Role Center App

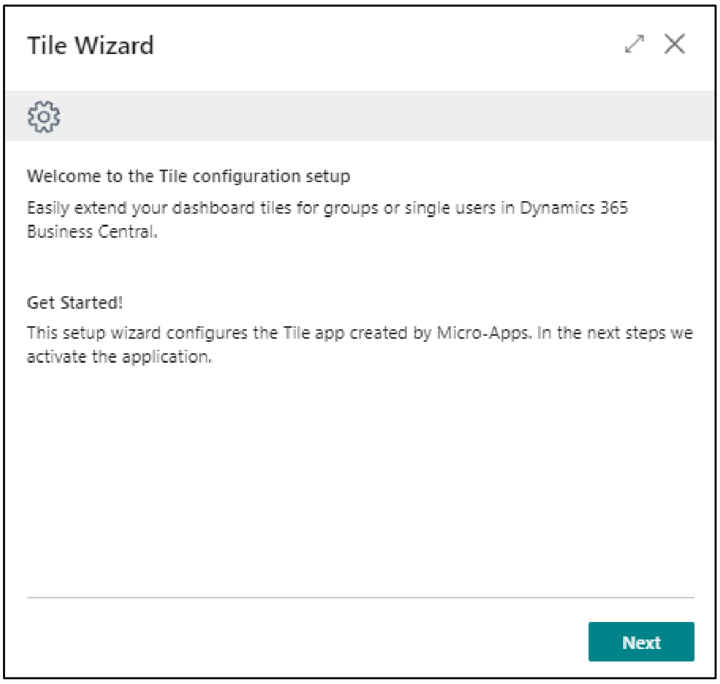
This document will describe all the necessary information for the use of the Role Center app, created by Micro-Apps. This extension creates the possibility to add tiles to the Role center based on your own customization

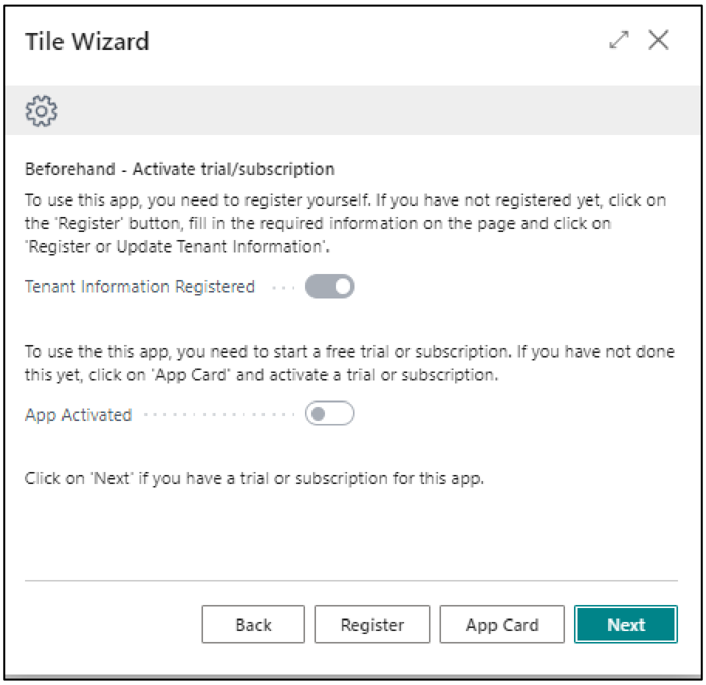
Installation:

The installation of the Role Center app is available via the Microsoft Marketplace for Business Central extensions/apps. From here you can automatically install the extension and make it available within every company within your Business Central environment.

Role Center setup

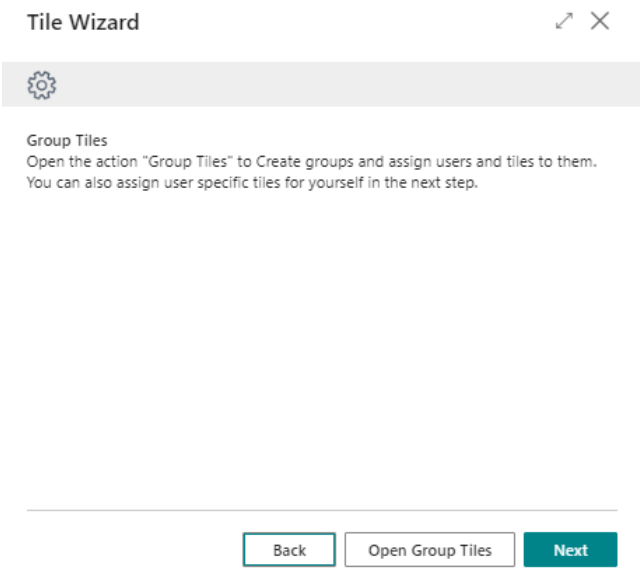
After the installation has been completed, the page "Role Center Wizard" is available in Business Central. With this configuration wizard we can set up the Role Center app step by step. This wizard contains all the necessary steps to completely set up the extension. The first step is to register yourself and to activate the trial or subscription. Afterwards we can setup tiles trough two ways. The Role center Tiles per user and the Role Center Groups.



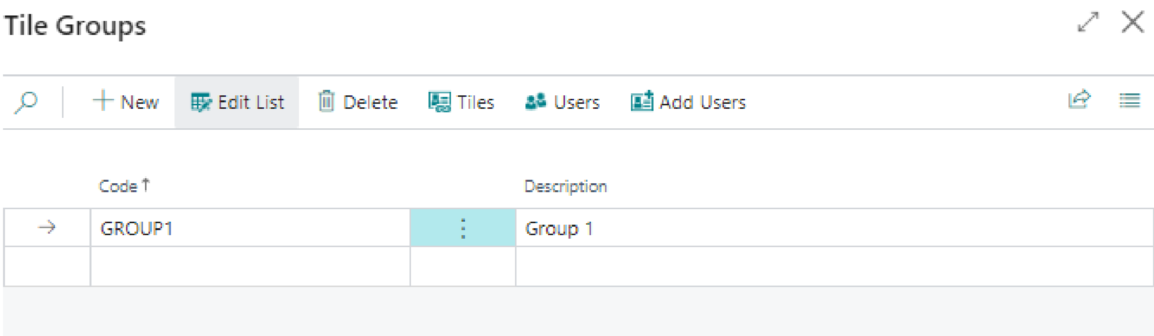


Role Center Group setup

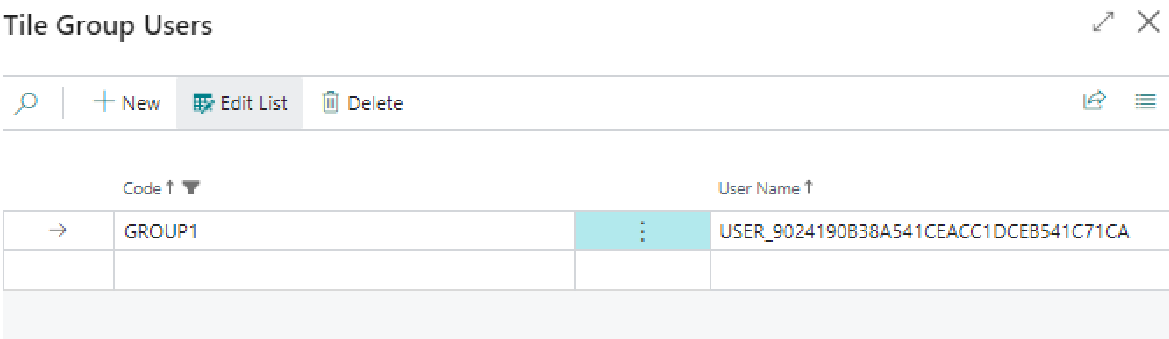
On the next page we can set up the Group Tiles by clicking on the “group” option.



In the tile groups setup, you can add a **code** and a **description** for your group, allowing you to give it a name. Once the group is created, you can add users to it by clicking the **“Add Users”** button. This option lets you select and add users to the chosen group.

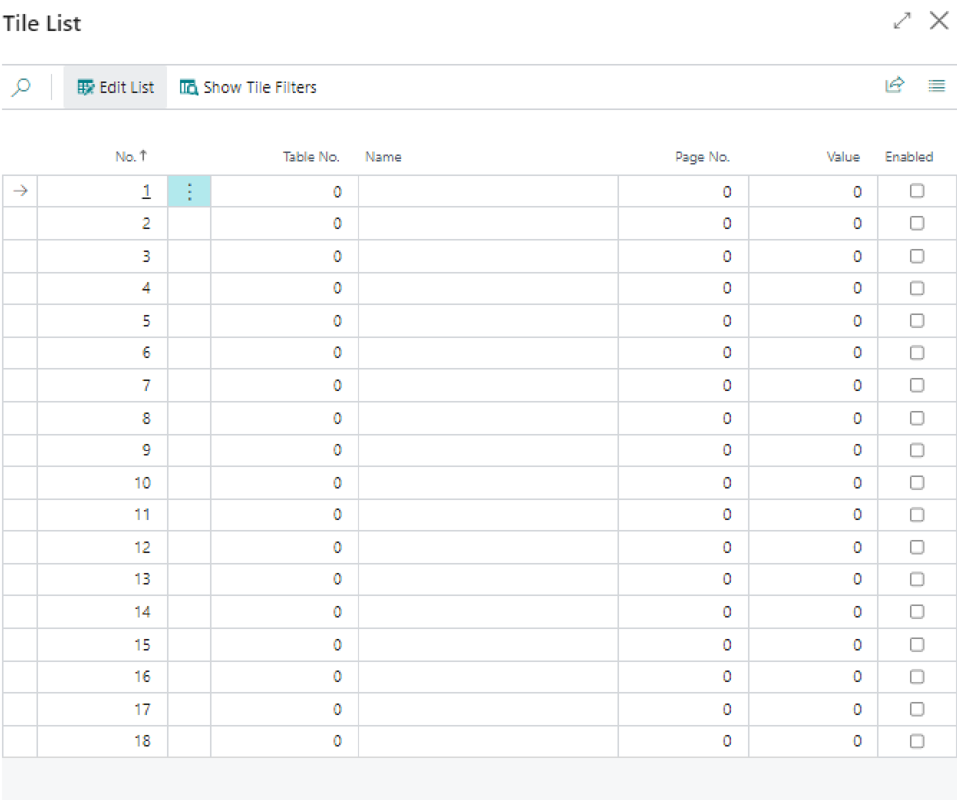


It is also possible to view all users in this group by pressing **“Users”**

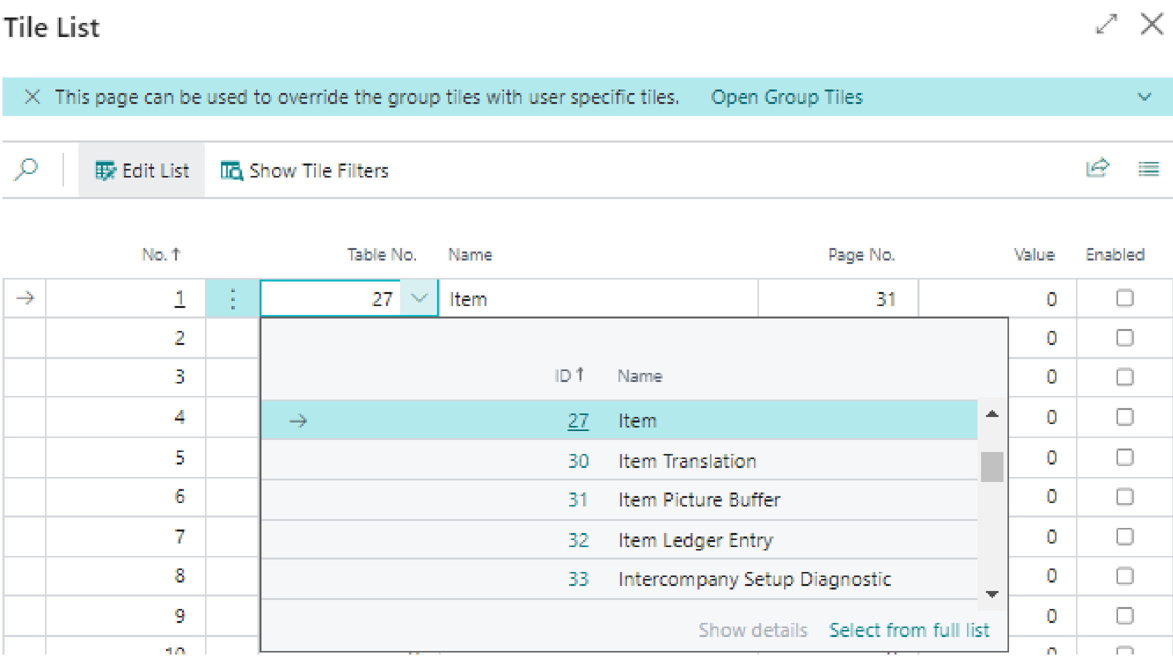


Once the group is created and users are added, you need to create the tiles. This can be done through the **"Tiles"** option on the group tiles page. When you click on this option, the tiles list opens. On this page, you can set up the tiles.

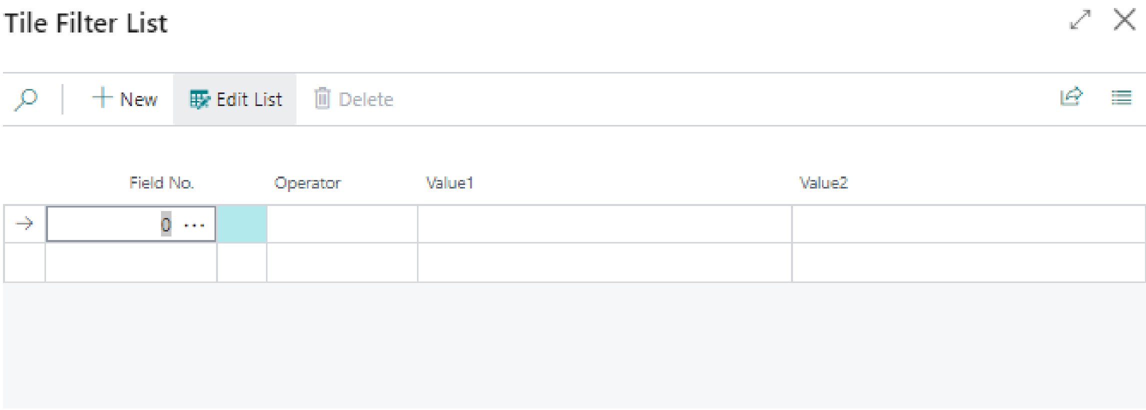
You can set up a total of 18 tiles. To configure a tile, click on the **"Table No."** column. This allows you to select the table data you want to display in the tile being created.



For the guide we are going to choose table No. 27 this will make sure we display the items in the tile. On the right the **“Enabled” checkbox** has also be checked so that it is activated



Using the "Show tile filters" option on the tile list page, you can add additional filters to the items displayed in the tile.



On this page, several options are available:

Field No.: This shows the number of the field where the filter will be applied, listing all fields in the chosen table.

Operator: This field allows you to set various conditions:

"=": Equals the value entered in Value1

">": Greater than the value entered in Value1

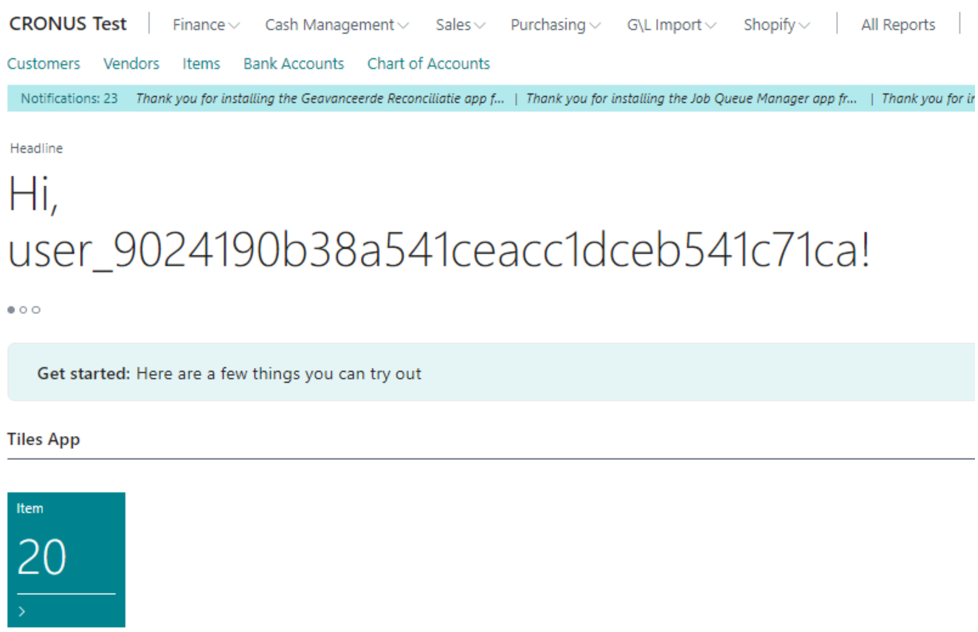
"<": Less than the value entered in Value1

"<>": Not equal to the value entered in Value1

"Between": Includes all values between Value1 and Value2

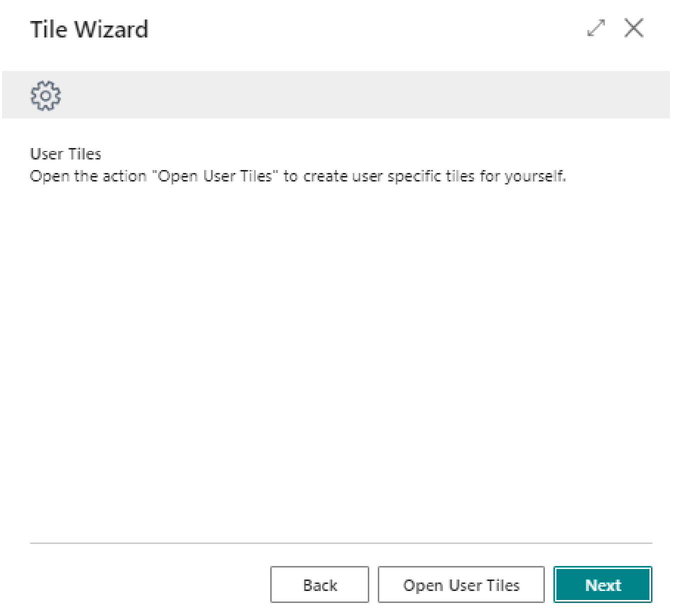
Value1 & Value2: These fields can be filled in to set the filter.

Once everything is filled in and the user is added to the group, the tile will appear on the Business Central home screen.



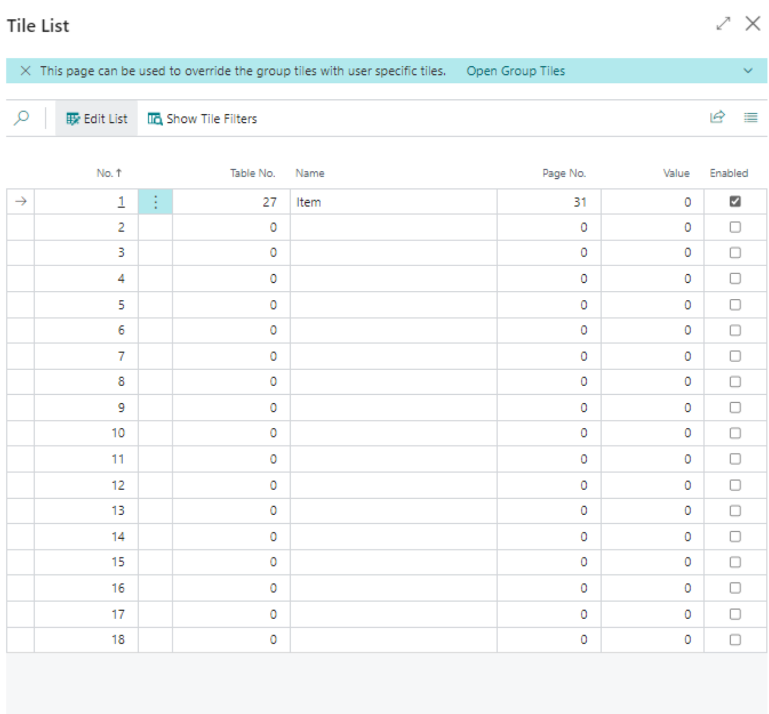
Role Center Tiles setup

After setting up tile groups, you can also configure tiles for individual users. This is done by pressing "Next" in the tile wizard after the tile group page. This will take you to the tile user page. Here, you need to press "Open User Tiles" to set up individual user tiles.



The user tiles work exactly the same way as group tiles but are specific to individual users. Each user can set up their own tiles that they want to display.

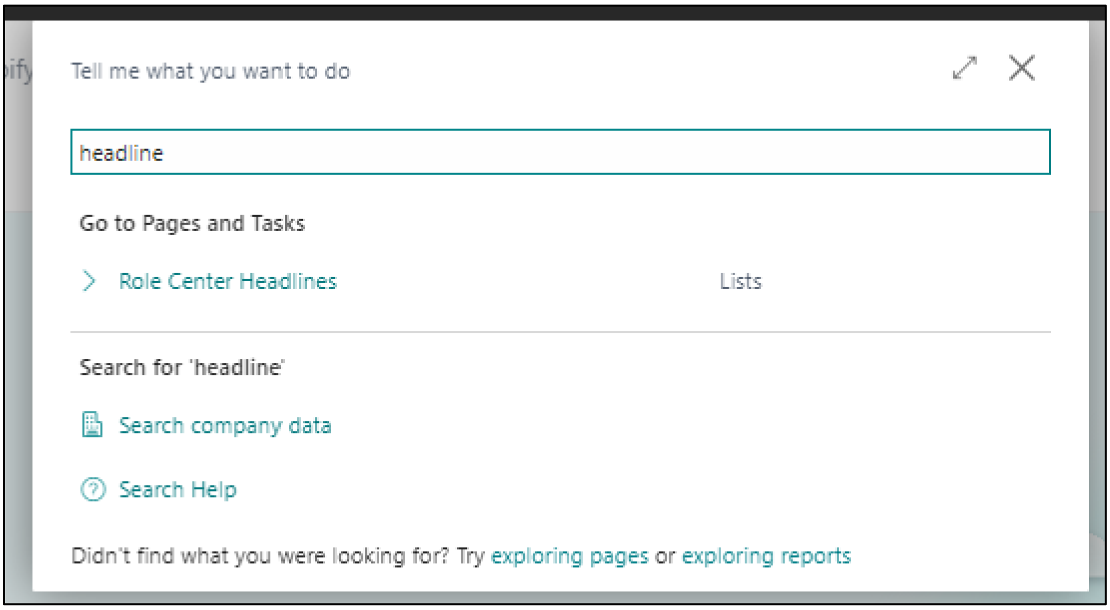
Important: User tiles overwrite group tiles. You can only set up 18 tiles in total. If a group tile is configured with a specific number (e.g., number 4) and a user also selects number 4 for their user tile, the user tile will overwrite the group tile.



No. ↑	Table No.	Name	Page No.	Value	Enabled
1	27	Item	31	0	☑
2	0		0	0	☐
3	0		0	0	☐
4	0		0	0	☐
5	0		0	0	☐
6	0		0	0	☐
7	0		0	0	☐
8	0		0	0	☐
9	0		0	0	☐
10	0		0	0	☐
11	0		0	0	☐
12	0		0	0	☐
13	0		0	0	☐
14	0		0	0	☐
15	0		0	0	☐
16	0		0	0	☐
17	0		0	0	☐
18	0		0	0	☐

How to edit the role Centre headline text.

To edit the headline text, go to "Role Center Headlines."

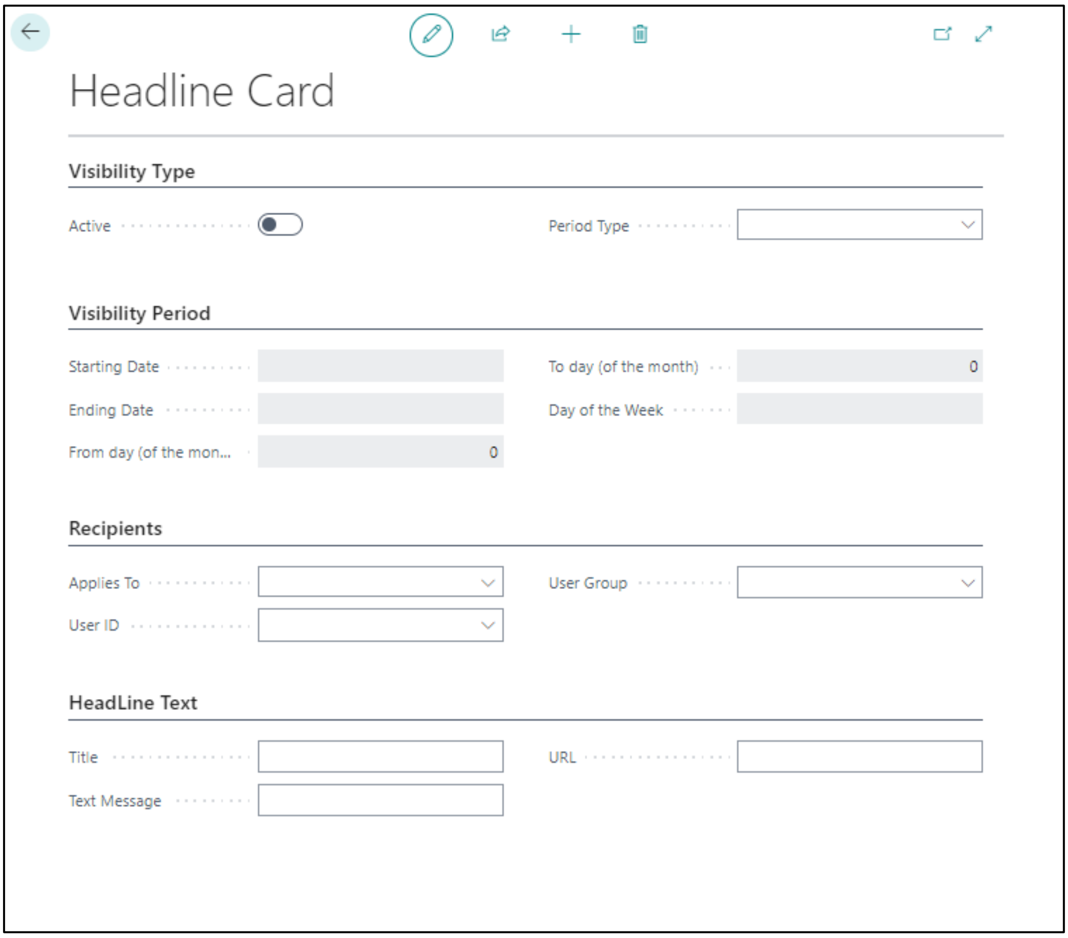


On this page, you can view all headline cards, both active and inactive. To create a new headline card, simply click "New," and a new card will open.

On the headline card you have a lot of options.

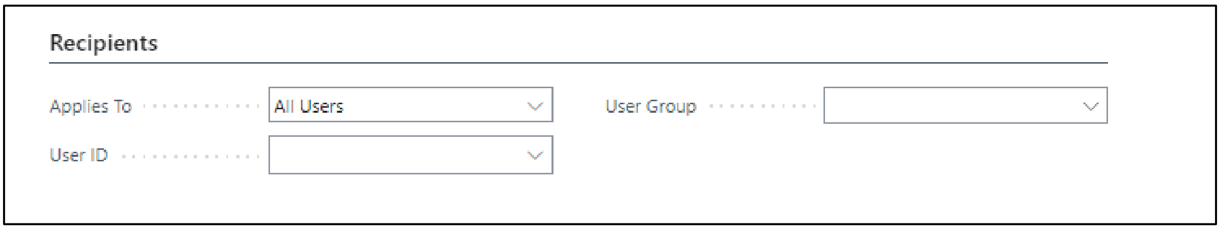
Under the "Visibility Type" section, you will find the "Active" switch, which allows you to activate or deactivate a headline card. Additionally, under the "Period Type" section, you can determine when the headline card should be displayed. The available options are:

- **Fixed Period**
  The headline card will be active during the specified start and end dates and will rotate randomly with other active headline cards during this period.
- **Weekly**
  You can select a specific day of the week for the headline card to appear.
- **Monthly**
  The headline card will be displayed on a specific day each month.
- **Yearly**
  The headline card will reappear on the same date every year.
- **First Day of the Month**
  The message will be displayed on the first day of every month.
- **Last Day of the Month**
  The message will be displayed on the last day of every month.



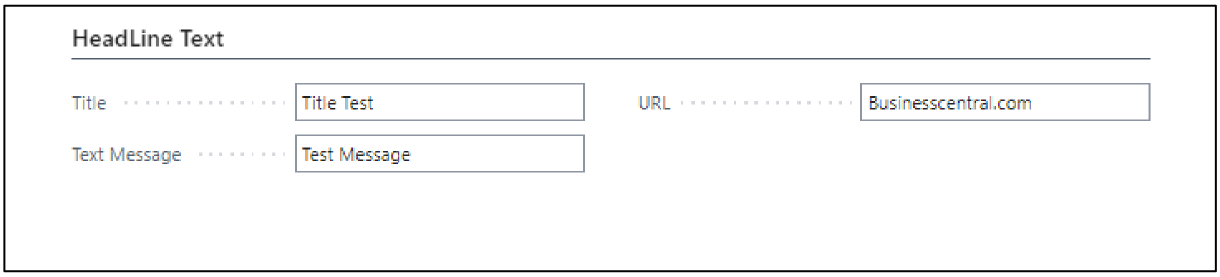
Under the "Recipients" section, you can choose who the message applies to. There are three options:

- **All Users**: The message will be shown to all users in Business Central.
- **Single User**: This option allows you to target a specific user with the message.
- **User Groups**: The message will be displayed to all users within a selected user group.



In the "Headline Text" section, you can define the content of the message:

- **Title**: The headline's title.
- **Text Message**: The message you want to display.
- **URL**: A clickable link that will be shown when users click on the headline.



Once set to active, the headline will appear in the Role Center.