


Microsoft®

ACHIEVE RESULTS

*Project Management and Accounting
with Microsoft Dynamics SL and
Microsoft Office Project Server*

Profitable project management depends
on the right information...

 Microsoft Dynamics® SL



...at the right time. This focused insight is crucial to applying appropriate resources, carrying out key tasks, managing profitability and making wise decisions. With Microsoft® Dynamics SL and Microsoft Project Server Project Management and Accounting, you can empower your organization's professional project managers with a flexible, integrated solution tailored to unique business needs. From managing proposal writing to smoothly launching new projects and tracking their progress to analyzing opportunities and assessing results, Project Management and Accounting helps keep projects on track and your business thriving.

INSIGHT



CONFIDENCE

Microsoft Dynamics SL

DRIVE PROJECTS THAT MEET CUSTOMER REQUIREMENTS WITH A SOLUTION BUILT TO WORK THE WAY YOU DO

Microsoft Project Management software helps you gain confidence that what you do every day to manage your projects will drive financial performance and meet customer requirements.

Efficient Organization

- Quickly set up, track, and maintain key project information, budgets, contracts, and documentation requirements. Automated alert messages keep you on top of deadlines, pending tasks, and key indicators you choose to track. Deliver role-based information about all aspects of projects via an intuitive Project Portal for project managers, employees, executives, subcontractors, owners and all other key stakeholders.

Strict Control

- Strengthen fiscal management with real-time access to project revenues, costs, and margins. Manage change-order processes by viewing schedule and budget impacts before alterations proceed.

Increased Profitability

- Create custom pricing structures, rates, and mark-ups for billing, and tailor them to individual projects and customers. Shorten billing cycles and leverage cash flow when project costs flow directly to invoicing processes.

Integrated Accounting

- Streamline financial management with flexible, automated processing and seamless links across financials, projects, inventory, work order, cash management and field service operations.

Productivity Enhancement

- Boost productivity with powerful tools for employee time keeping, utilization management, automated notifications, and the ability to work from the field via Web-based access to information and processes.

Convenient Analysis

- Retrieve and enter real-time project information securely via a Web browser. Assess performance and manage profits across multiple projects with easy access to summaries and details, plus integration with industry-standard reporting tools such as SQL Reporting Services (SRS) and Business Analytics.

“For any given day or time, I can quickly create a snapshot of how productive each broker is and see the expenses coded to their account. Having this timely information, we can immediately react to low commissions, excessive spending, or both, as opposed to learning about it at after quarter end.”

Scott Nesbitt,
Chief Accounting Officer,
Choice Energy

MICROSOFT DYNAMICS SL PROJECT MANAGEMENT AND ACCOUNTING AT A GLANCE

Microsoft Dynamics SL project-related modules include:

Contract Management

Ensure timely and profitable project completion with features that help you track documents, handle change orders, manage subcontractor performance, and link payments to successful delivery (using the Pay-when-Paid feature).

Project Controller

Quickly set up projects to fit your business, then manage them effectively with timely, detailed revenue and cost information.

Project Budgeting

Gain control of profitability with powerful tools to create budgets, track results, and preview the impact of changes.

Time and Expense for Projects

Streamline labor reporting with timesheets and expense reports that can be accessed anywhere, anytime over the Web.

Allocator

Efficiently and flexibly manage project finances with customized rate structures, automatic allocation of charges and revenues, work-in-process tracking, and accurate project data for billing and posting.

Flexible Billings

Improve cash flow by automating invoicing processes and converting unbilled receivables more quickly to revenues.

Communicator

Keep projects on track with automated alerts for deadlines, approvals, escalating costs, or other messages you choose.

Employee Utilization

Improve human resource productivity by tracking availability and billable time, setting utilization goals, and managing performance against them.

Analyzer

Enhance decision making with the ability to conveniently summarize, analyze, present, or compare project performance and profitability data.

ORGANIZED PROJECT MANAGEMENT WITH FINE-TUNED CONTROL

Tailor project structures, information, and tracking to work the way you do for closer control of all aspects of project success and profitability.

Initiate Projects Effectively

Customize project setup and organization with Microsoft Dynamics SL Project Controller. Multiple levels of information, flexible billing structures, and user-defined entries capture the data you need and let you share it with people you specify.

Gain control over subcontractor performance and costs with Microsoft Dynamics SL Contract Management's powerful tools for tracking commitments and monitoring and motivating progress. Tighten financial safeguards by linking disbursements to deliverables, calculating retention, and handling Pay-When-Paid agreements.

Maximize profits by efficiently, accurately, and consistently tracking employee utilization data. Track everything from goals for billable hours and revenue to actual hours billed and revenue earned.

Manage Time and Expenses Accurately From Any Location

Capture time and expense at the project (job) and task (phase) level for multiple purposes—costing, billing, payroll, and project status update. Project and accounting staff can capture labor costs, employee-related expenses, material costs, and other accounts-payable transactions directly against projects and tasks, providing insight into all costs associated with your projects.

Easy-to-use, Web-based access lets team members and project stakeholders view, update, and submit project information—including time cards, expense reports, and analysis of project status with drilldown to detailed transactions—from any location. Review and approval capabilities streamline workflow and ensure timely and accurate submission of mission-critical data, allowing you to bill your customers, analyze profitability, and review project status faster than ever before.

Immediate integration of project time and expense capture provides all the information in one place for accurate, centralized reporting and can dramatically reduce the amount of time required to present billable transactions on customer invoices.

“Now in a matter of minutes, I can open a report and tell the customer how current he or she is on each project, and what pending and open change orders there are. Microsoft Dynamics SL has sped up the time it takes to access data by at least 100 percent.”

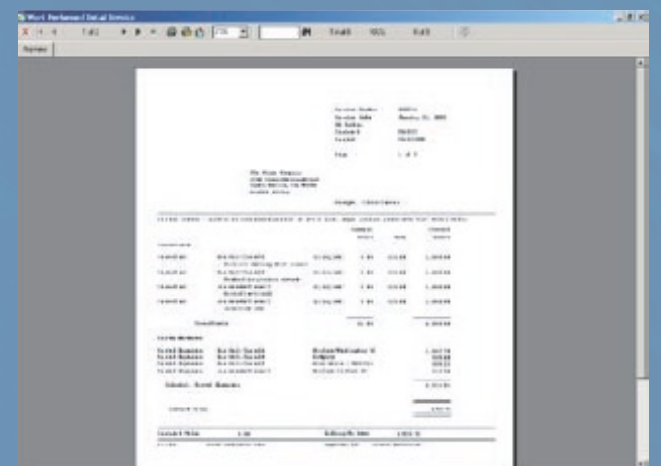
Steve Heiderstadt,
Vice President of Construction,
BP Air Conditioning

Web Timecard Entry



Capture time information, even from employees working remotely, with data automatically routed to the appropriate managers.

Flexible Invoice



Invoice customers with different types of services and fees — all at one time.

FINANCIAL SOLUTIONS THAT KEEP YOU FOCUSED ON PROFITABILITY

Satisfy customer demands, stay on top of evolving situations, and improve cash flow with tailored billing processes, efficient automation options, and clear views of profitability throughout the project lifecycle.

Maintain Tight Fiscal Control

Automate your management of unbilled receivables with billing methods and mark-up rules to automatically post billings to Microsoft Dynamics SL Accounts Receivable and General Ledger.

Help reduce the time and effort required to produce invoices – customers can be invoiced with different types of services and fees at the same time. Choose from unlimited combinations of time and materials, progress, and fee billing methods. Managers can be automatically notified when draft invoices are available for their review. Drafts can be reviewed and marked-up online and submitted for final invoicing without having to manually markup paper copies or create invoices in a separate system.

Track and control your budgets from project initiation to completion. See how change orders and revisions affect your budget throughout the life of a project.

Use Microsoft Dynamics SL Allocator to design custom rate and billing structures, mark-ups, and recognition rules, and then automatically distribute complex charges and revenues by using automated processing.

Accurately recognize revenue by using flexible revenue-recognition methods that meet your specific audit, business, and project needs. Control your revenue by using cost plus, fixed price, and time-and-materials methods at the project-task level.

View and Analyze the Exact Information You Need, Exactly the Way You Want It

Enhance profitability with real-time views of detailed financial data from initial budget through project closure, without waiting for accounting periods to close.

Access project status and billed and unbilled Accounts Receivable information, then drill down to transaction details—all from a Microsoft Office SharePoint-based Web interface that can be accessed from any Internet-connected PC*.

Manage fiscal performance every step of the way with the ability to forecast outcomes, monitor trends, predict the impact of changes, and track multiple revisions of estimate-at-completion and forecast-at-completion, in addition to the original budget.

Create alert messages for revenues and cost budgets, making it easy for project managers to identify potential cost overruns and other problems that jeopardize project success before they happen.

*Microsoft Internet Explorer 5.5 or later required. Assumes the viewer has proper credentials for a secure, authenticated connection to the SharePoint server.

Project Communicator

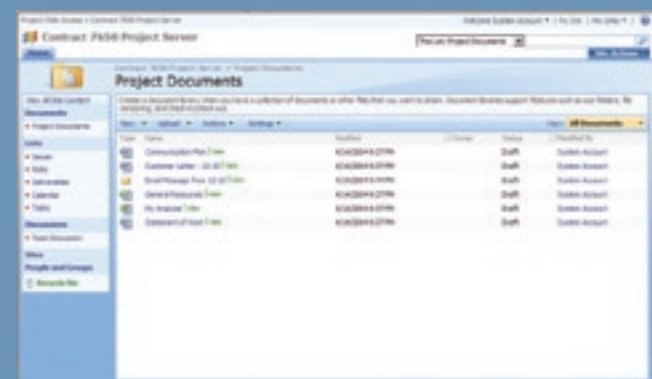


Microsoft Dynamics SL will send alert messages to prompt people to review exceptions or take action. Project alerts help ensure that key project issues are addressed promptly.

SYNCHRONIZE INFORMATION, PEOPLE, AND PROCESSES USING MICROSOFT SHAREPOINT COLLABORATION.

Enhance productivity with project information that flows seamlessly from one process to the next and across functional boundaries, geographical barriers, and the Internet to your desktop. Microsoft Office SharePoint provides a common location for Project data to be shared among all project stakeholders.

SharePoint Project Documents



Optimize project manager and employee communication with collaborative project document sharing.

Connect Smoothly Across Applications and Platforms

Increase productivity with the ability to perform key project tasks and manage progress anywhere you can access the Internet.

Strengthen relationships by giving customers and business partners secure, Web-based access to the shared information that can enhance your mutual success.

Save time maintaining data. Integration across Microsoft Dynamics SL financial management modules gives you fast access to updated, accurate information.

Keep on top of deadlines and the current status of important documents. Tracking tools in Contract Management and proactive alert messages from Microsoft Dynamics SL Communicator help you ensure compliance with vital paperwork requirements.

Manage resources effectively throughout your organization. Provide a view of resource information and evaluate availability across multiple projects so back-office staff and front-line project managers have visibility into resource schedules and availability. View assigned tasks to resources for optimal management of these valuable assets.

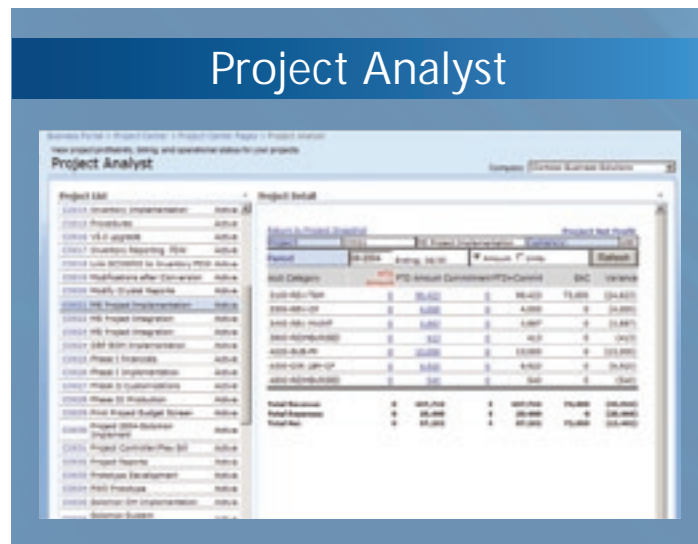
Enhance business decision-making with comprehensive performance data, quickly collected and summarized by Microsoft Dynamics SL Analyzer for analysis and presentation.

Seamlessly analyze data with industry-standard reporting tools such as Microsoft Excel, SQL Reporting Services, Business Analytics, and Microsoft Dynamics for Analytics-FRx® for efficient, in-depth analysis.

Empower Managers and Executives With Business Analytics

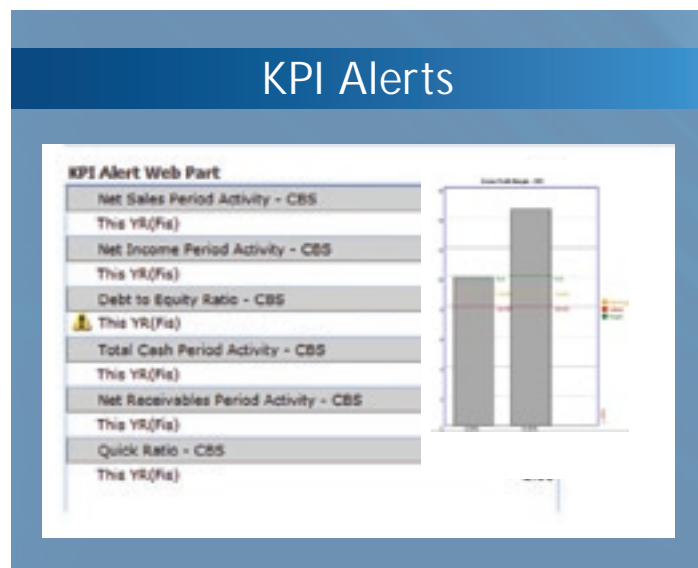
Consolidate information from various business functions and present one set of the same, accurate numbers through Business Analytics for Microsoft Dynamics SL. There is no need for managers and executives to struggle to gather data from multiple, disconnected systems. Rather, they gain the ability to monitor business activities from start to finish, dealing with budgets, timelines, department and employee productivity, and a project's effect on the company.

Analyze rising and falling performance of customers, project managers, inventory, and more. This valuable solution creates meaningful analytics that provide insight to help measure and improve operational efficiency.



Using Business Analytics for Microsoft Dynamics SL, advanced reporting and analysis of financial results and operational activity is available to truly understand what is happening within projects and the business overall.

Gain insight on relevant metrics like profitability and project margin percentages by department, item margins, and financial analysis and controls. Achieve the compliance control you need by tracking these metrics against budgets, quotas, and goals.



At a glance, view key project billing and financial performance indicators.

Provide interactive reports to people in tools already familiar to them, such as Microsoft Office products or Internet Explorer.

Microsoft Office SharePoint Services

Microsoft Office SharePoint Services enables you to centrally store, link, and share project-related issues, risks, and documents for collaborative tracking. Propagate best practices for project work with SharePoint templates to improve project management processes throughout your organization.



CONTROL

Microsoft Dynamics SL and Microsoft Office Project Server (Enterprise Project Management)

THE AGILITY TO FOSTER COMPETITIVE ADVANTAGE

Meet the most complex operational requirements with agile efficiency. Microsoft Dynamics SL and Microsoft Office Project Server (EPM) provide the custom operation, reliable processing, and depth of function you need to exceed expectations, delight customers, and outpace the competition.

Connect Microsoft Dynamics SL to the Microsoft **Office Project Solution**—which includes Microsoft Office Project Professional and Microsoft Office Project Server—to create a seamless solution for task assignment, resource management, resource planning, task status updates, project scheduling, project management, budgeting, time and expense entry, invoicing, and more.



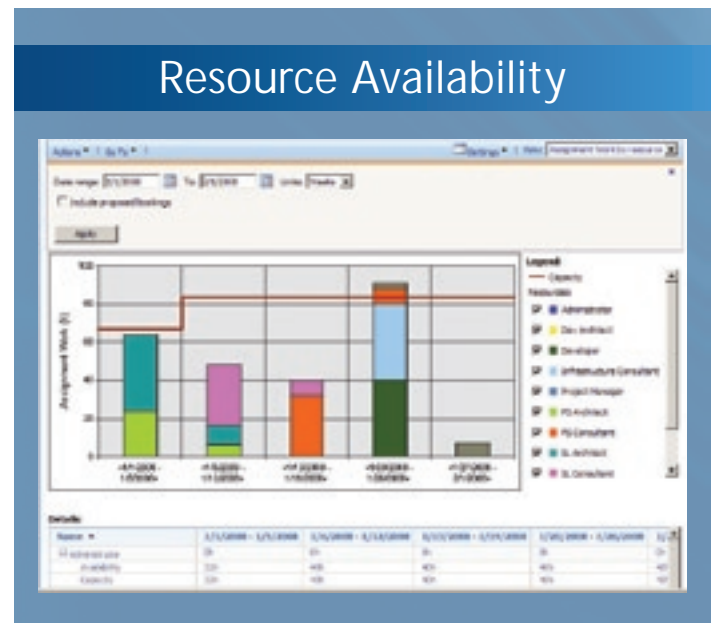
The bi-directional connection with Microsoft Office Project Server makes real-time project/job financial data available to the project manager at the task/phase level in Microsoft Office Project Professional.

Projects can be initiated and updated in either Microsoft Project or Microsoft Dynamics SL, with information flowing automatically across applications. This powerful connection enables project managers and accounting staff to use the tools most appropriate for their roles.

Project Collaboration using Microsoft SharePoint allows all project stakeholders access to information as it happens where and when they need it the most. One integrated system connects every aspect of your business, from financial and project management, e-business, and payroll, to distribution, field-service management, and reporting. The result is accurate, timely, and detailed information that provides the insight for precision control and shrewd decision-making. As your business grows, a vast network of dedicated Microsoft Certified Business Solutions Partners and independent software vendors (ISVs) will be there to offer reliable service and long-term support. Enhanced performance, greater profitability, and expanding success – it's all within your reach.

Project Scheduling

Schedule projects using Enterprise Project Management that ensures the project can be completed on-time and creates a baseline used to measure performance of the project. Project scheduling then ensures resources know what they are expected to accomplish and in what timeframe.



Quickly view resource goals and performance to adjust to new business demands.

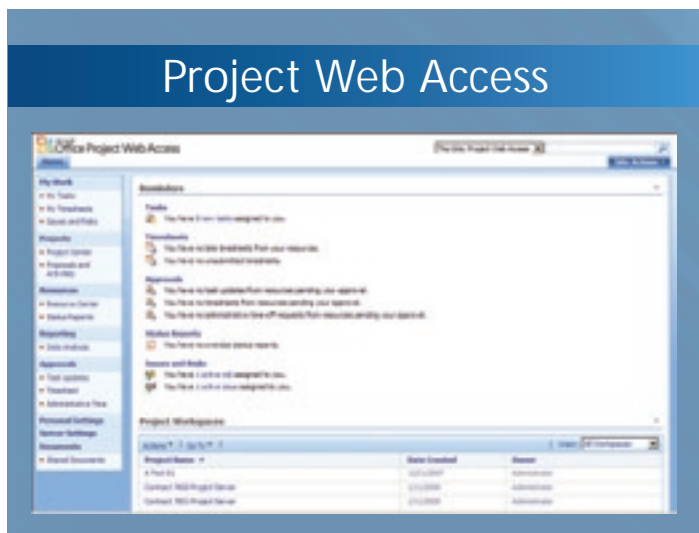
Resource Planning

See how changes to the schedule impact your resource's ability to get the task completed in the appropriate timeframe. Immediately identify if a resource is over- or under-utilized.

Get accurate information about resources throughout your organization so you can assemble the best team for each project. Evaluate skills and resource task assignments and resource utilization rates for optimal deployment of resources. Perform valuable resource planning by utilizing the Resource planning tools of Project Web Access of EPM.

Improve Management of Employees' Time

Access information about employee availability and use it to set goals for billable time, track results, and realize greater productivity by using Microsoft Dynamics SL Employee Utilization and Microsoft Office Project Server Resource Planning.



Project Web Access provides project employees a common location to manage Tasks, Approvals, Status Reports, Issues and Risks as well as manage Project Workspaces (Project SharePoint Sites).



AGILITY

Microsoft Dynamics SL at Work – Microsoft Dynamics and Project Server Case Study

Intelligent Automation Corporation

Company Builds Integrated Platform, Boosting Productivity by up to 50 Percent

Intelligent Automation Corporation (IAC) supplies diagnostic products for helicopter and turbine engines. Seventy-five percent of the company's revenue comes from government contracts. Initially, the company's accounting application was sufficient to meet the government's strict project accounting and reporting requirements. However, as IAC began to expand its manufacturing operation, integrating manufacturing and accounting data presented many challenges. To overcome these issues, IAC deployed Microsoft Dynamics SL and Microsoft® Office Project Server. As a result, IAC has increased productivity by 10 to 50 percent, expanded manufacturing operations, enhanced employee accountability and communication, and provided a central repository of information.

Situation

Founded in 1999, IAC develops prototypes of diagnostic equipment used primarily in helicopters, with grant money provided through the U.S. government's Small Business Innovative Research Program. Over the next several years, government agencies expressed interest in several product designs. This meant that IAC had to build prototypes and, consequently, open a small manufacturing facility. By 2003, IAC had won several manufacturing contracts producing products for the U.S. Army, U.S. Air Force, and commercial helicopter manufacturers.

Inability to Support Manufacturing Expansion

As the manufacturing side of the business grew, however, several IT challenges arose. One key obstacle was that the company's computing infrastructure was designed to support research and development as well as strict government contractor accounting requirements—not manufacturing. "We originally chose Deltek because it is tailored to support the very detailed, very complex regulations of the U.S. government," explains Robin Ash, Controller, IAC. "The application focuses heavily on project cost accounting, and it is quite effective in managing the services role of a government contractor. But once our production demands grew, the application couldn't accurately incorporate manufacturing subsidiary activity into the general ledger."

To help support manufacturing demands—such as inventory management, procurement, and work order processing—IAC initially expanded its solution by deploying a Deltek purchasing and manufacturing module. However, it soon became obvious that the Deltek module could not provide the functionality required to seamlessly integrate a growing manufacturing operation. "Our hand was forced to find a new solution, because if we didn't, we knew we would face ongoing problems in manufacturing and accounting," says Ash.

Difficulty Scheduling Personnel

As the company struggled with the Deltek application, employees were also facing issues in managing projects and scheduling. To date, employees had relied on a combination of spreadsheets created using Microsoft Office Excel® spreadsheet software and another Deltek product, E-Planner, to gain insight into projects and personnel resource availability. However, IAC needed greater insight into the schedules of various personnel involved in product design, prototyping, and manufacturing.

IAC began looking for a computing solution that could integrate and report on all of the company's information, including traditional financials, accounting, scheduling, project management, and manufacturing. In addition, the system had to support government requirements in project cost accounting and report generation.

Solution

IAC selected Microsoft Dynamics® SL and Microsoft Office Project Server. To maximize its existing hardware and operating system investments, accelerate the time required for system integration, and benefit from an easy-to-use interface.

IAC continued to expand the capabilities of its system, such as customizing Microsoft SL so that it would collect the detailed project cost information required in government audit reports by agencies such as the Defense Contract Audit Agency (DCAA).

With enhanced business portal functionality of Microsoft Dynamics SL, IAC has access to a central repository regulated by access controls, and electronic timesheet processing is accessible through the portal, and includes sufficient rules and security to comply with government requirements surrounding timesheets.

Benefits

Boosted Productivity by 10 to 50 Percent

Employees at IAC are working 10 to 50 percent faster by using Microsoft Dynamics SL and Project Server. “Generally speaking, our productivity has increased simply because the Microsoft product interface is so much easier to understand than our old MS-DOS®-based system,” says Ash. “The ability Microsoft Dynamics SL gives us to drill down and instantly access the information we need is invaluable. Employees in manufacturing and project management have realized the greatest increases in productivity, working up to 50 percent faster.”

One reason for this improvement in manufacturing is a result of work order processing. In the past, receiving clerks logged information directly into inventory. Today, receiving clerks log materials in the system, and then a material operations manager verifies the information before the new materials are posted in inventory. As a result, work orders are more accurate, and employees do not have to backtrack to troubleshoot inventory issues.

Project managers are getting more done because they no longer have to constantly monitor projects and follow up with employees. “Project managers used to manage milestones, schedules, and budgets,” explains Ash. “This responsibility has filtered down to individual engineers.”

Enabled Expansion in Manufacturing

Previously, IAC accountants faced reconciliation issues from manufacturing every month.

“It’s very hard to marry manufacturing and accounting,” says Ash. “Microsoft Dynamics SL does a wonderful job connecting our manufacturing subsidiary activity into the general ledger. The information we need is just a click away. For example, using our old system, we had to go into so many different reports to get the information we needed. Using Microsoft Dynamics SL, I can instantly check every work order that has been created against a part number, or check every sales order including transaction information. You can drill so far down into details that it is just amazing.”

Enhanced Communication and Accountability

One of the biggest changes IAC has realized as a result of the deployment is an increase in communication between engineering teams and project managers. “Microsoft Dynamics and Project Server have transformed the culture of our company,” Ash notes. “Communication between employees has dramatically increased. Engineers used to focus almost exclusively on their own work, whereas today there is a lot of synergy between engineering groups. People realize that one person’s work might be relevant to a different project. And as a result, we’ve seen improvements in product quality.”

Authorized engineers and managers can access project status through the portal, instantly learning how much money has been spent on a project and how much money is left. Employees can also see if the project is on track or if more resources are required to get the job done on time.

Provided a Central Repository of Information

The business portal provides centralized access to Microsoft Dynamics SL—including information about financials, project cost accounting, scheduling, project management, and manufacturing—as well as access to electronic timesheets and information from HR. For example, the portal includes access to job listings, employee benefit information, and companywide announcements. In addition, authorized employees can now view the quantity of an individual product part, the sales history of a particular customer, a project’s status, or which projects are over budget.

“The business portal is an amazing tool, which we have just started to use,” explains Ash. “The portal allows any authorized employee to access Microsoft Dynamics SL, even if they do not have a seat on their system. Employees use it to set up work spaces for each project, so people can post documents, chat online, or just see what’s going on with a project. We have so many plans for the portal because it is an enabling technology that provides our employees with the information and tools they need to get their jobs done effectively.”

MICROSOFT DYNAMICS SL

Microsoft Dynamics® SL is a business management solution specialized to help project driven mid-sized organizations obtain reports and business analysis, while helping increase efficiency, accuracy, and customer satisfaction. With the powerful solution of Microsoft Dynamics SL for professional services, operations, field services and construction management, you can be confident that projects are estimated correctly, completed on time, and meet your customers' requirements.

Achieve more — with a solution designed to work the way you do.



COLLABORATION



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