

AXUG® Magazine

BUSINESS
INTELLIGENCE
FROM THE GROUND UP

HELP AND
RESOURCES
FOR MICROSOFT DYNAMICS AX 2012

AXUG TAKES ON ROME



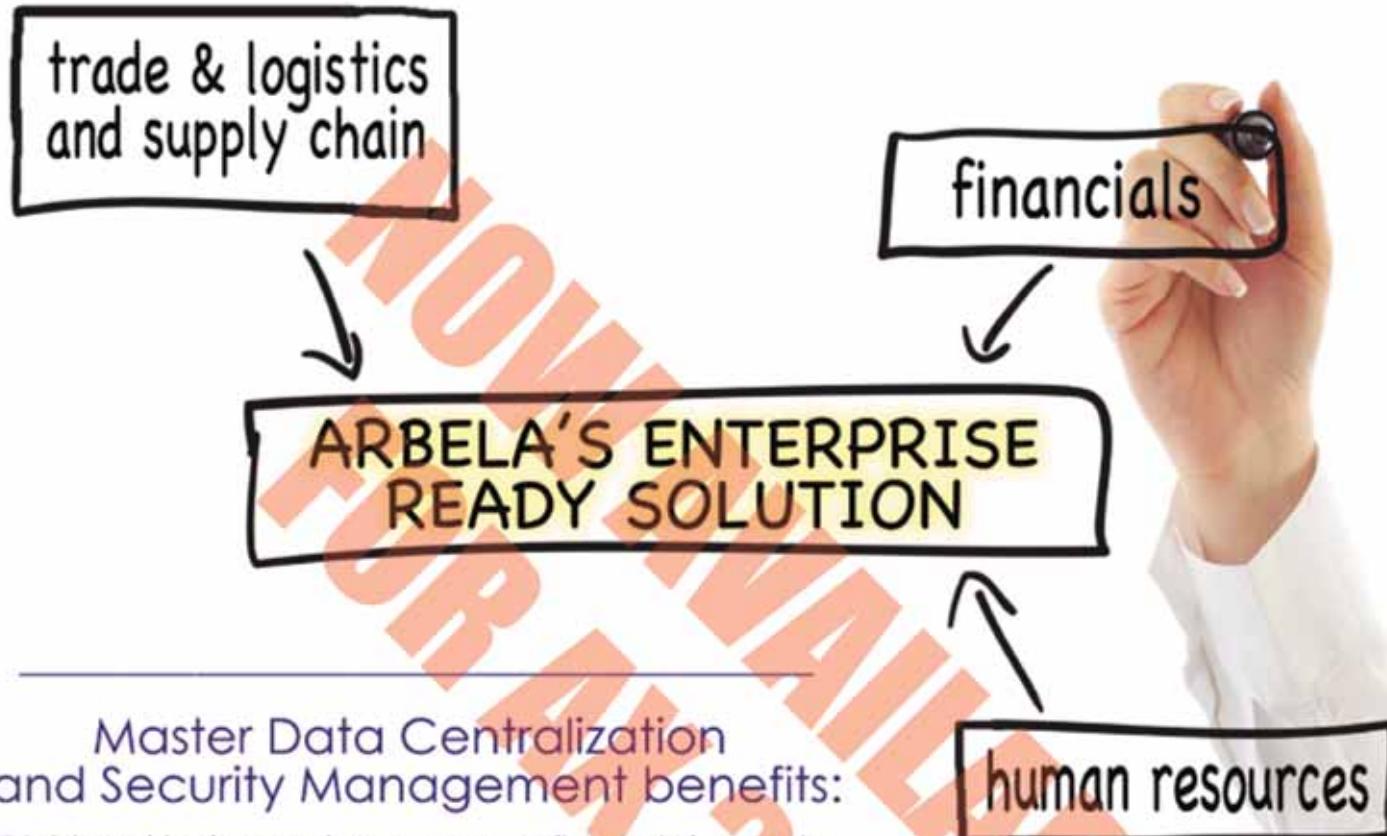
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Magazine

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The BI Journey

frank Vukovits, Jr.

FROM THE
Director

Business Intelligence. The phrase itself always makes me chuckle. What business doesn't want to be intelligent? There have not been many words that have taken on more of a life of their own in the corporate world than business intelligence, or BI for short. BI is the theme for this issue of AXUG® magazine for three reasons: it's hot, we have lots of great AXUG Premium Partners whose business is built around BI and Microsoft Dynamics AX, and for a long time AXUG has been talking about the topic through the BI and Reporting Special Interest Group (SIG).

For many AXUG Members, their BI project started as an idea, then became a project which became a journey, and is now still evolving as technology changes. In many ways, BI projects are like Microsoft Dynamics AX implementations. They start with lots of excitement as they are "hot" and promise to provide your company, especially your executives, with the information that they need to manage the business. Then, more than likely, your BI project may slow down a bit, and the excitement is soon replaced by the emotion of work, lots of work, possibly, that will be required to make your BI truly become integrated into your business processes. Finally as you start to near the completion of the BI project, new ideas or technologies appear...the new "hot" if you will (read Big Data). Suddenly you have to decide when to declare the project complete and move into maintenance mode, otherwise the project will always be a revolving scope and tie up resources longer than expected. Sound familiar? If so, perhaps you can glean some ideas of how best to keep the "hot" part of BI alive and well in your company as AXUG Members share their approaches for successfully implementing BI and Microsoft Dynamics AX in their own organizations.

Each year, as the BI and Microsoft Dynamics AX world have matured, there have been great BI Partners who have continued to provide end Users with the tools to turn data into information, better, faster, cleaner, and in ready-made presentation form of information. The power of the Microsoft stack and the evolving products from the Microsoft Dynamics Corporate Performance Management (CPM) team have also provided Users with additional tools to ensure no piece of data is unturned into information.

Five years ago we started the BI and Reporting Special Interest Group (SIG). For the first couple webinars, we talked about exporting data to Excel and trying to get cubes to work with Microsoft Dynamics AX. The term BI was used, but it wasn't common across the entire AXUG membership as many companies just wanted to get "good" reports out of Microsoft Dynamics AX. They preferred to worry about things like "intelligence" in their reporting later, once standard reporting was locked down. Looking back, it has been a great journey for this SIG as Members have become more familiar with the tools they already own, like the Microsoft stack. As newer versions of Microsoft Dynamics AX have come to market, many Members have gained great value around BI and reporting through the capabilities now standard in the solution. Microsoft Dynamics AX 2012 R2 is a perfect example of the evolution of BI in the core product. Of course, there are many AXUG Members who still need to extend their BI and reporting even further, so they have shared their successes with the many BI add-on products in the marketplace. As we look to the ongoing growth of the BI and Reporting SIG, webinars and breakout sessions at AXUG Summit and Convergence will continue to provide Users with the chance to learn more about BI. The journey down the BI road is just that, a journey, not a quick trip, so be engaged in the BI and Reporting SIG. I'm sure you will not be disappointed.

If you happen to be reading this magazine while at Convergence and are not yet an AXUG Member, I encourage you to join AXUG (www_AXUG_com/join_axug/). BI is just one of the many, many areas that Microsoft Dynamics AX Users like you meet to discuss and learn from each other. AXUG provides the best opportunity for you and your company to maximize your investment in Microsoft Dynamics AX through the listen, learn, and share objectives of the User group. If you are already an AXUG member, I challenge you to leverage the benefits of AXUG and maximize your Microsoft Dynamics AX investment. You won't be disappointed.

See you in the French Quarter!

Frank Vukovits, Jr.

Director of Programming, AXUG





Don't solve a *single* document processing issue.

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Documents, and the data trapped within them, are the lifeblood of your business. Yet, despite advances in automation, many organizations continue to struggle with methods for efficiently imaging, indexing, distributing, searching and retrieving documents from their core ERP system. Extend that to a specific business process like Accounts Payable, and the complexities of PO matching, approval workflow and reporting only compound the problem.

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WELCOME TO OUR NEW *members*

This quarter we're learning more about Braun Intertec Corporation, sharing a little about who they are and what they do.

Assisting public and private organizations and property owners with site evaluations, site preparation recommendations, and construction support services has been at the heart of Braun Intertec since 1957. More than 600 employees represent multiple technical disciplines including environmental consulting, geotechnical engineering, testing, special inspections, and facilities evaluations. Braun Intertec is a 100 percent employee-owned company based in Minneapolis, Minnesota.

"Being an AXUG® Member allows us to connect with other Members and leverage our knowledge of the product," says Craig Leska of Agile Frameworks, a subsidiary of Braun Intertec.

Welcome also to the new Members who have invested in AXUG Premium membership and Partner membership this year! At press time, the group's grand total of Member organizations is 2,200. Please note that these organizations have given AXUG permission to share their name publicly.

Premium Members Added Last Quarter

Alltech Budapest	Reply
Bank of Valletta plc	Rockwater Energy
CME Services, s.r.o.	Rubena a.s.
DOBREVE ENERGIA S/A	Scandinavian Tobacco Group Eersel BV
Grimme Landmaschinenfabrik GmbH & Co KG	SPF do Brasil Ind e Com Ltda
KCS.net Deutschland GmbH	Starz
MAPEI	Steel Dynamics
Meopta - optika, s.r.o.	Ultimate Software, Inc.
New Yorker Information Services Intl GmbH	Vree Health Italia Srl

Premium Partner Members Added Last Quarter

Experlogix, Inc.
ScanWorkX

Again, thank you for your contributions, and welcome to AXUG! If you, too, want to explore the benefits of AXUG Premium Membership and take advantage of membership opportunities, simply visit www_AXUG_com > Join AXUG. Our Premium Members are the lifeblood of our organization and enable us to continue to provide valuable networking, educational events, and solution-specific programming.

AXUG

NEWS

MEMO

Asurion Employee Honored with Patriot Award

Asurion, a global leader in technology protection services, recently received the Patriot Award, given by the Employer Support for the Guard and Reserve (ESGR). This award is given to honor employers "for contributing to national security and protecting liberty and freedom by supporting employee participation in America's National Guard and Reserve Force." This includes accommodating the needs of active service men and women through flexible schedules, time off before and after deployment to spend time with family, and granting leaves of absence if necessary.

"This award recognizes the value Asurion has placed on the service men and women they employ," said retired Army Colonel Don Bradley of ESGR. "We are proud of companies in our community like Asurion who work with active and reserve duty men and women to enrich the workplace and drive productivity."

CountryMark Program Can Prolong Engine Life

CountryMark, one of Indiana's leading suppliers of fuel and lubricants, is offering a lube analysis program to test the fluids in farm and construction equipment as well as buses and over-the-road trucks. Mick Calvin, CountryMark business development manager, said the Total Analysis Program or TAP can alert users to potential problems before they head to the fields this spring. "This program allows us to look at crankcase oil, transmission fluid, hydraulic fluids, and anti-freeze, and to analyze these fluids to determine the quality, the life, and the contaminates that might be in these fluids," he said. The analysis will tell users how their equipment is performing as well as how their lubricants are performing. Calvin told Hoosier Ag Today that the analysis of crankcase oil, "Will tell us if we have reached the end of the life of that oil or if there are things like dirt, anti-freeze, or wear metals in the oil." He added that some operators have the analysis done each time they change oil, while others use a longer interval. He noted that more modern equipment and quality lubricants can go longer between changes.

Microsemi Space Solutions on Board for Historic Mars Rover Mission

Microsemi Corporation (Nasdaq: MSCC), a leading provider of semiconductor solutions differentiated by power, security, reliability, and performance, recently extended its congratulations to NASA and the Jet Propulsion Lab (JPL) for the historic landing of the Mars Curiosity rover. Several of Microsemi's space products were used in mission-critical applications during the launch and flight to Mars and continue to support the mission on the surface of Mars. These applications include: launch systems; avionics; telemetry; navigation, drive control, mission computers; cameras; and other instruments.

"Microsemi has had the privilege of providing high-reliability semiconductor solutions for groundbreaking U.S. space programs dating back to the launch of the first Atlas rocket more than 50

years ago," said James J. Peterson, president and CEO of Microsemi. "The landing of the Curiosity rover on Mars is yet another historical milestone in space exploration, and a credit to American ingenuity and innovation. We are proud that our technology played a role in this significant event, and we salute NASA, JPL, and all of the individuals on the successful landing of the Mars Curiosity rover."

Tel smith Receives Pillar of the Industry Award for Participation in "I Make America" Campaign

The Association of Equipment Manufacturers (AEM) has named Telsmith the newest recipient of their annual Pillar of the Industry award, given to companies for achieving Gold status in the I Make America campaign.

To obtain Gold status and earn this award, Telsmith dedicated time and effort to activities that would create awareness to the I Make America program. Such activities included significant employee involvement; outreach to the state, local and federal legislators; promoting campaign sign-ups at trade shows and with allied trade associations; and production of an "A Day in American Life" video telling the story of how Telsmith companies, employees, and communities "make America."

"We commend Telsmith for achieving Gold status in the I Make America campaign," said Dennis Slater, president of AEM. "As a member of AEM, Telsmith exemplifies the commitment we need from all manufacturers around the country to send the message to Congress and the White House that our economy is in urgent need of a new manufacturing policy that will create jobs."

Zurn Introduces Z6930-XL and Z6930-XL-GEN AquaSense® Battery Powered Sensor Faucets

Zurn Industries LLC, industry leader in highly-engineered water product solutions, announced the debut of the new Z6930-XL and Z6930-XL-GEN AquaSense® Battery Powered Sensor Faucets. The faucets feature a new aesthetic coupled with improved quality components, including chemically-resistant materials designed to withstand conditions commonly faced in commercial applications.

The new, free-flowing design of the Z6930-XL is well-suited for a wide range of commercial market applications such as high-profile office buildings, educational facilities, and healthcare applications. In addition to the new design appeal, an enhanced, hidden sensor lens is constructed of chemically-resistant materials to deliver long-lasting durability. Designed to resist harmful cleaning agents or user vandalism once installed, the Z6930-XL also offers a one-of-a-kind replaceable sensor lens to further extend the life of the product. Constructed of an all-cast brass spout, the faucet features electronic efficiency for improved battery life and is ideal for new construction and retrofit applications. The new sensor faucet is also backed by a five-year warranty to ensure years of long-lasting superior performance.

AXUG

events

EXAMPLE

The event calendar on www_AXUG.com and the weekly AXUG® newsletter are your best sources for the latest AXUG event information as this list is subject to change. Events are added weekly, so check back often and get registered for the next exciting AXUG event.

Special Interest Group (SIG) Sessions

MARCH 26 – Project Managers

APRIL 11 – BI and Reporting

APRIL 12 – CPM Friday

APRIL 16 – Internal Controls and Compliance

MAY 10 – CPM Friday

MAY 21 – Project Managers

JUNE 14 – CPM Friday

JULY 12 – CPM Friday

AUGUST 9 – CPM Friday

SEPTEMBER 13 – CPM Friday

OCTOBER 11 – CPM Friday

NOVEMBER 8 – CPM Friday

DECEMBER 13 – CPM Friday

Workshop Sessions

MARCH 28 – UGIO

APRIL 2 – UGIO

APRIL 9 – Member Benefits You've Probably Never Heard Of!

APRIL 23 – UGIO

APRIL 24 – Convergence Encore: Microsoft Dynamics AX 2012 Project Management

APRIL 30 – Microsoft Dynamics AX 2012 Under the Hood: Business Intelligence

APRIL 30 – Microsoft Dynamics AX 2012 Under the Hood: New Security Model

MAY 1 – Convergence Encore: Social Media

MAY 7 – Partner Showcase: Altec Document Management

MAY 8 – Convergence Encore: Code and Database Optimization

MAY 14 – Convergence Encore: Microsoft Dynamics AX 2009 Tips and Tricks

MAY 15 – Microsoft Dynamics AX 2012 Under the Hood: Financials

MAY 22 – Convergence Encore: Microsoft Dynamics AX 2012 Tips and Tricks

JUNE 4 – AXUG Partner Benefits and What it Means to You!

JUNE 5 – UGIO

Roundtable Sessions

MARCH 29 – Inventory Friday!!!

APRIL 1 – AXUG Partner Benefits and What it Means to You!

APRIL 26 – MRP

MAY 31 – Inventory Friday!!!

JUNE 7 – Ask the Expert: Security

Regional Chapter Meetings

APRIL 10 – Ontario

APRIL 11 – New Orleans

APRIL 18 – Houston

APRIL 18 – Southwest

APRIL 25 – New England

MAY 16 – Southwest

MAY 16 – Indiana

news

AXUG

Global Branch News

Carolinas Chapter

The AXUG® Carolinas Regional Chapter met on February 6 at the Sunrise Technologies office in Winston-Salem, North



Carolina. Turnout for the meeting was very good with 26 attendees: nine Users (all AXUG Members), four Partners, and one Microsoft representative. The meeting opened with a light breakfast and networking. After a welcome and introductions, Sunrise Technologies presented

a Microsoft Dynamics AX for Retail demo, which was unique as it was done in a mock retail environment complete with touchscreen stations, receipt printers, and cash drawers. How cool is that!

After some more networking during lunch, Sunrise lead a presentation and discussion on "Creating a System of Engagement with Microsoft Dynamics AX – Business Intelligence and More". This was followed by roundtable discussions on topics such as inventory issues, retail, go-live/ implementation issues, and BI.

The meeting closed with a solicitation for a User to host the next meeting, scheduled for this summer. Over the last couple years, the Carolinas Regional Chapter has tried to encourage User Members to host a chapter meeting to showcase their use of Microsoft Dynamics AX. This has been well received by all, and we hope to continue in this fashion going forward.

New England Chapter

The AXUG New England Regional Chapter meeting took place in late January at the Microsoft offices in Cambridge, Massachusetts. We had

a tremendous turnout, with 30 attendees representing 11 different Microsoft Dynamics AX Customers – all AXUG Members – and six different Partners. After a round of introductions, the meeting sponsor, Bottomline Technologies, presented an overview and brief demonstration of its three main products: Createform® for Dynamics AX, Transform Filer® for

Microsoft SharePoint®, and Transform AP® for Microsoft SharePoint. It was great to see how these capabilities integrate with Microsoft



Dynamics AX and leverage SharePoint for a powerful User experience!

Regional Chapter Chair Mark Erickson of Bemis Associates, Inc. then presented an update on AXUG, followed by a wonderful lunch from Baker's Best. After lunch, our keynote speaker Gina Pabalan from Edgewater Fullscope gave a very interesting and engaging presentation on "Business Intelligence – Getting the Information You Need out of Microsoft Dynamics AX". Gina explained the various layers of the BI stack and how important each one is to an effective BI solution. She discussed the phases a typical Microsoft Dynamics AX Customer goes through: implementation – stabilization – optimization, and how BI can be an essential part of extending ERP beyond the initial requirements. She clearly explained the elements of BI Development Services, or BIDS, and showed how various third-party solutions map into these services. (Gina is featured as our VAR Partner Member Showcase on page 22.)

Following Gina's presentation, we morphed our discussion of BI into a roundtable discussion on several different topics, followed by a discussion of future agenda topics. Our chapter has agreed to meet quarterly, on the fourth Thursday of each quarter, from 10:00 a.m. to 3:00 p.m. We reached out to yet another business Partner, ITK Solutions, who offered to help arrange speakers for our next meeting on Thursday, April 25, at Microsoft in Cambridge. Topics to be explored are archiving, EDI, what next after Microsoft Dynamics AX 2012, and a review of Convergence 2013.

As mentioned during the roundtable, AXUG NE has established a LinkedIn group to facilitate communication among Members. We encourage Members to join the group and keep the conversation going! We thank our sponsor and speaker, as well as those who were able to attend our January meeting. We look forward to seeing you in April!

TOLA (Texas, Oklahoma, Louisiana, and Arkansas) Chapter

The AXUG TOLA Chapter met on February 13 at Thermon Manufacturing in San Marcos, Texas. Thirty-eight Users, Partners, and Microsoft representatives met to hear a Microsoft Premier Support overview from Sonny Ranz and a sponsor presentation from Zap Technology, a Microsoft Partner of the Year award winner.

After lunch the learning continued with an in-depth look at Microsoft Dynamics AX 2012 SP2, a plant tour of Thermon Manufacturing, and a presentation from Microsoft on CustomerSource. We rounded out the afternoon with some logistical planning for our next meeting.



AXUG Takes on Rome

Many analogies can be drawn from the fact that the first AXUG® Event in Europe was held just down the street from the site of the ancient Roman Forum. Like the Forum, the event was a place to gather and share information. Although it's doubtful the ancient Romans were discussing business issues and their company's use of Microsoft Dynamics AX, the premise of value through community stood clear.

Microsoft Dynamics AX User communities exist in many places around the world. The January event alone brought in Users from Australia, Czech Republic, Denmark, Germany, Hungary, Ireland, Italy, Malta, Norway, The Netherlands, the United States, and the



unique to the individuals who work in those areas. The discussion was so lively in some sessions that only about half the slide deck was presented as the discussion in the room provided even better guidance for Users as they shared their own experiences.

Users were also interested in hearing from others who have recently upgraded to Microsoft Dynamics AX 2012. User training, non-technical requirements for upgrades, and best practices for working with Partners during an upgrade were discussed in the roundtable



United Kingdom. One of the main drivers for holding The AXUG Event – Rome was to invite people from those disparate communities together in an effort to connect them into a global dialogue.

This objective was met, and plans are well underway to create a federation that provides separate User Groups a place for support. Although Users in a country have much to discuss with regard to localization issues, there are many opportunities for sharing knowledge around issues that are global in nature. Inviting more people to the conversation means that the likelihood of someone, somewhere having the answer to your problem increases.

We quickly saw that some issues transcend the specific geographic place in which Users work. For example, managing the vast functionality of Microsoft Dynamics AX in the finance, manufacturing, and IT administration areas provided many opportunities for role-based breakout sessions to discuss issues

sessions. Security was another lively session as technical and functional Users learned about tools and approaches for managing security in the various versions of Microsoft Dynamics AX.

In addition to bringing together representatives from previously existing User Groups, another objective was to seed new groups in regions that don't currently have a User Group. Out of The AXUG Event – Rome, we've already seen User Groups introduced in Hungary, Ireland, and Italy!

Thanks to everyone for their contributions during the breakout sessions, and special thanks to our friends from support in the United Kingdom and R&D in Copenhagen who made the trip to Rome. Of course, the event also would not have been a success without great sponsors: Atlas from Globe Software, AXtension, Demand Solutions, and TARGIT. Their Partner showcase sessions provided Users an excellent opportunity to learn more about solutions that can further enhance their Microsoft Dynamics AX installation.

The spirit of community was alive and well in Rome, and we look forward with anticipation to future events.

AXUG

MILINDA Vitharana PROGRAM MANAGER



MILINDA VITHARANA

Dynamics AX team and work towards the vision Microsoft has for BI.

AXUG®: *The theme for this issue is BI, so we're glad to visit with you about what Microsoft sees as the future of BI.*

Milinda Vitharana (MV): If you look at the BI industry, the last 20 or 30 years have been spent on perfecting the engineering side. We have a lot of technologies, but the challenge now is making business insights accessible to everyone in the organization in a way that doesn't require them to have special skills. This struck me as the next hurdle.

AXUG: *What kind of work are you doing to make BI more accessible for Users?*

MV: My team owns the BI framework within Microsoft Dynamics AX, and one of our core philosophies is that BI is part of what you do. It's not a place you go to or a tool you use. BI should be there to assist you as you focus on your daily work.

For an example: we provide insights in very subtle ways, say on a list page we show recent activity and other relevant data. If you want to dig deeper, see trends, and create visualizations, we will launch a graphical environment where you can explore relevant data. We're not trying to overwhelm the User, but instead help by being in the background and coming to the foreground only when you want it to.

AXUG: *What is your team's vision for BI in the future?*

MV: In the immediate future, you will see improvements that make it

easy to explore data and trends. It will be super easy to take data from Microsoft Dynamics AX, quickly visualize it or mash it up with other external data, and then pin it back in the client.

Capabilities are just one angle of the value; the other is pre-built models and content that you can use without having to develop from the ground up. Going back to Microsoft Dynamics AX 2009, one of the things we wanted to do was provide a solution that you can implement as you implement Microsoft Dynamics AX. We simplified the implementation and configuration of the solution in Microsoft Dynamics AX 2012. We want to be able to provide a good starting point for our Customers where you can just turn the switch on and use the functionality when you implement the product.

AXUG: *With those enhanced capabilities, where do you see ISV solutions fitting in?*

MV: We see ourselves as a platform where our Partners and ISVs can add value on top of what we do. We cannot possibly provide all the content and capabilities that are relevant to all the industries and Customers of all sizes. We want our Partners and ISVs to specialize and create additional value for our Users.

I think there's room for improvement and growth. Today there's a general sense of confusion around BI tools and capabilities. Of course, Microsoft ships a set of powerful capabilities and tools with the product, and there are a lot of great tools and capabilities offered by our ecosystem of Partners and ISVs. However, while these capabilities are powerful and cool, there are situations in which you should use them, and there are cases where you shouldn't. I agree that there is some overlap in these capabilities, but we haven't done a good job explaining which tools are to be used for which purpose.

So, after a lot of consultation and discussion, we created a one page taxonomy (see sidebar) that explains the capabilities and when you should use them. That's one of the things you'll hear us talk about in every forum we get invited to. A lot of our Partners and ISVs have adopted this taxonomy, and we would like to see others aligning with this taxonomy as well. We're also creating a white paper called "The Right Tool for the Job" which explains our reasoning in great detail. This information will be presented at Convergence and then available online after the event in InformationSource.

By de-mystifying BI together as an ecosystem, we can all benefit.

AXUG: *What questions do you receive most often from Users?*

MV: Many of the questions I receive are along the lines of capabilities, such as which tools Users should use and what technologies they should adopt. We discussed a bit on this topic earlier.

In addition to clarifying the right tool for a given job, I feel that adding value on top of Excel is super important. Excel is on almost every desktop and most tools have an "export to Excel" option. If you've seen enhancements in SQL Server 2012 and in Office 2013, you will notice that Excel in conjunction with SQL Server is becoming a great BI tool.

As a Microsoft Dynamics team, we'll leverage that more and more. For power Users who really want to make sense of data, Excel is a great tool that you can rely on. As a strategy, we will enable you to securely take Microsoft Dynamics AX data into Excel and then mash it up with other data sources. We will make that scenario easy and fun.

The other question I get is in terms of data warehousing and data structures used for reporting. To data warehouse or not, there are a lot of arguments out there. As someone who built data warehouses for almost a dozen years, I can see the value. However, technologies have evolved that address the scenarios that previously could only be addressed by a data warehouse back in the day.

One of the things we'd like to do is to enable you to achieve some of these scenarios without having to make a major investment in a data warehouse. Building a data warehouse is not cheap or easy. If we can avoid that with newer technologies, why shouldn't we look into that?

However, we do realize that you have to build data warehouses for some scenarios, and we've always enabled you do to so with SQL Server BI technology.

AXUG: *Do you experience bewilderment from Users when you suggest they use Excel as a reporting tool?*

MV: We do. Unfortunately we didn't think of Excel as a BI client in previous versions (such as 2003 and 2007), so we didn't really make that scenario simple. There were pivot tables, charts, and macros. If you knew your way around, you could do great things.

With Excel 2013, you will see that building great visualizations and doing analysis has gotten a lot easier. I see such enhancements

coming into Excel more and more in the future. I do hear concerns from people when we say that Excel should be the ad-hoc analysis/reporting environment, but looking at the technology in the pipeline, we see that Excel will be dramatically improved both from a User as well as a manageability point of view.

AXUG: *Does Microsoft Dynamics AX 2012 make it easier for Users to use BI functionality out of the box?*

MV: Microsoft Dynamics AX 2009 was the first time we introduced the concept of an out-of-the-box BI solution. The whole idea was to provide a ready-made solution so that every Microsoft Dynamics AX User has some BI capability built in. The solution in Microsoft Dynamics AX 2009 was harder to implement than we thought.

We've made it a lot easier to implement that with Microsoft Dynamics AX 2012. We have also introduced a wizard-driven UI for performing most common configuration and customization options so that the solution can be implemented without requiring specialist BI skills.

That's not to say it's an end-all solution. We've built it on top of the Microsoft BI stack in a way that it can be extended by a power User or a developer. The solution will also work well with external tools that work with Microsoft BI technologies.

Going forward you'll see BI playing a key role in the Microsoft Dynamics AX User experience. Our hope is that you'll leverage the capabilities we provide out of the box.

My request – my appeal, really – is for Users to try the solution. It will get you started and provide value to your Microsoft Dynamics AX implementation.

AXUG

Want to keep up with the Microsoft Dynamics AX team and their BI endeavors? Bookmark their blog at blogs.msdn.com/b/dynamicsaxbi.

Microsoft Dynamics AX 2012 R2 BI Capabilities & Tools

CATEGORY	CAPABILITY	TOOL or OPTION
QUERY	PRE-DEFINED QUERY <ul style="list-style-type: none"> Operational Queries Lists of Operational/Financial Data Print Lists of Operational /Financial Data 	<ul style="list-style-type: none"> Cues List Pages Auto Report
	AD-HOC QUERY <ul style="list-style-type: none"> Analyze Operational/Financial Data 	Microsoft Excel add-in for Microsoft Dynamics AX 2012
REPORTING	Ad-hoc Reporting Statutory & Financial Reports Charting and Infographics Production Reports	Microsoft SQL Server Report Builder v3 with Cubes Management Reporter for Microsoft Dynamics AX2012 R2 ASP.net Chart Controls Microsoft SQL Server Reporting Services Reports
ANALYSIS	Key Performance Indicators Scorecards Ad-hoc Summarization and Exploration	Role Center/Business Overview Web Part (For Advanced Capabilities: PerformancePoint Services in Microsoft SharePoint Server) SQL Server Power View Microsoft Excel with Cubes and Microsoft Dynamics AX add-in
ANALYTICAL APPLICATIONS	Financials Consolidation	Management Reporter for Microsoft Dynamics

Tips and Tricks for Finding Help When You Need It

by Margo Crandall

If you are looking for Help and resources for Microsoft Dynamics AX 2012 and subsequent releases, there are a few key things you should be aware of before you start:

- » The Microsoft websites are organized around providing assistance for specific stages of the Customer lifecycle: evaluation and purchase, customization, implementation and rollout, production use, and production maintenance.
- » Some of the Microsoft websites and the content on them require logons and are not accessible to public search engines. These sites include CustomerSource, InformationSource, and PartnerSource.
- » Content is written and organized specifically for the Application User, IT Pro, and Developer audiences.
- » Content on TechNet and MSDN is updated frequently in English.
- » Updates to in-product Help for the Microsoft Dynamics AX 2012 Help Server are released as installable updates on CustomerSource and PartnerSource. Updates are available for English and localized Help.
- » We announce our content updates on Twitter (@AXContent) and on the AXSupport blog (<http://blogs.msdn.com/b/axsupport/>).

What are all the websites for, and when should I use them?

The Microsoft websites are organized to support the stages of the Customer lifecycle. Each stage is supported by a different set of websites.

Sites	Customer Lifecycle Stages				
	Evaluation	Customization	Implementation and rollout	Production use	Production maintenance, updates, and support
microsoft.com/dynamics/ax	✓				
Dynamics Marketplace	✓				
MSDN		✓			
TechNet			✓	✓	

InformationSource*	✓	✓		
CustomerSource*		✓		✓
Microsoft Learning		✓		
Microsoft Dynamics Community	✓	✓	✓	✓
Microsoft Download Center	✓	✓	✓	✓
AXSupport blog	✓	✓	✓	✓
WebSearchAX	✓	✓	✓	✓

*Requires service plan enrollment and is not available from public search engines such as Bing and Google.

Microsoft.com/Dynamics/AX

The primary site for evaluating and purchasing Microsoft Dynamics AX. It provides information about the capabilities of Microsoft Dynamics AX, Customer references, opportunities to view the product in action, and information about how to buy the product. You can also chat with a knowledgeable sales representative.

URL: www.microsoft.com/en-us/dynamics/erp-ax-overview.aspx

Microsoft Dynamics Marketplace

Provides solutions that are tailored to your industry or to your specific need as well implementation Partners in your region.

URL: <http://dynamics-erp.pinpoint.microsoft.com/en-US/home>

MSDN library for Microsoft Dynamics AX

The primary site for developers who want to customize or extend the capabilities of Microsoft Dynamics AX. It provides detailed how-to articles and API reference topics. We announce additions and updates to content on MSDN almost monthly.

URL: msdn.microsoft.com/en-us/library/aa496079.aspx

TechNet Library for Microsoft Dynamics AX

The primary site for system administration and application User content. Additions and updates to content on TechNet are announced approximately monthly. Content is provided for each audience:

- » Application User content includes information about how to

configure modules, perform tasks within a module, how to use product-wide features, and productivity tools.

- » System administrator content includes information about deployment, patching, upgrades, managing different types of servers, and security.

URL: <http://technet.microsoft.com/en-us/library/gg852966.aspx>

InformationSource*

Provides tools and guidance that help you plan and achieve predictable implementations of Microsoft Dynamics AX 2012. InformationSource provides resources for analyzing, designing, configuring, and customizing Microsoft Dynamics AX by following a set of best practices that were researched and identified by the Microsoft Dynamics AX solution architecture team.

InformationSource provides supported services and tools that can be used to improve implementations, such as the Data Migration Framework, Application Analysis Tool, Intelligent Data Migration Framework, Security Upgrade Advisor, and Code Upgrade Service.

The site also provides access to core concepts about application architecture and implementation strategies in the form of the following content types:

- » Datasheet—Two-page documents that describe a feature. Intended for pre-sales conversations.
- » Elevator pitch PowerPoint slides – Slide decks that describe a core concept or feature.
- » White papers – Core concept and design insight papers describe features and decisions that were made as features were designed.
- » Videos – How-to videos that demonstrate how to perform a task.

URL: <http://informationsource.dynamics.com/rfpservicesonline/RfpServicesOnline.aspx>

CustomerSource*

The primary support site for Microsoft Dynamics AX. It contains licensing information, Knowledge Base articles, hotfixes, and updates. It also provides information about how to submit support requests, and it is the site where you can access training resources from Microsoft Learning.

URL: www.customersource.com/

Microsoft Learning

Lists extensive training and certification resources, and helps you find Training Centers that can provide instructor-led training.

URL: www.microsoft.com/learning/

Microsoft Dynamics Community

Hosts blogs, forums, and videos from the Microsoft product team as well as Partners and Customers. Resource pages have recently been added that can help you resolve frequent Customer issues. Examples of resource pages include Upgrading to Microsoft Dynamics AX 2012, Troubleshooting Common Office Add-in Issues for Microsoft Dynamics AX 2012, and Enterprise Portal and Role Centers in Microsoft Dynamics AX 2009.

To keep up with newly released and updated resource pages on the Community site, you can subscribe to the RSS feed for the Resource Page blog at: <http://community.dynamics.com/product/ax/axtechnical/b/axresources/rss.aspx> .

URL: <http://community.dynamics.com/product/ax/default.aspx>

Microsoft Download Center

White papers and other printable documents are available from the Microsoft Download Center but can also be found through searching TechNet and CustomerSource.

URL: <http://www.microsoft.com/en-us/download/default.aspx>

Microsoft Dynamics AX Support blog

Provides tips and tricks from our support team and notices of updates about the content that we've recently posted to TechNet and MSDN.

URL: <http://blogs.msdn.com/b/axsupport/>

WebSearchAX

Although the web search page is available from within Microsoft Dynamics AX, it is also a website that you can add to your Favorites menu and use externally. You can use it to search for content by User role, product version, module, and topic type. You can also include blogs, community, code samples, and white papers in the search results.

URL: www.microsoft.com/dynamics/ax/websearch/WebSearchAx.htm



What's the best way to search?

- » Use the WebSearchAX page to access a Bing search that is filtered to include only official Microsoft Dynamics AX content from TechNet and MSDN. The tool also enables you to search for relevant community content, to specify a product version to search for, or to search only for code samples. You can get to WebSearchAX from the Help menu in Microsoft Dynamics AX or directly from: www.microsoft.com/dynamics/ax/websearch/WebSearchAx.htm.
- » Use any public search engine to find content from TechNet, MSDN, Microsoft.com, or the Microsoft Download Center.
- » To find hotfixes and updates on CustomerSource, search for the following pages:
 - » Hotfixes Released for Microsoft Dynamics AX 2012
 - » Hotfixes Released for Microsoft Dynamics AX 2009
 - » Hotfixes Released for Microsoft Dynamics AX for Retail
 - » Hotfixes Released for Retail Chain Manager R2 for Microsoft Dynamics AX 2009
- » Go to InformationSource and search directly.
- » Go to CustomerSource and search directly.

Note: When searching content on the Help server, you may need to search for plural and singular terms separately.

Where is the Help for me?

Application Users

Application User content includes information about how to configure modules and how to perform tasks within a module. It also provides information about product-wide features and productivity tools.

- » The most up-to-date content is on TechNet, in the Application Users section. Some content is only available on TechNet, such as the Report Catalog.
- » The same content, current for the released version of the product, is available from within the client at Help > Application User Help.
- » From within the client, you can also use the web search page (WebSearchAX) that is available from Help > Application User Help on the web.
- » Context-sensitive Help is also available for forms in the client and in Enterprise Portal by pressing F1.

System Administrators

System administrator content includes information about deployment, patching, upgrade, managing different types of servers, and security.

- » The most up-to-date content is on TechNet in the Microsoft Dynamics AX 2012 System Administrators section.

- » From within the client, use the web search page (WebSearchAX) that is available from Help > System Administrator Help on the web.

Developers

Developer content includes information about how to use the IDE and debugging tools, Visual Studio integration, User experience guidelines, and reference content for X++ and APIs.

- » The most up-to-date content is on MSDN in the Microsoft Dynamics AX 2012 for Developers section.
- » From within the Development Workspace in the product, use the web search page (WebSearchAX) that is available from Help > Developer Help on the web.
- » Context-sensitive Help is available for classes, tables, methods and data types by pressing F1 in the AOT or in the MorphX code editor.

What is the relationship between Help in Microsoft Dynamics AX and Help on TechNet and MSDN?

When each version of Microsoft Dynamics AX 2012 is released, it includes US English Help that was finalized approximately four weeks before that version of the product was generally available. That Help is localized, and it is usually available at general availability (GA). Because the content publishing team at Microsoft cannot ship the most up-to-date version of Help with the product, we recommend that you download the most recent installable update for your country or region.

We publish all of the Help that is available with the product on TechNet and MSDN as well.

After most of the content for a product release is live on MSDN and TechNet (usually in one big push), we then move to publishing monthly updates to it. Updates from TechNet are eventually published in half-yearly Help updates or with the next product release.

Where can I get English installable updates?

The update is available as part of KB 2781666: Hotfix for updated content in US English (<http://go.microsoft.com/fwlink/?LinkId=200535>)

Where can I get localized installable updates?

To get non-US English Help, you must install a Help update on your Help server. If you have an earlier version of Microsoft Dynamics AX 2012, you may want to install the most recent Help from the US English Help update.

The update is available as part of KB 2585394: Hotfixes for translated content (<http://go.microsoft.com/fwlink/?LinkId=218294>).

Is the Localized Help ever updated?

We ship new installable Help updates with each product release.

How can I give feedback about Help?

You can provide feedback directly from TechNet and MSDN topics as well as from topics in Microsoft Dynamics AX.

- » On TechNet or MSDN, you can use the control at the bottom of each topic to let us know whether the content was helpful. After you click it, you are provided with space to send specific feedback.

Did you find this helpful?

Yes No

- » In Microsoft Dynamics AX, you can use the link at the bottom of each topic to send comments about it to the Content Publishing team.

You can also email us at Adocs@microsoft.com to let us know if content that you need is missing or if existing content doesn't meet your needs.

[AXUG](#)

Margo Crandall is principal technical writer for Microsoft Dynamics AX content publishing. In her role, she works on the system administration documentation and often helps publicize solution content. She has been with Microsoft for more than 15 years and can be reached at Margo.crandall@microsoft.com. Visit www.AXUG.com/member-resources/magazine to read the online version of AXUG Magazine and activate the hyperlinks Margo references in this article.

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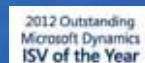
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NAME THAT PHOTO

contest

Tad Dockstader, from Kurt J. Lesker Company and a presenter at The AXUG® Event in Rome this past January, visiting with Christian Rytt and Michael Neipper, members of the Microsoft Dynamics AX R&D team.

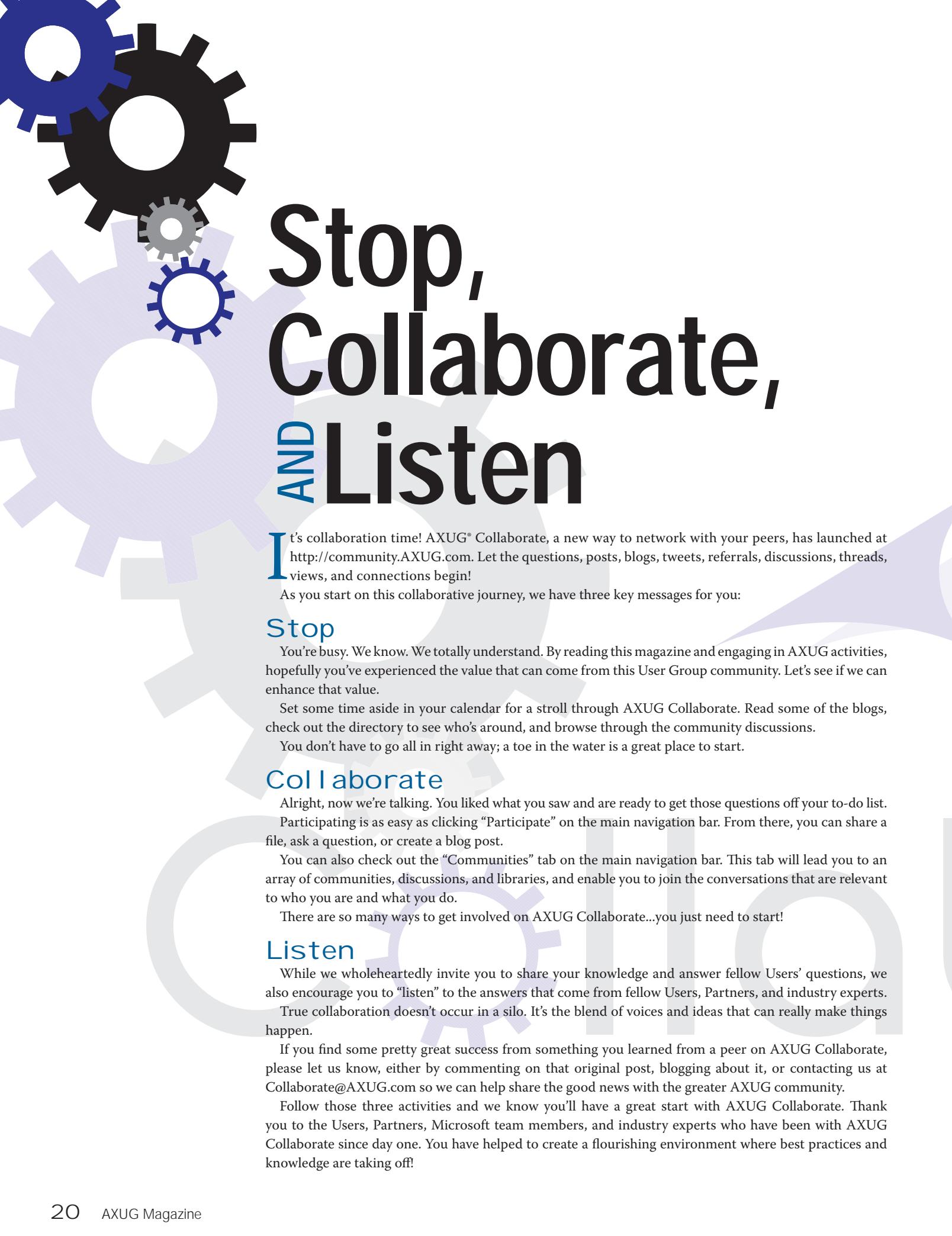
What might these gentlemen be discussing? Simply email your submission to Captioncontest@AXUG.com. The winning submission will be printed in the magazine's next issue.



Congratulations!

Congrats to **BRANDON SPENCER** from **ICM APPS TEAM** for winning last quarter's contest with his submission of "You say they are giving away an XBOX in that one?" Brandon – your prize is in the mail!

RESULTS



Stop, Collaborate, AND Listen

It's collaboration time! AXUG® Collaborate, a new way to network with your peers, has launched at <http://community.AXUG.com>. Let the questions, posts, blogs, tweets, referrals, discussions, threads, views, and connections begin!

As you start on this collaborative journey, we have three key messages for you:

Stop

You're busy. We know. We totally understand. By reading this magazine and engaging in AXUG activities, hopefully you've experienced the value that can come from this User Group community. Let's see if we can enhance that value.

Set some time aside in your calendar for a stroll through AXUG Collaborate. Read some of the blogs, check out the directory to see who's around, and browse through the community discussions.

You don't have to go all in right away; a toe in the water is a great place to start.

Collaborate

Alright, now we're talking. You liked what you saw and are ready to get those questions off your to-do list. Participating is as easy as clicking "Participate" on the main navigation bar. From there, you can share a file, ask a question, or create a blog post.

You can also check out the "Communities" tab on the main navigation bar. This tab will lead you to an array of communities, discussions, and libraries, and enable you to join the conversations that are relevant to who you are and what you do.

There are so many ways to get involved on AXUG Collaborate...you just need to start!

Listen

While we wholeheartedly invite you to share your knowledge and answer fellow Users' questions, we also encourage you to "listen" to the answers that come from fellow Users, Partners, and industry experts.

True collaboration doesn't occur in a silo. It's the blend of voices and ideas that can really make things happen.

If you find some pretty great success from something you learned from a peer on AXUG Collaborate, please let us know, either by commenting on that original post, blogging about it, or contacting us at Collaborate@AXUG.com so we can help share the good news with the greater AXUG community.

Follow those three activities and we know you'll have a great start with AXUG Collaborate. Thank you to the Users, Partners, Microsoft team members, and industry experts who have been with AXUG Collaborate since day one. You have helped to create a flourishing environment where best practices and knowledge are taking off!

AXUG Collaborate and LinkedIn:

Completing Your Profile and Building Your Network

by Michelle Spitzer

Ugh, not another online profile to update!" No worries – you can complete your AXUG® Collaborate profile by simply pulling in the information you've already entered on your LinkedIn® profile. It's also a great way to discover which of your existing LinkedIn connections are AXUG Members and add them to your AXUG Collaborate network, too!



From the AXUG Collaborate home page, click on "Complete your profile" in the upper right-hand corner.

Once on your Profile, scroll down and click on "Bring in your information from LinkedIn."

Grab Profile Info from LinkedIn

Bring in your information from LinkedIn®

You will be prompted to enter your LinkedIn username and password. Doing so will bring you to the LinkedIn Connect page. The left-hand column displays your picture, summary, job history, and education information from your LinkedIn profile; the right-hand column is the information as it appears in your AXUG Collaborate profile. Simply check the box in the "Update from LinkedIn" column next to the profile information you want to display in AXUG Collaborate. Then click Save and Continue.

The LinkedIn Connect page allows users to sync their LinkedIn profile with their AXUG Collaborate profile. It shows sections for "Your Picture from LinkedIn", "Your summary from LinkedIn", "Your job history from LinkedIn", "Your education from LinkedIn", and "Your connections from LinkedIn". Each section has a "Save" button and a "Update from LinkedIn" checkbox. A "Save and Continue" button is at the bottom.

Next you'll see a LinkedIn Friends page, which will display all of your LinkedIn connections who also have profiles in AXUG Collaborate. Simply click the "Send Contact Requests to All" button at the top of the page, or connect with them individually by using the "Add as contact" or "Send Message" links in the right-hand column. When you're done, click "Finished" at the bottom of the page.

AXUG

The Search Results page shows a list of LinkedIn friends who are also members of AXUG Collaborate. The columns include "Name", "Title", "Company", "Location", and "Connections". There are buttons for "Edit Profile", "Add as Contact", and "Send Message". A "Show: 25 per page" dropdown is in the top right corner.



Dynamics Customers. Now at Edgewater Fullscope, Gina's team is dedicated to serving the needs of Microsoft Dynamics AX Users and helping them take their Microsoft Dynamics AX implementation to the next level.

At AXUG® Summit 2012, Gina presented "Business Intelligence – Getting the Information You Need Out of Microsoft Dynamics AX." AXUG sat down with Gina to learn more about the BI landscape for Microsoft Dynamics AX, which included some surprising thoughts about when and how Users should implement BI.

AXUG: What led you to focus on BI to this extent?

Gina Pabalan (GP): BI is a natural extension of ERP. ERP is the transactional backbone and the necessary foundation of BI. Integrated ERP systems like Microsoft Dynamics AX require a lot of data input, and it is important that Users receive value from that data. Even though a new ERP system provides business value in and of itself, companies are looking for more; they want information to help them manage their business in a more strategic way.

We believe it is important to provide clarity around this topic to better serve our Customers. My presentation breaks down BI, discusses why it's difficult to implement, and shares what you need to do to make it work. It also covers Microsoft and the ISV landscape, which is evolving.

AXUG: What's the largest problem surrounding BI today?

GP: There are a lot of misaligned expectations around the "what, when, and how" of implementing BI.

When a User is purchasing Microsoft Dynamics AX, the executives making the investment decision see the BI dashboards and envision what life will be like with all this great information

Gina Pabalan, director of support and optimization services for Edgewater Fullscope, has more than 20 years of experience working with clients to implement enterprise applications and business intelligence (BI). Gina has her master's of business administration and is a former CPA. While working for PricewaterhouseCoopers Consulting and IBM Global Services, Gina served many large global clients, mainly in the manufacturing industry. Later at Microsoft, Gina managed a team dedicated to serving Microsoft

to help manage their business. Many times, the dashboards are the very reason they move forward with an ERP investment. Since the BI layer is being delivered as a component of Microsoft Dynamics AX, it seems like a natural and easy extension. What is not so clear is that implementing BI is not easy. In fact, many Users are simply not getting what they need, nor are they meeting their own expectations of what they thought they would be getting.

This misaligned expectation is typical across most ERP implementations, regardless of the chosen ERP system. Users simply underestimate what it takes to be successful with BI, and anyone who claims there is an easy solution is simply not being honest about it.

First, BI is much more dynamic than ERP. For example, there are only so many ways to define how to create and manage purchase orders. With BI, an organization's informational needs will constantly evolve. Therefore, it is important to implement a framework and tools that a User can support longterm. BI is a business initiative. If Users don't see it as such, they won't get near the value out of it.

Secondly, it is extremely difficult to implement BI in parallel with ERP.

Thirdly, the BI technical landscape is confusing. Microsoft espouses that the BI layer is delivered with Microsoft Dynamics AX, but then we can walk the Expo floor at AXUG Summit or Convergence and find several ISV Partners selling BI. Users are generally confused about this. They think to themselves, "My Partner told me that BI was part of Microsoft Dynamics AX, so why do I need these other vendors?"

AXUG: To your second point, why is it difficult to implement BI in parallel with ERP?

GP: It is a nice concept to be able to design BI in parallel with an ERP implementation, but it just is not practical. Think about this: an ERP implementation transforms core business processes throughout an organization, and it is important that it is done correctly. When Users flip the switch, they must be able to ship orders, invoice customers, properly track inventory, etc. Companies may see this as a no-brainer, but it is not. The focus must be on core business processes, the basic blocking and tackling of ERP. Many companies struggle to meet the most basic demands of the ERP implementation. Throw in BI, and Users just do not have the people, the bandwidth, and many times, the skill set.

I believe companies should wait until business processes are stable and the organization as a whole is prepared to focus on BI as a strategic initiative. The only exception would be for companies who already have an existing BI framework in place and are simply tying the new ERP system into that.

AXUG: *What people and skill sets are required?*

GP: Many Users think this is something they can pass off to the IT group to deliver. Although IT is a critical player, the most successful BI projects have a business leader focused on defining and leading the charge on delivering business information to the organization. The BI lead should be someone who intimately understands the business and has the experience and vision to understand the key measures and strategic value drivers of enterprise information and performance management.

On the IT side, the skills will be determined by the chosen tools. Within my presentation, I walk through all the components of the BI stack and the various options. The selected BI landscape will determine the required skills. This is why there is no single answer that applies to every organization.

Lastly, don't assume that because someone knows Microsoft Dynamics AX, that they have the skills to implement BI. This is often not the case.

AXUG: *Why do you feel there are so many ISV Partners focusing on BI?*

GP: Although there is definitely a role for ISVs, Edgewater Fullscope does not align itself with any one of the vendors. Each company should assess their own needs and their internal capacity and budget to deliver the right solution. Unbiased advice and being educated on the options are important components to making the right decision on BI framework and tools. Keep in mind that all the vendors, including Microsoft, will show the pretty graphs and the "output" of BI, but it is important, before investing in any solution, to truly understand what it is being purchased.

Further, the BI landscape continues to evolve. What may have been the right answer for Microsoft Dynamics AX 2009 may not be the right answer for Microsoft Dynamics AX 2012.

AXUG: *In addition to all the ISV solutions, in your presentation you mention Excel as a BI tool. Do you think Excel is a good BI solution for Users?*

GP: Excel on its own is not the BI solution, but it is absolutely part of an overall BI strategy. Most business people use Excel, so any time you can put Excel in between a User and a data source, it's a positive thing. For example, it is natural for a functional business User of Microsoft Dynamics AX, such as an accountant or materials manager, to customize a Microsoft Dynamics AX grid, copy and paste it into Excel, and analyze from there. Is this BI? I believe so. That said, there is more to it than Excel, at least for companies looking to deliver enterprise BI. If you look at Microsoft's vision for BI, Excel is certainly part of it.

AXUG: *What's the downside to using just Excel for BI needs?*

GP: Excel can be instrumental in delivering and analyzing business information. The problem I see with Excel, as with many good IT products, is that since it is so effective at what it does best, people tend to overextend the use of it, trying to stretch it into areas better served by other tools or solutions. For example, it is a terrific User tool for analysis, but some organizations may try to use Excel as a main data source, hosting massive amounts of data within Excel. There are limitations, including concerns of data integrity and control.

AXUG: *What other recommendations do you have for Users looking to implement a BI strategy?*

GP: Many Microsoft Dynamics AX Users run extremely lean IT departments, with only two or three people on staff, and they struggle with delivering a solid BI solution to their organization. The chosen BI framework must be practical and something they can support longterm. Since an organization's informational needs will continue to evolve over time, it is important that the User organization is not dependent on a Partner for every need or change they want to make.

BI comes in many sizes, so User organizations should expect to have more than one way of delivering information to their User base.

AXUG

Would you like to hear Gina's presentation live?

Save April 11, 2013, at 2:00 p.m. ET in your calendar and check
www_AXUG_com/events for webinar details.

CPM: PAVING THE WAY FOR BETTER DECISIONS

by Jill Carter

Corporate Performance Management (CPM) is a dynamic and exciting part of running a business. How else do you know if the decisions you are making for your company are the right ones? And, while every business measures their progress, what constitutes progress is different from company to company. These different needs are what make creating CPM solutions exciting as well. As a product development team, we run into twists and turns and surprises around every corner.

The Microsoft Dynamics CPM team wants to ensure we deliver innovative and intuitive solutions that exceed Customer expectations. In order to do that, we work very closely with a wide variety of Customers. We dig into their business problems and bounce our ideas for solving them. With an average 10+ years of experience in the CPM space, I thought it would be interesting to ask my fellow team members for their perspective on why CPM is important and what thoughts they have when designing CPM solutions.

First though, let's talk a little bit about CPM. There are three main activities that make up CPM and that happen at the same time:

- » Develop goals – Planning/Budgeting/Forecasting
- » Measure progress against those goals – Financial Reporting and Analysis
- » Determine if and where improvements are needed – Taking Action/Decision Making/Adjustments

CPM software capabilities need to take into consideration these activities and make the process as seamless as possible. For Microsoft Dynamics AX Customers, we are committed to making a long-term investment in the Microsoft Dynamics products that are used to set goals and monitor results:

- » Budget Planning in Microsoft Dynamics AX 2012 R2 – Planning/Budgeting/Forecasting
- » Management Reporter – Reporting and Analysis

These are purpose-built applications, not a set of tools, that provide a robust and secure environment for Users to plan and analyze organizational results. Microsoft Dynamics CPM provides management with timely and accurate information so decisions can be made to improve overall performance.

Let's take a look at these solutions closer and hear from members of the Microsoft Dynamics CPM team.

Management Reporter

Management Reporter is the Microsoft Dynamics AX application used for the creation, distribution, and analysis of financial statements. Management Reporter empowers decision makers to provide real-time insights into organizational results, allowing you to take action and align employee behavior with overall goals.

"The best thing about Management Reporter over the last few years has been the ability to wow the Customers with new and existing features," said April Olson, management reporter program manager. "Financial reporting is one of those must-have parts of a business, but it's often not an area where new and useful features are added. The ability to add so much value to Customers by doing this was very exciting and rewarding."

From a report design perspective, Management Reporter uses building blocks that allow report designers the ability to mix and match these building blocks to create a wide variety of financial reports while keeping report maintenance low. Reports take advantage of the general ledger data available in Microsoft Dynamics AX. Since Management Reporter allows for reports to use any combination of dimensions, report designers are able to get more information out of their general ledger to provide meaningful reports to their company's stakeholders. Reports can also be grouped and scheduled to provide predictability during the financial review process.

Management Reporter leverages the power of Microsoft SharePoint® to deliver reports to those that need them. By publishing personalized report links to SharePoint libraries, everyone in the company has financial data at their fingertips. These reports are viewed in a clean and modern web viewer that allows report viewers to interact and collaborate with others in the company about financial data.

The web viewer in Management Reporter is a new feature. It provides a personalized and relevant financial report for Users across the company, and all they need is a web browser. I was the main designer of this feature, and it was a blast to work on. We stepped outside the traditional financial reporting box and explored many different options with Customers. As a result, many of the Customers we talked to liked how intuitive it is. They said anyone in their company would be able to use it with little to no training. Others were also impressed at how smooth it is for a first release.



"It's so fun to engage all of the willing Customers we have and really use their feedback. It's fun to look at the problem and solve it in a new and effective way," added April.

Budget Planning in Microsoft Dynamics AX 2012 R2

Whether doing top-down budgeting or bottom-up budgeting, Budget Planning in Microsoft Dynamics AX 2012 R2 helps Customers maximize efficiency and User productivity as well as ensures data accuracy when preparing a budget plan.

An organization, hierarchy-based budget plan limits Users' access to the budget plans for the responsibility centers they have access to. Users have the option of using either the Microsoft Dynamics AX client or Microsoft Excel® to update their budget plan. Along with securing the budget plans, budget planning provides an approval process using configurable workflows. Since budget planning is a part of Microsoft Dynamics AX, a seamless integration to the human resources module is available which allows Users to include salary and position information in their budget plan. Once the budget plan is complete, the approved budget is transferred to the general ledger where budgetary control ensures actual expenses don't exceed the budget funds available.

According to Swamy Narayan, principal program manager lead for budget planning, he had three goals when designing Budget Planning: provide auditability to request to approval process; leverage the investment of Microsoft Dynamics AX in Financial Dimensions, Workflow, Security, and Microsoft Office integration; and support budget development using Microsoft Excel while ensuring Microsoft Dynamics AX was the single source of truth.

Bringing It All Together

Since Management Reporter is built specifically for use with Microsoft Dynamics AX, it's optimized to allow for a deep integration with Microsoft Dynamics AX. Ryan Sandness, program manager, helped design the integration between Budget Planning and Management Reporter and feels there is substantial value in the integration between the two solutions.

"Management Reporter makes it easy to create and analyze a side-by-side comparison of a budget plan as it travels through different revisions and to view a side-by-side report containing a list of all of the proposed budget plans," said Ryan.

Microsoft Dynamics AX general ledger data is trickled into the Management Reporter data mart for increased reporting performance. System information, financial data, and financial setup

are all included in the data mart to allow for detailed trial balances, ad-hoc reports, and IFRS statements. All Users, both Microsoft Dynamics AX and Management Reporter, are managed from within Microsoft Dynamics AX.

Attributes such as transaction description, document numbers, and other important transaction and account properties can be included on reports to provide additional detailed information. Along with attributes, Users can filter by originating currency or journal number to create ad-hoc reports for investigation and analysis. Data can also be restricted by operating, tax, and current posting layers to get accurate reports for specialized report needs.

Reporting trees are dynamically aligned with organizational hierarchies, allowing for reports to be quickly updated to reflect the most recent changes to the business. Customers are telling us this is a key reason they are using Management Reporter with Microsoft Dynamics AX.

Management Reporter and Microsoft Dynamics AX can be used together to consolidate companies or business units either with just Microsoft Dynamics AX companies or any ERP. Ownership percent, different charts of account, or fiscal calendars along with Microsoft Dynamics AX consolidation companies can all be handled by Management Reporter. Management Reporter is flexible enough to handle all of the financial reporting needs a company may have.

Reports can be created using budget information from budget plans and budget reservations to help measure overall progress against a company's goals. Users can then drill back on these budget balances, as well as account balances, when viewing reports. Each User is provided relevant and timely information to ensure adjustments can be made as necessary.

"When designing Budget Planning and Management Reporter integration, we made sure that organizations can re-use their existing budget versus actual report to report on their actuals, their budget planning data, budget register data, and budget reservation data with just slight modifications to the column definition," added Ryan. "This familiarity will help Users to generate reports quickly no matter which stage of the budget cycle they are in."

Customer business problems and ensuring the CPM process is as integrated as possible are things the Microsoft Dynamics CPM team takes very seriously. Customer stories are woven into each feature we develop. As a result, Management Reporter and Microsoft Dynamics AX close the circle on the CPM process by providing not only reporting and analysis, but also planning and budgeting that allow you to adjust and be flexible in a changing business environment.

AXUG



doc-link™

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Unlock your potential for improved efficiencies and significant cost savings. Use the power of your Microsoft Dynamics® ERP solution coupled with *doc-link*™'s tight integration to increase control, document visibility, productivity and customer service. With the versatility of *doc-link*, you can make any process or department into a paperless one.

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wordfind

Congratulations to Kelly Kane from Algood Food Company for winning the Winter 2013 Word Find. Your prize is in the mail, Kelly! Below are 25 words that relate to the topics and theme in this issue of AXUG® Magazine. These words can be found in the grid horizontally, vertically, diagonally, backwards, and forwards. Submit your completed Word Find for a chance to win a gift certificate; simply scan and email your entry to Wordfind@AXUG.com.

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- Analyze
- AXUG
- Braun Intertec
- Business Intelligence
- Collaborate
- Community
- Convergence
- Edgewater Fullscope
- Knowledge
- Management Reporter
- Microsoft Dynamics
- Milinda Vitharana
- Regional Chapters
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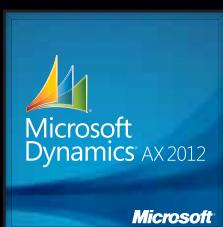
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LEND YOUR EXPERTISE TO THE COMMUNITY

Once upon a time, roughly nine years ago, a gentleman named Andy Hafer was a CIO pounding his head against the wall, trying to get his financial management system to do something it clearly had no intention of doing.

Suddenly it came to him. Someone – somewhere, somehow – has this figured out. He just had to find that person.

That light bulb moment evolved into what you know today as AXUG®, a User Group that is designed by Users, for Users. It's a place where people can go to learn from those who have walked the path, thus alleviating similar head-pounding experiences. It's a place where people can share knowledge with colleagues they didn't know they had. It's a place where magic can happen.

The success of AXUG to date comes not from the technology that makes a webinar possible or the facility that houses an event, but from the active participation of the Users delivering and consuming content in those arenas.

The success of AXUG in the future depends on Users like you to take that first step and lead a session, facilitate a roundtable discussion, organize Global Branch meetings, share a tip in AXUG magazine, or even just raise your hand to ask a question.

Each User has a story to tell, and AXUG is the place for you to tell that story.

How do you take that next step? We're glad you asked. There are so many ways for you to lend your expertise to the AXUG community; you just need to discover what suits you.

Below are a couple of scenarios for you to consider; an interest inventory of sorts. Circle or note the answers that best describe your actions:

The session is about to start. Where can you be found?

- A. The front of the room, of course! You've had five cups of coffee and two hours of sleep, but you are ready to roll and your slides look amazing!
- B. The front row with a fresh OneNote page, handouts printed at your side, new batteries in your mouse, and a list of questions in hand.
- C. The back of the room, greeting people and showing them where they can find an open seat. Does anybody need a bottle of water?
- D. Mobile device in hand, Twitter launched, and #readytoliveblog.

The next round of Global Branch meetings are next week. What are you doing?

- A. Polishing off your session content. They're going to love these demos!
- B. Blocking off your calendar so your co-workers know where you'll be for the day.
- C. Tidying up the last of the logistical details and working with your AXUG liaison to make sure everything is set.
- D. Checking the Facebook event you set up for the occasion, both to see who has registered and to share some teasers as to what they'll experience next week.

It's Summit time. Where do you head first?

- A. To check in and see which of your friends are already here.
- B. To check in, get the conference guide, and reconfirm your action plan for this week's sessions.
- C. To check in, because you're hosting a roundtable discussion in a few hours.
- D. To check in. Actually you already checked in via Four Square, posted a picture of the registration booth to Instagram, and updated your Facebook status.

The next issue of AXUG Magazine just landed on my desk. What do you do?

- A. Flip to the article you sent in. These tips and tricks are solid GOLD!
- B. Read it cover to cover, flagging the content that you want to review again later.
- C. Send an email to your AXUG liaison with an update as to what you did at the last Global Branch meeting as well as update them that your company is moving to a new office in a month.
- D. You already read it after it was posted on the website, but it's nice to have a copy in your hands.

And now for the answer key...

Mostly As

You're sharing the knowledge and expertise you've gained through the years – thank you for that! Whether you're presenting at an event or taking your knowledge to paper for magazine or newsletter articles, you're helping others avoid pounding their heads against the wall. Let that information flow!

Mostly Bs

You're a model AXUG Member! We love that you're getting value out of the User Group and invite you to continue participating in activities as you're able. Thanks also for sharing your insight and engaging in the dialogue – that's what makes AXUG what it is!

Mostly Cs

You're logistics-minded and likely enjoy behind-the-scenes work more than being the center of attention. Good roles for you include leading a Special Interest Group (SIG) or Global Branch, hosting roundtable discussions, keeping the rest of your team up-to-date on the latest and greatest AXUG information, and helping to host fellow Users at events.

Mostly Ds

You've got social media down to an art. From writing blog posts to spreading the news about AXUG, you're a great asset to the community and will help many other Users get excited, energized, and informed about User Group activities.

Take That Next Step!

We invite you to get involved based on your interests. Visit www_AXUG_com/volunteer to complete a volunteer form or email Volunteer@AXUG.com if you'd like a bit more information before you commit.

Volunteering connects you with others in the Microsoft Dynamics AX community and makes it an even better place to be. We can't wait to see your talents in action.

AXUG

AXUG: Tell me about Total Dynamic Solutions.

Mike Skillingstad (MS): We're a complete enterprise business management solution. We provide our clients with a pre-packaged Data Mart and help them build out custom business intelligence (BI) tools such as cubes, web reports, and dashboards. We also have a full suite of web-planning products that cover everything from financial and Customer planning to merchandise and store operations planning.

AXUG: Do you do a significant amount of work in the retail space or do you work with other industries as well?

MS: Yes, we do a fair amount of work with retailers, but we also work with a wide variety of industries. We have clients in healthcare, consumer packaged goods, and manufacturing – even a large pizza franchise company.

AXUG: Are your products “on the shelf” or custom built for each client?

MS: It's a hybrid between the two. We offer a fully developed product that is then configured to fit our clients' specific business needs.

AXUG: How do you approach BI with your offerings?

MS: In the book “Good to Great,” Jim Collins talks about the “Doom Loop.” The Doom Loop is when a business hastily reacts to disappointing results without real understanding. This over-reaction typically leads them to make poor business decisions and change direction too quickly, which causes a loss of momentum that more often than not creates additional disappointing results.

Our goal for BI is to provide proactive information related to what's happening in a User's business to find the root cause of issues rather than stopping at 30,000 feet and hoping to make the right decision. Granular levels of data can create insights that can provide more actionable and concrete information for the C-level executive down to the first level manager. This creates

We need to help people think about their business differently so they can create relevant visibility and accountability through our tools.

much greater visibility across the organization. We want Users to quickly identify opportunities and issues with our graphical tools and reports, then use our planning tools to create accountability and enable better decision-making capabilities.

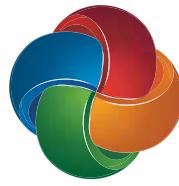
AXUG: What kinds of things are Users able to do better because of your solution?

MS: Under the theme of visibility and accountability, one of our healthcare clients has said that our software solutions are revolutionizing their business. They can see things in real-time and know that it's right. In our system, one plus one equals two. It's not 1.9996 or 2.001. They can get at their information faster and more effectively and know and trust that it's right. Secondly, they can push that information down through their entire organization and hold people accountable like they've never done in the past.

Another good example is with sales teams. Salespeople often aren't held accountable for specific numbers and can typically create a number of reasons why something wasn't accomplished. Our tool makes salespeople commit, which is a huge value-add to our clients.

AXUG: But not necessarily to the sales guy!

MS: You're right. We're not a “five days and you'll be running dashboards” model. Our process is more involved. Real and lasting change doesn't happen overnight. We need to help people think about their business differently so they can create relevant visibility and accountability through our tools. The good



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WEBSITE
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salespeople will come back and say the product is great. The ones that aren't good probably needed to go work somewhere else.

AXUG: *What do you have coming up for your clients?*

MS: A fully-hosted extranet version of our software is complete, which allows clients to access our applications online without a large IT staff or IT infrastructure.

We have a large steel manufacturing client that will be using our new hosted system. They're a holding company, own a number of mills, and don't have a data center and IT staff. Our new fully hosted, web-enabled toolset is going to work very well for them.

AXUG: *What do you like most about working with the Microsoft Dynamics AX User community?*

MS: I have been very impressed with the sophistication of the Microsoft Dynamics AX User community. We work with a wide range of ERP platforms, and Microsoft Dynamics AX Users are consistently more organized and more interested in continuing to grow their capabilities and toolsets.

Microsoft Dynamics AX Users know that Microsoft and Microsoft Partners have new tools for them. Other platforms don't have developers that are bringing new tools to the space, so the Users don't look at their systems the way Microsoft Dynamics AX Users do.

We're excited to be in the space, and we appreciate what AXUG does for the Users. We're excited to be a part of the Microsoft Dynamics AX community in general and look forward to continuing the partnership into the future.

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How Some of Us Got There

by Ashraf Aly



I think most of you (if not all) have read and listened to numerous colleagues of ours eloquently explain, justify, and prove that business intelligence (BI) is vital to clear reporting visibility across our ERP, and sometimes, distributed systems landscapes. I'm sure that all of us can agree on this.

Rather than continue on these concepts, and attempt to add to the clarity already provided by BI professionals much more qualified than me, I'll take the perspective of an individual who is part of an organization suffering from the lack of an enterprise-wide reporting solution, and how we realized (the hard way) what the solution was.

I, like many of you, joined an organization that was plagued by the lack of visibility into their operational Microsoft Dynamics AX data. The initial implementation of our Microsoft Dynamics AX system was successfully completed, but it did not include the critical component of providing for a robust, easy to use, and reliable reporting solution as part of the baseline Microsoft Dynamics AX implementation. As a result, we had a solid and operational ERP system but minimal visibility into the data housed within it.

As simple as this problem seems, we (as project managers) tend to take on ERP challenges that sometimes overshadow the area of reporting. Efforts are spent on only a few selected reporting requirements defined during a Microsoft Dynamics AX implementation rather than on the inclusion of a more holistic BI reporting solution. Unfortunately, when this step is missed, the negative impact is felt more and more as time goes by.

How did we initially address these reporting challenges? We looked to our system support Partners to advise us on the best path to take. The advice given, and the direction taken, was to create "custom" reports that would provide our Users with what they needed. However, a few important questions were not asked during the production of these reports. Could these reports be:

- » Sliced and diced in different ways?
- » Shared with others?
- » Modified easily?

As the analysis continued in relation to this approach, many other shortcomings were realized. These included:

- » Inability to produce reports across Microsoft Dynamics AX companies
- » Inability for Microsoft Dynamics AX Users to manipulate out-of-the-box Microsoft Dynamics AX reports
- » Inability for Users to produce ad-hoc reports
- » Inability to produce complex analytics (e.g. sales KPIs)

It was at this point that the decision was made that we needed an enterprise-wide BI solution. We started off by asking the most basic questions:

- » Are we the only company using Microsoft Dynamics AX that has reporting challenges?
- » Are there specific BI products tailored to Microsoft Dynamics AX-specific ERP landscapes?

minTE

Sometimes the question is never asked as to whether or not an off-the-shelf BI solution would deliver on what many of us require. Many Users across organizations are adamant that their reporting needs are “unique” and that no one application would provide them with what they are looking for. This statement may have held true in the early ERP days, but as time has gone by, many solution providers have stepped up to the plate and have developed specific solutions that address the complex reporting requirements of organizations using Microsoft Dynamics AX. These tools are not produced with one specific industry in mind, but as a more generic tool that can be leveraged across various businesses.

You will not find a shortage of off-the-shelf BI solutions available in the market, but you must ask yourself as to which one of these solutions has been developed specifically for Microsoft Dynamics AX ERP landscapes. That specific question makes it easier to compare apples to apples, ensuring that your ultimate selection is as appropriate as possible to your Microsoft Dynamics AX landscape.

Many other questions need to be asked and researched as well. Just to name a few:

- » Can the solution be deployed in a short amount of time?
- » Can this solution provide cross-functional reporting?
- » Can this solution provide drill-down capabilities?
- » Does this solution have pre-packaged analytics?
- » Is this solution easy to use?
- » Can your Users be empowered to address their own reporting requirements?
- » Is this solution scalable (e.g. can additional databases be added)?
- » Can this solution work with a systems landscape that involves on-site Microsoft Dynamics AX infrastructures, alongside cloud based applications (e.g. Microsoft Dynamics CRM)?

In order to ensure that our search for the right BI solution was successful (both in terms of requirements as well as in cost) we employed a thorough request for proposal (RFP) process. Once we applied this process, a number of BI solutions and vendors popped up. This list was long and included solutions that were clearly not applicable for a Microsoft Dynamics AX landscape. By taking a strong stand on short-listing only those vendors that addressed Microsoft Dynamics AX-specific landscapes, the resulting list became much shorter.

During the RFP process, each potential vendor was requested to install their BI solution directly on our IT infrastructure, provide a working data cube, and demonstrate examples of our reporting requirements.

Certain vendors go the extra mile by carrying out demonstrations using your company-specific data. This was instrumental in providing us with the confidence we needed to make the right choice. By using our company-specific data during the demonstrations, we were able to quickly relate to what was being shown to us.

Once our detailed due diligence was completed, only one vendor

stood out as having both the product and expertise that we needed. This organization was ZAP. Their treatment of our requirements and needs was thorough and focused. They took minimal time to gain a clear understanding of our business, and they were able to support us to a level that was impressive throughout the project.

Other important criteria that played into our decision to acquire the ZAP BI solution included:

- » Time to market
- » Ease of use
- » Simplicity of developing complex analytics
- » The availability of an extensive list of “out-of-the-box reports and dashboards”
- » Investing in ongoing efforts to provide additional BI functionality
- » A solution and vendor that has proven to be a BI solution leader in the Microsoft Dynamics AX BI domain
- » Consistently delivering on what they promise

Equally important is the support structure each vendor has. This organization's support processes are well-defined, and their dedication is reflected in each support request.

For those that are in the process, planning for, and/or are thinking about providing your organization with a BI solution, I recommend that you remember the following:

- » Take the time to research possible BI solutions targeted specifically for a Microsoft Dynamics AX landscape environment
- » Look to see if the vendor and product are endorsed by Microsoft
- » Make sure that you choose a BI solution that is easy for Users to produce reports and analytics from
- » If your IT area is currently developing Microsoft Dynamics AX reports for Users, empower your Users to depend on themselves by means of a User-friendly BI solution
- » Ask to see what predefined analytics are provided directly out of the box
- » Does the tool provide the ability to add on additional application databases
- » Does the vendor have a solid support structure

We sometimes forget that business intelligence was initially conceived to provide support to the decision making process. We should not lose sight of this, and we need to make sure that our efforts in addressing our organization's reporting requirements are always carried out with this understanding. The right BI solution will help keep you on that track.

AXUG

Ashraf Aly is the global ERP director for Ascom Network Testing. He is responsible for 13 different business units around the globe that are all maintained within Ascom's Microsoft Dynamics AX landscape. Ascom Network Testing provides best-in-class solutions to measure, analyze, and optimize mobile networks. For more information, visit www.ascom.com.

GENCE

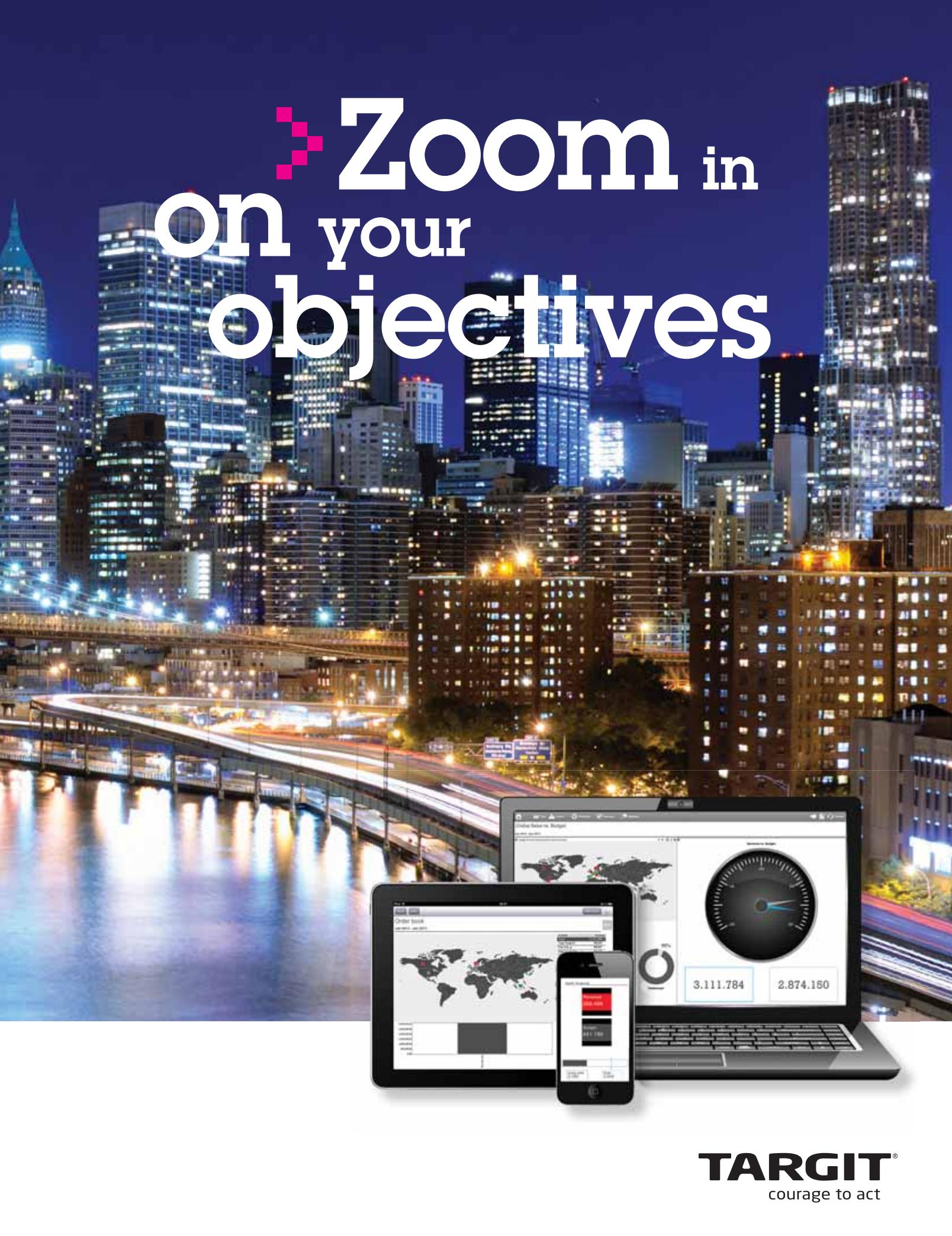


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AXUG® Academy courses are a great way for you to extend your organization's Microsoft Dynamics AX knowledge in a focused, hands-on environment. Classes are available as online, instructor-led courses throughout the year and in-person courses scheduled around AXUG Summit.

Thinking this might be exactly what you're looking for? Read on to find out more about our online and in-person courses.

Online Courses

We're glad to feature numerous subject matter experts in these instructor-led courses. Attending a class puts you front and center with some of the brightest minds in the industry, all from the comfort of your own desk.

In-Person Courses

As mentioned, our in-person courses are scheduled around AXUG Summit so that you may travel once to benefit a great deal.

AXUG Academy has scheduled half- and full-day training courses on Monday, October 21, and Tuesday, October 22, 2013, just before AXUG Summit begins. These in-person courses are taught by experts in Microsoft Dynamics AX and related tools, and many of the instructors also teach our online classes.

This class format enables you to learn new skills and technologies while sitting next to your peers and with an instructor standing by to answer your questions. While our online courses are a wonderful format for learning throughout the year, this in-person opportunity is something special.

Premium Members and Microsoft Service Plan Members receive a significant discount on tuition; more than 20 classes were offered at AXUG Summit 2012.

Courses for AXUG Summit 2013 are under development and will be posted soon at www_AXUGsummit.com.

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The full 2013 schedule is printed below (alphabetically by course name and including the scheduled date(s)).
Register and learn more at www_AXUG_com/memberresources/academy.

Advanced Forecaster - June 21

Advanced Management Reporter - March 27, August 16

Compliance for Techies: Internal Control Approaches for Microsoft Dynamics AX Code Management - June 14, October 4

Custom Reporting with Microsoft Dynamics AX Tools You Already Own - June 14, September 18

Microsoft Dynamics AX 2009 Security 101 - April 26

Microsoft Dynamics AX Development Methodologies and Techniques - June 7, November 1

Introduction to Management Reporter - April 5, July 19, December 13

Introduction to Microsoft Forecaster - April 19, September 20

Inventory Costing in Microsoft Dynamics AX 2012 - September 13

Inventory Setup, Management, and Reconciliation in Microsoft Dynamics AX 2012 I - July 26, November 1

Inventory Setup, Management, and Reconciliation in Microsoft Dynamics AX 2012 II - August 2, November 8

Inventory Setup, Management, and Reconciliation in Microsoft Dynamics AX I - April 26

Inventory Setup, Management, and Reconciliation in Microsoft Dynamics AX II - May 3

Managing Your Microsoft Dynamics AX 2012 Environment - July 18, December 12

Master Planning in Microsoft Dynamics AX 2009 - August 23, November 15

Performance Optimization in Microsoft Dynamics AX 2012 - June 21, November 8

Understanding Approaches for Smart Code Development and Management in Microsoft Dynamics AX 2012 - April 12, August 23

Understanding the Microsoft Dynamics AX 2012 Data Model - April 19, August 16

Understanding the Microsoft Dynamics AX 2012 Security Model - May 16, September 12

Upgrading to Management Reporter from FRx - May 17, November 15

"I am a developer and new to Windows products. We are implementing Microsoft Dynamics AX 2012 and didn't understand how Management Reporter fit in. I'm sure it will allow our business team to create much of their ad-hoc reporting on their own. The instructor was a very effective teacher."

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Team

Attend with your colleagues to make the most of AXUG Summit's many learning and networking opportunities. You'll go home with a wealth of ideas that you can put to work for your organization.

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THE EXPERTS WEIGH IN ON BI

AXUG® sat down with a few of the business intelligence (BI) experts in the industry, Nils Rasmussen, principal of Solver, Dr. Morten Middelfart, CTO of TARGIT, Ray Major, president of Halo Business Intelligence, and Noah Kluge, vice president of PrecisionPoint, to gain insight into what they see as the future of BI.

Make it Self-Service

Mobile applications and the cloud are hot right now and will increase in popularity as more and more business functions become available on mobile devices and through hosted platforms.

This topic has been on Users' and vendors' minds for the last three to five years. "Practically speaking, we're now into a more distributed consumption environment where people aren't connected to the office as much," says Noah. "There are enough products in the marketplace that are readily available on mobile devices that the 'mobile' dream is becoming a reality."

"Users want to continue whatever they're doing on their mobile device," says Morten. "But when we go on a mobile device, do we need to see the same reports as we would on a desktop? And do we need to ask for that information, or do we want the system to let us know when there is something interesting to look at?"

"Where I see the shift in mobility, which is broader than just mobile devices, is that computers will be used as an ally to analyze information and show us where we need to direct our attention," adds Morten. "This analytics aspect is an underlying trend, and the biggest potential in mobility is the ability to get notified when something in the system changes."

With increased mobile capabilities come greater opportunities to empower Users, says Nils. "Moving to self-service BI, where an average User can use the BI tool and get data for analysis without the help of IT, is the next step."

Make it Social

You know what the social media powerhouses of Facebook, Twitter, and LinkedIn are...but how about social BI?

"Social BI is the concept of a social media tool that engages people in productive discussions about things that matter to their organization," says Nils. "Think about LinkedIn. You can go there and find numerous Microsoft Dynamics AX groups. People are self-organized there. If you take that concept inside an organization, you can define discussion groups and access levels – which should be everybody, not just execs or department heads."

The natural place to go for discussions today is email. You can send an email about an inventory problem to one person or 100, thinking that you'll get the answer you need. "Email has become a problem because that one message results in hundreds of messages," says Nils.

"Email was never meant to be the place where decisions are made. Phone calls and meetings have been the place for that for years,"

continues Nils. "If you think about internal social collaboration and social media sites like LinkedIn, you can create groups for things like budget processes, giving Users a spot to talk about strategy, issues, etc. Things that are a discussion could be in the tool and not in email."

All that data swirling about, dubbed "big data" is another aspect of social BI that will be growing in popularity and influence, according to Noah.

"Collecting big data is an augmentation to a BI environment," says Noah. "Most companies have fundamental issues to resolve before they decide what to do with tweets. Big data concepts have been talked about for more than five years, but now the software is catching up with the thought leadership for those ready to undertake this next phase of BI."

Ray agrees, "Humans are social creatures and need the ability to talk about anomalies in a data and how to change them. Data is dumb, in and of itself. It's the human interpretation that makes things happen. When people who work together can be grouped around KPIs to drive business, then comes success and profitability."

Nils sees making BI social and collaborative as a critical initiative over the next few years. "Creating internal, social tools where discussions happen in threads and Users receive an automated daily activities summary are very different than getting rained on with emails," he says.

Make it Collaborative

Spending more time in productive discussions is just the tip of the social element of BI. "The next steps are report libraries, groups, alerts, and personal profiles," says Nils. "In larger organizations, the only way to know people's contact information is through an Excel phone list or Outlook address books. Wouldn't it be great to know that 'Joe in accounting' is an expert at such and such system and can help with a deployment? With these types of things, you can find out what people have done in prior roles and invite them to be part of discussions that drive important business initiatives."

These features are possible because the social media powerhouses have brought them into the market. The next step is to bring them into organizations for purely corporate purposes.

"We have all these great charts and reports through BI, but the 'people' were missing," says Nils. "Creating a collaborative portal with a knowledge base that improves processes and speeds up decision-making is the last mile."

Ray believes we're at the point where Users are looking to BI to get more out of their corporate data assets. "The ability to collaborate through social media has fundamentally changed the way people look at data," says Ray. "When data systems were developed, people put numbers in without a lot of power to do analysis. Now with more than seven billion things connected to the Internet, you have the ability to pull data and make better business decisions."

That pull of information is key, says Morten. "Adding not only

Microsoft Dynamics AX data but other external data, i.e. public trade figures or social media data, and marrying the two, that's the future."

Noah agrees, sharing that making it easier to collaborate will mean that people can add analysis and commentary to reports while maintaining their information in a meaningful manner.

"SharePoint has been trying to be that place for the last four years, but the capability of the software is just now coming along where we'll see people taking advantage of it," says Noah. "For example, the normal approach of finance running a report and providing commentary on it could be an online experience instead of stuck in a PowerPoint."

Make it a Game Changer

When these concepts come to fruition, business as we know it will change, giving Users "the flexibility and ability to get to data that you store, taking it out of 'data jail,' and unlocking it so you can actually use it," says Noah.

"I've been doing this for 22 years, and a dashboard or a nicely formatted report doesn't turn heads anymore," says Nils. "At the root, this is about processes. Everyone in an organization is smart in one way or another. Give people a voice, and you'll be surprised at what they can contribute."

From Morten's perspective, "Once you start thinking about BI and analytics on a broader scale, interesting things happen. For each interaction, more analytical power needs to be applied. It might be that a dashboard or a report triggers the User to drive advanced what-if scenarios, share and collaborate with other Users, set up alerts to avoid future incidents, and maybe even change product prices in their stores. We see it as the future of BI and analytics that the User will need more to happen with as few interactions as possible."

That collaboration in motion, a "symphony of information" as Morten puts it, places the User closer to making sound decisions for his/her organization.

"You're gathering all this information on LinkedIn, SharePoint, email, calls, and meetings," continues Nils. "Pulling all this information into one social collaboration tool gives you one place for this information. I think that's exciting and could mean considerable efficiency gains in an organization."

AXUG

Each of our panelists works for an organization that provides BI solutions. If you'd like to learn more about their solutions, we invite you to check out their websites.

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WHY NOW IS NOT THE TIME TO BUILD BI

After almost 40 years of the enterprise software market re-inventing ERP solutions to run our businesses, why in 2013 would you consider the risk of building an ERP solution when you can buy one like Microsoft Dynamics AX, which has already had NASA program levels of investment leveraged against it? The simple answer is: you wouldn't.

Those reading this article in the Convergence edition of AXUG® Magazine have already taken or will be taking the wise step toward supporting the incredible investment that Microsoft has leveraged into the Microsoft Dynamics AX platform since acquiring the solution in July of 2002.

With an ever-increasing R&D investment in this product line, Microsoft has created not only a platform that is inherently flexible and increasingly scalable, but also a business model that allows some of the best global consulting firms to support the individual needs of any Customer across multiple industries. It is therefore hard to understand why any "sane" selection team would look past this product to any other for the needs of the process and transaction flows of their business.

Enterprise resource planning (ERP) has become a standard requirement for all organizations to manage and process the transactions that run their business. Initially it was all about ensuring that these systems provided the business the capability to have an "unqualified audit" or support taxation requirements; however, as with maturity in all industries, these systems now provide this as a pre-requisite, and there is a new reason why a business needs to invest in ERP: VISIBILITY.

This need has created a very interesting conundrum for both the consultancy firms that sell and support Microsoft Dynamics AX and Customers who invest in this very platform.

If we go back no more than 10 years, the prime reason for investing in ERP was to support the control of business process. Today that has not changed; after all, a business needs to know that all aspects of finance, sales, purchasing/procurement, distribution, production, and quality assurance are managed in a uniform and consistent way that can stand up to any scrutiny.

But let me ask this: Who of you today, in March 2013, would be selecting an ERP solution like Microsoft Dynamics AX only on the basis of the inputs that you need to manage to ensure that Assets – Liabilities = Revenue – Expenses? Hopefully the answer is very few.

Business has changed.

Five to seven years ago, the automotive industry was selling technology that added more features such as satellite navigation, parking sensors, reversing cameras, and auto-opening doors; a month ago at Super Bowl, the industry was selling value, economy, green compliance, and safety.

It is not because the aspect of functionality and capability in cars has dropped in importance; in fact, they are as important as they ever were. But they have become expected baseline components rather than the deciding factors for purchase. The factors that buyers look at now have changed, much like the factors for choosing an ERP system have changed.

So, where is this leading?

In 2013 almost every organization that is faced with the unenviable task of updating its ERP system is no longer looking to solutions to assist with compliance around audit and tax or to ensure that its retrospective reporting requirements are met.

In almost all cases, the cost justification and business case for ERP today is both visibility and transparency: It is now absolutely expected that Microsoft Dynamics AX will provide transaction-level accountability. But, the "savvy" buyer will be asking: How do I use this to create management differential, visibility, and

transparency in my industry? This question is something that the ERP community in general is now rushing to fulfill.

CEOs, CFOs, and CIOs who are commencing a hunt for a system that will transform their businesses for the next 10 years realize the drivers have moved from the efficiency of transaction input to the revelation of management output and how a management team can interact with their ERP system to make smarter, faster, and more informed decisions for their industry.

Purchase orders, sales orders, BOMs, and all the other mundane aspects of an ERP solution are now only the door opener and are not the aspects of this investment that will make the Customer rush to close the door. Customers simply expect that after 40 years of ERP market development, solutions such as Microsoft Dynamics AX will provide this functionality.

So now Customers need to understand how they will achieve their goals and assemble a solution that both manages the process flows and transactions – but more importantly – delivers value through integrated outcomes and allows for management decisions and cost justifications to be made.

Traditionally ERP vendors and their Partner ecosystems (such as Microsoft Dynamics) have had little to no focus on outcome management and business intelligence (BI). This rather unfortunate view means that in many cases, Customers are deploying flexible solutions like Microsoft Dynamics AX with additional process changes and customizations with no reference to the information that management needs when the solution is deployed and in production.

As such, Customers have traditionally gone outside of their ERP provider to system integrators and infrastructure Partners to have a BI solution built. This has without doubt proved to be costly, unsuccessful, and in so many cases, career limiting. The incredible number of "train wrecks" that has been documented over the years has led many Customers to believe that BI is too hard.

Clearly if that same question was posed – "Would you have built your ERP solution" – every Customer would say an unequivocal, "Are you insane?". So why do Customers then do the very same thing with a BI project that in many cases can be as complicated and as risky as the ERP project?

The answer is that the community of Partners and system integrators sees massive consulting revenues by being available to push Customers down that "build" path. Up until the last 12 months or so, there were not solutions in the market that could be bought and would be delivered in record time with incredible returns and minimal risk.

That time has come, and now Microsoft Dynamics AX Customers have options to buy BI from vendors that have the entire experience built and automated by industry and with many of the standard best practice outcomes and analytics already built and available. This allows Customers to invest in BI at the same time as their Microsoft Dynamics AX project and ensure the exact outcomes they expect will be available to run their business will be integrated into the production outcomes of Microsoft Dynamics AX.

So, in 2013 the opportunity for Microsoft Dynamics AX Customers and prospects to know that one of the main reasons that they invested in Microsoft Dynamics AX is the ability to better manage their business into the future is finally available in a set of BI solutions that is being deployed globally across many industries with dozens of references in record times.

Take some time to look at the business intelligence options now available in the market. They can take an average outcome and turn it into a result that will have the entire organization understanding why the pain that was endured in changing ERP systems has been worth it.

find the LOGO

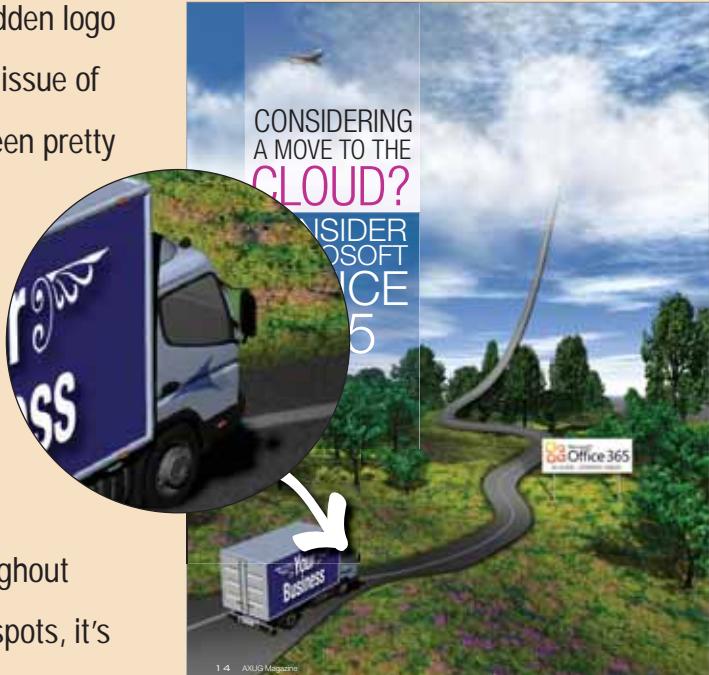
C O N T E S T

No winners last quarter. The hidden logo on page 14 of the Winter 2013 issue of AXUG® Magazine must have been pretty hidden. Let's play again.

Hidden somewhere between the covers of this magazine is our AXUG logo.

Can you find it?

While our logo shows up throughout the magazine in conventional spots, it's hidden in only one place.



When you've found it, send an email to **Logocontest@AXUG.com** with an explanation of where and on what page it's at. We'll choose a winner at random and will **highlight him/her in the next issue** of the magazine.



good luck!



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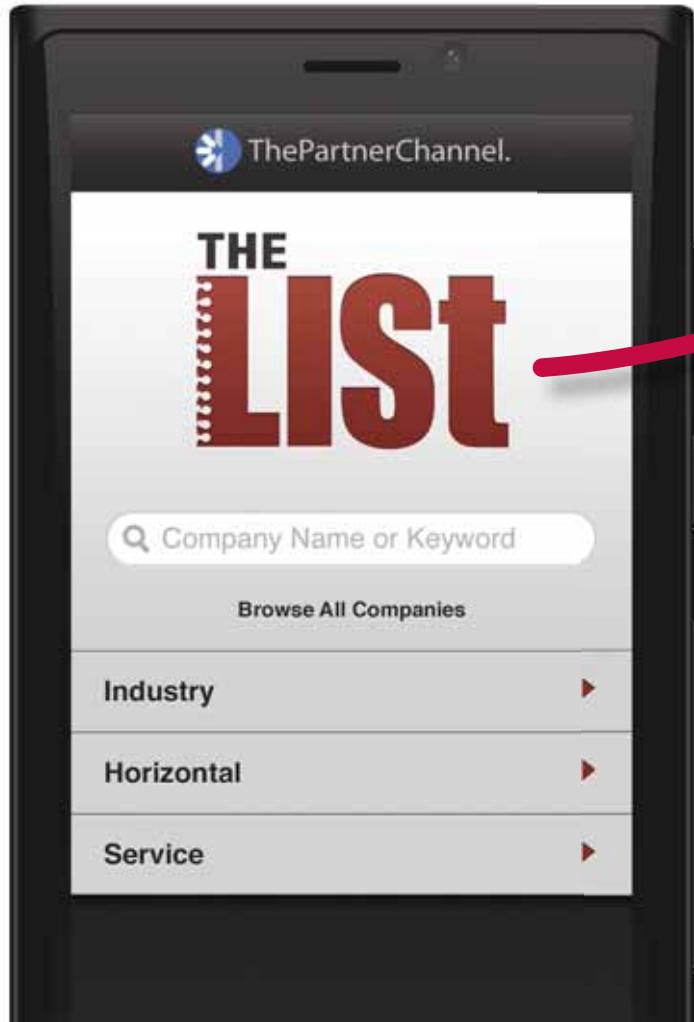


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The List from The Partner Channel® is your tool for finding the solutions available from Microsoft Dynamics® Partners. Review the various industry, horizontal and service offerings available and you may just find exactly what you've been looking for! The List is unique in that it shares only those solutions and services that work with the Microsoft Dynamics product line. We want you to spend time using the solution, not looking for it. If you have a product or service that you would like included on The List, please contact Jane@thepartnerchannel.com.

NOTE: The Partner Channel, Dynamic Communities®, and AXUG® offer no expressed or implied warranty or guarantee for any of the products included in this directory. Support and quality assurance of these software products and services are solely the responsibility of each Microsoft Dynamics Partner.

*Due to the nature of the "classified" format used for The List, Microsoft Dynamics brand guidelines may not have been followed. We encourage Partners NOT to follow the example we are setting!

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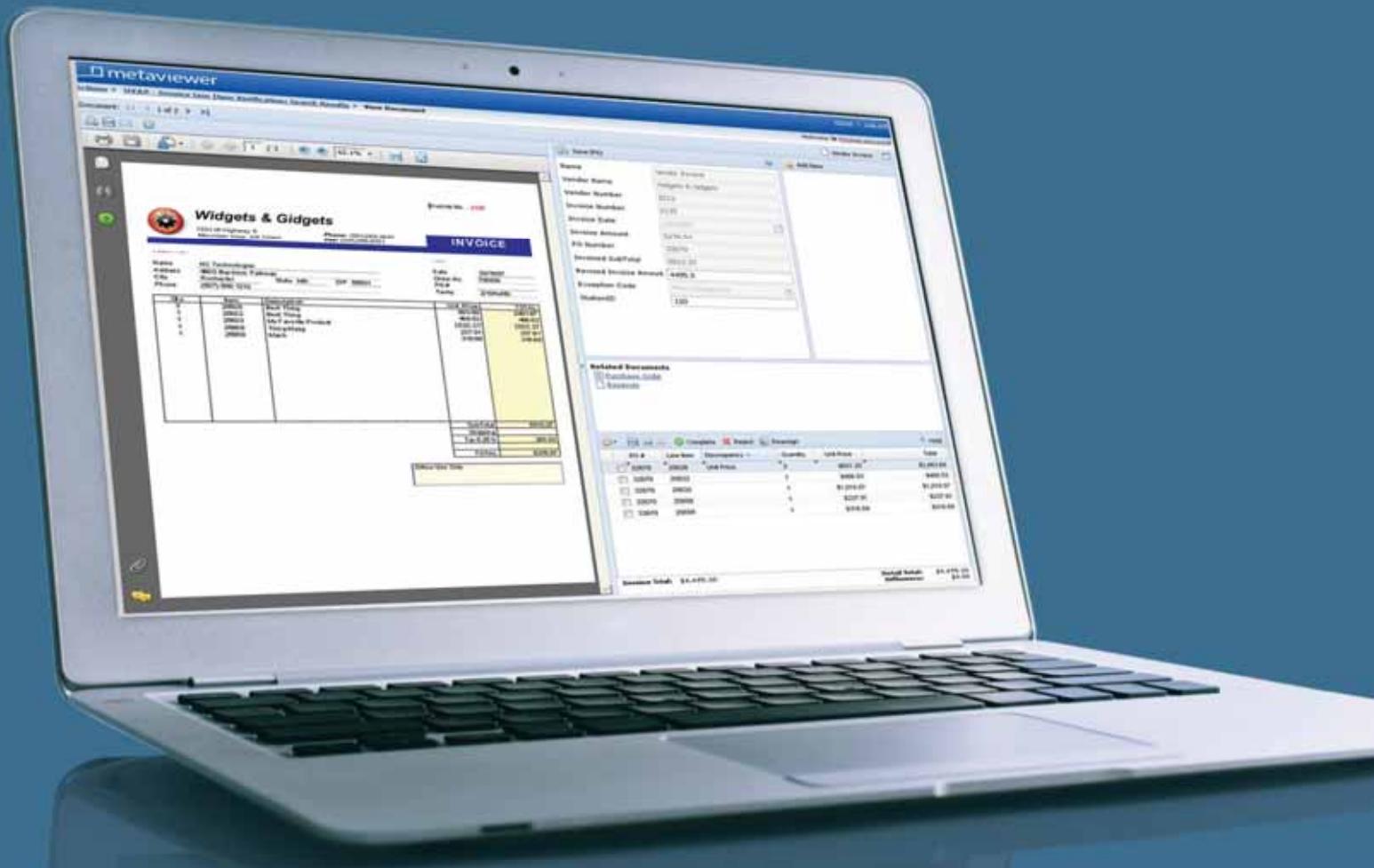
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