

Microsoft Dynamics® SL

Statement of Direction

Product strategy and roadmap for Microsoft Dynamics SL

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www.microsoft.com/dynamics/sl

<https://community.dynamics.com/sl/b/slnews/default.aspx>

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Welcome

Welcome to the Microsoft Dynamics SL Statement of Direction. This document provides insight into our Microsoft Dynamics SL development plans for the next releases. This information is designed to be as transparent as possible giving the most insight into what the future may look like so you can plan accordingly to get the most from your investments whether you are a prospect, existing customer or partner.

Microsoft Dynamics SL is a project focused solution that has a wide variety of uses from professional services to project manufacturing, government contractors to construction and everything in between. One of the many reasons customers use Microsoft Dynamics SL is because it can simultaneously support different types of business needs, unlike other solutions that just focus on one industry.

Smart mid-sized businesses thrive on their ability to compete by being more agile. However your ability to implement change effectively will be largely determined by the business systems that your people use. Microsoft Dynamics SL is designed to be easy to customize and simple to use. Microsoft is committed to further enhancing Microsoft Dynamics SL. We have ambitious development objectives, and we are committed to helping our customers drive costs down across all aspects of an ERP implementation to get value faster.

This document is broken into three sections. The first section focuses on the most recent releases; the next is on the *cloud or web* strategy and concludes with a preview of what's coming in the next release.

Overview of Microsoft Dynamics SL

In September 2012 Microsoft Dynamics SL 2011 Feature Pack 1 (FP1) was released as an add-on to version 2011. It enhanced the existing application functionality in Microsoft Dynamics SL 2011 along with adding new features and capabilities.

Some of the top features are highlighted in this paper:

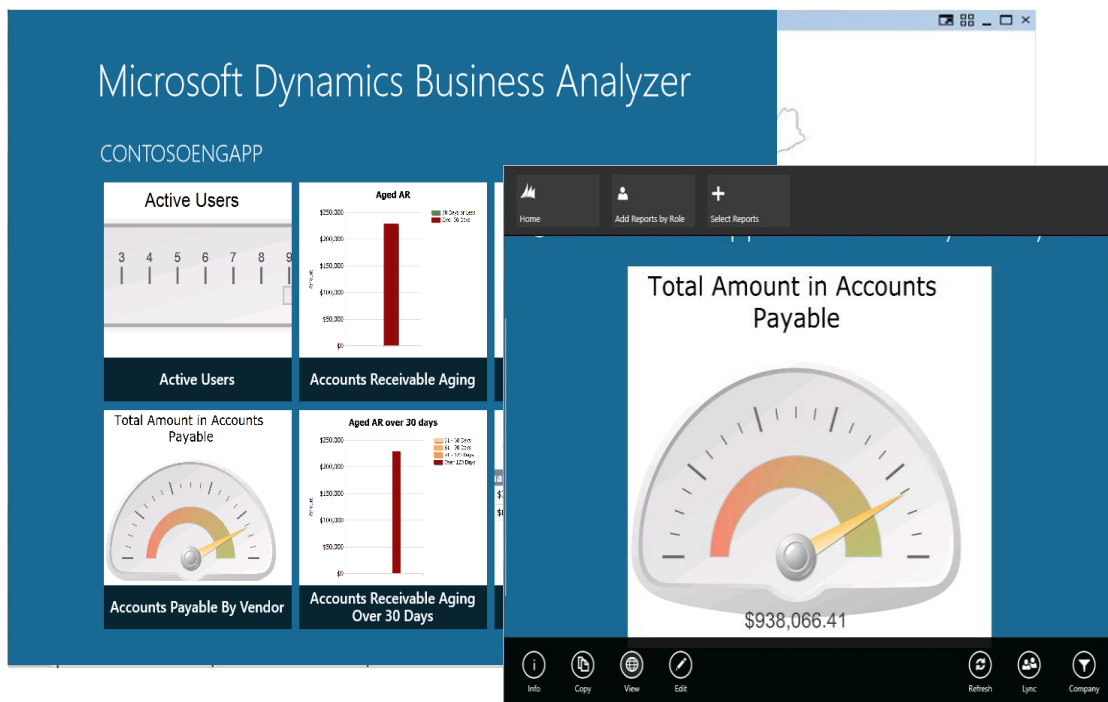


Figure 1: Business Analyzer

- **Business Analyzer dashboards**
 - Deliver business data visualization capabilities throughout your organization.
 - Decision makers gain control and actionable insight with the Microsoft Dynamics SL Business Analyzer set of KPI tools.
 - Get more out of your charts and graphs using Business Analyzer actions, such as the ability to edit reports, copy charts, and change dates.
 - Participate in online coordination with reports and assign tasks easily using enhanced instant messaging and real-time presence information from Microsoft Lync Server 2010.
- **Office 365 and SharePoint Online support**
 - Continued support for the latest Microsoft technologies and programs, including Office 365 and SharePoint Online

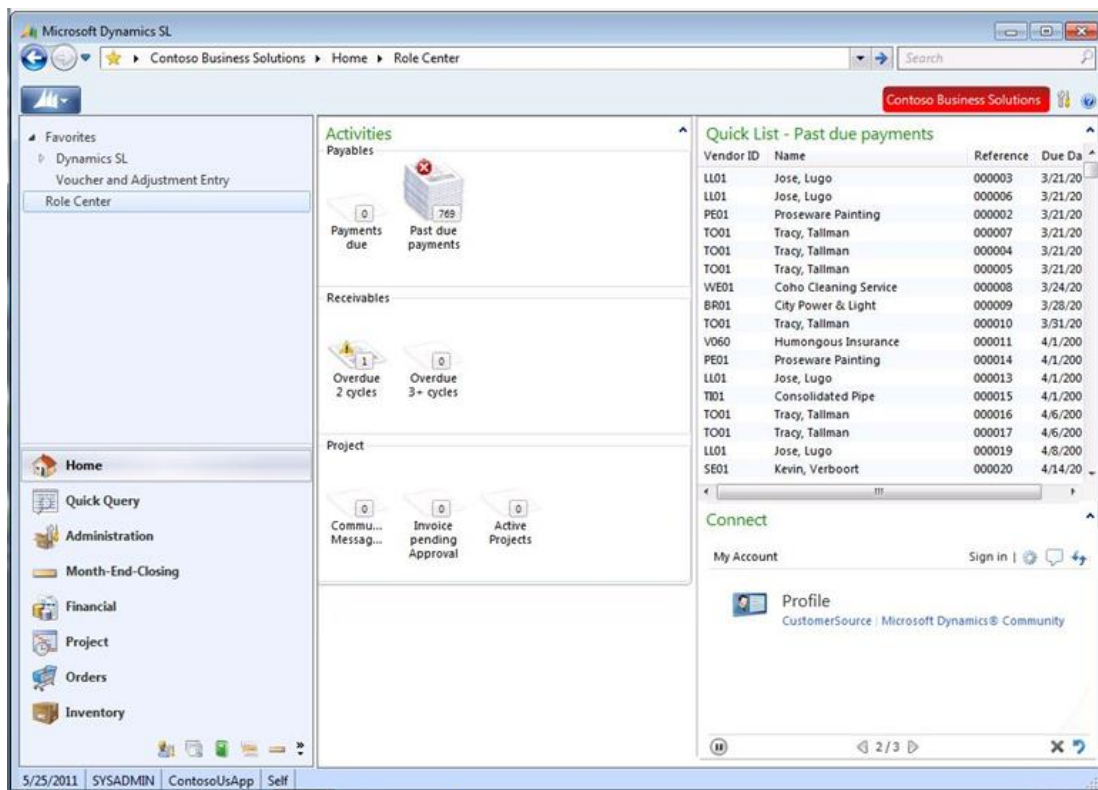


Figure 2: Role Tailored Menus

- People start the day right with **role specific activity panes** that display items that need their attention, **role-based menus** displaying the tasks that are relevant to them, and **quick lists** that display activity pane specific information making it easy to prioritize specific job tasks.
- Find what you need in a few clicks with **menu search** features and viewing **history**.
- Attach documents directly to screens in Microsoft Dynamics SL using the **Attachments** feature allowing future reference and review.
- Streamline inventory management with **project inventory allocations** that automatically occur when a purchase order is placed or through manual allocations.
- **Export data** from any Microsoft Dynamics SL grid directly to Microsoft Excel for editing and review.

Batch Number	Reference Number	Released	VendId	Vendor Name	Document Type	Document Description	Document Date
000382	001352	1	VI01	Fabrikam Man...	CK	...	11/21/2003
000476	001428	1	VI01	Fabrikam Man...	CK	...	12/31/2003
000380	000503	1	VI01	Fabrikam Man...	VO	...	11/21/2003
000469	000632	1	VI01	Fabrikam Man...	VO	Created from R...	12/30/2003
000568	001500	1	OR02	Fabrikam, Inc. ...	CK	...	2/23/2004
000695	000234	1	OR02	Fabrikam, Inc. ...	CK	...	5/10/2011
000560	000747	1	OR02	Fabrikam, Inc. ...	VO	...	2/20/2004
000694	000930	1	OR02	Fabrikam, Inc. ...	VO	...	4/11/2011
000065	001058	1	C105	FabrikamNatio...	CK	...	5/16/2003
000062	000076	1	C105	FabrikamNatio...	VO	...	5/16/2003
000691	000926	1	C105	FabrikamNatio...	VO	...	2/18/2011
000692	000927	1	C105	FabrikamNatio...	VO	...	2/18/2011
000587	001517	1	LA01	Lucerne Metal ...	CK	...	3/4/2004
000548	000733	1	LA01	Lucerne Metal ...	VO	...	2/13/2004

Figure 3: Quick Query

- **Quick Query** provides over 100 predefined views of your ERP data fitting the needs of small and medium-sized businesses that can be filtered, customized, and saved. You can also drill back to a Microsoft Dynamics SL screen to view the original transactions.

Figure 4: SSRS Report generation

- **Business Analyzer (SSRS) report generation**
Create SQL Server (SSRS) reports directly from Quick Queries using the report generation wizard. SSRS reports can be viewed inside the Business Analyzer.

- **Calculate and Store actual vs. provisional indirect costs**

Ability to Review Project information at the Provisional Plan Rate vs. Actual along with support for reporting multiple pools such as Fringe, Overhead, G&A, among others.

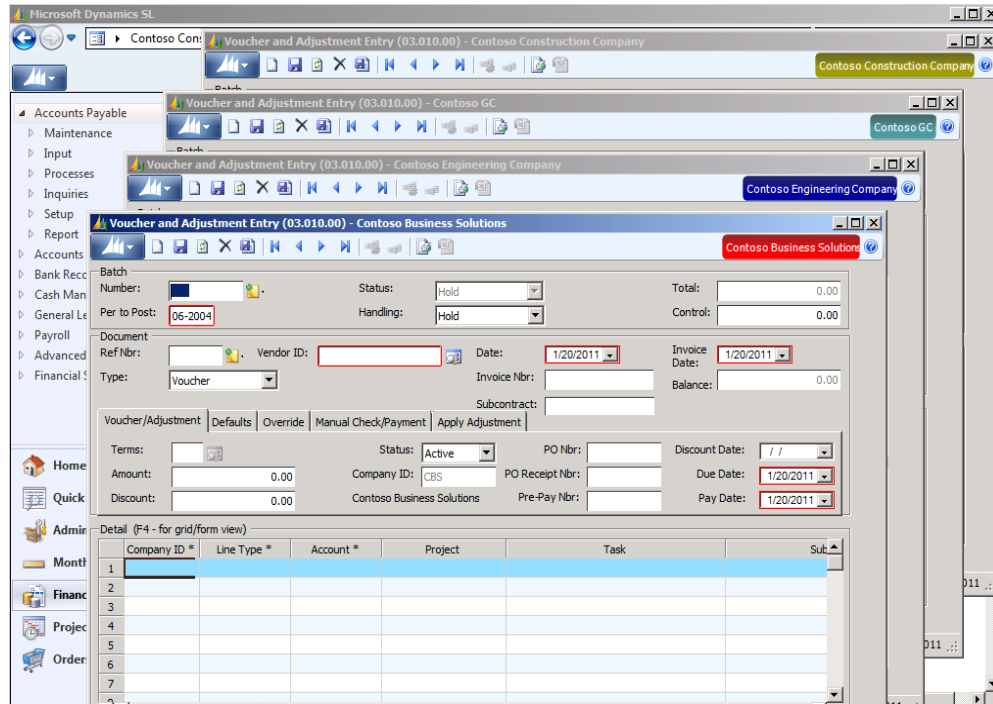


Figure 5: Keep screens open in multiple companies at the same time

- **Multi company functionality**

Simultaneously complete data entry, queries or run reports for **multiple companies**.

- **Support for Microsoft Dynamics CRM 2011 & 2013**

Connector for Microsoft Dynamics is built by Microsoft to support integration between Microsoft Dynamics CRM and Microsoft Dynamics SL customer, contact and address information.

- **Management Reporter**

Take advantage of Microsoft Management Reporter—a real-time financial reporting system built on the latest Microsoft technologies—to create boardroom-quality reports without IT assistance, enhance security for reports, and increase support for regulatory compliance.

Future Strategy and Product Roadmap

Over the next several releases Dynamics SL will continue to enhance the current product features while adding new functionality. This work is being paired with a new focus to web enable Microsoft Dynamics SL at the same time.

The evolution of cloud services is enabling people to use technology to work differently. By taking advantage of these services, you have more flexibility in the devices you use and where and how you use them.

Cloud – it's not what you think it is

The world is in a technology shift. No longer are computing devices limited to a desktop or locked into a private company network. Today you have computing power in your hand in the form of a phone or tablet and you use apps every day. The world is connected, always “on” and highly mobile. Driving all of this is the Cloud, including the internet and the applications and services that live within it.

In all reality, when you're talking about “the cloud”, you're really talking about services. The cloud runs on services. If you think about it, most of the interactions you have today with the cloud ultimately involve interaction with a service of some kind. Things like Yammer, Skype, Office 365 and many others are all service driven.

Azure is a service that creates a platform to house services. This allows you to build and host scalable applications on a cloud platform. Its open and flexible service platform enables you to build, deploy and manage apps. This gives you the opportunity to solve problems in new and different ways.

The simplest conclusion to draw from this is that when you are talking about the Cloud, you're really talking about Services. Services that allow you to stay connected *how* you want, with *any* device you want and also *where* you want.

The evolution of services opens an opportunity to re-imagine business applications in ways that were too costly or impractical. With Microsoft Dynamics SL our strategy is to provide flexibility so you can choose how you want to deploy and how you want to purchase. Deploy on premise, in the cloud or a combination of both using the device of your choosing.

MICROSOFT DYNAMICS SL AND “THE CLOUD” – A ROLE-BASED APPROACH

The Microsoft Dynamics SL team's latest initiative is focused on continuing to enhance and add new features while at the same time creating new ways to remotely access Microsoft Dynamics SL. This is accomplished by creating web apps to access Microsoft Dynamics SL features and functionality.

As we set our sights on expanding the accessibility to Microsoft Dynamics SL via web apps, we have taken a role-centric approach. This has allowed us to consider first the user roles in Microsoft Dynamics SL which benefit the most from having system access available via the web. Based on the primary focal point of the Microsoft Dynamics SL client base, the initial focus is on project management and its surrounding roles. These project roles include: Project Employees, Project Managers and Project Accountants.

The first web apps being released focus on time entry, expense entry and time and expense approval. This is followed with Project Analytics, additional Project approvals and communications. Once the Project roles have been addressed the focus will move to other areas and roles in Microsoft Dynamics SL.

MICROSOFT DYNAMICS SL WEB APPS

In 2013, Microsoft Dynamics SL introduced its first web app that enables people, whether they are running on premise or in the cloud, to access Microsoft Dynamics SL through a browser. Microsoft is taking its traditional Microsoft Dynamics SL client server solution and adding web accessible applications

Two components are involved in delivering web apps. The first element is in creating web services for Microsoft Dynamics SL features and functions. The second part is a browser-enabled user interface that interacts with the web service.

WEB SERVICES

Dynamics SL web services, with a direct connection to your Dynamics SL data, provides the connection layer. The benefit of this process is twofold. Web services are delivered as they become available. This allows Microsoft Dynamics SL to release several web services in the midst of traditional development cycles and have more web applications in progress - ready to release prior to the next major release. The second benefit is to the customers, partners and ISVs. The web services are built to connect directly to Microsoft Dynamics SL for querying as well as entering data. This means legacy systems, custom and industry based systems or ISV products can be written to connect directly to the Microsoft Dynamics SL data and know that the data being viewed or entered is being validated.

To illustrate how web services have progressed to date, the following web services have been released or will soon release, compatible with Dynamics SL 2011:

Current Web Services

- Customer
- Project
- Project Time Entry
- Project Expense Entry
- Project Time & Expense Approval

Planned Web Services (as of 11/2013)

- Project budget & invoice approvals
- Project delegations
- Project resource assignment
- Project timesheet

Additional web services will be added to the list throughout the year. Visit CustomerSource or talk to your partner to learn about the most recent web service and web apps release plans.

WEB APP INTERFACES

Once web services are created for a feature, the next step is to build the web based user interface to complete the web apps. One important factor is to provide access to these interfaces across different devices and device types. This includes focusing on mobile access via smartphones, tablets, as well as desktop access. This is accomplished in part by creating interfaces written using the HTML5 language. These web apps can be hosted internally at a client site or externally at a certified hosting partner site. The web apps provide a user friendly interface via Windows, Android and iOS devices, as well as on desktop interfaces and devices that support HTML5. The initial releases of Microsoft Dynamics SL web apps in the coming year are scheduled to include the following project functionality:

Project Time Entry

- Enter Project time lines and attach receipt images

Open Timecards

Period Ending: Tue. Apr 30, 2013
 Status: InProcess Total Hours: 5
 Type: Regular

Period Ending: Mon. Apr 15, 2013
 Status: InProcess Total Hours: 0
 Type: Regular

Period Ending: Sun. Mar 31, 2013
 Status: InProcess Total Hours: 13
 Type: Regular

Period Ending: Fri. Mar 15, 2013
 Status: InProcess Total Hours: 88
 Type: Regular

Timecard Entry

Status: ☒ In Process

Ending Date: Fri. Mar, 15 2013

New

Day: Fri. Mar 1, 2013
 Project: EN123003 Hours: 8
 Task: DS00202

Day: Mon. Mar 4, 2013
 Project: EN123003 Hours: 8
 Task: DS00202

Day: Tue. Mar 5, 2013
 Project: EN123003 Hours: 8
 Task: DS00202

Comments Delete

Figure 6: Project Time Entry

Project Expense Entry & Expense Report

- Enter Project expense lines and attach receipt images

Expense Entry

Date: 6/20/2013

Status: ☒ In Process

Description:

Advance Used: 0.00

Trip/Expense:

Total: 1,575.23

New

Monday, June 17, 2013
 Exp Type: Car Rental
 Project: Bridge Design
 Task: On-Site Meetings

Tuesday, June 18, 2013
 Exp Type: Hotel Expenses Domestic
 Project: Bridge Design
 Task: On-Site Meetings

Comments Delete Notes/Attach

Notes / Attach...

Notes

Note From (TM.ENT.00)
 Revised Date: 6/20/2013

Attachments

New Attachment

Title: 000009.jpg
 Description: Rental car receipt
 Date: 6/19/2013

Figure 7: Project Expense Entry & Expense Report

Project Time and Expense Approval

- Project managers review and approve or reject timecard and expense entries

The screenshot shows a web interface titled "T/E Approvals". At the top left is a "Back" button. Below it, there's a "Filter by:" section with two buttons: "Time" and "Expense". Below that is an "Employee:" input field with a search icon. A "Set all actions" section contains four buttons: "Clear", "Approve", "Reject", and "Forward". The main part of the interface is a table with columns: "Resource:", "Report:", "ID:", "Date:", and "Amt/Hrs:". There are three rows of data, each with a type indicator (EXPENSE, TIME, EXPENSE) and an information icon. Each row has a set of action buttons: "No Action", "Approve", "Reject", and "Forward".

	Resource:	Report:	ID:	Date:	Amt/Hrs:	
EXPENSE ⓘ	Berry-PM-Jo	Association meeting	0000200025	Jan 23, 1998	\$37.65	No Action Approve Reject Forward
TIME ⓘ	Ackerman-Engr~Pilar	Comment/Description	0000010280	Aug 15, 2013	\$8	No Action Approve Reject Forward
EXPENSE ⓘ	Ackerman-Engr~Pilar	My trip	0000200049	Sep 10, 2013	\$456.44	No Action Approve Reject Forward

At the bottom left, there is a "Commit Actions" button.

Figure 8: Project Time & Expense Approval

Project Analyst (includes Project Net Profit & Task Net Profit)

- Access project profitability and other project management reports

Project Budget and Invoice Approval

- Project managers review budget and invoice entries, choosing to approve or reject

Project Communicator

- View automated messages and send messages to other project users

Project Resource Management

- Provide basic employee resource planning for Microsoft Dynamics SL projects

- **Project Maintenance & Inquiry**

- Ability to create new projects, maintain existing projects and lookup project status as needed.

- **Project Timesheet Entry**

- Crew leaders can enter time on behalf of their employees.

WEB CLIENT INTERFACES

A web client is also being developed for Microsoft Dynamics SL. The web client focus is to take the traditional Microsoft Dynamics SL screens and make them accessible via a Web Client. The first focus of the web client will be taking data entry and maintenance screens used by project accountants and make them accessible via the web.

NEW RELEASE CYCLE - A CHANGE IN THE RELEASE PROCESS

Microsoft Dynamics SL has traditionally focused on major releases and subsequent cumulative updates. These releases focus on building enhancements to Microsoft Dynamics SL based on input from our customers and partners. With our additional focus of adding web access to Microsoft Dynamics SL, development is now working across two parallel processes. Besides the traditional addition of new features, we also have efforts dedicated to creating new web applications that are not tied to major releases. This means that customers get access to new web-based business processes as they become available, placing the new web apps into production immediately.

PRODUCT ROADMAP

Microsoft has proven our commitment to further enhancing Microsoft Dynamics SL through innovative technology and important core functionality. The roadmap for future enhancements aligns with our investment in new features as well as releasing new web apps on a semi-annual basis as described in the previous section. In this section we will focus on the next major release scheduled in calendar year 2014. The feature list was predominately chosen after reviewing feedback entered on MSConnect (connect.microsoft.com).

With a rapid release web app cadence adding new functionality every half year, you can rest assured that the solution you invest in today will grow at a rate to provide years of business success for your organization.

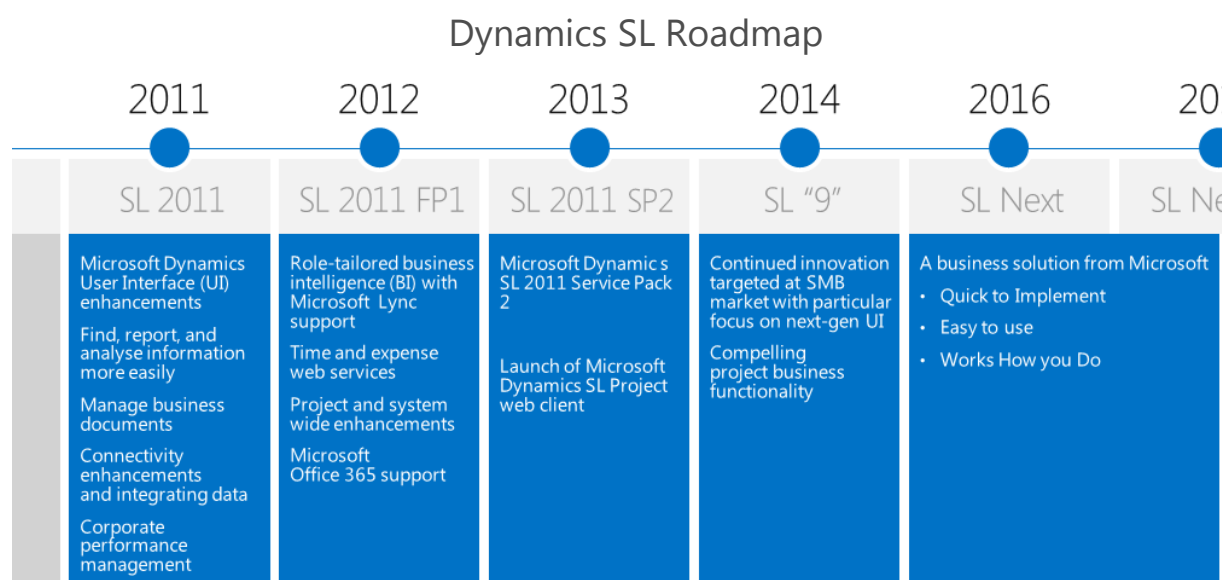


Figure 9: Microsoft Dynamics SL product release timeline

MICROSOFT DYNAMICS SL 9

Microsoft is committed to further enhancing Microsoft Dynamics SL. We have made a significant investment in new releases and scheduled upcoming releases. The next major release of Microsoft Dynamics SL (codenamed SL 9) provides enhancements primarily in the area of Project Management while enhancing core elements in the financial modules.

NEW FEATURES AND ENHANCEMENTS

- Multi-company enablement for project series
- Multi-currency enablement for project series
 - Enhancing existing powerful project feature to work with multi company and multi-currency functionality.
- Quick Query refresh grid to Excel
 - New Quick Query feature creates refreshable Excel documents and pivot tables right from the Quick Query screen to share data across a company
- Payroll enhancements
 - Continued input from our payroll customers adds new features to speed up and ease the payroll process

The screenshot displays the 'Invoice Preview' window in Microsoft Dynamics SL. The left pane shows a grid of invoice records with columns for Reference Number, Document Type, Customer ID, and Original Document Amount. The right pane provides a detailed preview of a selected invoice, including a header with company and document details, a table of line items, and a footer with tax and total amounts.

Reference Number	Document Type	Customer ID	Original Document Amount
000001	CM	CT0130	179,337.42
000001	DM	CT0130	179,337.42
000002	IN	CT0130	50,170.18
000002	DM	CT0130	50,170.18
000003	IN	CT0130	700.00
000003	CM	CT0130	700.00
000004	IN	CT0100	193,236.06
000004	IN	CT0130	55.25
000005	IN	CT0100	54,058.38
000005	IN	CT0130	905.17
000006	IN	CT0120	71,900.98
000006	IN	CT0130	28,132.04
000007	IN	CT0120	52,854.28
000007	DM	CT0130	55.25
000008	IN	CT0110	193,236.06
000008	CM	CT0130	28,132.04
000009	IN	CT0100	193,236.06
000010	IN	CT0100	54,058.38
000011	IN	CT0100	754.25
000011	IN	CT0131	50,170.18
000012	IN	CT0100	59.53
000012	CM	CT0132	179,337.42
000013	IN	CT0130	975.32
000013	IN	CT0133	179,337.42

Row Count: 60

Invoice Preview (08,220.00)

Contoso, Ltd.Demo

Load Filter: Where Document Type begins with Enter a value

Save Filter

Refresh Edit

Document - Click on a column heading to sort by that field

INVOICE PREVIEW

Contoso, Ltd.Demo
233 Elm
Pawley, OH 43084

Invoice Date: 12/1/2010
Document Date: 000009
Reference Number: 000009
Customer ID: CT0130
Term: 2/10 NET30

Page 1 of 1

DESCRIPTION	UNIT DESC	QUANTITY	RATE	PRICE	GST PRICE
Tax#		1	800.00	800.00	
Tax#		1	7,022.90	7,022.90	
Tax#		1	9,999.99	9,999.99	
Tax#		1	38,289.20	38,289.20	
Tax#		1	128,858.96	128,858.96	
City of Chicago, IL		0	0.00	448.34	
Cook County, IL		0	0.00	448.34	
Chicago, IL Trans		0	0.00	1,348.00	
State of Illinois		0	0.00	11,888.00	
Tax: CHICAGO, IL 0.0004				179,337.42	
Tax: CHICAGO, IL 0.0004				12,288.00	
TOTAL:				193,236.06	

BAS 0060 SYSADMIN 11/13/2012

PREVIEW
UNRELEASED
AR INVOICES

- Print/preview unreleased Accounts Receivable (AR) invoices
- Web-based reporting provides access to Microsoft Dynamics SL reports via a web browser
- Web-based Quick Query search feature provides search, sort and find capabilities through a web browser

Support Strategy

Major releases of Microsoft Dynamics SL, such as Microsoft Dynamics SL 2011, enjoy five years of mainstream support from the date that the version was first generally available. Mainstream support includes a commitment to provide security, tax, and regulatory changes. Beyond this five-year period, there is an additional five years of extended support. Please visit the Microsoft Support Lifecycle page to learn more about what is available in each support phase.

The Microsoft Support Lifecycle policy is designed to ensure that you can secure the return on the investment that you make in implementing any individual release. This will help you develop your own version upgrade plans.

For more information, see [Microsoft Support Lifecycle](#).

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