

Microsoft Dynamics AX 2012

PREVIEW



Powerfully Simple

Get more value, faster.

Prebuilt industry capabilities—for manufacturing, distribution, services, and Public Sector (with retail coming soon)—and enhanced core ERP functionality, such as the Audit Workbench and budgetary controls, help you meet special business requirements with less customization. Our global solution grows easily with your business and gives people instant, RoleTailored insight and increased productivity.

Plan, see, and change your business with agility.

From enhanced Financial Dimensions to a model-driven layered architecture, you gain both the insight and the ability to quickly adapt to changing business needs and opportunities, free up development and solution resources, and streamline deployment (including flexible hosted and on-premises options), maintenance, and upgrades.

Let simplicity drive adoption and lower costs.

Give users a consistent, familiar experience, effortless Microsoft Office interoperability, and improved collaboration across the extended supply chain. IT staff can focus on strategic development with simplified application life cycle management.

Microsoft and pervasive interoperability

What drives these capabilities? *Pervasive interoperability*—the interaction of ERP systems, business and productivity applications, communications solutions, and the underlying technology platform—that works on-premises or in the cloud. Microsoft Dynamics AX 2012 and other Microsoft products and technologies are built to deliver pervasive interoperability, and a global ecosystem of knowledgeable partners is available to help you realize the benefits. All of which makes upgrading to Microsoft Dynamics AX 2012 a sound strategic decision.

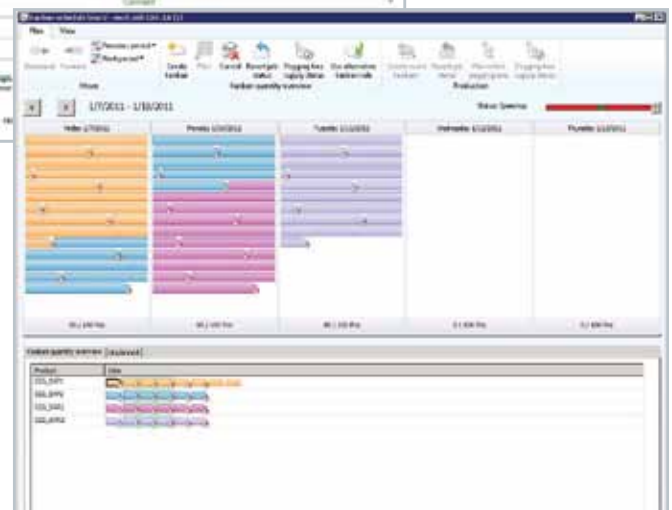
Microsoft is committed to continually deliver powerful, agile, easy-to-use solutions that add value across your organization, today and tomorrow. The coming release of Microsoft Dynamics® AX 2012 is a delivery on this commitment. With more than 1,000 new features and enhancements across core enterprise resource planning (ERP) and industry capabilities, Microsoft Dynamics AX 2012 will help provide more business value faster, enable agility and insight in your organization, and help drive faster adoption, broader usage, and easier maintenance and upgrade through a continued emphasis on simplicity.

Couple this with a constant focus on pervasive interoperability—the natural interaction of ERP systems with Microsoft® business productivity applications and IT infrastructure technology—and the coming release will help sharpen your competitive edge and empower your people to anticipate and embrace change.



Consolidate role-specific information, workflow, reports, task lists, links and KPIs on a single easily-customized Role Center to enable fast, convenient review and action, whether you're using the Windows client or a web browser.

User interfaces such as the Kanban scheduling board feature an intuitive visualization to help you stay on top of production job status.



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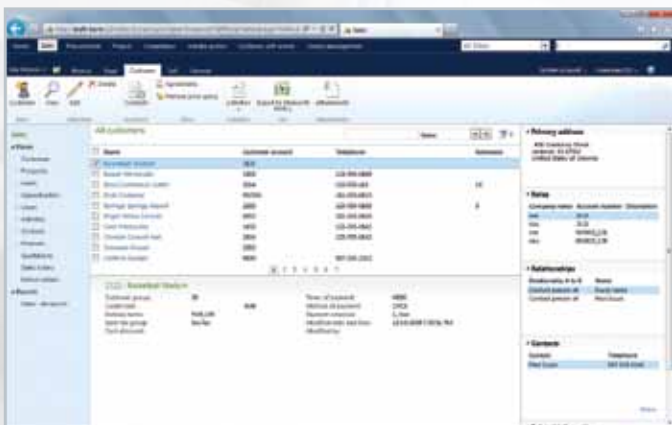
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RoleTailored User Interface

The enhanced RoleTailored user interface spans the the Microsoft Dynamics AX Windows client and Enterprise Portal and helps to drive productivity and business insight through its familiar user experience and connection with business processes. Microsoft Word and Excel®, familiar and powerful tools that workers already know and use, work bidirectionally with Microsoft Dynamics AX 2012 to enhance worker productivity, and a more flexible Help system provides added support when needed.

RoleTailored ERP client

- Improve productivity with enhancements to the RoleTailored user interface such as FactBoxes, Fast Tabs, and Preview Panes that let you view data from multiple sources without leaving the current form. Highlight relevant items, multitask, visualize information in useful new ways, and reduce chances of accidentally changing the data. In this release new Role Centers will be included, such as Treasurer and Budget Manager.



Budget Manager Role Center and Customer List Page

Enterprise Portal based on Microsoft SharePoint® technology

- A smoother interface improves the user experience overall with Action Panes and more configuration options. Collaboration workspaces allow teams to quickly organize and share information about projects, marketing campaigns, and opportunities. And Windows Live® ID authentication, improved search, and appearance of pages fosters productivity.

Microsoft Office add-ins

- Microsoft Office add-ins enable you to use Microsoft Word to build templates and documents that combine structured and unstructured information from Microsoft Dynamics AX. Use Excel and Word add-ins to view, analyze, and update information in Microsoft Dynamics AX. Bidirectional interoperability enables users to access and refresh data in Microsoft Dynamics AX without leaving Excel and Word.

New Help system

- Make Help more relevant to your business by customizing topics, enabling others in the organization to create Help documentation, promptly applying and distributing updates, and using Search and the Help viewer to find Help on your network or the web.

Built-in Industry Capabilities

Microsoft Dynamics AX 2012 is purpose-built for organizations in manufacturing, Public Sector¹, services, and distribution (with retail coming soon), delivering industry-specific capabilities out-of-the-box. New in this release is support for public sector organizations. Microsoft Dynamics AX 2012 uniquely combines industry-specific capabilities in one solution and makes them available to all customers, benefiting organizations that require capabilities for more than one industry.

Manufacturing

- Utilize the flexibility of Microsoft Dynamics AX 2012 to run process and discrete manufacturing models in a single solution. The mixed-mode capability also allows implementation of lean manufacturing practices in the way best suited for your company.
- Take advantage of a new operations resource model to efficiently use resources at multiple locations. Schedule resources (vendors, people, machines, tools, or locations) to jobs and operations based on their capabilities (ability to perform a specific production-related activity). A scheduling engine will handle resource selection.
- Model and execute lean manufacturing on production flows to reduce delivery lead times, trim excess inventory between work centers, treat contractor labor as a service (not a BOM component), and support continuous improvement by using kanban boards, event kanbans, and kanban rules to view, plan, and run kanban jobs.
- Use the new constraint-based Product Configurator to efficiently create, maintain, and reuse product models, components, and attributes.

¹ In four countries currently.

- Let shop floor workers use the touch-enabled job registration form to register time and quantities produced; use this functionality to let shop floor supervisors prioritize jobs and perform actions such as start/stop jobs.

Public Sector

- Use unlimited dimensions to support public sector fund accounting and expanded reporting capabilities for fund, program, function, organization, grant, project, location and object.
- Facilitate multiyear budgeting, accounting, and reporting for projects and grants with the capability to track multiple funding sources and automatically distribute funds according to program guidelines, including: 1) linking transactions to specific funding sources; 2) prioritizing funding sources; 3) restricting funding sources to specific activities or classes of expense; and 4) providing support for matching funds and grants.
- Define accounting distributions and view subledger journal entries prior to journalizing source documents.
- Use posting definitions to automatically generate "due to/due from" entries between different funds.
- Implement a flexible departmental billing engine for efficient collaboration with customers, while significantly reducing process management time requirements.

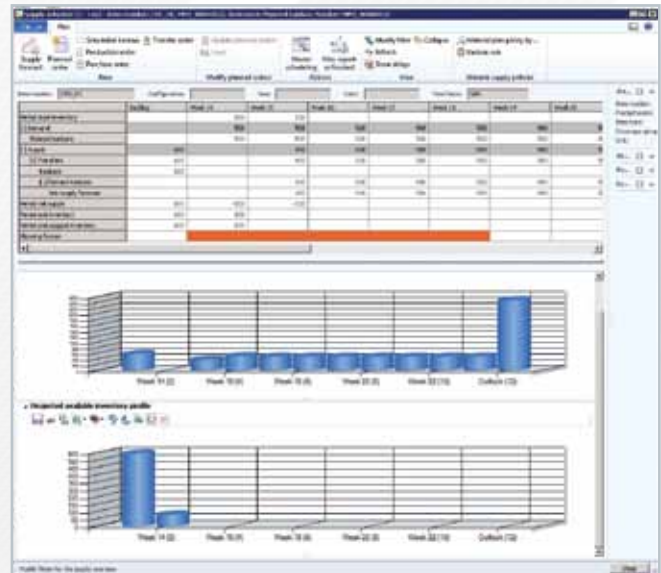
Service industries

- Strengthen proposal management, project quotation, and project budget control with complex work breakdown structures, milestone definitions, task assignments, and deliverable specification.
- Improve your ability to forecast, plan, and ultimately schedule the right resources onto projects at the right time and in the right place, matching individual skills and capabilities to service tasks and project goals.
- Take advantage of Workspace Collaboration in Microsoft SharePoint Server to increase project collaboration and foster application of best practice service-delivery methodologies. Build on that foundation to connect with service partners and clients in richer and more interactive ways.

Distribution

- Improve supply chain planning capabilities across your organization, using new views that display all intercompany supply and demand. In addition, planned intercompany demand is visible for upstream companies within the organization, and can be considered in master planning. Planning and management are also supported with a full view of intercompany order-pegging using a multilevel pegging form.
- Sales order process enhancements allow users to place orders in a more productive way, allowing faster order entry by limiting the amount of information to be entered. This permits easier access to sales order header or line details as well as expert features allowing users to modify default settings and customize sales orders.

- Other features include pricing enhancement to manage mass changes, smart rounding rules based on currency and amount, and translation of prices in multiple currencies based on a reference price list.



Supply Scheduling

Core ERP Suite Capabilities

Microsoft Dynamics AX 2012 raises the bar for delivering powerful ERP capabilities and supporting operational efficiency in many key functional areas. Microsoft Dynamics AX 2012 includes new capabilities such as supplier relationship management, case management, and the Audit Work Bench, as well as important enhancements in the following domains: finance, sales and marketing, procurement, project accounting, human capital management, supply chain management, inventory management, and global risk and compliance.

Financials

- Quickly create unlimited, form-based financial dimensions that can be shared across legal entities for a complete business view, audit trail transparency, and detailed analyses.
- Transform budget information into precise, workflow-driven management tools with multiple, variable, and hierarchical budgetary controls that allow you to define how you want to manage expenditures and achieve greater control of the procurement process.
- Set up, view, and manage encumbrances, including purchase order commitments, in the general ledger, and manage workflow items with respect to year-end processing and encumbrances.

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- Streamline the cash-to-collections process to save time, engage efficiently with customers, and improve cash flow.
- Simplify and help ensure accurate processing of requisitions, orders, invoices, and other key transactions by defining accounting distributions and viewing subledger journal entries before journalizing source documents.
- Improve accounts payable operational efficiency with new capabilities to match invoices, allocate charges, process and track purchase order prepayments, add lines to invoices, and more.
- Define and control the information you capture more precisely to achieve better insight into your business.
- Increase productivity and accuracy as you leverage architectural advances to share key financial data among legal entities.
- Sharply reduce time and effort for year-end closing with enhancements that include purchase order rollover and budget carry-forward options.

Sales and marketing

- Use the Microsoft Dynamics CRM Connector to access information in Microsoft Dynamics CRM 2011, both on-premises and online.
- Efficiently open, assign, resolve, and follow up on customer service, collections, and similar issues using new case management capabilities.

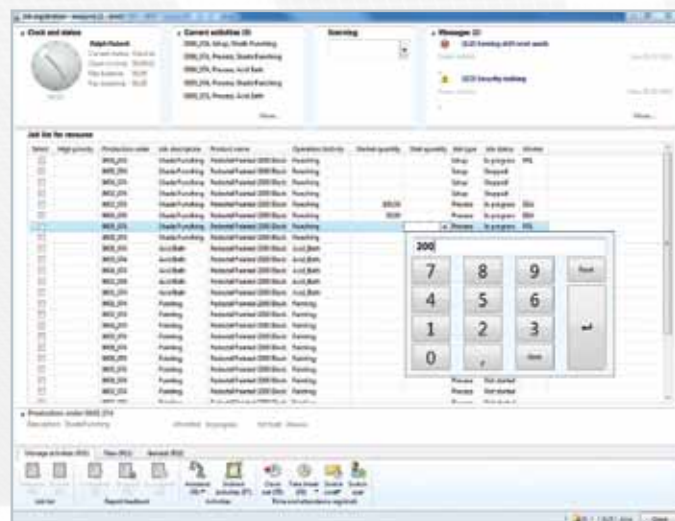
Procurement and sourcing

Procurement and sourcing in Microsoft Dynamics AX allows managing direct and indirect procurement of goods and services. In Microsoft Dynamics AX 2012 the following enhancements have been made:

- Self-service capabilities: empower workers 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, requesting additional users, requesting the scope of their offering be expanded, uploading catalog content, submitting invoices, reviewing payments, and more.
- Import, create, edit, stage, publish, and search catalogs of items for internal consumption on an internal shopping site. Or punch out directly to your vendor catalog.
- Create a virtual workplace where category managers can manage overall spending by category.
- Utilize requisition aggregation, work queue management, category management, and other procurement functionality through a procurement-based Role Center.
- Establish a centralized procurement desk capability across your organization to support procurement policies and processes.
- Easily set up and maintain one or more different purchasing policies and apply them to different sets of requisitioners across the organization.

Supply chain management

- Easily convert a purchase order line or sales order into a delivery schedule and maintain total order discount eligibility even when multiple deliveries result.
- Support quality management with a new inventory blocking feature that works manually or on an automated basis to enjoy greater flexibility and granularity in quality order specification, and more.
- Improve your ability to report the value of goods in transit between companies, using two new reports in Microsoft Dynamics AX 2012.



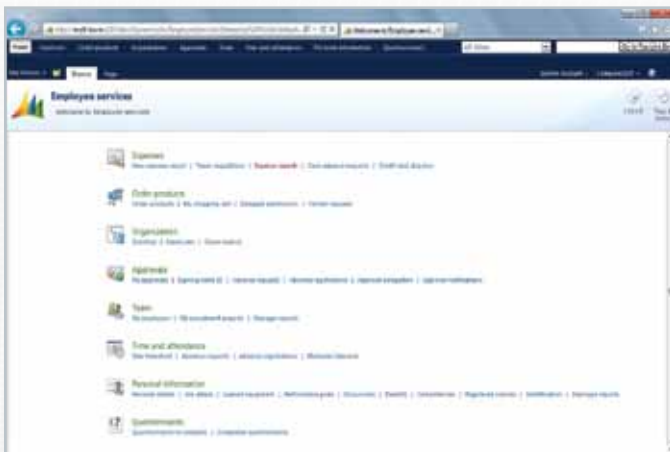
Touch Screen capabilities in Manufacturing Execution System

Project management and accounting

- View a summary as the project budget is created, compare against funding, and make corrections before submission.
- Create and manage projects in Enterprise Portal to enable remote access and reduce software installation and update issues.
- Make time sheet entries more efficiently with enhanced time entry capabilities and user experiences from a web browser or the client application.
- Allocate and post revenue based on internal sales prices for workers, categories, and dimensions, enabling profitability monitoring by allocation area.
- Improve management of complex portfolios of projects and next-level optimization of resource schedules through enhanced integration with Microsoft Project Server 2010.

Human capital management

- Improve individual productivity by referring to Role Centers for data, alerts, task lists, and reports pertinent to specific job functions; more than two dozen predefined Role Centers can be accessed from the Enterprise Portal or Microsoft Dynamics AX Windows client.
- Use the Employee Portal and workflow tools to enforce spending and approval policies at a more granular level, and to enable employee self-service for performance goal management.



Employee Services in Enterprise Portal

- Transfer and view employee records easily, and reduce manual process steps in recruiting, onboarding, development, transfer, and termination.
- In Microsoft Dynamics AX 2012, the Expense Management application for the Enterprise Portal is improved in many areas to help streamline processes and improve productivity. This includes the expense entry, cash advance request, credit card dispute, travel requisition, and expense report delegation. In addition, the approval experience for expense reports, travel requisitions, and cash advances are improved or introduced.

Global risk and compliance

- Define/refine your corporate policies and automate the auditing process with the Audit Workbench.
- Track energy consumption and greenhouse gas emissions to proactively monitor your organization's environmental impact: use the enhanced Environmental Sustainability Dashboard and the new, associated data cube to keep aware of energy consumption, carbon footprint, and KPIs for waste and water usage. Take advantage of a graphical interface for easy setup and "what-if" capabilities to help you assess the impact of proposed changes.
- Help ensure organizational compliance with laws, regulations, policies, and business rules through Compliance Center enhancements including improved Internal Controls capabilities, the new Default Controls Library, and the new Import and Mapping Wizard.

Country-specific capabilities

- To control feature availability based on the location of the legal entity, Microsoft Dynamics AX 2012 uses the country associated with the legal entity's primary address. For example, if the address of the legal entity is in Canada, users can see and work with Canada-specific features.
- Microsoft Dynamics AX 2012 offers a range of capabilities that support country-specific localization. To learn more, visit CustomerSource.

Application Foundation

Master data, reference data, and global engines are the foundation of the application. In Microsoft Dynamics AX 2012 the enhancements in these three areas simplify the definition of master and reference data and the use of global engines across the multi-entity enterprise.

Master data

- Organization model: model organizational structures more accurately, capturing more hierarchies and greater detail, to enable more sophisticated reporting, improved security, and easier data sharing.
- Global Address Book: create multiple address books, manage address book access, selectively enforce policies by address book, and create applicant records directly from application forms.
- Product information management: create and maintain product definitions and master definitions for sets of products across the entire organization, and share them across companies to maintain centralized product repository control.



Organization Model

Reference data

- Time zone enhancements: easily set and change time zone preferences, support multiple time zones, synchronize time zone preferences with local time zones, and view different time zone information for transactions.

Global engines

- Policies management: utilize this new capability to help implement a unified procurement strategy across employees, purchasing agents, and vendors.

Role-based security

- Create security permissions for individual application objects to simplify maintenance and enable reuse of security constructs. Implement security policies for individual table records, offering greater granularity. Simplify configuration and administration of services.

Enterprise portal enhancements

- Enterprise Portal integrations can be developed easily using Visual Studio 2010. Enterprise Portal supports table hierarchies for more efficient database structures, and a new security model offers greater control.

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Take the next step toward becoming a dynamic business—the Microsoft Dynamics vision for companies that can continuously evolve to face economic, operational, and organizational challenges. By planning your future upgrade to Microsoft Dynamics AX 2012, your organization can become more agile, so you can adapt quickly to change, expand into new markets, and develop innovative products and services.

Talk to your partner about the business benefits that an upgrade to Microsoft Dynamics AX 2012 could offer.

FOR MORE INFORMATION ABOUT

Microsoft Dynamics AX 2012, visit:
www.microsoft.com/dynamics/ax



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