

# STREAMLINE

Microsoft Dynamics AX

## Gain Efficiency, Flexibility, and Insight with Professional Services for Microsoft Dynamics AX

White Paper

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[www.microsoft.com/dynamics/ax](http://www.microsoft.com/dynamics/ax)



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## Introduction

As we settle more firmly into the information age, managing and accessing knowledge clearly provides a key competitive advantage. Helping the people in your organization stay current with evolving trends is a key business requirement. With recent growth at 20 percent a year, the professional services organization (PSO) industry is one of the world's fastest-growing industry segments. Yet in this highly competitive field, maximizing efficiency during the life of a project or engagement can still be one of the greatest challenges.

PSOs need to ensure they run profitably and in compliance with a host of regulations and policies such as Sarbanes-Oxley—but they also face other significant pressures. For example, measuring the degree of project completion can be difficult, and as a result, deadlines are missed. Employee turnover in the services industry is high (in many cases as high as 40 percent), and forecasting and managing resource utilization can be a challenge. To add to these complexities, the ability to capitalize on historical information is critical to the success of projects from financial, scheduling, and scope perspectives. Moreover, as many other industries become global, services companies must do the same to meet the full needs of customers. That means it's necessary to have global resource deployment capabilities to help ensure that the right skills are assigned to the right project.

Another challenge is that PSO customers have grown to expect a far greater range of services, while smaller budgets and faster timelines make it difficult to enhance quality and innovation. Project complexity is also increasing because customers are demanding accelerated schedules and expecting that PSOs will leverage knowledge and experience to rapidly produce results.

Because the value of any service firm is built on people and knowledge, PSOs need tools that can help build team synergy and maximize the effectiveness of employees' knowledge and experience. By using established project management tools and methods, PSOs can proactively organize projects and effectively manage time, equipment, capital, and human resources.

### Professional Services for Microsoft Dynamics AX

Designed especially for PSOs, Professional Services for Microsoft Dynamics® AX is a comprehensive business management solution that integrates project, financial, and resource management capabilities to help companies increase revenues, lower costs, and simplify compliance.

Microsoft Dynamics AX can help you to improve profitability, efficiency, and customer service, and adapt quickly to changing business conditions by breaking down boundaries between departments. The solution also enables you to connect and collaborate with customers and business partners effectively, which can result in improved customer satisfaction, increased productivity, and the flexibility to seize new market opportunities when they arise—all important requirements in today's business environment.

Professional Services for Microsoft Dynamics AX improves business agility by removing the restrictions that separate your company from customers and suppliers. It also helps eliminate the barriers between your company and your employees, so they can make smart, fast decisions.

You put a lot of hard work and creativity into optimizing your organizational assets and pleasing your customers. The information in this white paper will show you how Professional Services for Microsoft Dynamics AX can help you get the job done.

## Benefits of Professional Services Automation (PSA) Solutions

PSA solutions can be a powerful way to deliver value for the following PSO stakeholders:

- Current and potential customers who want innovative, high-quality work performed on schedule and within budget limitations.
- Organizational leaders who need to manage the company to achieve maximum customer satisfaction and profitability, portfolio and business alignment, and responsiveness to change.
- Functional staff members who need to focus their time on projects, not paperwork.
- Project managers who want to better manage teams and deliver projects on time and on budget, and whose teams require accurate time, expense, and status reporting, as well as resource and skill optimization.
- External customers, partners, and suppliers who require accurate invoicing, high-quality customer service, close collaboration, and efficient dispute resolution.

This section presents an overview of the benefits available to these stakeholders when they use a PSA solution.

### Cost Reduction

Minimizing unnecessary costs during difficult economic times can be critical to market survival. Although lowering costs is often not a primary reason for implementing a PSA solution, many companies find that the efficiency and productivity gains can result in significant savings. Cost reduction comes from automating core business processes, improving invoicing, and streamlining administration and resource management.

### Increased Revenue and Profitability

One of the top reasons for investing in a PSA solution is the increased revenue and profitability that results from improved resource utilization, which ultimately leads to improved customer satisfaction and repeat business.

### Greater Visibility into the Organization

Having timely and accurate access to resource and project data can enhance business decision-making when it comes to prioritization of strategic services, projects, resources, and funding. With the enhanced visibility that a PSA solution can provide, project and operational managers can optimize resources while improving on-time and on-budget delivery.

## **Proactive Resource Utilization**

PSA solutions deliver real business value by helping you manage commitments effectively and maintain a proactive approach to resource utilization. You can see which commitments are fulfilled, and view the variance of the estimated commitment time versus the actual time spent on a given project. You can optimize resources with the ability to see where a user is committed in the future and where opportunities for commitment exist on current or planned projects.

## **Improved Team Collaboration**

Project managers can effectively manage teams, regardless of location. Whether employees are spread over long distances or across companies, teams can keep on top of deliverables by using Web-based collaboration and communication portals. Portals help reduce information overload by delivering aggregated content from multiple projects and sources to provide project managers, resource managers, and company executives with views of their entire project portfolio.

## **Process Improvement Across the Project Services Life Cycle**

In highly project-driven organizations, process improvements can reduce time to market while lowering development costs and improving quality. These benefits come from creating reusable templates and processes, automating core business processes, and tightly integrating project planning, scheduling, and invoicing.

## **Greater Customer Satisfaction and Loyalty**

Improved efficiency and productivity have little meaning if the customer is unhappy with the final results. Maintaining service quality and effective customer collaboration throughout the service lifecycle can significantly improve customer loyalty and repeat business—the hallmark of any successful service organization. Ongoing measurement of customer satisfaction should be built into any PSA strategy.

## **Reduced Billing Cycle Times**

By accurately calculating resource time and expense and project progress, PSOs can reduce billing cycle times. Accurate invoicing helps to reduce customer challenges so that PSOs can speed invoice processing, resulting in reduced costs and a greater ROI.

## **Minimized Revenue Leakage**

When manual entry or separate systems must be used to invoice customers for services, you can lose funds through “revenue leakage”—the result of errors or incomplete or lost paperwork. Minimizing this leakage includes accurately accounting for all billable time, chargeback, or equipment and material usage on service-related projects.

## **Performance Data Integration**

PSOs often struggle with performance data that is locked in functional data silos and systems. An effective PSA solution aggregates and centrally exposes this data with key performance indicators (KPIs) and reports. By acting as a data provider, data consumer, and data presenter, the solution provides a single location where data can be analyzed and presented, giving you a holistic view of the organization.

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## **Improved Service Agility**

By combining resource and project optimization with improved executive decision-making, PSOs can adapt quickly to sudden change. The ROI on service agility can be difficult to measure—but agility is critical when responding to changes in business priorities, competitive pressures, new technologies, and economic fluctuations.

## Empowering Professional Services Organizations

Professional services organizations operate much differently than other industries. Your company acquires experience and knowledge about your customers, brand(s), competitors, and markets; generates important communications such as e-mail messages, faxes, and phone conversations; produces documents; and creates work product. In addition, you generate project and customer transactions, timesheets, project and non-project expenses, and overhead costs. All of this intellectual and transactional capital creates value and takes time.

To thrive, you need tools that map, sometimes specifically, to your organizational challenges. For example, you might have the following requirements:

- Systems must adapt to the customer's organizational, project, and financial infrastructure.
- Systems must have the ability to create and manage complex budgets based on time and materials using a variety of customer-specific formulas or negotiated rates.
- Real-time budget reconciliations and change-control mechanisms to help ensure profitability and customer satisfaction.
- Profitability must be measurable at multiple levels—enterprise, office, customer, brand, product, contract, project, and even task.

### Project Life Cycle Overview

To illustrate how Professional Services for Microsoft Dynamics AX can help, let's take a look at a representative customer project life cycle. Professional Services for Microsoft Dynamics AX helps with these steps:

- Generate contracts, quotes, agreements, and staffing, and create customer records in your accounting and project management systems.
- Execute the project and manage the customer relationship.
- Close the projects or contracts.

For technical details, including core functionality, system architecture, and technical benefits, see Appendix 1 on page 15.

### Generate Contracts, Quotes, Agreements, and Staffing, and Create Customer Records

Professional Services for Microsoft Dynamics AX includes contract and project setup routines that conform to your customer and company standards, such as a flexible work breakdown structure (WBS) and business rules that are configurable at the customer, project, or sub-project levels. Professional Services for Microsoft Dynamics AX also provides you with reusable customer and project templates, multilanguage and multicurrency support, split billing, and configurable revenue recognition methods. In addition, projects and budgets can be automatically created from approved quotations, reducing the need for redundant data entry to save time and improve accuracy.

## **Execute the Project and Manage the Customer Relationship**

To help you mobilize and manage project teams and monitor progress, Professional Services for Microsoft Dynamics AX has bi-directional integration with enterprise project management systems like Microsoft® Office Project Server 2007. The solution also provides scheduling capabilities based on milestones or tasks, configurable automated workflows, a document repository, and program alerts and notifications. In addition, customer contact records are centrally managed and accessible to the entire organization through the Customer Master.

## **Close Projects and Contracts**

Accelerate revenue recognition and formalize project closing with the ability to administer project review scorecards and review project metrics; electronically archive digital project assets; choose between milestone, percent complete, or time-based billing; and manage retainages. The Revenue Recognition Wizard proactively reviews project data and proposes recognizable revenue so that you can manage by exception and avoid client conflicts with accurate billing that is based on actual progress. The solution also provides tools to assist with time and materials reconciliation, and it supports your organization's efforts to comply with Sarbanes-Oxley regulations and customer- or contract-specific standards or requirements.

## **Gain Business Agility**

Professional Services for Microsoft Dynamics AX helps provide critical insight into your company's financial, resource, and project management data so you can increase revenues and proactively manage business. The solution easily conforms to the way your company works, and it can be customized to fit changing business needs. Increase business agility with the ability to:

- Deploy only the tools and features that are relevant to your business.
- Create client, team, department, and project sites as needed.
- Create and deploy new tools and features as needed.
- Assign resources, establish billing rules and revenue recognition, and report at any level of detail necessary (including company, client, brand, product, project, sub-project, and task) with flexible planning and reporting WBSs.
- Capture and report project data through parallel financial and execution activity breakdown structures.
- Personalize and group the delivery of information to make the content relevant and accessible.

Professional Services for Microsoft Dynamics AX also enables you to layer information so you can see both high-level (executive summary) and drill-down (detail) views of company and project information. Users can deploy multicurrency and multicurrency support as needed, and create easy-to-use client profiles and templates with matrix rules for WBSs roles, rates, billing rules, and expenses. In addition, you can customize powerful revenue recognition and project billing rules to accommodate your unique business needs.

The ability to gather, analyze, and present valuable external insight into your business processes is reinforced with the capacity to administer security-enhanced Web-based surveys for planning, project post-mortem analyses, and corporate scorecard feedback. Moreover, the system enables users to take advantage of past experiences to identify evolving trends and core competencies, for example by archiving and later retrieving historical staffing plans, estimates, original budgets, and budget reconciliations.

## Tap into Deep Business Insight

Professional Services for Microsoft Dynamics AX enables you to integrate key business systems and information in a centralized dashboard to provide real-time insight that can help you quickly identify potential problems. For example, it can help you acquire insight into your financial data so you can increase revenues, maintain tight control over costs, and shorten billing cycle times. In addition, Professional Services for Microsoft Dynamics AX provides users with the ability to:

- Track financial transactions within and between different departments and subsidiaries for an accurate overview of revenue and cost flows.
- Accurately calculate and compound burdens, overheads, and other indirect cost components and effective labor rates to help ensure full cost recovery and compliant billing.
- Identify aging accounts and projects quickly.
- Monitor variations in estimates and costs to help track trends in profitability.
- Check project financial status with inquiries that enable people across your organization to view high-level or drill-down information appropriate for their needs.
- Track items throughout the supply chain with full traceability.
- Reduce manual work and redundant effort when generating sales and purchase orders.

PSOs need to effectively manage agreements with suppliers and customers. To meet this requirement, Professional Services for Microsoft Dynamics AX helps users increase the efficiency and accuracy of sales and purchasing processes by maintaining a complete overview of customer and supplier agreements. It also simplifies the handling of agreements with suppliers and customers to save time and money, and it gives your customers the correct price every time by automatically retrieving account-specific and agreement-specific prices, schedules of values, and discounts when creating estimates.

Professional Services for Microsoft Dynamics AX also helps improve cost efficiencies by managing the allocation of your resources. For example, it enables users to view and analyze human and material resources across the enterprise to avoid over- and under-allocations.

With critical business information and services in one place, Professional Services for Microsoft Dynamics AX helps you:

- Eliminate password overload with single sign-on to portal and corporate applications, such as customer relationship management (CRM), human resource management (HRM), and enterprise resource planning (ERP) systems.
- Take advantage of information stored in Microsoft Active Directory® to streamline ERP user creation, and target, filter, and sort critical company information.
- Roll up disparate information into consolidated views to increase information relevance and value while maintaining drill-down detail where it's needed.

Users can also gain a fast and efficient overview of clients, projects, and teams with powerful, flexible reporting functionality that helps them identify the following components:

- Clients and industries that represent a business expansion opportunity.
- Most and least profitable clients.
- Most effective and efficient internal sales, production, and account management teams.
- Most profitable project types.

## Work Efficiently

With Professional Services for Microsoft Dynamics AX, you can optimize your team's time and energy to lower costs and achieve company goals through stronger collaboration and centralized access to critical intellectual capital. Manage teams proactively to avoid project cost overruns and allocation issues with the ability to:

- Find and assign team members to projects and tasks from within the company using Inter-company Resource Sharing, which exposes resource data between companies.
- Quickly set up fee-based projects with a project wizard that helps ensure project information is entered completely and sequenced accurately.
- View and analyze proposed team member availability and workload before booking them on projects to avoid conflicts and over-allocations.
- Keep management and team members abreast of changes to projects, documents, and tasks with dashboard and e-mail alerts.
- Manage project costs with flexible, robust client/project budgeting and estimating capabilities and expense threshold rules.
- Improve team member efficiency with Web-based, workflow-enabled time and expense entry, including clock-in/clock-out time entry.

Taking advantage of historical information is another way to trim costs from the bottom line. To help, Professional Services for Microsoft Dynamics AX enables you to create reusable templates and business processes from historical data. Users also have the ability to:

- Capture notes associated with any projects, phases, tasks, or documents during your project, and then archive them for future use.
- Enforce document, list, and digital asset item-level version control to create historical records of project progression.
- Search the entire portal for relevant documents, notes, and lists, and get results according to your role-based system access rights.
- Create schedule, team, pricing, and process templates based on historical information captured from previous projects.

Because you can process information quickly when multiple people attack the same problem from different angles, Professional Services for Microsoft Dynamics AX helps you facilitate team collaboration to accelerate and enhance the quality of work. Specifically, it provides users with the ability to:

- Use document and online meeting workspaces to improve collaboration with team members, clients, and partners.
- Maintain accurate version control with document check-in/check-out processes.
- Capture important strategic and tactical thinking and feedback with threaded discussion boards that help team members, partners, and clients to interact.
- Increase team collaboration and ease of use through full bi-directional integration with Microsoft Office Professional 2007.
- Synchronize project, personal, and team calendars with Microsoft Office Outlook® and Microsoft Exchange Server.

Professional Services for Microsoft Dynamics AX also helps you push mission-critical information to your front line so you can make critical company, client, and project information accessible to frontline staff anywhere, at any time through a Web-based enterprise portal.

### **Contain Risk and Increase Accountability**

To help you contain risk and maintain control of your business processes, Professional Services for Microsoft Dynamics AX provides tools that can help you ensure that teams work within corporate policies and that your processes adhere to industry best practices, client standards, and government regulations. For example, it enables users to:

- Ease Sarbanes-Oxley compliance with information access control and audit trail capabilities.
- Manage companywide system access with user, group, and role-based security, including assigning access to content at the document or list level.
- Extend corporate security policies to critical business systems through synchronization with Active Directory.
- Establish standard document templates, reports, and forms to help ensure consistency across teams and departments.
- Manage original budgets and budget revision approvals and track current budgets against the original and both approved and unapproved revisions.
- Calculate and compound burdens and overheads or other indirect cost components so they can be accurately applied to project costing and customer billing in accordance with contract and governmental standards.
- Control and monitor expenses applied to client or project billing by creating threshold-based expense rules that adhere to agreed-to budgets and contracts.
- Satisfy customer requirements for American Institute of Architects (AIA)-style schedules of variances and G702/G703 invoice formats.

To help you establish, automate, and monitor core business processes, Professional Services for Microsoft Dynamics AX provides mechanisms that enable you to configure workflows to automate key business processes, help ensure that rules are consistently followed, and speed the routing process. In addition,

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users can easily document complete audit trails of business and project processes with business activity monitoring (BAM). The solution also helps you manage and record the evolution of project and financial information. For example, you can maintain project histories down to the document, item, and transaction level with version control. Every version change is stamped with the date, time, and user information—and you can even enforce the collection of revision comments.

### **Complement the Systems You Already Use**

Professional Services for Microsoft Dynamics AX works like and with familiar Microsoft software, so you can take advantage of the entire catalog of Microsoft products. The solution integrates closely with powerful Microsoft technologies such as Microsoft SQL Server® and Microsoft Internet Information Services, as well as familiar Microsoft Office system programs like Microsoft Office Word, Microsoft Office Excel®, Microsoft Office PowerPoint®, and Outlook. Easy to use, deploy, and upgrade, this fully integrated solution is designed to help you quickly and cost-effectively seize competitive advantages whenever possible.

# Solution Map of Industry-Specific Capabilities

This solution map shows the industry-specific capabilities provided by Professional Services for Microsoft Dynamics AX as they integrate with core Microsoft Dynamics AX business functionality.

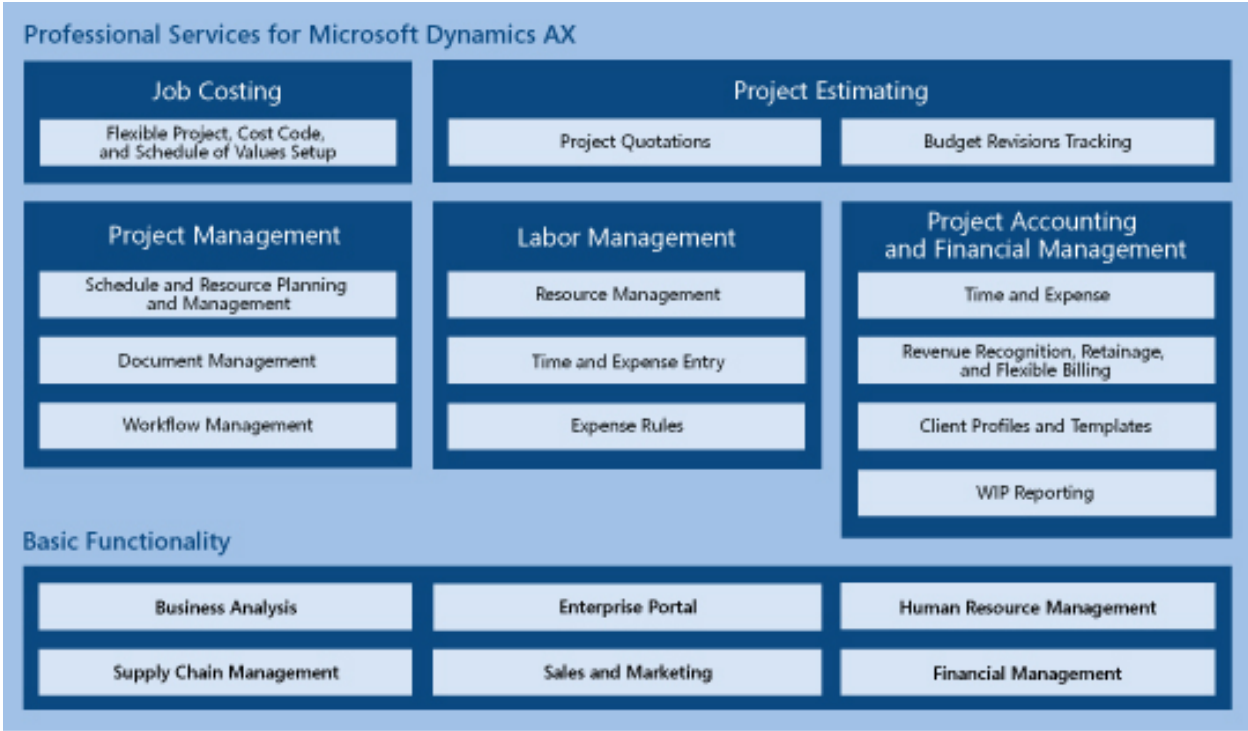


Figure 1. Professional Services for Microsoft Dynamics AX combines basic business functionality with enhancements for job costing, project management, labor management, project accounting, and financials.

## Conclusion

Professional services organizations today face a whole new set of challenges: a deluge of information, constant demands on attention, new skills to master, and pressure to be ever more productive. Professional Services for Microsoft Dynamics AX gives you new ways to link islands of information and streamline processes to help you deal with a complex, information-rich environment. You can then use your time to seize emerging opportunities, build stronger customer relationships, and deliver world-class customer service.

In addition to providing you with new and better ways to work, Professional Services for Microsoft Dynamics AX can be tailored with add-on functionality while maintaining low TCO, so you can adapt and upgrade your solution over time with minimal risk and expense. The highly flexible, layered architecture—a major benefit over competitors' solutions—enables Microsoft technology partners to provide valuable customizations and extensions to the Microsoft Dynamics AX product line to fit your unique vertical business needs. So you can invest in your future with a solution that is backed by a vast network of Microsoft solution providers and independent software vendors, all dedicated to helping ensure that your Microsoft Dynamics AX solution changes and grows in step with your business.

At Microsoft, we believe the keys to helping businesses be more agile are empowering individual workers with tools that improve efficiency, enabling users to focus on the highest-value work, maximizing the impact of employees and workgroups, and driving deep connections with customers and partners. If you are looking for ways to gain operational agility and efficiency; gain deeper insight into business opportunities, information, and processes; and maintain control of your business processes and remain in compliance with corporate, client, and government policies and regulations—such as Sarbanes-Oxley—consider taking your PSO to the next level with Professional Services for Microsoft Dynamics AX.

## Appendix 1: Technical Details

### Core Functionality

Professional Services for Microsoft Dynamics AX includes the following functionality for the core modules:

- Flexible planning, hierarchy, and analysis with configurable WBSs.
- Multi-company and multicurrency support throughout projects.
- Ability to create matrix rules and templates for WBSs, roles, rates, billing rules, and expenses.
- Web-based, workflow-enabled time and expense entry.
- Powerful revenue recognition and project billing rules.
- Configurable alerts and notifications.
- Bi-directional integration between Office Project Server 2007 and project accounting.
- Access to all critical systems and data through a central interface with single sign-on.
- Project management and financial status reports and queries.
- Integration between project financials and project management systems.

### System/Application Architecture

Professional Services for Microsoft Dynamics AX provides a flexible two- or three-tier architecture, which enables the system to scale as usage is increased. The key features of the architecture include:

- Layer technology.
- Ability to easily add in vertical-specific functionality without affecting the core code of the system.
- Scalability.
- Ability to implement additional servers as more users and locations are brought in.
- Decentralized implementations can roll into a global instance if needed.
- Global access.
- Single global base supports localization for each country.
- Only one code set to manage.
- Systems integration.
- Electronic document exchange between partners.

## Built Using Proven Microsoft Technologies

The Professional Services for Microsoft Dynamics AX platform includes integrated Microsoft technologies, as shown here.

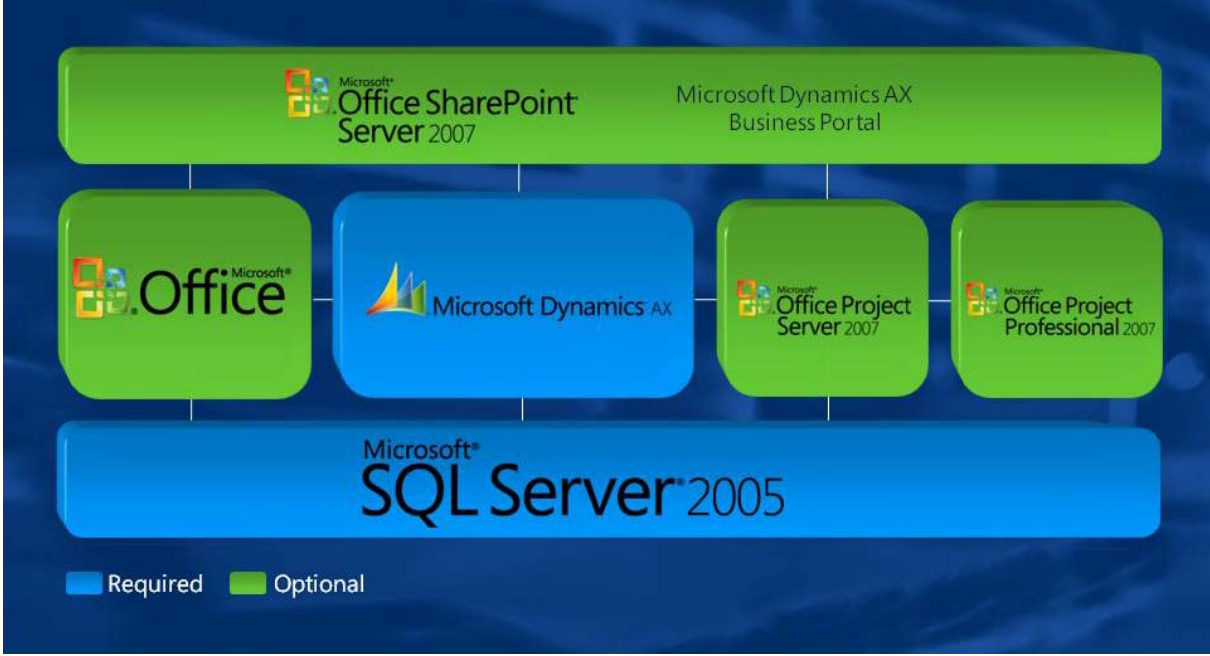


Figure 2. This comprehensive solution uses SQL Server to store data and integrates tightly with other optional Microsoft technologies.

The following table lists key Microsoft technologies and their functions as part of the Professional Services for Microsoft Dynamics AX solution.

<p>Microsoft Dynamics AX</p>	<p>Designed for midsized to enterprise companies, Microsoft Dynamics AX is a multilanguage, multicurrency business management solution.</p> <p>Microsoft Dynamics AX includes applications for financial management, customer relationship management, supply chain management, human resource management, project management, and analytics.</p> <p>Because it integrates with familiar Microsoft applications—such as SQL Server, Microsoft BizTalk® Server, Microsoft Exchange Server, the Microsoft Office system, and the Windows® operating system—employees can work with familiar tools and help reduce training costs.</p>
<p>Microsoft SQL Server 2005</p>	<p>SQL Server 2005 is an enterprise-class relational database management system that enables optimum scalability and connectivity between various systems.</p>
<p>Microsoft Windows SharePoint® Services</p>	<p>Windows SharePoint Services is a Web-based team collaboration portal solution. Its primary purpose is to enable team members to communicate and collaborate on specific projects and documents. Key features include:</p> <ul style="list-style-type: none"> <li>• Document libraries</li> <li>• Lists (tasks, contacts, events, custom)</li> <li>• Team calendars</li> <li>• Threaded discussions</li> <li>• Document workspaces (for document sharing and collaboration)</li> <li>• Alerts and notifications (additions, changes, deletions)</li> <li>• Flexible site structures (project hierarchies)</li> <li>• Dynamic/configurable access control lists, down to the document library and/or list level</li> <li>• Built-in version control that saves every version of a document with notations</li> </ul>

<p>Microsoft Office SharePoint Server 2007</p>	<p>Office SharePoint Server 2007 aggregates information from the entire organization and presents it to team members, executives, customers, and partners through Microsoft Dynamics AX Web parts, enterprise search, SharePoint lists and document libraries, and through other enterprise systems using a robust single sign-on engine. With access to aggregated data, you can increase team member efficiency, enhance collaboration and communication, and align project teams to corporate policies.</p> <p>Access to portal data is controlled by network credentials or simple username and password authentication, and it can be synchronized with Active Directory. Content can be targeted to all portal users, specific groups, or individual users. Key features include:</p> <ul style="list-style-type: none"> <li>• Fully customizable interface: Branding, page design, and content structures are fully configurable.</li> <li>• Single sign-on: Connect enterprise users, customers, and partners to all relevant enterprise systems and information by using a single password.</li> <li>• Content targeting: Control access to information contained within the portal and underlying SharePoint sites, and publish relevant news, announcements, and notifications to specific groups or users.</li> </ul>
<p>Microsoft Office Project Server 2007</p>	<p>Office Project Server 2007 is a server-based data aggregation, processing, and reporting system used to collect and manage project, resource, and task information created with Microsoft Office Project Professional 2007 desktop software.</p> <p>Using the Project Web Access functionality in Office Project Server 2007, team members can view and update their progress on tasks, issues, and risks assigned to them. Project managers can view and manage their entire project portfolio. Resource managers and executives can manage resource allocations and stay on top of enterprise projects quickly and easily. Key features include:</p> <ul style="list-style-type: none"> <li>• Alerts and notifications: Team members and project managers can set proactive system alerts</li> </ul>

	<p>and notifications to let the team know when tasks have been assigned, changed, or deleted, and when they are approaching a critical date or milestone.</p> <ul style="list-style-type: none"> <li>• Notations: Attach project notes associated with entire projects or individual tasks.</li> <li>• Issues and risks planning/management: Identify, assign, and track issues and risks associated with a project.</li> <li>• Resource allocation reporting: Resource managers, department managers, and executives can use OLAP cubes to view the allocation of resources across the organization.</li> <li>• Dynamic, customizable views of project data: Create executive summaries and detailed views of your project data to proactively manage budgets, resources, and expectations.</li> </ul>
<p>Microsoft Office Project Professional 2007</p>	<p>Office Project Professional 2007 is a desktop application for client computers, used to create, staff, estimate, and manage projects. Dynamic scheduling capabilities at the organization, resource, and task levels help ensure project accuracy and speed the development of project plans. Further, project templates help ensure fast, consistent project plan creation across the organization.</p>
<p>Microsoft Office Professional Edition 2007</p>	<p>Office Professional Edition 2007 is a desktop application suite for client computers that includes:</p> <ul style="list-style-type: none"> <li>• Microsoft Office Word 2007</li> <li>• Microsoft Office PowerPoint 2007</li> <li>• Microsoft Office Excel 2007</li> <li>• Microsoft Office Access™ 2007</li> <li>• Microsoft Office InfoPath® 2007</li> </ul> <p>Office Professional Edition 2007 programs can be extended using Microsoft .NET software for connecting people, information, systems, and devices. Use this technology to add features, functionality, and connectivity with other corporate systems and databases.</p>

## Professional Services Modules

The core functionality offered by the Microsoft solutions outlined above can be tailored for professional services organizations by adding the following modules. Together, these modules comprise Professional Services for Microsoft Dynamics AX.

<p>Microsoft Office Project Server 2007 Integration Adapter for Microsoft Dynamics AX</p>	<p>A server add-on for Microsoft Dynamics AX and a client add-on for Microsoft Office Project Professional 2007 that allows projects and enterprise resources to be synchronized between Professional Services for Microsoft Dynamics AX and Office Project Server 2007.</p> <p>Projects, tasks, and assignments can be created in Office Project Server 2007 using Office Project Professional 2007, and then moved into Microsoft Dynamics AX. You can also create projects and tasks in Microsoft Dynamics AX and push the project plan to Office Project Server 2007. When corresponding project plans exist in both systems, updates are bi-directionally synchronized to keep financial and project execution systems updated in real time.</p> <p>Enterprise resources can also be kept up to date through a one-way synchronization from the Human Resource Management in Microsoft Dynamics AX and the Project Server Enterprise Resource Pool. Any changes to a resource account, skill, or résumé attributes are automatically synchronized.</p>
<p>Resource Scheduling in Microsoft Dynamics AX</p>	<p>With this module, PSOs can better manage and forecast the allocation of resources across the organization. Resources can be hard- or soft-committed to projects. Resource managers can view current resource commitments to avoid conflicts and identify opportunities to commit resources to potential projects.</p> <p>Resource managers can staff projects one at a time or multiple projects at once through an easy-to-use rich client or Web-based interface. Resources can be identified based on the skill, résumé or free-form attribute requirements of the project. They can also be identified by task by using the built-in attribute matching engine. Conversely, resource managers can select projects and tasks that closely match the skills of their resources. This helps lower costs by allocating resources to existing projects rather than investing in generating new business just to keep a resource allocated.</p>

## Technical Benefits

Professional Services for Microsoft Dynamics AX offers a variety of technical benefits, including a flexible systems architecture, bi-directional integration, and an extensible platform that can reduce total cost of ownership (TCO) and accommodate future growth.

### Unique, three-tiered architecture

Microsoft Dynamics AX has a unique, three-tiered architecture that makes it easy to integrate with other components and programs and with the Internet. The possibilities include program peer-to-peer integration, COM/managed interfaces integration, and Web services-to-Microsoft Office and other third-party systems integration.

### Full, bi-directional integration with Microsoft Office system programs

Microsoft Dynamics AX, SharePoint, and Office Project Server 2007 are all capable of importing and exporting information to and from Microsoft Office system programs such as Word, Excel, PowerPoint, and Access. With Office Business Applications functionality, applications are fully integrated into a composite solution that is flexible and dynamic. For example, you can manage Microsoft Dynamics AX documents, such as timesheets, without having to exit Outlook. You can also create documents offline and then import them into the enterprise solution, or export data contained in enterprise applications for external presentations.

### Easy integration of Microsoft Dynamics AX with existing portal solutions

The Microsoft Dynamics AX Web part framework opens up Microsoft Dynamics AX Web elements as individually and independently usable components. Microsoft Dynamics AX Web parts can be used directly in any existing portal solution that supports hosting of SharePoint Web parts. For instance, customers with existing portal solutions—such as portals based on ASP.NET, Windows SharePoint Services, or even Office SharePoint Server 2007—can simply use Microsoft Dynamics AX Web parts and reference Web forms and Web reports from Microsoft Dynamics AX.

### Common search functionality

With common search functionality from Enterprise Portal in Microsoft Dynamics AX, you can discover content from both the SharePoint and Microsoft Dynamics AX databases. Information workers require quick access to the information they use every day, as well as access to data stored on the corporate intranet. The ability to search structured and unstructured data in SharePoint and Microsoft Dynamics AX makes this possible.

### Reliable, scalable SharePoint platform reduces TCO

With a scalable infrastructure, IT professionals can establish a foundation that can help to reduce network administration efforts and total cost of ownership (TCO). Such an infrastructure also accommodates future collaboration needs, such as an organization-wide portal strategy or interorganization communications.

By establishing SharePoint team sites that use Microsoft Dynamics AX content, IT professionals can realize the following scalability benefits:

- **Cost-effective scalability.** With Microsoft System Architecture and ASP.NET stateless front ends, IT professionals can provide scalable team workspace services in environments that range from a single computer to a clustered server farm. Even in very large environments, system administrators can set up Windows SharePoint Services configurations with multiple, stateless front-end Web servers that support large numbers of user connections and as many database servers as required. Organizations can scale up their SharePoint workspace environment without compromising system reliability,

security, or performance, and without committing substantial additional systems management effort. These capabilities can help IT professionals expand SharePoint and keep systems administration costs under control.

- **Continuous system operations of large sites.** Windows Server 2003 and SQL Server technologies such as load balancing and failover enable system administrators to maintain enterprise-class reliability for all team workspace infrastructures. By detecting host failures and automatically redistributing traffic to functional hosts, Windows Server 2003 load balancing helps ensure that team sites and mission-critical services based on SharePoint are available when and where users need them. The resulting increase in system availability reduces system administration effort and its related costs.
- **Faster configuration and reduced development costs.** To build integrated collaboration programs quickly and easily, IT professionals can use the development tools of the Microsoft .NET Framework, standard data formats such as XML, and common tools. The strategy of using the Microsoft .NET Framework, Web services, Microsoft Visual Studio® .NET, and Windows Server 2003 to build SharePoint products and technologies reduces the time, effort, and costs involved in developing SharePoint solutions.
- **Reduced costs and accelerated return on IT investments.** Industry standard protocols like XML that enable data exchange between different platforms help IT professionals extend the value of existing business data and computing systems by making formerly isolated data silos available through a Web browser or productivity program.
  - **Lower site-provisioning costs.** Standardized site design templates and easy-to-use site operations tools help IT administrators to provision team workspaces quickly. With SharePoint, system administrators can help users create sites, control site membership, directly monitor site usage, and moderate content submissions with minimal IT effort and site-provisioning costs.
  - **Reduced site support costs.** After the team workspace is set up, the self-service tools of SharePoint enable users to create site templates that use Microsoft Dynamics AX and collaborative information, to share them with one another, and to reuse customized, proven site solutions. Because teams handle day-to-day site functionality and administration, users rely less on the IT staff, and IT support costs decrease.
  - **Lower operational costs.** Using the underlying management technologies and tools of the Windows Server 2003 platform, IT professionals can monitor and troubleshoot SharePoint team sites with less time and effort. IT professionals can configure SharePoint from a centralized location by using Group Policy and the familiar Microsoft Management Console (MMC) graphical user interface, monitor sites with Windows Management Instrumentation (WMI), and administer the sites remotely by using scripts and command-line tools.
  - **Lower site backup and restore costs.** Per-site backup and restore, along with the centralized user administration capabilities of SharePoint, helps IT professionals to back up and restore team workspaces individually. As a result, IT administrators can minimize effort and related system management costs by restoring a small subset of data rather than an entire database.

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- **Lower site management costs.** IT professionals can use the Microsoft .NET object model to create custom scripts that automate common site management functions and to build custom programs on the SharePoint platform. IT administrators can use browser-based administration tools or the command line to manage workspace sites and site collections. These capabilities reduce the effort and costs involved in site management.

## System Requirements

<b>Component</b>	<b>Server Requirements</b>	<b>Client Computer Requirements</b>
Microsoft Dynamics AX	Windows Server 2003	Windows XP or Windows Vista®
Microsoft SQL Server	Windows Server 2003	Enterprise Manager (required only for DBAs and users accessing data directly)
Microsoft Windows SharePoint Services 2.0 or 3.0	Windows Server 2003 SQL Server Internet Information Services Exchange Server or SMTP configured for notifications	Microsoft Internet Explorer 5.0 or later Microsoft Office SharePoint Designer 2007 Web site creation and management tool for interface manipulation/design and workflow creation (PC only) Visual Studio .NET for advanced customization
Microsoft Office SharePoint Server 2007	Windows Server 2003 SQL Server Internet Information Services Exchange Server or SMTP configured for notifications	Internet Explorer 5.0 or later
Microsoft Office Project Server 2007	Windows Server 2003 Windows SharePoint Services 3.0 or Office SharePoint Server 2007 SQL Server Internet Information Services Exchange Server or SMTP configured for notifications	Internet Explorer 5.0 or later (PC) Terminal Services using Internet Explorer 5.0 or later (Mac) Microsoft Office Project Professional 2007 (for project managers)
Microsoft Office Project Professional 2007	N/A	Windows XP or Windows Vista
Microsoft Office Professional 2007	N/A	Windows XP or Windows Vista

## Appendix 2: Additional Resources

For more information about Microsoft Dynamics AX, visit

[www.microsoft.com/dynamics/ax](http://www.microsoft.com/dynamics/ax).

For more information about Microsoft Windows SharePoint Services, visit

[www.microsoft.com/sharepoint/](http://www.microsoft.com/sharepoint/).

For more information about the Microsoft Office system, visit

<http://office.microsoft.com/en-us>.

For more information about Microsoft Office Project Server 2007, visit

<http://office.microsoft.com/en-us/FX011204851033.aspx>.

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