

# INNOVATION

Microsoft Dynamics

## Software for the People-Ready Business

Vision and Product Plan

June 2006

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



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## ***Abstract***

This paper updates the Microsoft® Business Solutions product plan and roadmap paper published in April 2005, with the new Microsoft Dynamics™ vision. This paper introduces the idea of software for the people-ready business and shows how Microsoft plans to deliver on its vision over the next few years. The main ideas behind the Microsoft Dynamics innovations are to provide software that is familiar to people, and that works with companies' existing systems, fuels productivity, and facilitates confident business decision making.

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# Software for the People-Ready Business

Microsoft Dynamics™ is a line of integrated, adaptable business management solutions that lets you automate and streamline financial, customer relationship, and supply chain processes. Microsoft Dynamics brings together people, processes, and technologies, thereby increasing the productivity and effectiveness of your business, and helping you drive business success. Microsoft Dynamics includes a range of widely adopted software solutions, including Microsoft Dynamics AX, Microsoft Dynamics CRM, Microsoft Dynamics GP, Microsoft Dynamics NAV, and Microsoft Dynamics SL.

Microsoft Dynamics demonstrates our convictions: At Microsoft, we're believers in the impact of people on business. Amplify the impact of your people, and you help drive business success. When you equip people with the right tools, they can tackle complex business challenges while simultaneously increasing productivity, all of which ultimately contributes to the bottom line. Therefore, the underlying philosophy for Microsoft Dynamics puts people at the center of the application design. From a comfortable, familiar, consistent user interface that works with and looks like Microsoft® Office programs to an individualized, task-based user experience, the Microsoft Dynamics line has been built with the goal of helping make people more effective in conducting business processes. Businesses can implement Microsoft Dynamics solutions rapidly and see them be adopted immediately, because users are already familiar with the interfaces and can start working the way they enjoy.

We understand that people want software tools that are comfortable and that enhance their ability to do their work. The vision and promise behind Microsoft Dynamics is that of software that works the way people do, is familiar and easy to use, and lets people engage productively with others both within and outside of the organization. To that end, Microsoft Dynamics merges the realms of business productivity software and business management and business process automation, aligning software functionality as close as possible to the jobs and processes people actually perform. This understanding of how people and businesses work will be reflected consistently throughout all of our business management applications.

Microsoft delivers on its commitment in two waves of software releases (see Figure 1).

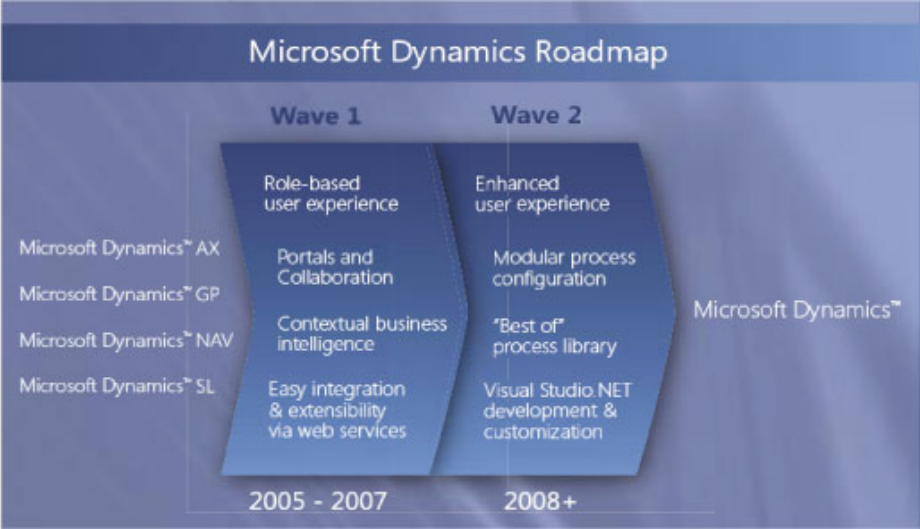


Figure 1: Microsoft Dynamics release waves

- **Wave 1**

We believe that the best way to address the challenge of working both with unstructured personal productivity tools and with structured business applications is to blur the lines between the Microsoft Office System and Microsoft Dynamics, so that for a user, no obvious switching between applications needs to happen and the interoperability of the two applications appears seamless. A solution provider that builds on the Microsoft platform can provide this interoperability with the documented APIs available for Microsoft Office applications; for Microsoft Dynamics, we've chosen to make this same interoperability a priority.

The first wave of releases have begun shipping and will continue through 2007, and focuses on the challenge of the user experience. Microsoft Dynamics solutions will evolve to offer a common, empowering user experience, designed following a role-based approach. In this wave, we will focus on increased interoperability between Microsoft Dynamics and Microsoft Office applications. Microsoft Office SharePoint® Portal Server 2007 becomes the business portal technology for all collaboration and Web sites. Microsoft SQL Server™ 2005 and SQL Reporting Services enable decision making and deliver actionable business intelligence to everybody in a business organization. In addition, functionality and user experience of Microsoft Dynamics solutions incorporate innovative features of the Microsoft Windows Vista™ operating system.

- **Wave 2**

Beginning in 2008, wave 2 will introduce into Microsoft Dynamics applications a new, model-driven logic engine that will drive down the cost and complexity of customizing business management solutions. The design will closely reflect actual business processes and their flow across different departments and people in specific roles. Even more than in the first wave, Microsoft Dynamics will work the way people and businesses do.

Microsoft plans to implement all these innovations in an iterative, gradual manner, so customers can smoothly manage the transition from their current applications into a new generation of technology.

As the development of Microsoft Dynamics solutions unfolds, enhancements and benefits will focus around four main themes:

- Familiar to your people
- Works with your systems
- Fuels your business productivity
- Enables confident decision making.

Discussed in more detail below, these issue complexes are highly complementary and interwoven.

## ***Familiar to Your People***

Microsoft Dynamics solutions work like and with other Microsoft products and technologies that people in organizations are already familiar with—Microsoft Office programs being a widely-used example. Designed with a focus on the roles people play throughout your company, Microsoft Dynamics delivers an individualized, task-based user experience and allows your employees to easily customize and automate processes, based on their own preferences and work styles. That means less training and development time and a quicker return on your investment.

### **Comfortable Software Environment**

As Microsoft continues to develop the Microsoft Dynamics applications, they will look even more like the Microsoft Office programs people are familiar with. Design of the user interface in Microsoft Dynamics will resemble the layout of Microsoft Office Outlook® 2007 messaging and collaboration client:

- The applications will give people access to important functionality in the *wonder bar* on the left side of the screen.
- The *ribbon* will appear just as it does in Office Outlook 2007, making software functions easy to find and learn.
- The *bread crumb bar*, a new feature in Microsoft Windows Vista, also will appear in Microsoft Dynamics, giving people an easy way to track their navigation and gain orientation within the application.
- Buttons for moving forward and backward in the application, much like browser buttons, will make navigation even easier.
- Also similar to Windows Vista, the Microsoft Dynamics applications will use the visual metaphor of stacks of documents to show the contents of a folder.
- In addition, by using a design feature of SharePoint® Portal Server 2007, people will be able to reconfigure screens in Microsoft Dynamics applications to add or remove user interface parts, much as they manipulate Web parts on SharePoint Portal Server sites.

However, offering a productive, comfortable user interface is just one aspect of how Microsoft gives its business management applications immediate familiarity.

### **Realistic Business Model**

During the last three years, Microsoft has invested vast resources in building a business model (see Figure 2) that matches how people work from within the departments in their companies work. Microsoft researchers have conducted more than 1,400 individual site visits to over 280 companies to study how people in all kinds of business functions use computers and technology, who they interact with in what way, and what other tools and strategies they use in managing their work. In addition, Microsoft's findings from the User Experience Lounge at Convergence, the annual Microsoft Dynamics partner conference, also contribute significantly to the application design efforts.

The resulting business model today comprises five different departments and 61 distinct personas that represent how a person performs a set of tasks. Within each department, a variety of organizational structures—using 15 different organizational charts, from the most basic to the highly complex—further determines how people and processes relate. The model also contains a blueprint for work in small businesses, where roles tend to be less separated than in larger organizations.

In addition to personas, departments, and organizational types, 33 process groups represent how people work within certain business scenarios. And within these 33 business process groups, Microsoft has found 155 different processes, tasks, and steps that are relevant to business application design.

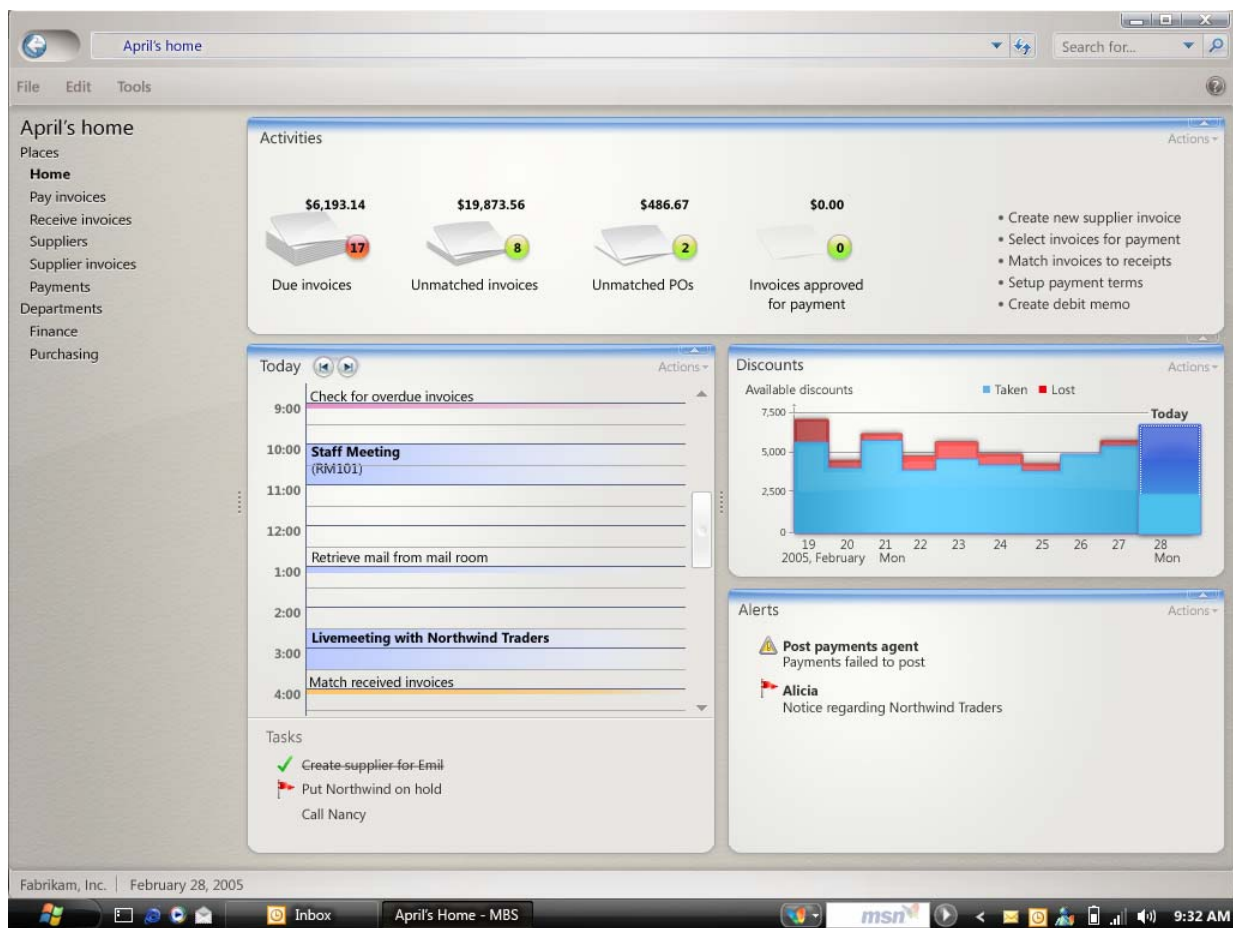


Figure 2: The Microsoft Dynamics Customer Model

## Software Functionality Available Where People Need It

Resulting from this intense research and creation of a business model are business software applications that offer people a productive experience that is immediately familiar to them and that follows the way they like to work (see Figure 3).

Business roles are already available in Microsoft Dynamics GP, which features 21 of them—all the roles that might use a business management solution or information from it. People can personalize, depending on their role requirements, their Microsoft Dynamics GP Home pages and Microsoft Business Portals. Microsoft Dynamics CRM provides a roles-focused approach to serve sales, marketing, and services departments. Microsoft Dynamics SL offers role-based business intelligence, as well as a role-based portal experience. Upcoming releases in Microsoft Dynamics NAV and Microsoft Dynamics AX will include business roles (28 different ones in Microsoft Dynamics NAV).



**Figure 2:** Microsoft Dynamics home screen for April, the accounts payable clerk

An important concern in building the business roles is to ensure software functionality available to people where they need it the most. Some roles may spend the majority of their time in the business management application and work without having to leave the application, and personalizing their screens for the most practical workflow.

Another type of business role may spend a large amount of time in Microsoft Office applications, such as Outlook 2007 or Microsoft Office Word 2007, but from time to time, might need information from the business management application to create a document or support a decision. In a traditional scenario, that role would switch between the Office application and the business management solution to retrieve and copy information, or would need to ask for somebody's assistance in locating information from the business management solution.

For this kind of role, Microsoft eliminates the need to switch between software environments or enlist assistance by extending the Microsoft Office experience into the business management application. Today, this extension can take place in three ways:

- People using Outlook 2003 or Outlook 2007 can access information and functionality of Microsoft CRM directly from Outlook.
- Microsoft Snap is a collection of products for Microsoft Office users to work with certain Microsoft Dynamics applications. These snap-in programs deliver information from the business management solution directly into Microsoft Office programs. The snap-in programs, some of them already available as a free download, ease several frequently occurring tasks:

- Timesheet Management: View or submit time entries through Outlook, by using information from Microsoft Dynamics AX.
- Vacation Management: Submit vacation requests through Outlook, based on information from Microsoft Dynamics AX.
- Business Data Lookup: Through Microsoft Office Excel® 2003 (and Excel 2007, soon to be released) spreadsheet software or Word or Outlook, search for information in Microsoft CRM or Microsoft Dynamics AX.
- Roles intensively using the company's intranet portals, based on SharePoint Portal Server, can combine structured information from Microsoft Dynamics business management applications with unstructured data from Microsoft Office programs on a portal, and thereby have the information available for collaborative workflows.

As development continues, look to Microsoft Dynamics applications to offer to the business roles even closer integration of business management and productivity software.

## Experience-Driven Design

As Microsoft continues its research and further develops the customer model, the customer model will more and more determine the nature of the user experience, which, in turn, will inform the navigational structure of Microsoft Dynamics solutions. The solutions will include Activity Centers—representations that reflect each of the business processes that a role can be involved in. Through these Activity Centers, people will be able to plan their work and control their workloads with best effectiveness, and manage by exception wherever processes allow. People will be able to adapt their user experiences to reflect changing complexity in departments and companies, and to reflect the types of data used in each segment of evolving business processes.

The business management applications will introduce Activity Centers and the enhanced user experience through the next few releases. Activity Centers allow roles to work completely within the context of their business functions. Businesses will also be able to use a role configurator to adjust roles definitions to the way they work—combine or split roles, or change the tasks and processes they are involved in.

## ***Fits with Your Systems***

In order to work in a way that is familiar to people, Microsoft Dynamics applications must fit with the systems customers already have in place. Microsoft Dynamics applications work the way a customer's current technology does, and easily and rapidly can become a key component of the technological infrastructure. Businesses that implement Microsoft Dynamics solutions can extend the value of technology investments already made, and can rapidly generate substantial returns on their implementation of Microsoft Dynamics.

## **Building a Connected Business Technology Infrastructure**

Microsoft Dynamics solutions and other Microsoft products and technologies complement one another, so you can obtain the best possible value from your software investment. Microsoft considers it a high priority to ensure that its products can come together in one optimized infrastructure.

After the efficient, fast implementation of a Microsoft Dynamics solution, IT professionals in businesses can work strategically, fine-tuning the infrastructure to optimally suit business requirements, with minimal requirements for support and maintenance. Business needs can drive customization and integration of Microsoft Dynamics with other technologies, so the company infrastructure can serve to promote the business's goals. Workers in all roles in a business organization can engage productively within a streamlined, consistent software environment that gives them immediate access to all the functionality and information they need in order to succeed. Upgrades and software enhancements can take place smoothly, without jolting individual or organizational productivity.

Here are a few highlights of Microsoft Dynamics in interaction with other Microsoft technologies:

- **Microsoft SharePoint Portal Server 2007 and Windows SharePoint Services**

Interoperable with SharePoint Portal Server 2007, Microsoft Dynamics solutions become fully enabled for team collaboration and productive, fast-moving workflows. Companies can use SharePoint Portal Server to build team Web sites that feature documents and information from Microsoft Office, reports and business intelligence sourced out of SQL Server 2005, and business information from the Microsoft Dynamics applications. An important component of SharePoint technology are Web services, which can provide a broad spectrum of information needed by business roles.

The business portal functionality within the Microsoft Dynamics product family and the Microsoft Business Scorecard Manager, both built on SharePoint technology, offer business functions and performance information. Microsoft Office 2007, the Excel Server and the SharePoint Report Center—both also based on SharePoint technology—assist people and businesses in accessing and distributing business reports and analyses to the stakeholders who need to see them.

- **Microsoft SQL Server 2005**

Integrating with Microsoft SQL Server 2005, the business information generated by Microsoft Dynamics solutions becomes completely available for advanced reporting, analysis and actionable business intelligence, and empowers people in all business roles to make all kinds of business decisions, from the most detailed to the most far-reaching, in confidence. Microsoft Dynamics solutions provide the relevant information people need the most, depending on their roles, avoiding the distraction of too much information that must be sifted before it becomes meaningful.

- **Microsoft Windows Server® 2003**

Serving as the operating system for Microsoft Dynamics solutions, Windows Server 2003 gives businesses a cost-effective way to build their technological infrastructure on a dependable, extensible platform that can scale to grow with the business. Powering connected applications, networks, and Web services from the workgroup to the data center, Windows Server 2003 allows

for the most efficient use of hardware and resources and provides a high level of security and integrity for data and applications. Users can authenticate themselves to all Windows®-based applications with a single, efficient logon.

- **Microsoft Exchange Server 2003**

Microsoft Dynamics solutions, such as Microsoft CRM, integrate with Microsoft Exchange Server to make complete, current business information available for efficient communications among team members or with customers and business partners. Business people can increase the value of critical business relationships for all parties concerned, and can maintain a stronger focus on the goals they pursue within these relationships.

- **Web Services**

To facilitate the effectiveness of the business roles discussed in the previous sections, Microsoft Dynamics makes extensive and increasing use of Web services. Incorporating XML, Web services make it easy to bridge software applications, no matter what language they have been written in or what hardware they run on. Microsoft Dynamics includes more than 240 different Web services.

Many of the Microsoft Dynamics Web services serve the purpose of making Microsoft Dynamics solutions work smoothly with other technology present in a business. Web services will give businesses a way to link systems, as well as organizations and business entities, thereby making information available where it is most useful.

- **Microsoft BizTalk® Server 2006**

To bridge between Microsoft Dynamics solutions and other systems, including legacy systems running on mainframe and mid-range computers, businesses can implement Microsoft BizTalk Server 2006. With the help of BizTalk Server 2006, organizations can make information from other systems relevant and useful within the context of business management with Microsoft Dynamics. BizTalk Server includes 23 applications and adapters for connecting to legacy systems.

Business managers also can use BizTalk Server to link their Microsoft Dynamics applications to the systems in use at their companies' subsidiaries or business partners, to exercise the level of control they want to have, and to understand business events that have an impact on them. Integration of BizTalk Server and Microsoft Dynamics helps businesses reduce the cost of technology ownership by providing the critical connections even between disparate software systems. That capability can be extremely valuable in times of organizational change, such as mergers and acquisitions.

- **Microsoft Dynamics Snap**

Already mentioned in the previous section, Microsoft snap-in programs let users take advantage of the Microsoft Office client application and avoid duplicate data entry. Information from the business management solution enters directly into Excel 2003, or Outlook or Word.

Microsoft Snap was developed using Microsoft Visual Studio® Tools for Office (VSTO) and Microsoft Dynamics Web services. Microsoft expects to offer additional snap-in programs to facilitate real-time communications and more effective collaboration, supported by a context of immediately available, comprehensive business information.

- **Microsoft Windows Vista**

The design and user interface concepts of Microsoft Dynamics solutions will be consistent with Windows Vista, increasing the comfort and consistency people experience in their software environment. For example, a bread crumb bar will offer the same navigational ease in Microsoft Dynamics as it does in Windows Vista, and the visual stack metaphor to indicate folder contents will appear in both Windows Vista and Microsoft Dynamics.

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- **Microsoft Office System**

Microsoft Dynamics solutions and Microsoft Office applications already have many integration points. Drawing from the Microsoft Dynamics applications, people can manipulate and analyze data in Excel, populate Word documents with the right contact and transaction information, and use current contact data and account histories in Outlook e-mail communications. From a user perspective, Microsoft Dynamics will be highly consistent with the 2007 Microsoft Office system.

## ***Fuels Business Productivity***

Businesses need to be productive in order to succeed. Microsoft Dynamics fuels business productivity by automating business processes and delivering flexible solutions that can be adapted to meet companies' needs. Microsoft Dynamics solutions bridge different types and areas of work; promote collaboration across lines of business among employees, vendors and customers; and integrate financial, customer relationship, and supply chain processes. Microsoft Dynamics uses a flexible architecture that makes it easy for businesses and their technology providers to customize the solutions to changing business needs.

### **Automating for Insight and Connection**

Microsoft Dynamics solutions offer automation to boost productivity in many different ways. Companies can use automation to eliminate routine and frequent tasks, generate automatic notifications of business conditions for the people who need to be aware of them, or simplify the creation and distribution of business documents and reports. In a larger context, automation makes it possible to streamline processes to move rapidly and with best economy. Microsoft Dynamics effectively connects structured and unstructured information, as well as structured and unstructured workflows. For example, companies can integrate and automate many of the steps that people perform as a customer engagement develops, from the initial conversation with a prospect to an order and on, to a product being sourced, made, shipped, and serviced.

Productivity grows with the insight and intelligence available to individuals anywhere in the company. Microsoft Dynamics offers a wide spectrum of business reporting and analytical tools that enable a deep understanding of business performance, customer preferences, market trends, and factors that need to play a role in a business's productivity planning. As discussed in more detail in the next section, Microsoft Dynamics delivers the intelligence that allows people at all levels and in all lines of business to make the best decisions to drive productivity to the next level.

Microsoft Dynamics is designed to connect people, information, and processes in productive, focused collaboration. With portal sites built on Microsoft SharePoint technology, companies can empower employees, customers, vendors, and business partners to access and exchange business information and documents, and keep processes moving forward.

### **Increasing Productivity of Collaboration**

Today, the portal functionality of Microsoft Dynamics delivers self-service, human resources-related applications to employees, provides executives with performance dashboards and key performance indicators, and lets customers and vendors perform such tasks as ordering products, updating invoices, or reviewing inventory, order status, shipping information, and transactions. Going forward, Microsoft Dynamics will enable even more productive business portals, blending structured as well as unstructured information. SharePoint Portal Server 2007 will also make it possible to incorporate blogs and wikis into the collaborative environment. People usually need to find information without wasting time and, therefore, SharePoint Portal Server will include a powerful search capability that allows unified searches across both structured and unstructured data.

#### **Scenarios for Successful Collaboration**

Many productive applications for integration of Microsoft Dynamics and SharePoint technology are possible. For example, marketing managers can publish on a SharePoint site the statistics and results pertaining to a campaign, together with the campaign documents and deliverables. By integrating the team site with Microsoft CRM, a manager can display all opportunities generated by the campaign, and correlate them directly to campaign distribution information to evaluate the campaign's success.

Based on the campaign results and information available through the SharePoint site, people can collaborate through the same site in refining the campaign or in creating a new one. Company employees

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can give creative services vendors and talent access to information and documents on the site, as needed for best productivity. When the company makes the site available on a its extranet for people outside of the organization, vendors and contractors can enter cost, shipping, product detail, or other information that can flow directly into Microsoft Dynamics.

Another compelling, productive application is the area of product design. A company can publish on a team site structured bills-of-materials and product costing information from its Microsoft Dynamics business management solution. Product designers can use the site to collaborate in the design process and manage design efficiently. On the site, they can store and track all pertinent, unstructured information, such as communications and design-related documents.

Human resources and recruiting processes can become much more productive with integration between Microsoft Dynamics and SharePoint technology. Line-of-business managers establish job role descriptions and skill sets and create job requisitions in the business management solution. When the company publishes that information on a human resources intranet site, recruiters easily can assess open requisitions and start the process of filling them. Once candidates have been recruited, the recruiters can submit resumes to an extranet site, and hiring managers and the human resources team can collaborate in the interviewing and offer stages, exchanging and documenting candidate evaluations and feedback with ease and consistency.

## ***Enables Confident Decision Making***

People using business management applications, no matter what role they play, must be able to obtain with ease all the information they need, every time they look for it. With that information in hand, they can make wise business decisions with confidence and respond quickly to complex, changing business conditions.

Microsoft Dynamics business management solutions, in integration with Microsoft SQL Server 2005, SQL Server Analysis Services, and Microsoft Office Excel, allow people anywhere in a business organization to access relevant information and understand its meaning, using familiar tools. Microsoft Dynamics balances information access and the safeguarding of information. Business people can find and work with all the information they need, and, at the same time, managers can control which roles have access to sensitive information.

### **Making Information Actionable**

Microsoft Dynamics helps business decision makers to gather, analyze, and understand information and make sound, well-informed decisions. Working in a familiar software environment, people can use the analytics and reporting capabilities of the Microsoft Dynamics business management solutions to make sense of the data residing in their organization. They easily can export the information to Excel for further analysis and better insight, or use Microsoft SQL Server reporting and analytical capabilities to drive strategic decision making. In integration with portal functionality within Microsoft Dynamics, companies can make information and reports available for team collaboration on an intranet site, or offer key performance indicators to business executives who need to learn the most important information in the least amount of time.

Compliance efforts, whether they are related to regulatory compliance or corporate standards initiatives, depend to a high degree on the reliability, completeness, and promptness of business reporting. Microsoft Dynamics business reporting and analytical capabilities, in integration with Microsoft Office and SQL Server analytical tools, help business managers maintain and demonstrate compliance, disclose and restrict information as appropriate, and rapidly implement corrections to any looming compliance gaps.

Over the next few years, Microsoft Dynamics solutions will deliver even stronger decision-making support, including contextual business intelligence. To empower decision makers, Microsoft Dynamics will feature closer, more flexible integration of data sources, business and productivity applications, analytical capabilities, and reporting tools.

### **Gaining Contextual Business Intelligence**

“Contextual business intelligence” means that people can obtain complete, relevant information and make smart business decisions based on people’s actual roles and needs and from within the software environment they work in. Two complementary visions drive Microsoft’s commitment to deliver an increased level of insight to business decision makers:

- **User empowerment:** Make business intelligence available to people, so they can act on emerging opportunities and manage efficiently by exception.
- **Deep process insight:** Give people visibility across applications and business activities, with proactive notification when values and events fall outside of expected parameters.

In pursuing these goals, Microsoft follows a holistic approach to delivering business intelligence. SQL Server 2005 serves as the business database and complete business intelligence platform with integrated analytical capabilities, including online analytical processing (OLAP); data mining; data warehousing; reporting; and extraction, transformation, and load (ETL) capabilities. SQL Analysis Services and SQL Reporting Services support strategic insight that makes sense of an organization’s wealth of data. The Microsoft Business Scorecard Manager, drawing data from the SQL Server database and built on

SharePoint technology, displays business information and key performance indicators (KPIs) in context, making data immediately actionable for managers who need to define business direction.

For those who run their businesses with Microsoft Dynamics, Microsoft is making more advanced business intelligence, as enabled by the SQL Server platform, directly accessible. All business roles, depending on their needs, will have rich analytical capabilities that help them monitor, understand, and drive business performance.

## Supporting All Roles and All Decisions

Microsoft understands that people in an organization make three different types of decisions: strategic, tactical, and operational.

- **Strategic decisions.** These are wide-ranging decisions with great importance for an organization's long-term ability to thrive and compete. A small group of executives and senior staff may make just a few strategic decisions. They need business intelligence based on a comprehensive, deeply rooted analysis of all relevant business trends.
- **Tactical decisions.** Often made by directors and senior managers, these are decisions that affect business operations for mid-range time frame. For example, a product manager setting up a pricing schedule or planning which product features to accentuate in an upcoming release will make tactical decisions.
- **Operational decisions.** Almost everybody in an organization makes operational decisions, every day. Operational decisions don't have a wide-ranging reach or long-term intent, but can have important consequences for an operation's success as their impacts aggregate.

Users of business management solutions need to make all three kinds of decisions. Microsoft Dynamics, therefore, will support all roles and all types of decisions with an efficient, easy-to-use infrastructure. In more traditional approaches, business intelligence was, and often still is, confined only to informing tactical decisions. Neither approach helps an organization manage its operations most effectively nor lets it articulate a successful strategy.

Microsoft follows three principles in delivering business intelligence:

- **Provide a complete, integrated offering** that supports all aspects of business intelligence to all business roles, including information workers, IT professionals, and developers.
- **Make business intelligence available where most people want to have it**—within their Microsoft Office business productivity applications or their Microsoft Dynamics business management applications. People can remain within their preferred application while they uncover relevant insights.
- **Deliver business intelligence to every role in a business**, scaling to the entire enterprise as well as smaller organizations, thereby making it affordable for businesses to acquire such universal business intelligence, and continuing to support and enhance all three types of decisions already mentioned.

## Benefiting from Pervasive, Advanced Decision-Making Capabilities

For Microsoft Dynamics users anywhere in their organizations, highly sophisticated business intelligence capabilities become available for everyday use. It will be much easier to perform ad-hoc data analysis to inform fast business decisions that need valid substantiation. For example, Microsoft has already done, and continues to do, substantial development work on data analysis cubes for Microsoft Dynamics AX, Microsoft Dynamics GP, Microsoft Dynamics NAV, and Microsoft Dynamics SL—development that enhances the analytical capabilities of these business management solutions.

## **Experiencing A Wide Spectrum of Integrated Intelligence Tools**

Integration of Excel and Microsoft Dynamics CRM offers compelling business intelligence benefits for decision makers. Microsoft has exposed the data model of Microsoft Dynamics CRM by means of secure viewing technology, so people can, depending on their roles, view all the operational data to which they have permission, and can create live links from Excel to view and analyze sales leads and business opportunities. People can activate filters in Microsoft CRM to obtain desired data, and open the information as a dynamic worksheet in Excel.

With charting capabilities and other features in Excel 2007, it becomes easy to report on, for example, the estimated revenue of sales opportunities. Even better, a decision maker can use Excel Server capabilities to create spreadsheets that contain live data feeds from Microsoft CRM or another business management solution, and give the team instant visibility to ad-hoc analysis created by the decision maker.

SQL Reporting Services Manager and SQL Report Builder integrate with all Microsoft Dynamics business management applications and enable people to perform fast, reliable data analysis. For example, from within Microsoft Dynamics, a business person can use Report Builder to create reports pertaining to certain business areas, such as accounts receivable. The menu gives direct access to the reporting tools, so there is no need to leave the application.

## **Understanding Growth and Driving Performance**

As mentioned, Business Scorecard Manager also integrates with Microsoft Dynamics applications. Different business roles can have their own dashboard parts, together with KPIs, fed by data from the Microsoft Dynamics business database. At the same time, Microsoft Dynamics applications, as well as Business Scorecard Manager, can integrate with Microsoft Business Portal. People can use an intranet portal based on Microsoft Office SharePoint Portal Server 2007 to make KPIs directly available to business stakeholders, and disseminate reports and business intelligence findings, together with unstructured data, for team collaboration and accelerated decision making.

A possible user scenario for this kind of business intelligence would be a sales manager wanting to look at results by using Business Scorecard Manager. Proper roles definition would give the sales manager access to important KPIs directly through a dashboard. Dashboards can be set up to show such information as sales by region or the top-ten sales executives, drawing on data directly from the business management application. The dashboards even can serve data from several source systems.

Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like and with familiar Microsoft software, automating and streamlining financial, customer relationship and supply chain processes in a way that helps you drive business success.

U.S. and Canada Toll Free 1-888-477-7989

Worldwide +1-701-281-6500

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

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