Microsoft Dynamics AX Update and Roadmap
James Page & Guy Orridge
10 August 2011
Agenda

- General Availability for Dynamics AX 2012
- Themes for Dynamics AX 2012
- Roadmap
- Summary of Investments in Functional Footprint
- Discover the new look for Dynamics AX
- Extending AX – Key Investments in the Application Foundation
  - Workflow Framework
  - Case Management Framework
  - Security Framework
  - Reporting & BI
  - Office Add-ins
- New licencing approach
General Availability for Dynamics AX 2012

Microsoft Dynamics AX 2012, made generally available in August 2011, includes specific localisations for the following countries:

Australia, Austria, Belgium, Canada, Denmark, Finland, France, Germany, Iceland, Ireland, Italy, Malaysia, Mexico, Netherlands, New Zealand, Norway, Saudi Arabia, Singapore, South Africa, Spain, Sweden, Switzerland, Thailand, United Kingdom, United States.
Themes for Dynamics AX 2012
Business Trends

Increasing Specialization and Outsourcing

Global Competition

Demographic Changes

New Technology
Product Strategy

- Investment in industry relevance, empowering a rich vertical ecosystem!
- Global: multi-site, -legislation, -language & n-site central deployment
- ERP for Everyone - Increase productivity of ERP users & reach more employees
- Decrease Time-to-Value for ERP deployments
- Utilise the power of the Microsoft Application Platform
Powerful

Deliver **more value faster** with a powerful unified solution:

- **Gain value quickly** with purpose-built industry and operational capabilities in a single solution.
- **Scale your organisation** quickly with a single global solution.
- **Gain immediate insight** and unlock greater productivity with a RoleTailored user experience.

“I think Microsoft has really, really thought about what ERP should be and they’ve committed to making that happen.”

— Rif Kiamil
CIO, JJ Food Services
Agile

Increase opportunities and reduce risk with an agile solution

The solution has practically been rebuilt with modern architecture in mind. It’s been designed to be modified. It’s not an afterthought. It’s in its DNA.”

— Ajit Kotwal
AX Architect and PM, AX Intelligence

Unified natural model lets you plan, see, and change your business.

Flexible deployment alternatives support your business today and tomorrow.

Model-driven layered architecture makes company-differentiating changes easy.
Simple

Drive adoption and lower costs with an easy-to-use solution.

Provide access to data and business processes by giving people an ERP solution that is simple to use.

Connect employees, customers, suppliers, and partners easily through integrated collaboration capabilities.

Streamline IT processes by simplifying management of your ERP solution at every stage of the life cycle.

“Many international companies are using 200, 300, 400 applications. Consolidate those to two primary applications, and that’s just enormous savings.”

— Marcia Dorer

Business Development Director, Silver Bullet Technologies
**Microsoft Dynamics AX 2012 Roadmap**

- **2011**
  - RapidStart Service for Microsoft Dynamics AX 2012**
  - Connector for Microsoft Dynamics (CRM to AX)

- **2012**
  - 6 Additional Languages (*):
    - Finnish (fi)
    - Icelandic (is)
    - Norwegian (no)
    - Arabic (ar)
    - Swedish (se)
    - Thai (th)

- **2013**
  - R2:
    - 11 new localizations (incl. Russia, China, Brazil)
    - More HCM
    - More Business Intelligence
    - Support advances in Application Platform

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**MS Dynamics AX 2012**

- Powerfully Simple ERP
- 25 country localizations, 23 languages
- New Licensing Model
- Management Reporter for Microsoft Dynamics AX 2012**

**Feature Pack:**

- Store Management
- Point of Sale
- Merchandizing

(*) Language coverage of user assistance differs per language  
(**) Available in select countries
Commitment to Long term Innovation

- Simplifying Application Lifecycle
- Enhance Financial Capabilities
- Enrich Industry Platform
- Best Practices in Business Processes
- Software + Services

Dynamics AX 2012

- Continued focus on Simplifying Application Lifecycle
- More Industry functionality
- More deployment flexibility
- Azure platform adoption

Dynamics AX 2009

- Role Tailored UX
- Global Enterprise Capabilities
- Compliancy
- Self-Service BI

Dynamics AX '7'

- Continued innovation targeted at mid-market with particular focus on:
  - Simplicity
  - Productivity
  - Dynamics User Experience Leadership
  - Microsoft technology
  - Time-to-Value

Dynamics AX '8'

This represents Microsoft’s current view of its product direction and should not be interpreted as a commitment on the part of Microsoft. Until Microsoft releases any version of this software in a particular country, product availability, features and dates are subject to change without notice.
Summary of Investments in Functional Footprint
Extensive new feature list

Absence Management  Employee Self-service  Personalized Role Centers
Time and Attendance updates  Services  Procurement  Vendor invoice portal
Enterprise Search  Category management  Benefits Administration
Auto reports based on SSRS  Purchasing policies  One-GLS layer – second phase
Audit Workbench  New Organizational Model  Buy Center Functionality
New products and services definitions  eProcurement  Injury and Illness tracking
New workflow templates  Integration w/SharePoint 2010 client  Work-item queues
Bi-directional integration with Excel and Word  Commerce Services  Sites Services
Graphical workflow editor  Travel Expense Management with Pre-Authorizations
Management Reporter Integration  Payment Services  Security for reports integrated
Vizualizations  global object cache  Role-Based Security
Application Integration Framework enhancements  pluggable authorization
Enhanced pre-views  SQL model store  ISV licensing
Two new pre-built datacubes: workflow and ESD  business operations framework
Factboxes  Table inheritance

CONNECT / DISCOVER / EXTEND
Discover the new look for Dynamics AX
What Microsoft did in this release?

- Role-tailored navigation
- More powerful list pages
- Extensive enterprise portal changes
- Simplified detail forms
- Improved setup forms
- Strong interactive reports
Role Tailored Navigation

- **Fixed assets** and **Budgeting** have been separated from **General ledger**
- **CRM** has been renamed **Sales and Marketing**
  - Absorbed sales order functions from **Accounts Receivable**
- **Purchasing** has been renamed **Procurement and Sourcing**
  - Absorbed purchase order functions from **Accounts Payable**
- **Basic** and **Administration** split into
  - **System Administration** (IT focused)
  - **Organization Administration** (cross-app reference data)
- **Manufacturing Execution** and **Time and Attendance** functions have been merged into **Home** and **Production control**
- **Product Builder** has been merged into **Product Information Management**. **Items setup** split from **Inventory management**
- **Environment** has been merged into a new module called **Compliance and internal controls**
Client User Experience

- Role Centers
- Area Pages
- List Pages
- Master Details
- Transaction Details
- Setup forms
  - Simple List
  - Simple List & Details
  - Table of contents
- Dialogs/QuickPaths
- Reports
Enterprise Portal User Experience

- Role Centers
- List Pages
- Detail Forms
Your new AX form

Action Pane Tabs

Button Groups

Fast Tabs

Action Pane

Fact Boxes

Action Pane Strips

Fast Tabs expanded permanently

Fast Tabs collapsed
Extending Dynamics AX – Key Investments in the Application Foundation
Key Investments in the Application Foundation

- Workflow Framework
- Case Management Framework
- Security Framework
- Business Intelligence and Reporting
## Extended the workflow foundation

- Financial journals
- Purchase requisition
- Free text invoice
- Invoice posting
- New user approval
- Budget transactions
- Procurement catalog import
- Expense report (line item)
- Documents
- Expense report
- Timesheet
- Signing limits
- Confirmation of receipt
- Purchase requisition (line item)
- Purchase order (line item)
- Vendor requests
- Audit cases
- Time & attendance
Graphical Workflow Editor

Workflow Process:
- Drag and drop components

Detailed Properties:
- Context sensitive properties/settings

Example Workflow:
- Approve user request 1
- Notify new user
- Manual decision 1
- Approve user request 2

Errors and Warnings:
- Description: You must define at least one outgoing sequence flow for approval task Approve user request 1.
- Path: Approve user request 1

Automatic Action Conditions:
- Enable automatic actions
- Test/Check Conditions
- Add condition
Key Investments in the Application Foundation

- Workflow Framework
- Case Management Framework
- Security Framework
- Business Intelligence and Reporting
Time recording
Track time/effort against cases

Managed SLAs
Customer specific service levels

Case log
Detailed history of cases

Case references
Multiple file/linked references

CONNECT / DISCOVER / EXTEND
Key Investments in the Application Foundation

- Workflow Framework
- Case Management Framework
- Security Framework
- Business Intelligence and Reporting
Role-based Security Concepts

- **Roles**: Group of duties for a job function (80 roles)
- **Duties**: Group of related privileges required for a job function (767 duties)
- **Privileges**: Group of entry points with associated access levels (5777 privileges)
- **Permissions**: Group of base objects and required permissions (20,000+)

**Process Cycle**
Key Investments in the Application Foundation

- Workflow Framework
- Case Management Framework
- Security Framework
- Business Intelligence and Reporting
The BI options in Dynamics AX 2012

- Enhanced ad-hoc query and reporting tools
  - Dynamics AX 2012 add-in for Microsoft Office enables creating documents with live AX data
  - Improved productivity via filtering, ordering and sorting within List pages
  - Discover data quickly with search integration in list pages and forms
- Excel, Word and SharePoint are first class output targets
- Capability to integrate AX data with other applications via OData
  - Create mash-up applications with data easily
- Migrated production and auto report frameworks to SQL Server Reporting Services
  - Provide capabilities & features not available within MorphX Reports (ex. advanced charting)
  - Dynamics AX customers, partners get the benefit of future investments by SSRS
- Enhancements to OLAP framework and Analysis Cubes
  - Easily deploy, configure or customize cubes using a Wizard driven UI
  - Reuse concepts such as Views, Calendars, Dimensions in building cubes
  - Simplified Analysis Cube schemas enable extending via SQL BI tools
OUT-OF-THE-BOX REPORTS

AX 2009

X++ REPORTS: 1210
SSRS PRODUCTION REPORTS: 35
SSRS ROLE CENTER REPORTS: 150

AX 2012 (RTM)

X++ REPORTS: 710
SSRS PRODUCTION REPORTS: 150
SSRS ROLE CENTER REPORTS: 150
New licencing approach
Microsoft Dynamics AX 2012
Packaging and Licensing
Overview
Microsoft Dynamics AX 2012 User CALs map to Employee roles

**User Types**

**Enterprise**
- Driving the business
- Managing processes across the organization

**Functional**
- Manages a business cycle within division, business unit
- Does not cross multiple units

**Task**
- Performs tasks to support a business process or cycle

**Self Serve**
- Manages own personal data within system

**Role Examples**

**Financial Controller**

**Customer Service Representative**

**Field Technician**

**Field Service Assistant**

**Named User CALs**

**Enterprise User**

**Functional User**

**Task User**

**Self Serve User**
Session Summary

- Theme and Roadmap
- Looked into the Investments in Functional Footprint
- Stepped through the new look for Dynamics AX 2012
- Looked into the Investments in the Application Foundation
- New licencing approach
- Session wrap up
And finally

Our “Optimising Supply Chain Processes through Mobility Solutions” session will give you the opportunity to enter sales orders from your smartphone

- Phone must have wi-fi and a browser
- If you want to try this, you must see Julian Brown during lunch break to get your phone connected to our local wi-fi network
- Number of spots is limited
- Julian will be located in the Experts Lounge next to the Dynamics AX stand
Questions
Thank you