Microsoft Dynamics AX 2009 Boosts Business Productivity with Groundbreaking Usability, More Collaboration Tools and Improved Business Insight

You may read this and think: productivity improvements? Again?

Yes, improved productivity seems to be on every ERP vendor's checklist of benefits whenever a new product or feature is released. And that's because inefficient and rigid systems continue to be a major pain for companies and organizations everywhere.

Inflexible systems overwhelm, overload, and frustrate people – the employees, managers, customers, vendors, and partners who are working hard to make things happen and grow their business. According to a recent report from Forrester, there is a deep-seated dissatisfaction with business applications because they are inflexible, don't address processes that cross business functions, and don't match the business' requirements. [1]

Indeed, a study from AMR Research[2] found that only 15% of employees are licensed to use their company's ERP system and that 46% of licensed ERP seats go unused. And when people don't use the system, business productivity declines, growth slows, and even business critical processes can be compromised. Because, it doesn't matter if standard operating procedures are in place if no one in the organization can access, see or enforce them.

Therefore, it's not surprising when Forrester concludes that "poorly designed user interfaces can profoundly affect the bottom line. The expenses associated with a bad UI, over the course of the application's lifetime, may end up being many times the cost of the application itself." [3] The report continues on to explain the costly implications of a bad UI, including increased new user training times, a decrease in productivity and poor user adoption.

So why then is Microsoft Dynamics AX 2009 different? We claim improved business productivity, too, but does our solution deliver on this promise? And, if so how? What makes Microsoft Dynamics AX 2009 so special?

High Usability Means Better Productivity

The answer is usability. The easier a software application is to use, the faster employees are able to adopt it and thereby enable the organization to reap the benefits the system provides. A study conducted in 2007 by the consulting group, Keystone Strategy, found that companies who

[1] *The Future of Enterprise Applications, Forrester 2007*
[2] *The Enterprise Planning Spending Report 2005-2006, AMR Research 2005*
[3] *The Future of Enterprise Applications, Forrester 2007*

have successfully deployed IT capabilities throughout the organization – meaning that people are really using the software – have been able to profitably grow their revenues.[4]

At the core of more agile, usable applications is the human experience, or what Forrester calls *Design- for-People* requirements.

"Design-for-people requirements place the businessperson's work at the center of business applications' human interface. The businessperson's work is the organizing structure for a workplace into which we plug transactions, business processes, content, unified communications, social networking, and tools. Instead of people having to figure out how to apply collaboration tools to their jobs, ad hoc activities are integrated with structured work in these unitary, contextual workplaces."[5]

Microsoft Dynamics AX 2009 has been designed to meet "people-ready" requirements; specifically, to improve business productivity by improving usability and increasing the reach of the solution so a larger percentage of employees have access to the system.

RoleTailored Design

When the Microsoft Dynamics AX development team first envisioned this release, one of the key goals was to significantly improve the usability and accessibility of the system – to make it "people ready" so more people in the organization not only will *be able to use it* but will *want to use it.*

The Microsoft Dynamics user experience team created a methodology that uses images rather than words to uncover users' impressions of Microsoft Dynamics software. By understanding users' unfiltered, emotional reactions about what they truly want – desirability – and need – relevance – they have been able to design software that can ultimately boost productivity. This "Feel IT" methodology was implemented in the development of Microsoft Dynamics AX 2009 and helped shape features such as the new Executive Role Centers.

Keystone Strategy, Inc. also investigated how enterprise applications, such as ERP systems, affect business performance – in particular end-user productivity. Their analysis of user responsibilities and industry standard usability tests such as Software Usability Measurement Inventory (SUMI) show that business productivity is a function of six factors:

1. **Collaboration –** ease of collaboration with colleagues, efficiency of application workflow, ease of communication with suppliers, partners and customers
2. **Business Insight –** ease of comprehensive reporting, real-time access to information, visibility across departments
3. **Flexibility –** agility in handling unexpected issues, ease of completing infrequent or unusual tasks, system adaptability to business needs
4. **Usability –** ease of use, user command of application and user enjoyment with software
5. **Familiarity –** ease of learning, intuitiveness of system, user comfort with application

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[4] *ERP End-User Business Productivity: A Field Study of SAP & Microsoft, Keystone Strategy, Inc. March 2007*

[5] *The Future of Enterprise Applications, Forrester Research Inc., 2007*

6. **Transactional Efficiency** – user effectiveness in executing repetitive tasks, efficiency of user interface, speed and reliability of system[6]

Microsoft Dynamics AX 2009 delivers on all 6 of these factors with significant investments and improvements in three key areas – all of which have a direct impact on improving business productivity:

1. User Interface, including Role Center
2. Business Intelligence
3. More integration with other Microsoft products and technologies

Business Productivity Factors and Microsoft Dynamics AX 2009						
New Features	**Collaboration**	**Business Insight**	**Flexibility**	**Usability**	**Familiarity**	**Transactional Efficiency**
User Interface • Action Panes • List Pages • Area pages • Visualizations				✓	✓	✓
Role Center • +30 Roles • Dashboard views • Personaliza-tion tools • Alerts	✓	✓	✓			
Business Intelligence • Performance indicators • Out-of-box data cubes • RoleTailored reports • Export to Excel & pivot-table-view		✓				
Microsoft Integration • MOSS/WSS • Unified Communica-tions • Microsoft Office 2007 • Microsoft SQL 2008	✓				✓	

Helping Employees Work Faster and Smarter

New User Interface and Role Centers Facilitate Collaboration and Usability

Learning a new software application or having to learn many different ones can slow down productivity. If a new user is familiar with the application, learning and using new applications

[6] *ERP End-User Business Productivity: A Field Study of SAP & Microsoft, Keystone Strategy, Inc. March 2007*

becomes much easier and faster. The user interface in Microsoft Dynamics 2009 has been changed to improve the user experience, the learning experience and leverage the successful design concepts from Microsoft® Windows® Vista and Microsoft® Office® 2007 and Internet Explorer.

User Interface Improvements

Working in Microsoft Dynamics AX 2009 is like working in other Microsoft programs that most people are familiar with.

Breadcrumb Bar

For example, the Breadcrumb Bar (BCB) is a new component in Microsoft Dynamics AX 2009. The concept for this comes from Vista and, as the name implies, gives the user a “breadcrumb” trail of where in the program he or she has been and how to get back. BCB allows the user to jump around or navigate to other areas in the system.

Travel Buttons

The Microsoft Dynamics AX 2009 user interface also includes Travel Buttons, allowing the user to go back to the previous page(s) as well as forward, if the user has gone to a previous visited page by means of the travel buttons.

Address Bar

The address bar allows for navigation to other areas in the system.

Command Bar

The command bar is intended to help users find the commands that are global to the workspace as well as commands that are applicable to the content page (in other words, the action pane). Microsoft Dynamics AX 2009 menu is collapsed into a single menu that is found on the left side of the Client window.

Navigation Pane

From the Navigation Pane, you can quickly open modules, forms, and other pages. The Navigation Pane is split into two parts.

- My Favorites
- Area Page Link

My Favorites is a way to create shortcuts to forms, reports, and queries. As the list of favorite shortcuts grows, you can keep it organized by creating folders. Users can further organize their favorite shortcuts, create favorite groups.

Area Page Link lists the modules that users have permission to access. When a user clicks on a module in the Navigation Pane, the content area displays that module's area page. The Navigation Pane displays links to the area page, the available list pages, and other forms used with that module.

Area Page

An area page is a Microsoft Dynamics AX 2009 navigation page that provides an overview of all the functionality in a domain and lists these on one page instead of in the folder structure as seen in the Navigation Pane. Each Microsoft Dynamics AX 2009 module has one area page.

List Pages
List Pages are used for finding a record and to initiate an action against that record. The List Page consists of:

- An Action pane
- A Filter pane
- Data grid
- A Preview pane
- Visualizations

Action Pane
Microsoft Dynamics AX 2009 has adopted the concept of ribbons from the 2007 Microsoft Office release to create Action Panes. The Action Pane is an intuitive, graphical command bar that appears across all navigation lists and shows commands relevant to the data contained in the list.

A Microsoft Dynamics AX 2009 action pane button is a control that represents a specific action. A button action is the task or operation that occurs when you click a button. Examples of button actions include opening another form, deleting a specified record, and printing a list of records.

The action pane uses the same button controls as other Microsoft Dynamics AX 2009 forms. When creating an action pane button, you populate properties that specify the appearance of the button, how it displays in the action pane, and the action that occurs when the button is clicked.

Filter Pane
List Pages include a Filter Pane that enables users to find and view an individual record or a group of related records. The filter pane contains the filter controls that are used to search all of the list page's records. The filter controls allow users to search a specified column for all records with a specified value.

Visualizations
Visualizations show users graphical representations of information structures like a company's distribution channel or organization.

Role Center

The Role Center is one of the many innovative and exciting features in Microsoft Dynamics AX 2009. The Role Center helps improve collaboration and communication among employees throughout the organization by enabling people to prioritize their work. It is a personalized home page that displays specific data, reports, alerts, key performance indicators, and common tasks associated with a user's role in the organization. It's possible to track the status of critical tasks, projects, and orders from the Role Center. Notifications and alerts which are initiated by automated workflows are displayed in the Role Center.

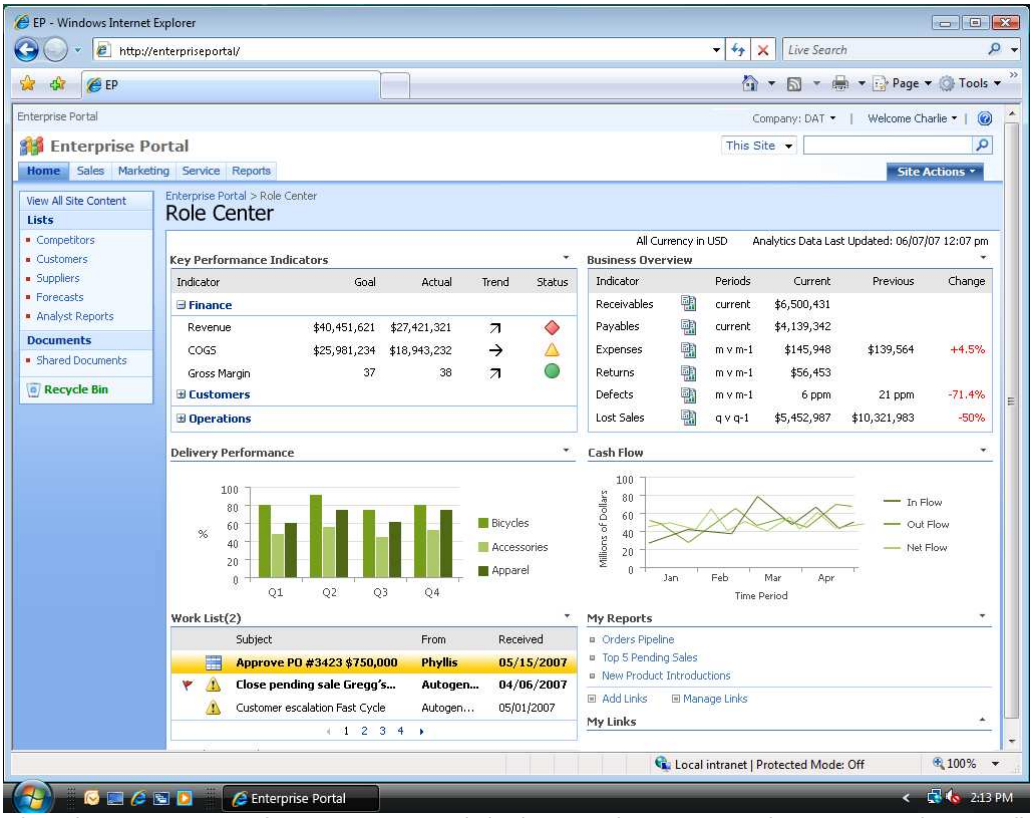
The user profile – a set of default information for a specific role in an organization, such as Chief Financial Officer or Accounting Manager – determines the content that is displayed on Role Center pages. Microsoft Dynamics AX 2009 has more than 30 Role Centers[7] and users can access and personalize their specific Role Center from the Microsoft Dynamics AX client or from an Enterprise Portal Web site.

Role-Tailored vs. Process-Oriented

What makes the Role Center different from other home pages and portals is that it is role-tailored instead of process-oriented meaning all the activities of that employee's role are organized in one place enabling the user to work more efficiently. For example, a typical Role Center consists of the following elements:

- Stacks (cues) which show records in visual representation and signal function
- Workflow list: business process/ alerts to help stay focused on the right activities
- KPI information for their particular role
- Communities: links to different communities such as finance , sales and marketing, service – all from within the Role Center
- Document library
- Direct access to relevant reports from the Role Center
- Graphical representation of important role-specific or related information

[7] *See a complete list of all the Role Centers in Microsoft Dynamics AX 2009 at the end of this document.*



The Role Center in Microsoft Dynamics AX 2009 helps boost productivity across the organization because all the activities of the employee 's particular role are organized in one place.

Self-Service Business Intelligence – Out of the Box

Another important factor in business productivity is Business Intelligence. What's the point of having a business management system if it's difficult to access, see, and use the data and information it contains? Microsoft Dynamics AX 2009 makes Business Intelligence available to everyone in the organization and empowers employees with visibility across departments, real-time access to information, and comprehensive reporting tools. All of this adds up to greater insight and better decision-making.

For example, Microsoft Dynamics AX 2009 delivers 10 predefined data cubes for all major solution areas such as HRM, AP, AR, and CRM. This makes it easier for employees to do analyses themselves right from Excel or display key performance indicators and business overview in the Role Center. Employees are able to find, visualize, and understand key data with RoleTailored reports, performance dashboards, analytical views, predefined analysis cubes, and integrated analysis and forecasting tools.

And the integration to Microsoft Office PerformancePoint Server delivers rich, enterprise-level BI capabilities. Reports can be customized more easily with a self-service tool that helps you organize, visualize, and share information. Microsoft Dynamics AX 2009 is fully integrated with Microsoft SQL Server 2008 Reporting Services and includes more than 120 rewritten or newly developed production SSRS reports.

Export Data to Excel
And it's easier for any user to extract and export data from forms in Microsoft Dynamics AX to Microsoft Excel and into pivot tables. Users can also export data from any list page in Microsoft Dynamics AX 2009 to Excel making analysis fast and the sharing of information more efficient.

More Integration and Easier Collaboration with other Microsoft Products

Microsoft Dynamics AX 2009 not only works like other Microsoft products to ease the learning curve for productivity gains, this release includes even better integration with Microsoft Office, making even better when working with Microsoft products and technologies.

Tight integration between Microsoft Dynamics AX 2009 and Microsoft SharePoint Server and Unified Communications boosts productivity by enabling employees to collaborate more efficiently from within familiar Microsoft Office programs.

For example, Unified Communications utilizes the Microsoft Dynamics AX contact information, which is stored and centrally maintained, so it's not necessary to log on again in Instant Messenger. Unified communications makes it possible to immediately determine who's present and available and easily share information and documents. Information can be extended or made available to employees through Microsoft Office or the Internet with multiple client options, including Enterprise Portal and Microsoft Dynamics Clients for Microsoft Office. These improvements help companies work faster and more effectively and enhance collaboration.

Productivity – Where Business Success Begins

Productivity is important. In fact, you could say that it's a critical competitive parameter and the foundation on which business success is built.

Manage Change and Growth
Productivity is closely linked to growth and an organization's ability to manage change in an efficient way. Steps to improve productivity, such as making tools like the ERP system easier to use and learn, make an organization more flexible. The easier the system is to learn the faster it becomes to acquire new companies and implement a company-wide system that everyone will use.

Compete Globally
Productivity gains make it easier to compete globally. Users that are all on the same system worldwide can share best practices, improve processes, and make better use of their IT system and technology. Visibility is improved across the organization enabling better and faster decision-making on all levels and across all departments.

Simplify Compliance
Productivity enhancements help improve and simplify compliance. High user adoption means it's easier to enforce standard operating procedures, rules and compliance-related processes thereby limiting risks associated with non-compliance.

Yes, Microsoft Dynamics AX 2009 delivers on the promise of productivity – by offering unsurpassed usability, easier collaboration and communication, and comprehensive business insight capabilities. Microsoft Dynamics AX 2009 was designed with people in mind – making it easier for them to work, collaborate and make informed decisions more efficiently.

Appendix

Out of the Box Role Centers

The following Role Centers are provided out-of-the-box in Microsoft Dynamics AX 2009:

- **CEO**
- **Operations:** Operations Manager
- **Logistics:** Warehouse Manager, Warehouse Worker, Shipping and Receiving, Purchasing Manager, Purchasing Agent
- **Production:** Production Manager, Shop Supervisor
- **Customer Service**: Customer Service Manager
- **Sales and Marketing:** Marketing Executive, Sales Manager, Super Sales Rep, Dedicated Sales Rep, Account Manager, Order Processor
- **HR**: HR Director/Manager, Training and Development Manager/Specialist; Recruiting and Staffing Manager/Specialist
- **Finance:** CFO, Accounting Manager, Controller, Accounts Payable Coordinator, Accounts Receivable Administrator, Credit and Collections Manager, Accountant
- **Professional Services:** Project Manager, Project Team Member