

Professional Services

Professional Services for Microsoft Dynamics AX *Enterprise Project Management Integration*

BENEFITS SUMMARY:

- Integrate financial, resource, and project management systems and information
- Initiate projects in either Microsoft Dynamics AX or EPM Solution
- Find the right enterprise resources for the job
- Automatically populate employee timesheets and update both financial and project management data
- Synchronize project progress and billing

Integrate your business management solution and enterprise project management (EPM) system and get a comprehensive picture of your organization and resources. With Professional Services for Microsoft Dynamics™ AX and Microsoft® Enterprise Project Management (EPM) Solution, everyone can keep their fingers on the pulse of the organization and help avoid inconsistent information and duplicate data entry.

Integrate financial, resource, and project management systems and information

Connect your enterprise financial and project management systems to integrate data and streamline company and project-related processes. You and your employees no longer have to look to multiple systems for information, which helps reduce redundant efforts, improve accuracy, and increase employee productivity.

Produce robust, real-time resource allocation reports to understand not only your employee allocation statistics, but also to what, where, and when they were allocated. This information can help you make better decisions on permanent and temporary staffing to meet project demands.

The screenshot displays the Microsoft Project Professional interface. The main window shows a Gantt chart for a project titled 'Project EPM Integration'. The task list pane on the left contains the following tasks:

ID	Task Name	Start	Finish	Resource	Cost
1	Use the following steps:				
10	10.1.1.1 Start conceptual model	1/1/2010	1/1/2010	Service_17	400
11	10.1.1.2 Start conceptual model	1/1/2010	1/1/2010	Service_17	400
12	10.1.1.3 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
13	10.1.1.4 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
14	10.1.1.5 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
15	10.1.1.6 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
16	10.1.1.7 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
17	10.1.1.8 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
18	10.1.1.9 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
19	10.1.1.10 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
20	10.1.1.11 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
21	10.1.1.12 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
22	10.1.1.13 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
23	10.1.1.14 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
24	10.1.1.15 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
25	10.1.1.16 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
26	10.1.1.17 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
27	10.1.1.18 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
28	10.1.1.19 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
29	10.1.1.20 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
30	10.1.1.21 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
31	10.1.1.22 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
32	10.1.1.23 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
33	10.1.1.24 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
34	10.1.1.25 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
35	10.1.1.26 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
36	10.1.1.27 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
37	10.1.1.28 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
38	10.1.1.29 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
39	10.1.1.30 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
40	10.1.1.31 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
41	10.1.1.32 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
42	10.1.1.33 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
43	10.1.1.34 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
44	10.1.1.35 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
45	10.1.1.36 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
46	10.1.1.37 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
47	10.1.1.38 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
48	10.1.1.39 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
49	10.1.1.40 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
50	10.1.1.41 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
51	10.1.1.42 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
52	10.1.1.43 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
53	10.1.1.44 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
54	10.1.1.45 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
55	10.1.1.46 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
56	10.1.1.47 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
57	10.1.1.48 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
58	10.1.1.49 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
59	10.1.1.50 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
60	10.1.1.51 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
61	10.1.1.52 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
62	10.1.1.53 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
63	10.1.1.54 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
64	10.1.1.55 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
65	10.1.1.56 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
66	10.1.1.57 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
67	10.1.1.58 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
68	10.1.1.59 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
69	10.1.1.60 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
70	10.1.1.61 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
71	10.1.1.62 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
72	10.1.1.63 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
73	10.1.1.64 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
74	10.1.1.65 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
75	10.1.1.66 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
76	10.1.1.67 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
77	10.1.1.68 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
78	10.1.1.69 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
79	10.1.1.70 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
80	10.1.1.71 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
81	10.1.1.72 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
82	10.1.1.73 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
83	10.1.1.74 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
84	10.1.1.75 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
85	10.1.1.76 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
86	10.1.1.77 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
87	10.1.1.78 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
88	10.1.1.79 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
89	10.1.1.80 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
90	10.1.1.81 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
91	10.1.1.82 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
92	10.1.1.83 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
93	10.1.1.84 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
94	10.1.1.85 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
95	10.1.1.86 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
96	10.1.1.87 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
97	10.1.1.88 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
98	10.1.1.89 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
99	10.1.1.90 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400
100	10.1.1.91 Complete conceptual model	1/1/2010	1/1/2010	Service_17	400

Mapping data between EPM Solution and Professional Services for Microsoft Dynamics AX is a straightforward process done through the Microsoft Project Professional desktop application. Configurable options are available to determine which data is synchronized and how it should be categorized.

Initiate projects in either Microsoft Dynamics AX or EPM Solution

Configuration options and validation provide you with the flexibility to set up your base project information in either Microsoft Dynamics AX or EPM Solution, while helping ensure that your project and finance teams are in step. With Professional Services for Microsoft Dynamics AX and EPM Solution, you can enter information in either system and pass it on to the other, then keep it updated through automatic data synchronization.

Find the right enterprise resource for the job

Most good business management systems have human resource modules that maintain employee training, certification, and skills data. Often that data rarely makes it out of the administration function of your company. With Professional Services for Microsoft Dynamics AX and EPM Solution, your project management professionals can take advantage of this data from within the EPM Solution. They can select and request appropriate enterprise resources based on skills, training, location, role, and title. Resource booking can then be further analyzed by centralized resource management teams, as necessary.

Automatically populate employee timesheets

Miscoding of time to incorrect jobs can lead to inaccurate reports and lost revenue. With Professional Services for Microsoft Dynamics AX and EPM Solution, assignments created in either application can be used to automatically populate an employee timesheet with the specific assignments for the reporting period. Employees retain full control and can enter actuals for the period and add additional projects and tasks to the timecard. When employee timecards are completed, project plans are updated automatically.

Synchronize project progress and billing

On many projects, revenue recognition and billing are tied to the achievement of milestones throughout the project life cycle. Often factors that accelerate or delay the completion of these milestones can cause information between finance or project management systems to become out of sync. With Professional Services for Microsoft Dynamics AX and EPM Solution, you can establish milestones attached to billing events. As timecards are completed and project plans are updated, data is synchronized between the business management system and the enterprise project management solution, helping to keep everyone up to date and automatically reforecasting billings and revenue recognition.

FEATURES

Bi-directional integration to project accounting	Bi-directional integration between Microsoft Dynamics AX and EPM Solution offers both increased team collaboration capabilities and ease of use. With powerful resource scheduling and tracking tools, your company can improve cost efficiencies by better managing the allocation of your resources.
Flexible project data management	Project information, tasks, assignments, and estimates can be created and managed in either Microsoft Dynamics AX or through the EPM Solution in Microsoft Office Project Server, and then synchronized between the systems.
Resource skill matching and assignment	Expose human resources data to project management professionals to help ensure that enterprise projects are staffed with the right resources through skill matching, role replacement, and experience profiling.
Automatic timecard population	Automatically populate employee timecards based on assignment data maintained in Microsoft Dynamics AX and EPM Solution to reduce errors, inefficiency, and redundant data.
Connected project management and finance activities	Synchronize percent complete calculations and billable milestone achievement between ERP and EPM systems to more accurately forecast and report billings and revenue.
Detailed project analysis	Accumulate costs and analyze projects at any level with drill-down capabilities. Flexible planning and reporting enables you to assign resources and report at any level of detail necessary.
Web-Based, workflow-enabled time and expense entry	Field personnel no longer need to be physically connected to the network in order to report project-related time and expenses. Virtual and remote employees can enter time and expense data securely through the Internet using a standard Web browser. Time and expenses can then be automatically routed for approval using configurable routing routines.

For more information about Professional Services for Microsoft Dynamics AX, visit www.microsoft.com/dynamics/ax.

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