you'll have fact boxes that will update as you scroll down, instead of having to go into each particular cart."

The NAV 2009 "action pane" will be similar in appearance to the "ribbon" used in Microsoft Office product such as Word. The icons in this pane can be personalized according to what kind of information the user needs or wants to see.

“We also know that in one organization one person might be wearing two hats, so to speak,” said Sillemann. “We have heavily extended what you can do in terms of personalization. And you can do it without involving IT staff, because we see that as a key trend – that they want to be able to do things themselves.”

Although other software makers may offer the ability to create role-based ERP, Wallis said NAV 2009 could speed up time to market among Microsoft’s customers. “There’s less customization, less tweaking and enablement by the system integrator, if you’re using one, or in-house IT, to get people up to speed in their role,” he said.

NAV 2009’s Web-based integration was part of the appeal at Toronto-based **Vox Wireless**, a consulting firm that recently implemented NAV 2009 among its 75-person firm and six regional Canadian offices.

“Our staff really liked the ability of running everything out of Outlook,” said Jim Heaton, CEO of **Vox Wireless**. “There are quite a bit of features tying in, as with CRM. You could book your appointment in Outlook with a customer and have that connected right back into NAV. Before, we would be entering it four times (into different areas).”

Sillemann said Microsoft conducted a number of surveys with information workers that showed they prefer to work with Office-like products, as it reduces the learning curve when new technology is introduced.

“They could be updating information using Excel,” he said. “Lots of customers prefer that if they lost a large amount of data, it’s easier to work in a tool like Excel, modify it and put it back into NAV.”

Microsoft will be offering 21 roles already designed for line of business managers when they purchase NAV 2009, although they will be able to create and define roles specific to their business as well. The product will also allow users to search for information across NAV as well as other systems to which it connects, Sillemann said.