

# Enterprise Portal

## Enterprise Portal in Microsoft Dynamics AX 2009

### BENEFITS

- **Build powerful connections with employees, customers, vendors, and other business partners.** Simplify communication and collaboration by making critical information and reporting and analytical tools easy to access and share through a customized, Web-based portal.
- **Make your business available online to all users.** People working at remote sites or on the road can use their Web portals to enter hours, project data, sales quotations, and orders to keep business information up to date, regardless of time zones or geographical barriers.
- **Provide employees with self-service options.** Employees can enter expense reports, make purchase requisition requests, view FAQs, register absence information, and update key human resource (HR) data at their convenience.
- **Improve user productivity.** Enterprise Portal is familiar, easy to use, and interactive, minimizing training requirements. In addition, rapid deployment helps reduce IT maintenance and administration costs.

**Open your business to employees, customers, vendors, and other business partners around the clock. Enterprise Portal in Microsoft Dynamics AX makes it easy to provide RoleTailored data and business processes in real time over the Web, with full support for intranet, business-to-consumer, and business-to-business communications.**

Based on Microsoft® Windows® SharePoint® Services, Enterprise Portal enables you to drive down costs by decreasing paperwork and empowering people to access information, processes, and tools. For example, customers can view company and product information, reducing the need for customer service people to respond to common questions and demands. Vendors can work efficiently with your business by initiating transactions electronically and communicating in their language of choice.



*Role Center for the Sales Representative*

With the Web-based Enterprise Portal, people can access the relevant tasks, information, and tools they need through the RoleTailored user interface. Employees can personalize their Role Centers according to business needs, such as viewing key performance indicators (KPIs) or changing language and currency settings. Web developers can easily customize the Web parts in Role Centers or in Enterprise Portal to add additional functionality using state-of-the-art development tools and technologies, such as Microsoft ASP.NET, Asynchronous JavaScript and XML (AJAX), and Microsoft Visual Studio®.

## FEATURES

BUSINESS ESSENTIALS	<b>RoleTailored access</b>	<ul style="list-style-type: none"> <li>• Deploy Role Centers for RoleTailored access to specialized data, alerts, and common tasks.</li> <li>• Personalize Role Centers by applying out-of-the-box Web parts, reports, or key performance indicators (KPIs).</li> <li>• Use built-in tools to customize the Web portal to meet specific business needs.</li> </ul>
	<b>Role and permission management</b>	<ul style="list-style-type: none"> <li>• Provide access to the information and processes required while helping to protect other company resources. Users see only the information and functionality they need.</li> <li>• Users are automatically authenticated on your network.</li> </ul>
	<b>Searchable index</b>	<ul style="list-style-type: none"> <li>• Access a Full Text Index to search all portal content and back-office data.</li> </ul>
	<b>XML support</b>	<ul style="list-style-type: none"> <li>• Access and incorporate data from various sources, including third-party back- and front-office systems by using Web parts and XML.</li> </ul>
	<b>Greater interactivity and modern Web interface</b>	<ul style="list-style-type: none"> <li>• Take advantage of greater user interface interactivity and responsiveness through the use of Asynchronous JavaScript and XML (AJAX), and ASP.NET.</li> </ul>
	<b>Reduced IT administration</b>	<ul style="list-style-type: none"> <li>• Rapidly deploy Enterprise Portal; configure with either Windows SharePoint Services 3.0 or Microsoft Office SharePoint Server.</li> <li>• Easily personalize the Web portal to display the controls, functionality, and information individuals need, or designate the Enterprise Portal site that will appear as an individual's Role Center.</li> <li>• Use the Setup Wizard to verify and automatically install Windows SharePoint Services and Microsoft Internet Information Services.</li> </ul>
ADVANCED MANAGEMENT	<b>Simplified development</b>	<ul style="list-style-type: none"> <li>• Customize Enterprise Portal using the Microsoft Dynamics AX development environment or Visual Studio.</li> </ul>
	<b>Web-based expense management</b>	<ul style="list-style-type: none"> <li>• Create per diem rules, define approval workflows, import credit card transactions, and handle personal expenses.</li> </ul> <p><i>Note: Microsoft Dynamics Client for Microsoft Office named user license is required.</i></p>
ADVANCED MANAGEMENT ENTERPRISE	<b>Enterprise Portal roles</b>	<ul style="list-style-type: none"> <li>• Customer: Place orders, track order status, and use Returns Management to initiate returns and track return status.</li> <li>• Vendor: Share real-time data on items, documents, purchases, and shipping.</li> <li>• Consultant: Get an accurate overview of project resources and hourly costs.</li> <li>• Sales Representative: Use CRM to track comprehensive customer data and automate sales force activities.</li> </ul>
	<b>Intranet and extranet access</b>	<ul style="list-style-type: none"> <li>• Provide Web-based access to Microsoft Dynamics AX for employees through your company's intranet.</li> <li>• Support business-to-consumer or business-to-business communication by providing access through extranet sites.</li> </ul>
	<b>Collaboration and document management</b>	<ul style="list-style-type: none"> <li>• Enhance collaboration across your organization using a centralized portal for employees, vendors, and customers.</li> <li>• Streamline the process of sharing documents and information by providing common data and business processes from a single location.</li> </ul>
OTHER	<b>Microsoft Dynamics Client for Microsoft Office and SharePoint</b>	<ul style="list-style-type: none"> <li>• Extend the process control and insight of your enterprise resource planning (ERP) application to all employees through the Enterprise Portal Employee role using familiar Microsoft SharePoint technologies.</li> <li>• Employee role: Use Purchase Requisition to request equipment and materials; use Expense Management to automate travel and entertainment processing.</li> </ul>

Features are organized by Business Ready Licensing edition. Actual editions may vary at the time of licensing.

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

This document is for informational purposes only.

MICROSOFT MAKES NO WARRANTIES, EXPRESS, IMPLIED, OR STATUTORY, AS TO THE INFORMATION IN THIS DOCUMENT.

04/2008

**Microsoft**