

YOUR PROJECT MANAGEMENT SOLUTION ROADMAP

The right way to streamline project management

If your business is project-driven, you need to keep close control of project performance, costs and revenues, labor, and other resources. With a wide spectrum of tools and technologies, Microsoft Dynamics® SL business management solutions give your people the tools they need to accomplish project goals and achieve outstanding results on budget, on time, and with excellent resource efficiency.

Manufacturing

Supply Chain Management

Field Service

Financial Management

Project Management

Business Intelligence

Microsoft Dynamics SL project management solutions overview

The profitability of your business depends on being able to estimate projects correctly, complete them on time, and meet customer requirements. To improve project profitability and manage risks, you need visibility into actual time and expenses as each project progresses.

With its full integration to financial management, Microsoft Dynamics SL for project management provides you with the focused insight and visibility you need to apply appropriate resources, carry out tasks, boost profitability, and make wise business decisions. Now you can drive projects more efficiently and manage your resources more effectively, using a tool built to work the way you do.

Comprehensive project management

By uniting accounting and project information into one system, Microsoft Dynamics SL provides you with a highly integrated solution that covers all aspects of your projects—from initial budgets to mid-project analysis and adjustment to final billing.

Cost control and profitability

Microsoft Dynamics SL helps your people take control and manage projects with optimal cost-efficiency and profitability. With increased visibility into project budgets and actual expenses, Microsoft Dynamics SL strengthens fiscal management and minimizes risk. You gain real-time access to project reviewing costs and margins, and by monitoring changes in key values such as costs or margins, you can take fast, appropriate action.

Streamlined project management

Productivity rises when work can be accomplished anytime, while on the go, through a Web browser. Project teams can work remotely at every stage, from initial planning and budgeting to labor and expense reporting, change-order approval, and results management. Improve communication throughout each project by connecting customers and suppliers to shared information.

Enhanced productivity from your resources

With the assistance of Microsoft Dynamics SL, you can manage your employees, contractors, partner relationships, and material resources to align with project goals and client expectations. Optimizing all your resources helps you stay within budget and provides additional opportunities for winning new projects and running them successfully. From the first stages of project planning to final project completion, Microsoft Dynamics SL helps increase the business value of project resources.

Business process: Sell

With the right tools, people in your organization can transform business challenges into business successes. Empower your organization's project managers with a flexible, innovative solution that can help your people to achieve more and your business to profit more.

Right from the moment you start generating initial estimates, Microsoft Dynamics SL can help you put your projects on the right track, set appropriate expectations, and help ensure that they have the margins you need for business success. It can increase management support for jobs of all sizes and durations, creating project-related resources that empower your people to improve budget analysis, minimize project costs, automate billings, better manage resources, track resources, plan capacity, and predict availability.

Key benefits:

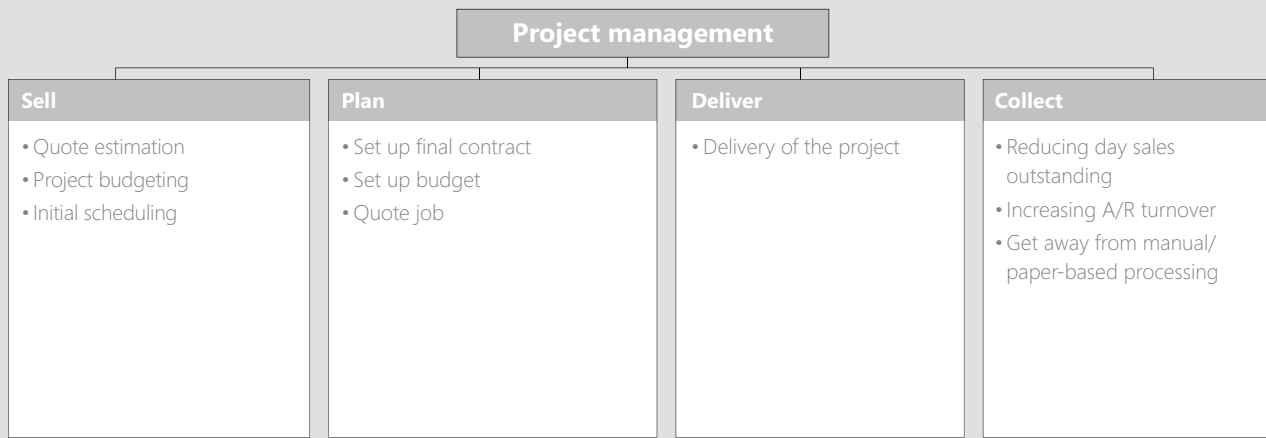
- **Save time and money.** Improve your project profitability by providing project managers with the accurate, meaningful information they need to gain control over project revenue and expenses.
- **Gain tight control of your projects.** Take control of your project finances with powerful budgeting tools that track your budgeting process throughout the life cycle of your project.
- **Enhance business decision-making.** Get access to comprehensive data about project performance and profitability. Quickly collect and summarize data for key metrics, pinpoint details for analysis, and present results in easy-to-understand formats.
- **Unlock business potential.** Enhance productivity role-based access to information and processes from a single Web-based portal.

Recommended Microsoft Dynamics SL modules:

- Analyzer
- BIO® Advanced
- BIO Foundation
- Business Portal
- Employee Utilization
- Project Budgeting
- Project Controller
- Project Self Service Suite
- Microsoft® Office Project 2007
- Microsoft Office Project 2007 Connector
- Time and Expense for Projects

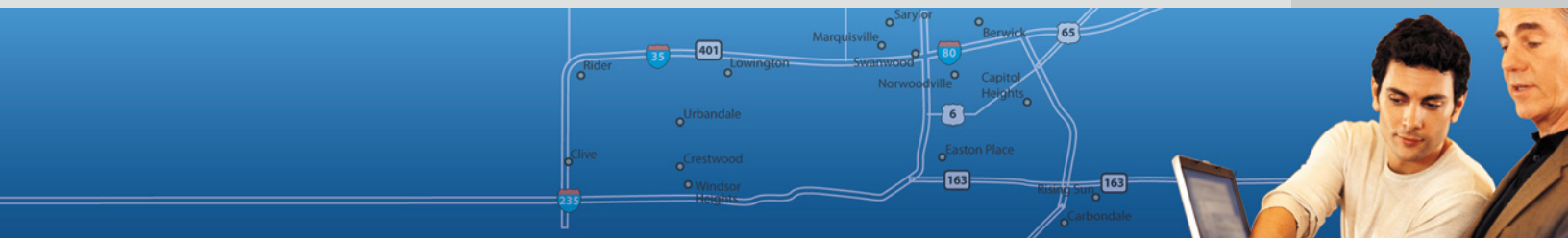
Roles that are empowered:

- Sales
- Project manager
- Estimator



Impacted roles

- A/R clerk
- Accountant
- Chief financial officer (CFO)
- Controller
- Director of professional services
- Estimator
- Materials manager
- Purchasing manager
- Project engineer
- Project manager
- Resource manager
- Sales



Recommended Microsoft Dynamics SL modules:

- Analyzer
- BIO Advanced
- BIO Foundation
- Business Portal
- Contract Management
- Employee Utilization
- Project Allocator
- Project Controller

Roles that are empowered:

- Director of professional services
- Project manager
- Resource manager

Business process: Plan

The success of your project can be decided from the moment you set it up. That's when you can allocate the right resources, ensure that the contract is perfectly tailored, and create a budget to help maximize success and profitability. And to start right, you need project structures, information, and tracking that work the way you do, when you do, to help control project success and profitability.

With Dynamics SL, you can have increased insight into your projects, with visibility into resources and expectations, utilization rates and real-time financial data—in the office, or on the job. You can have multiple levels of information, flexible billing structures and budget captions, and use user-defined entries to capture the data you need and share it with the people you specify. It allows you to be more dynamic in your planning, with quick and powerful analysis and insight into every aspect of the project—which can lead to timely completion, enhanced cash flow, and project profitability.

Key benefits:

- **Increase productivity.** Multiple levels of information, flexible billing structures and budget captions, and user-defined entities let you capture and share data quickly and easily.
- **Maximize profits.** By providing managers with accurate, meaningful information, you can help increase control over project revenue and expenses, enhance cash flow, and boost project profitability.
- **Streamline workflow.** Simplify time-consuming contract management tasks and increase the productivity of subcontractor interactions for even the most complex projects. Improve control over change orders, document tracking, and subcontractor disbursements to help ensure timely completion of projects.

Recommended Microsoft Dynamics SL modules:

- Accounts Payable
- Accounts Receivable
- Analyzer
- BIO Advanced
- BIO Foundation
- Communicator
- Contract Management
- Employee Utilization
- Project Budgeting
- Project Controller

Roles that are empowered:

- Accountant
- CFO
- Controller
- Director of professional services
- Materials manager
- Purchasing manager
- Project engineer
- Project manager
- Resource manager

Business process: Deliver

You're in the middle of the project, a critical time for the delivery of success—to both your customer and your business. You need to avoid cost overruns, resolve issues, maximize employee utilization, minimize your exposure to risk, and meet critical deadlines.

To help you meet the most complex operational requirements with agile efficiency, Microsoft Dynamics SL provides you with the custom operation, reliable processing, and depth of function you need to exceed expectations, delight customers, and outpace the competition. It automates time-consuming tasks, gives you thorough insight into key financial and project metrics, and enhances your control over your project so that projects stay on track.

Key benefits:

- **Help gain control of project finances.** Create flexible structures for labor rates and billing structures. Shorten the time it takes to get from quote to project.
- **Spot trends.** Use key data to react quickly to issues, which in turn can keep you within budget and on schedule.
- **Enhance business decision-making.** Gain access to comprehensive data about project performance and profitability. Present results in easy-to-use formats.
- **Increase productivity.** Streamline time-consuming contract management tasks and increase the productivity of subcontractor interactions by improving control over change orders, document tracking, and subcontractor disbursements.
- **Help reduce risk.** Set up system alerts to automatically notify you of issues, such as the expiration of subcontractor liability insurance.
- **Gain insight into your business.** Preconfigured, built-in views of Microsoft Dynamics SL financial data empower executives and power users with in-depth operational, financial, and strategic analysis capabilities that break the constraints of static, accounting-oriented reporting.
- **Manage projects efficiently and effectively.** Enable far-reaching insight and analysis for project operations and inventory sales, including the ability to extend information across your organization—from front-line managers to executives.



Recommended Microsoft Dynamics SL modules:

- Accounts Receivable
- Contract Management
- Flexible Billings
- Project Controller
- Time and Expense for Projects

Roles that are empowered:

- A/R clerk
- Project manager

Business process: Collect

To satisfy customer demands, you have to stay on top of evolving situations and adhere to their forms. And to satisfy your own goals, you have to realize revenue quickly, enhance cash flow with tailored billing processes, employ efficient automation options, and have visibility of profitability throughout the project life cycle.

With Microsoft Dynamics SL, you can provide project managers with the accurate, meaningful information they need to help control project revenue and expenses—enough to potentially make even low-margin projects profitable. You can help increase client satisfaction by expediting bill-to-payment time and increasing accuracy of invoices.

Key benefits:

- **Shorten billing cycles and improve cash flow.** Take control of unbilled receivables and convert them to revenues. Streamline invoicing and easily note needed corrections, finalize invoices, and post receivables.
- **Identify possible customer problems before they occur.** Flexible, connected functions provide detailed information and reporting to help you monitor receivables and enhance your cash flow and bottom line.
- **Take control of labor and project and travel-related expenses.** Accurate, timely cost information gives you the precise information you need to increase your productivity and make better, more effective business decisions.
- **Boost project profitability.** By improving control over change orders, document tracking, and subcontractor disbursements, you can help ensure timely completion of projects, enhance cash flow, and boost profitability.
- **Maintain tight fiscal control.** Forecast outcomes, monitor trends, predict the outcome of changes, and track estimates at completion and forecasts at completion, in addition to the original budget.

Accounts Payable: Keep accurate information at your fingertips about money owed, due dates, and available discounts with a focused and flexible way to carefully track and take advantage of terms and discounts, predict cash requirements, and monitor payments so that they are made only once.

Accounts Receivable: Actively manage your customer accounts and identify problems before they occur. Flexible, integrated functions provide you with detailed information and reporting to monitor receivables and do what you need to enhance your cash flow and bottom line.

Analyzer: Enhance business decision making with efficient access to comprehensive data about project performance and profitability. Quickly collect and summarize data for key metrics, selectively pinpoint details for analysis, and present results in intuitive and practical formats.

BIO® Advanced: Enable far-reaching insight and analysis for project operations and inventory sales, including the ability to extend information across your organization—from front-line managers to executives.

BIO Foundation: Preconfigured, built-in views of Microsoft Dynamics SL financial data empower executives and power users with operational, financial, and strategic analysis capabilities that break through the constraints of static, accounting-oriented reporting.

Business Portal: Unlock business potential and enhance productivity by providing role-based access to information and processes from a single Web-based portal. Business Portal integrates seamlessly with Microsoft Dynamics SL to deliver applications, information, and processes to employees, customers, and partners across the organization.

Communicator: Enhance control of project progress and profitability by increasing awareness of changes in key indicators or documents awaiting action. Automated alerts keep you informed of pending deadlines, required approvals, escalating costs, and eroding margins, making it easy to intervene so projects and profits stay on track.

Contract Management: Streamline time-consuming contract management tasks and increase the productivity of subcontractor interactions for even the most complex projects. By improving control over change orders, document tracking, and subcontractor disbursements, you can help ensure timely completion, enhance cash flow, and boost project profitability.

Employee Utilization: Get the information necessary to improve the profitability of service professionals and other human resources. Track personnel availability, billable time, revenues, and the realization of established utilization goals. View timecard line item details, or speed up analysis by customizing and summarizing data in a variety of groupings and time periods.

Flexible Billings: Shorten billing cycles and improve cash flow by taking control of unbilled receivables and converting them more quickly to revenues. Streamline invoicing with automatic generation, formatting, and submission of drafts for approval; then easily note needed corrections, finalize invoices, and post receivables.

Microsoft Office Project 2007: Utilize robust project management tools with the right blend of usability, power, and flexibility, so you can manage projects more efficiently and effectively. Stay informed and control project work, schedules, and finances; keep project teams aligned; and be more productive through connections with familiar Microsoft Office 2007 system programs, powerful reporting, guided planning, and flexible tools.

Microsoft Dynamics SL 7.0 connector to Microsoft Office Project 2007: Project driven organizations can optimize their project resources by activating the connection between Microsoft Dynamics SL and Microsoft Office Project Server 2007. The connector creates projects, assigns resources, and creates the resulting budgets in Microsoft Dynamics SL. Further connectivity allows for viewing of enterprise resource planning (ERP) data from within Office Project 2007, like budget, project, and task net profit.

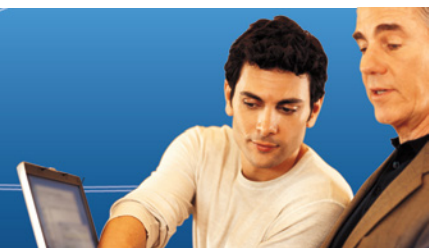
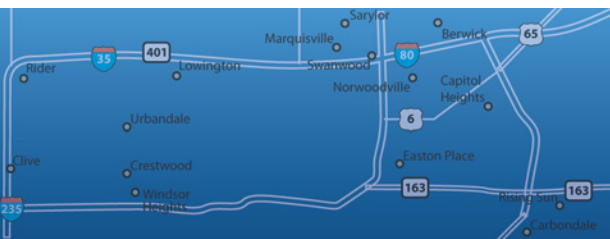
Project Allocator: Gain precise control over project finances by creating flexible, multitiered hierarchies to reflect the spectrum of labor rates and billing structures you need. Then automatically allocate charges and revenues, account for work in process, transfer or consolidate transactions, and record accurate data for billing and posting to general ledger accounts.

Project Budgeting: Take control of your project finances with powerful budgeting tools that allow you to significantly increase your project's profitability. By tracking your budgeting process throughout the life of your project, you can view the impact of budget changes on profitability and manage the information you need to make your project successful.

Project Controller: Improve your project profitability by providing project managers with the accurate, meaningful information needed to gain control over project revenue and expenses—enough control to make even low-margin projects profitable.

Project Self Service Suite for Business Portal: Project Self Service Suite for Business Portal enables project managers and their employees to perform many common project-related tasks remotely. These capabilities include the ability to create new projects, tasks, and budgets; view summarized and detailed information about the profitability of projects and tasks; review and approve documents and line items; and enter timecards and expense reports, all with validation that helps ensure that the entries are made in accordance with the same business rules that the organization has implemented in the back office.

Time and Expense for Projects: Take control of your labor, project, and travel-related expenses. Accurate, timely cost information gives you the precise information you need to increase your productivity and make better, more effective business decisions.



Look for the project management modules listed below:

Business Essentials

Includes *all* of the following components:

Accounts Payable
Accounts Receivable

Bank Reconciliation
Crystal Reports
Currency Manager
FRx® Currency Translation
FRx Desktop
General Ledger
Inventory
Landed Cost
Multi-Company
Order Management
Purchasing

Advanced Management

The Advanced Management Edition includes *all* of the Business Essentials Components *plus* the following components:

Analyzer

Bill of Materials
Business Portal
Cash Manager

Flexible Billings

FRx Professional
FRx Report Manager
Key Performance Indicators
Mobile Time and Expense for Projects/Timekeeper

Project Allocator

Project Controller

Project Self Service Suite for Business Portal

Requisitions

Advanced Management Enterprise

Advanced Management Enterprise components are compatible with the Advanced Management Edition. These a la carte components must be purchased individually.

Advanced Shipping Management

Communicator
Contract Management
Employee Utilization

Equipment Maintenance
Flat Rate Pricing
FRx Report Server
FRx WebPort
Inventory Replenishment

Microsoft Forecaster™

Microsoft Dynamics SL 7.0 connector to Microsoft Office Project 2007

Orders to Purchase

Project Budgeting

Service Contracts
Service Dispatch
Time & Attendance

Time and Expense for Projects

A la carte

A la carte components are compatible with the Business Essentials or Advanced Management Editions. These additional components must be purchased individually.

Advanced Payroll
Application Server
BIO Advanced
BIO Extender

BIO Foundation
BIO Vue Users
Financial Statement Translation
FRx Drilldown Viewer™

FRx Report Launcher
Payroll with Direct Deposit
Work Order

Disclaimers:

- Refer to the price lists for the official list of components by edition.
- Availability of components may vary by country.
- Illustrations represent packaging in a user model.

