Microsoft Dynamics® SL

Statement of Direction

Product strategy and roadmap for Microsoft Dynamics SL

Date: January 2012

www.microsoft.com/dynamics/sl

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MICROSOFT DYNAMICS SL STATEMENT OF DIRECTION

Welcome

Welcome to the Microsoft Dynamics SL Statement of Direction. This document will provide insight into our Microsoft Dynamics SL development plans through the year 2016. Whether you are a new or existing customer or partner, this information will help you plan and get the most from your investments.

Smart mid-sized businesses thrive on change. Their ability to compete with larger organizations relies on maintaining a higher level of customer focus which in turn requires greater agility.

In driving change within your business, you play a key role in defining the direction in which you want the business to go, and in helping your people to embrace it. However your ability to implement change effectively will be largely determined by the business systems that your people use.

Microsoft Dynamics SL provides a highly functional, flexible, affordable business solution that is designed to:

- Give you **greater control** over the key decisions that affect the success of your business, making sure that the right people are equipped with the right information and use it to make the right decisions.

- **Enhance your margins** - reducing transaction costs and increasing your focus on the most profitable customers, products, and services

- Support the changing needs of your business as you **drive profitable growth** by expanding into new opportunities.

Simplicity, Value, and Agility

Microsoft Dynamics SL achieves these objectives through:

- **Simplicity**. Microsoft Dynamics SL is familiar to your people, so it's easy to understand and use. It also leverages existing technology investments.

- **Value**. Microsoft Dynamics SL can be configured quickly to support your business needs – using one of the packaged solutions that our Partners provide, or using the standard tools that we offer.

- **Agility**. As your business needs change - Microsoft Dynamics SL can be quickly and cost effectively modified to support different business processes. As your IT strategy changes – Microsoft Dynamics SL offers you choices about the way that you want to deploy it.

Microsoft Dynamics ERP

Recent research has highlighted why these values are so important. For example, the Info-Tech Research Group [1]suggests that organizations should expect to incur costs across multiple categories when replacing their ERP systems. These costs go beyond hardware and software, and also include internal and external project costs, consulting, and training. The costs are broken down as follows:

- Project staff: 40%
- Consulting & services: 25%
- Internal costs: 10%
- Transition & training: 15%
- Software: 5%
- Hardware: 5%

Microsoft Dynamics SL has been designed to be fast to implement, easy to customize, and simple to use. Microsoft is also committed to working hard to further enhance Microsoft Dynamics SL. We have ambitious development objectives, and we are committed to helping our customers drive costs down across all aspects of an ERP implementation to get value faster.

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[1]"Select a Mid-Market ERP Solution", Info-Tech Research Group Inc.

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Overview of Microsoft Dynamics SL

In April 2011 Microsoft Dynamics SL 2011 was released. It was one of the largest Microsoft Dynamics SL releases in recent years, driven by customer and partner direction. The release focused on Simplicity, Value and Agility. Here are just a few of those features:
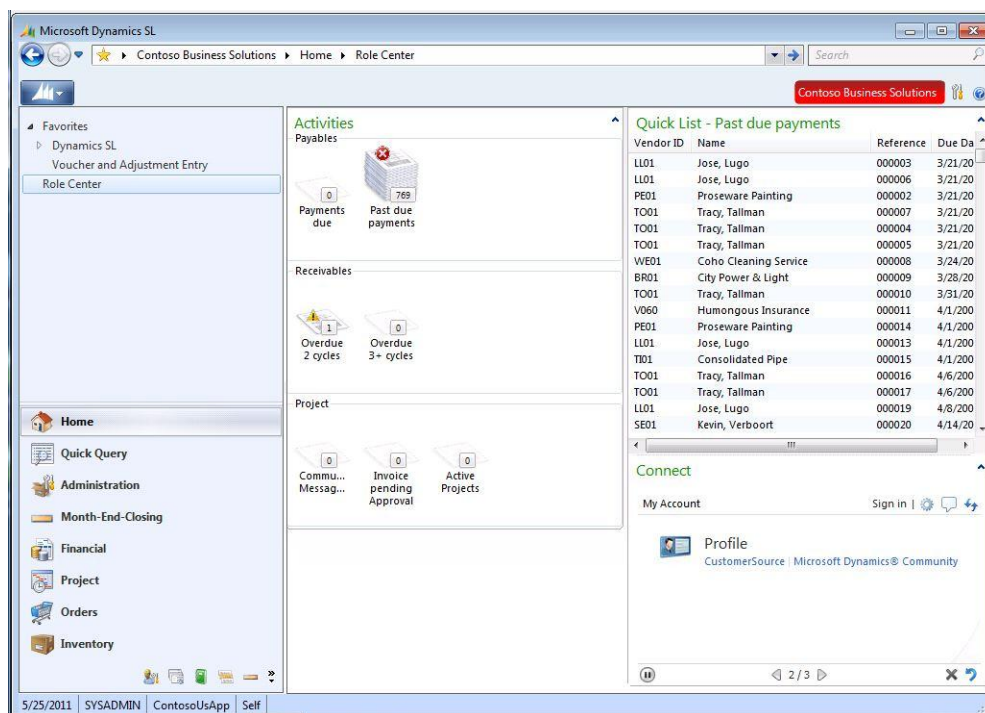

Figure 1: Activity Pane and Lists in Microsoft Dynamics SL 2011

- Help people start the day right with **role specific activity panes** that display items that need their attention, **role-based menus** displaying the tasks that are relevant to them, and **quick lists** that display activity pane specific information that make it easy to prioritize specific job tasks.
- Find what you need in just a few clicks with enhanced **menu search** features and **history lists**. Simply type a few words to locate report and screens or view a history of recently viewed reports and screens.
- Attach documents directly to screens in Microsoft Dynamics SL using the **Attachments** feature for future reference and review.
- Streamline inventory management with **project inventory allocations** that automatically occur when a purchase order is placed or though manual allocations.
- **Export data** from any Microsoft Dynamics SL grids directly to Microsoft® Excel for editing and review.

- **Quick Query** provides over 100 predefined views of your ERP data fitting the needs of small and medium-sized businesses that can be filtered, customized, and saved or can drill back to a Microsoft Dynamics SL screen to view the original transactions.
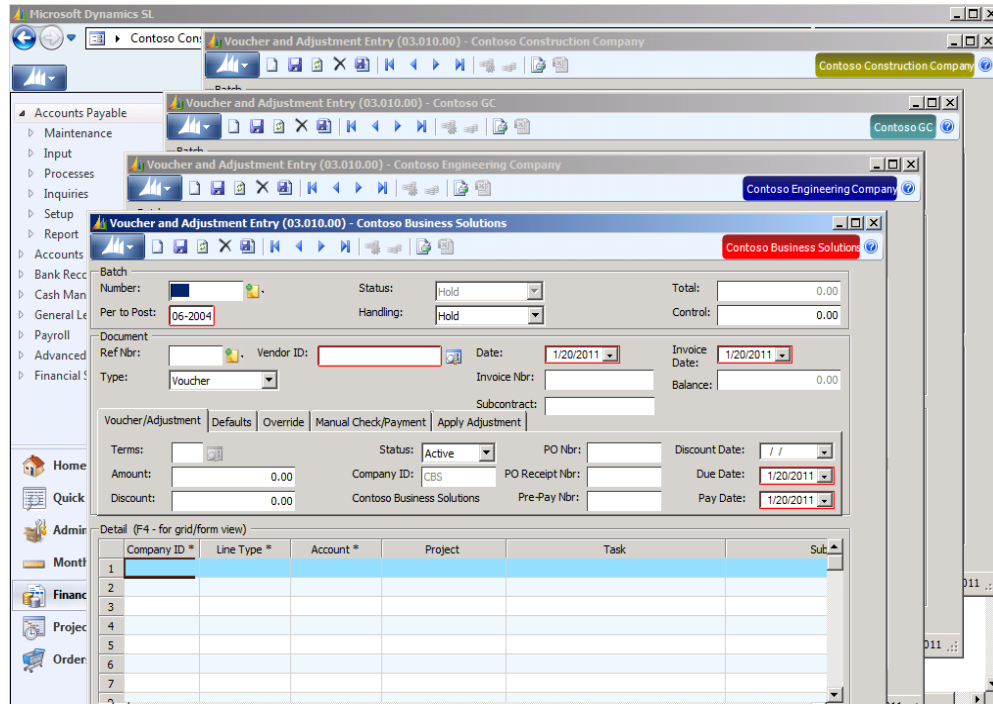
- Complete data entry, queries or run reports for **multiple companies at the same time**.
- Extend connections with a **web services** architecture that leads to better performance and efficient application integrations—both for your current systems and for those you adopt in the future.
- **BIO® 2011 for Microsoft Dynamics® SL 2011**
  BIO was enhanced to ease the installation, setup and maintaining of business intelligence information. The updated user interface helps simplify the creation of dashboards.
- **Microsoft Project Server® 2010 Support**
  The new Microsoft Dynamics SL 2011 Connector to Microsoft Project Server 2010 provides a great way to manage project status, resources and revenue and expenses for all types of projects, from small to large.
- **Microsoft Dynamics® CRM 2011 Support**
  Connector for Microsoft Dynamics is built by Microsoft to support integration between Microsoft Dynamics CRM and Microsoft Dynamics SL customer, contact and address information.
- **Management Reporter**
  Take advantage of Microsoft Management Reporter—a real-time financial reporting system built on the latest Microsoft technologies—to create boardroom-quality reports

Microsoft Dynamics ERP

without IT assistance, enhance security for reports, and increase support for regulatory compliance.

Microsoft Dynamics SL Capabilities

MICROSOFT DYNAMICS SL 2011 R2

Microsoft Dynamics SL 2011 R2 is scheduled to be released in Calendar H2 of 2012. The release marks continued investment in the Microsoft Dynamics SL product by:

- Delivering business data visualization capabilities through Business Analyzer

- Providing online coordination on reports with Lync communication support via Business Analyzer

- Office 365 support

- Enhancing the core financial and project series functionality

EMBRACING THE CLOUD

Our investments in cloud computing are driven by conversations with customers about their needs today, future growth aspirations, and how consumer experiences are shaping expectations for the role technology can play in their business. From these customer conversations it's clear that our customers are looking for ways to take advantage of cloud services.

Cloud – more than just a way to deploy

The emphasis on cloud computing in the market today has been on deployment to the cloud to reduce costs. At Microsoft we view the cloud as an opportunity to re-imagine business applications that deliver rich experiences with services, information, and capabilities from cloud and on-premises solutions in ways that today are too costly or impractical. To deliver the innovation that enables new business scenarios we intend to extend the integration available today with Microsoft's leading business and productivity applications, including Microsoft Dynamics CRM Online, Microsoft Office 365, and services from Microsoft SQL Azure.

DEPLOYMENT FLEXIBILITY

Many customers have decided to have Microsoft Dynamics SL hosted and managed by a third-party. These customers have decided not to maintain the IT infrastructure and staff that are associated with a traditional on-premises implementation or prefer to pay for their ERP solution on a per-user, per-month basis. They use operational expenditure instead of capital expenditure to pay for their business systems.

Microsoft is committed to providing the widest range of options for how you choose to deploy your Microsoft Dynamics SL–based business solution. You can already deploy your solution on your premises or choose to engage a hosting Partner who will run the software from their data

centers. Regardless of how you choose to deploy the product, the Microsoft Dynamics SL software and user experience is the same.

Enhancements to Application Functionality

Microsoft Dynamics SL 2011 R2 will enhance the already compelling application functionality that is available in Microsoft Dynamics SL 2011 as well as adding new features and capabilities.
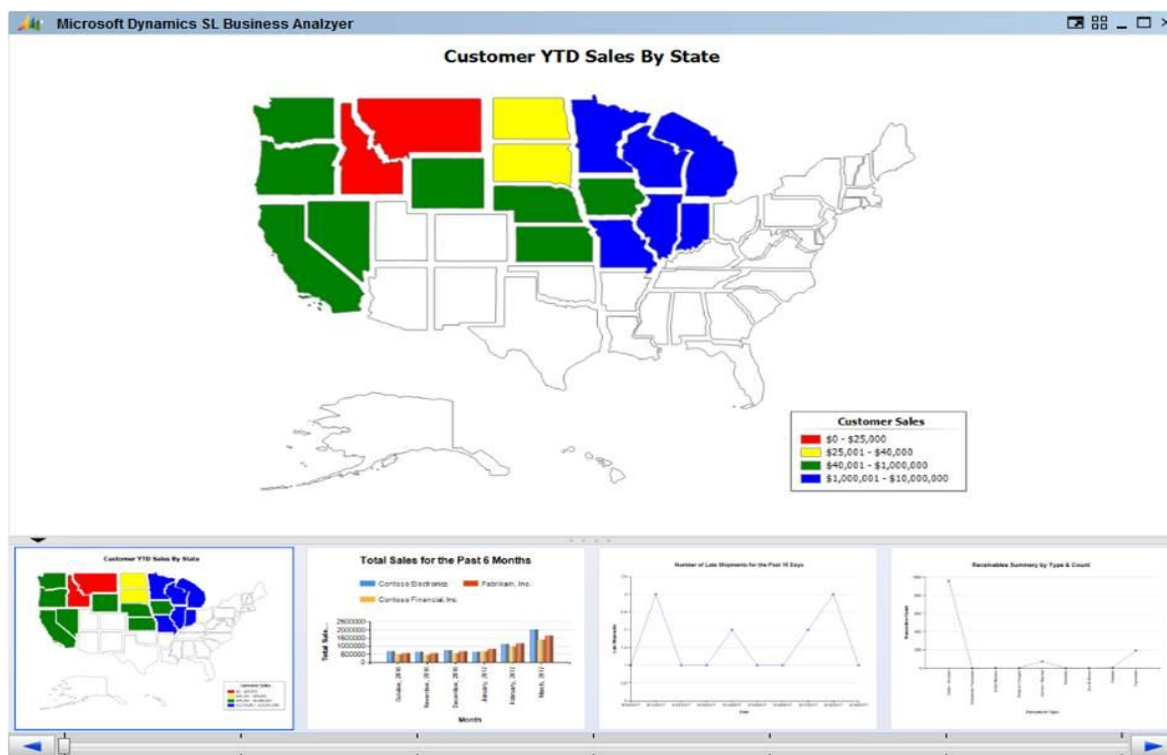

Figure 3: Business Analyzer in Microsoft Dynamics SL 2011 R2

This release will continue to demonstrate our ongoing commitment to driving further project and productivity improvements and decision making support through the Role Tailored experience – adding new business data visualization capabilities through the Business Analyzer.

We will also continue to enhance the solution in various areas of the product. Here are a few areas of investment.

Enhance Insight

Feature	Description
Business Analyzer	Gain control and actionable insight with the Microsoft Dynamics SL Business Analyzer • Get more out of your charts and graphs using Business Analyzer actions, such as the ability to edit reports, copy charts, and change dates. • Change how you interact with colleagues and assign tasks easily using enhanced instant messaging and real-time presence information from Microsoft Lync™ Server 2010.
Calculate and Store actual vs. provisional indirect costs	Ability to Review Project at the Provisional-Plan Rate vs Actual

Make it Easier

Feature	Description
Hard Close by Module	Limit which users or groups can post to previous periods or fiscal years by module.
Batch control reports by Module	Save time and paper by choosing to turn on or off batch control reports by module.
Web based time entry enhancement	Provide web based time users the ability to enter multiple invoice comments for customer invoices to help speed the payment process.
Service series pricing enhancement	Save time by applying special pricing across groups of service items instead of discounting them individually.

Microsoft Dynamics ERP

Extend Connections

Feature	Description
Web Services: Time Entry	Provide web services to connect Time Entry from third party or custom applications directly into Microsoft Dynamics SL
Web Services: Expense Entry	Provide web services to connect Expense Entry from third party or custom applications directly into Microsoft Dynamics SL
Enable Attachments	Provide Time and Expense web services the ability to also upload documents using the Attachments feature.

Tables: Microsoft Dynamics SL 2011 R2 Feature List (Subject to change)

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Roadmap

In 2014, we plan to release Microsoft Dynamics SL "9". In this release, we will focus on:

- Enhancing the compelling project and core functionality that is available in Microsoft Dynamics SL.

- Continue to invest in creating web services to extend the solution that can be deployed both on premise and through partner hosting.

- Aligning Microsoft Dynamics SL with new product releases across the Microsoft product portfolio, including Windows, Windows Server, and SQL Server.

COMMITMENT TO DEVELOPMENT

Microsoft is committed to further enhancing Microsoft Dynamics SL. We have made a significant investment in new releases and scheduled upcoming releases. Microsoft is committed to a predictable release schedule that helps customers adopt and take advantage of the latest innovations at a reasonable pace. Going forward, Microsoft may also offer a minor release between major releases for one or more functional enhancements. This will help customers benefit from product enhancements between releases without the need to install multiple solutions.
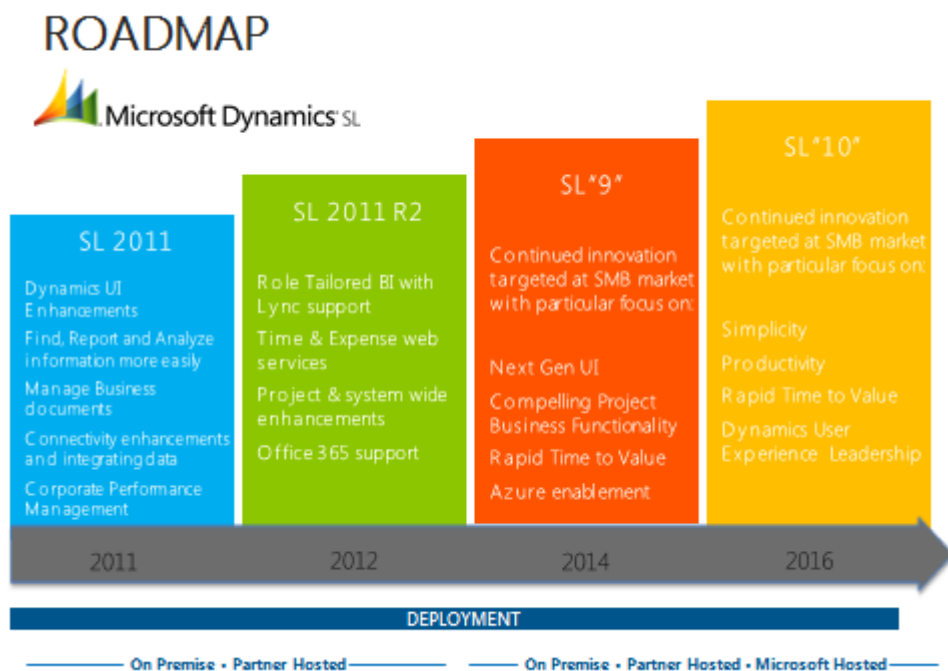

Figure 5: Microsoft Dynamics SL product release timeline (Subject to change)

MICROSOFT DYNAMICS SL STATEMENT OF DIRECTION

Our ambitions for Microsoft Dynamics SL extend well into the future, including the development plans that are required to support our business objectives. We will continue to ensure that Microsoft Dynamics SL has the appearance and behavior of other Microsoft products and works with Microsoft products and online services. We will continue to drive simplicity, value, and agility into all that we do. Our success relies on our ability to help you become a dynamic business.[2]

COMMITMENT TO SUPPORT MICROSOFT DYNAMICS SL

Major releases of Microsoft Dynamics SL, such as Microsoft Dynamics SL 2011, enjoy five years of mainstream support from the date that the version was first generally available. Mainstream support includes a commitment to provide security, tax, and regulatory changes. Beyond this five-year period, you can purchase up to an additional five years of extended support.

Product	General Availability	Exit date from mainstream support
Microsoft Dynamics SL 7	August 2007	October 2012
Microsoft Dynamics SL 2011	June 2011	July 2016

The Microsoft Support Lifecycle policy is designed to ensure that you can secure the return on the investment that you make in implementing any individual release. We also want to be transparent and provide greater visibility of our commitment to individual product releases and key dates when these commitments change. This will help you develop your own version upgrade plans.

For more information, see Microsoft Support Lifecycle.

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[2] Note: 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.

Mainstream Support Phase (5 yrs): Hot fixes, tax/regulatory releases, security updates
Extended Support Phase (5 yrs): Hot fixes, tax/regulatory releases
Self-Help Online Support (10 yrs +): Customized

Figure 6: Microsoft Support Lifecycle

COMMITMENT TO PARTNERS

The success of Microsoft Dynamics SL is largely due to the strength and capability of the Partner community that has developed around the product. Our Partners take many different forms – they include:

- Solution Providers, often referred to as VARs or Resellers, provide local and/or sector-specific expertise to help customers implement the product quickly and effectively.

- ISV's – who have developed their own software, based on the Microsoft Dynamics SL platform, to address the specific needs of customers in particular industries.

- Hosting Partners – who make Microsoft Dynamics SL available in a hosted environment.

Microsoft values the contribution that all these Partners have made to the ongoing success of the product. We will continue to do so.

COMMITMENT TO YOU

Our commitment to our partners reflects the value that they add to your business. We seek to complement that value by offering information and content through CustomerSource, which is a web portal that provides a wealth of product information, online training, and access to the wider community of Microsoft Dynamics SL customers.
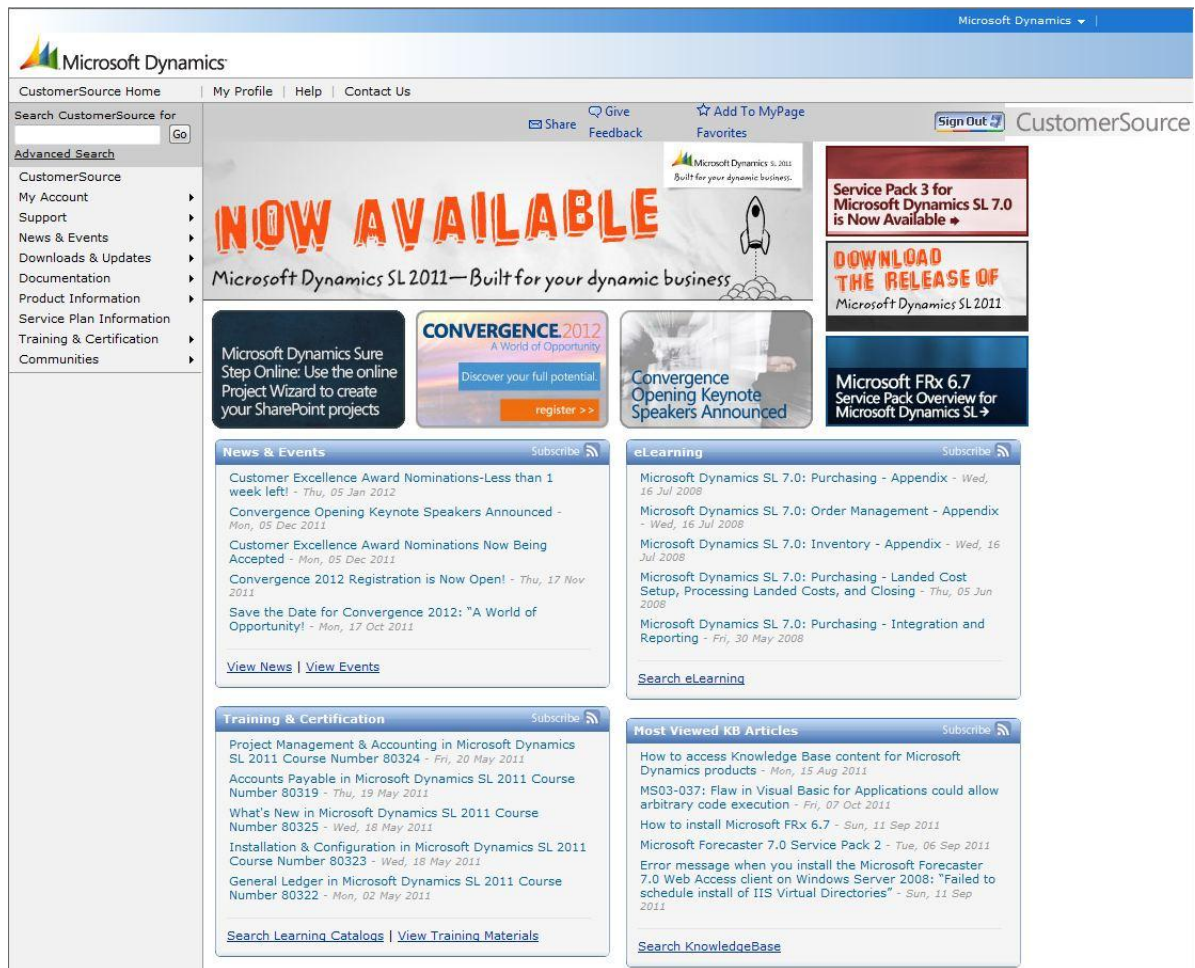
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Microsoft Dynamics ERP

Figure 7: Microsoft Dynamics SL CustomerSource

Dynamic Business

Dynamic Business is our vision for how for how an organization can be transformed by equipping the individuals in it. It is a vision for success and Microsoft is uniquely capable of delivering the breadth and depth of technologies that businesses need to help you win, now and in the future.

Learn more about Microsoft Dynamics and read the White Paper: Making Business Dynamic.

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Disclaimer

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.

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