Microsoft Dynamics AX 2012
For Services Organizations

A unified solution for service operations and performance management

Microsoft Dynamics® AX 2012: *Powerful. Agile. Simple.*

Highly client-responsive service that meets and exceeds expectations while driving profitable results and repeat business – that's the shared challenge of all services organizations. While discipline-specific situations vary across Professional Services, Architecture, Engineering and Construction (AEC), Real Estate, and Media and Entertainment, most firms also face a widening array of challenges today including global expansion, growing regulatory and compliance requirements, added business risk, and changing workforce demographics. Clients also expect greater visibility into their service providers' processes and tighter teamwork between organizations. Microsoft Dynamics AX 2012 helps services organizations address these challenges with a powerful enterprise resource planning (ERP) solution designed to strengthen service operations and performance management capabilities.

Expansion exposes services organizations to a host of new challenges such as unfamiliar markets, different cost structures and work practices, and new business partners. Governments everywhere are demanding more business accountability and instituting new mechanisms to monitor compliance. Clients want more visibility into service delivery and billing processes. Workforce profiles vary widely across geographies, making it hard to maintain portfolios of key talent. Challenges like these reflect the complexity of global business today and add to the overall risk that services organizations already face.

To transform these challenges into opportunities, services professionals need real-time access to role-specific information and tools that help inform and deepen their client relationships and improve their utilization of global resources. Business processes must be transparent but secure, supporting both collaboration and privacy. Services organizations must be able to anticipate changing workforce requirements and maintain a talent pool that meets their needs. And they must satisfy new reporting requirements in a timely and cost-effective manner. Performance capabilities that meet these needs can streamline service delivery overall. The net result: solid financial results.

The Microsoft vision for services organizations is one in which professionals around the world easily and securely access specific information and tools they need to perform their individual roles, all within an always-up-to-date system that spans business operations and functions. This approach to firm-wide performance management enables a tighter linkage between client relationships and global resources, consistent service delivery, and predictable financial results. Microsoft Dynamics AX 2012 provides a single source solution that reflects our commitment to apply the full breadth and depth of Microsoft innovation to help services organizations realize this vision on a unified platform.

"For Omnicom, one of the major benefits of Microsoft Dynamics AX 2012 is the way it integrates with Microsoft Office. Our users are familiar with the look and feel, and they know how to use Microsoft Excel and Word. So they can quickly understand the capabilities of Microsoft Dynamics AX 2012 and how to use it."

**– Wayne Wilson,
Director, Financial Systems
Strategy & Deployment,
Omnicom Group Inc.**

Microsoft Dynamics AX 2012

POWERFUL: Built to drive service delivery efficiencies across a firm's global workforce.

Streamline service processes with project-specific capabilities: Advance project budgeting and control using work breakdown structures, milestones, and assignments. Optimize utilization of talent by identifying and assigning best-fit resources based on skills and capabilities. Manage cash flow by applying payment retention terms, pay-when-paid, and diverse invoicing rules and policies.

Scale the firm to each new opportunity with a global-by-design solution: Expand globally with prebuilt, country-specific localizations for 36 countries in a single solution.* Serve the needs of global clients through resource forecasting and planning. Drive operational consistency with common processes for shared services and intercompany transactions.

Enhance professional productivity with RoleTailored user experiences: Consolidate role-specific views and activities in Role Centers for immediate productivity. Expedite key workflows with embedded notifications and alerts. Ensure compliance and drive efficiencies through enforced segregation of financial responsibilities and activities.
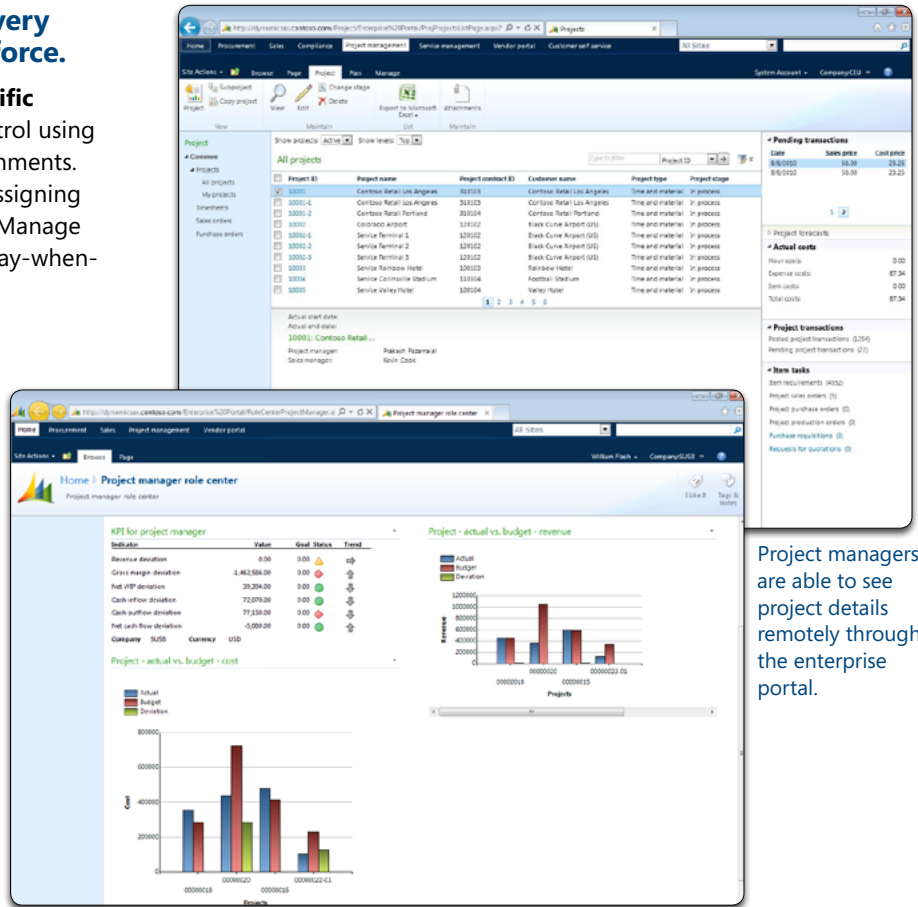
Project managers are able to see project details remotely through the enterprise portal.

Role Centers help people prioritize work and gain relevant information.

AGILE: Ready to meet changing market and client demands.

Adapt to changing process and regulatory requirements with model-driven methods: Plan and implement changes in practice and service line structures with the Organization modeling tool. Design new and alter existing workflows in the business process repository with a graphical Workflow Editor. Repurpose proven project templates and work breakdown structures to rapidly address evolving service requirements.

Respond precisely to client needs with integrated relationship management: Analyze client opportunities and drive cross-sales with integrated CRM. Provide consistent experiences and cultivate relationships with shared insight into clients and engagements. Assure delivery to client expectations with flexible contract structures and service level agreements.

Facilitate timely decision-making with rich financial and operational insights: Deliver cross-sectional views of the business with easy-to-use Financial Dimensions. Highlight exceptions, take action, and improve oversight across portfolios of projects with SQL Server reporting. Extract information to meet changing business needs with Excel-based and ad hoc reports.

SIMPLE: Easy to learn and use across the service chain.

Accelerate user onboarding and adoption with a familiar, intuitive user experience: Speed learning and adoption with a familiar Microsoft Office "look and feel" and common user interface across the web browser and Windows. Promote professional productivity with enhanced timesheets and a full range of self-service tools. Extend existing document-enabled processes with bidirectional integration into Microsoft Office 2010.

Connect service teams, clients, and partners through integrated collaboration and unified communications capabilities: Create project-specific sites for service team collaboration from within ERP using project-type templates. Enable end-to-end process integration with clients and vendors using online Site Services. Encourage virtual teaming with presence information, integrated messaging, and VoIP.

Integrate business processes and systems with pervasive interoperability: Link finance to marketing and operations with prebuilt integrations into Microsoft Dynamics CRM and Microsoft Project Server. Share master data and metadata across entities. Trim total cost of ownership (TCO) by building on Microsoft platform investments and connecting diverse line-of-business tools.

Microsoft Dynamics AX 2012 Highlights for Services Organizations

Familiar User Experience	• Deliver RoleTailored access to unified work lists, visual task queues, business processes and reports, notifications, key performance indicators (KPIs), and other important information. Services-specific Role Centers are available including Account Manager, Project Manager, and Project Team Member. • Simplify data access with familiar Microsoft tools including Microsoft Word, Excel®, Project, and SharePoint. Find information quickly with search capabilities for document libraries in Microsoft SharePoint and Microsoft Dynamics AX, and share information using workspaces created and linked from projects in Microsoft Dynamics AX. • Access project management tools and information easily using the Project Manager role available in the Enterprise Portal, with the ability to enter hours via the Internet or Microsoft Office Outlook®.
Client Relationship Management	• Build and strengthen client relationships through client, prospect, sales management, sales force and marketing automation, lead and opportunity management, and case management. • Create project quotations that can easily be converted into projects when approved. • Connect easily to Microsoft Dynamics CRM, online and on-premises.
Human Capital Management	• Administer the recruitment and selection process including campaigns, screening, developments, and candidate correspondence. • Easily administer worker information including core employee data such as address and contact information, education, skills, and certifications. Manage organizational structures, including formal and informal hierarchies and position management • Analyze skills (-gaps) based on job profiles, and search for skills (including filtering and weighting of skills) with Competence Management. Optimize resource allocation through skill and availability-driven project assignments. • Manage employee compensation. Define organizational benefit plans, enroll workers in benefits, assign dependent coverage, and designate beneficiaries. • Manage employee development and performance including development plans and periodic career discussions. Setup, deliver and analyze training courses. • Track profile-based clock-in/out registrations for workers with Time and Attendance and generate pay information for export to payroll system. Establish, communicate, and monitor absence policies.
Project Management and Accounting	• Use Project Management and Accounting to plan, create, manage, control and complete projects for your organization including time and materials, fixed price, and internal projects like investment, cost, and time projects. • Create your own hierarchical work breakdown structure that is enhanced by custom workflows and RoleTailored access to information and tasks. Add specific information to these activities including schedule, requirements, estimated cost and revenue, and worker attributes. • Create and manage project contracts, consisting of one or more projects. Manage project and grant funding by associating multiple funding sources with a project or grant, optionally linking any transaction to a specific funding source, prioritizing funding sources, and restricting funding sources to exclusive activities or classes of expenditures. • Manage projects with forecast (hour, expense, item, fee, on-account) and budgets. Manage project cost control by summarizing actual cost, committed cost, and remaining budget to discover total expected cost, and compare with the original budget. • Use powerful scheduling and tracking tools to allocate resources effectively through the bi-directional integration with Microsoft Office Project Server 2010 for projects, activities and tasks. • Measure utilization rates by comparing actual hours to budgeted hours. Compare the status of invoiced and chargeable transactions of a project or contract with the project quotation.
Project Time and Expense	• Enter time sheets through project time management. • Charge travel-related expenses against specific projects with Expense Management
Service Management	• Streamline service operations with service agreements, service orders, service subscriptions, and repair management.
Business Intelligence and Reporting	• Give employees instant access to information with built-in reports using Microsoft SQL Server® Reporting Services. Automatically generate custom reports with Microsoft SQL Server Report Builder, an ad hoc query tool. Access standard reports for profit and loss, consumed costs, payroll allocation, invoice on-account, actual versus budgeted costs, and cash flow. • Enable self-service business intelligence with prebuilt data cubes that can be displayed as KPIs in employees' Role Centers and viewed with more detail in Microsoft Excel.

Financials, Compliance, and Internal Controls	• Optimize financial operations with general ledger, bank management, fixed assets, accounts payable and receivable, cost accounting, budgetary control, intercompany accounting, and shared services support. • Streamline billing of projects by creating and editing invoice proposals for hours, expenses, items, sales orders, fees, subscriptions, advance and deduction payments, or milestones. • Schedule payments to project vendors when you receive payments from customers (Pay when Paid). Retain part of payment to a vendor. • Periodically match cost and revenue in the same general ledger period. Accrue revenue or capitalize cost for time and material in order to recognize the gross margin on the date the cost occurred or the invoice date. • Post and accrue revenue for fixed price based on completion percentage or completed contract. • Handle WIP for investment projects during the project before final elimination of the WIP value to a fixed asset upon completion. • Help ensure organizational compliance with laws, regulations, policies, and business rules, including internal controls through the Compliance Center. • Take advantage of the Audit Workbench to define your organization's policies and automate auditing processes. • Use an Environmental Sustainability Dashboard to track energy use and carbon footprint.
Procurement and Sourcing	• Facilitate direct and indirect procurement of goods and services. Track project purchase orders, project purchase requisitions, and project requests for quotation (RFQs) to manage costs and identify potential cost overruns. Create project quotations and project sales orders to offer customers the right price. • Utilize self-service capabilities to empower employees to order day-to-day goods and services from searchable online catalogs. • Help vendors operate more efficiently by enabling them to perform a variety of tasks online, such as updating profile data and catalog content, submitting invoices, and reviewing payments. • Enhance buyer capability to support procurement policies and processes. • Extend your procurement process with a cloud-based service facilitating the RFQ process and recruitment process (Sites Services).*
Employee Portal	• Use the Employee Portal and workflow tools to enforce spending limits, allow approval policies, and to enable employee self-service for time reporting, project and travel-related expenses, and performance goal management.
Tools	• Automate business processes through a graphical workflow editor to create business rules and custom workflows (or use templates) by business analysts. • Help ensure segregation of duty and minimal setup and maintenance of user accounts with role-based security and single sign-on capabilities. • Make organization-specific modifications easily in Microsoft Visual Studio® and X++ development environments. • Ease application-to-application and business-to-business integration with a flexible services and application integration framework.
Microsoft Platform Interoperability	• Maximize existing IT investments, lower TCO, and make additional productivity gains through Microsoft Dynamics AX 2012 interoperability with other key Microsoft technologies, including Microsoft Office, Project, Microsoft Lync, SharePoint, Windows and Windows Server®, SQL Server, Microsoft .NET, Microsoft BizTalk® Server, and Visual Studio.

* Check for availability in your country with your local Microsoft office or your Microsoft Dynamics partner.

Partner with industry experts

Microsoft Dynamics AX 2012 is delivered through a global network of partners with deep experience in Service Industries including professional services, architecture, engineering, construction and real estate firms, and media and entertainment, and more. These business partners can provide you with assistance tailored to your specific needs—from solution selection, to planning and design, to customization and configuration, to implementation, training, and ongoing support. This means you can get world-class business solutions from professionals who understand how your business works. To find a local Microsoft Dynamics partner and solutions for your business, visit http://dynamics.pinpoint.microsoft.com.

Learn more about Microsoft Dynamics AX 2012

Visit our website at www.microsoft.com/dynamics/AX.

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