



## Improve Performance Management

with Microsoft Office PerformancePoint Server 2007 and Microsoft Dynamics AX 2009

**Combine the power of Microsoft Dynamics® AX 2009 with the flexible performance management tools of Microsoft® Office PerformancePoint® Server 2007 to simplify monitoring, deeply analyze business performance, and enhance planning and budgeting.**

To better achieve operational goals and improve their position in the marketplace, many organizations are taking a proactive approach to budgeting, planning, and analytics. By establishing a collaborative and consistent budgeting process and using key performance indicators (KPIs) that align with performance, organizations can effectively monitor and improve business processes.

### Customer Scenarios

With Microsoft Dynamics AX and PerformancePoint Server, you can optimize planning and budgeting and use advanced analysis capabilities for specialized, real-time monitoring of your business.

#### Gain tight control of budgeting with integrated planning tools

Create dynamic budgets that accurately reflect current business conditions, and then share that data with ease. Access the most current data at all stages of the budgeting process, make forecasts using various “what-if” scenarios, and work collaboratively to make fast, accurate predictions. For example, you can export financial data from Microsoft Dynamics AX to PerformancePoint Server, and make it available to stakeholders in an Excel spreadsheet. Stakeholders can then add budget data to the spreadsheet and import it back into PerformancePoint Server to consolidate the data. To help ensure standardized processes, you can build integrated workflows and alerts in PerformancePoint Server to gain tight control over the entire budgeting process.

#### Expand monitoring and analysis with scorecards and dashboards

With Microsoft Dynamics AX and PerformancePoint Server, you can also analyze and adjust budgets using powerful tools for real-time monitoring and predictions. Compare business performance to KPIs, and use advanced analysis capabilities to identify variances or evaluate personal, departmental, or divisional performance.

For example, you can publish Microsoft Dynamics AX data cubes in executive dashboards and scorecards, with the option of using default cubes. Choose from four scorecard templates—General Ledger, Corporate Scorecard, Receivables, and Payables—to help identify specific trends based on business needs. With standardized reporting and simplified business intelligence tools available across the enterprise, you can improve best practices for internal reporting and satisfy external reporting demands.

### BENEFITS

Using Microsoft Dynamics AX 2009 with Office PerformancePoint Server 2007 delivers:

- **Simple, fast import of comprehensive financial data.** Connect and map to data, reduce manual data loading steps, and help ensure data accuracy with the Data Import Wizard.
- **Custom plans and budgets without coding.** Build, modify, and manage sophisticated business documents designed for the way you work—all without the need for programming.
- **Flexible, iterative budgeting.** Create plans and budgets using various business models, workflows, and versioning to create dynamic budgets for current business conditions.
- **Budgeting processes that align with performance management.** Empower people to evaluate performance using targeted scorecards, reports, and advanced analysis tools.
- **Integrated collaboration tools.** Work together to plan, budget, and forecast using Microsoft Office Excel®, Microsoft Office Outlook®, and Microsoft Office SharePoint® Server.

## FEATURES

<b>Integrated, single view of business</b>	<ul style="list-style-type: none"> <li>• Connect data from various internal and external data sources to create multiple versions of plans and budgets in a single view for simplified analysis and reporting.</li> </ul>
<b>Consistent process management</b>	<ul style="list-style-type: none"> <li>• Use business rules and real-time calculations that scale to support consistent processes, and simplify the consolidation of multiple budgets into corporate rollup.</li> <li>• Streamline planning and budgeting with data entry forms, workflow, submissions, approvals, and templates.</li> </ul>
<b>Data Import Wizard</b>	<ul style="list-style-type: none"> <li>• Import financial data from Microsoft Dynamics AX to PerformancePoint Server for accurate planning, budgeting, monitoring, and analysis—without additional coding.</li> <li>• Use the step-by-step guide to connect to source and destination systems, configure companies and dimension mappings, set data import options, and load source data.</li> <li>• Create multiple data import configurations with the ability to reuse the configurations later. PerformancePoint Server supports a range of business models from simple to sophisticated, enterprise-level scenarios.</li> </ul>
<b>Flexible budgeting and planning</b>	<ul style="list-style-type: none"> <li>• Use flexible frameworks and reporting structures that map to your existing business model, or combine figures for strategic analysis.</li> <li>• Improve decision-making by using Excel to explore “what-if” scenarios.</li> <li>• Regularly monitor the status of financial planning using detailed audit trails.</li> </ul>
<b>Easy monitoring and analysis</b>	<ul style="list-style-type: none"> <li>• Centrally manage security, subscriptions, analysis, and reporting services.</li> <li>• Use real-time dashboards to track and analyze budgets and forecasts and identify areas of the finance process that can be improved.</li> <li>• Summarize budgeting and forecasting data using standardized templates, the reporting library, and scorecards.</li> <li>• Use dynamic budget variance feedback loops to align performance to KPIs.</li> </ul>
<b>Multiple reporting and publishing options</b>	<ul style="list-style-type: none"> <li>• Publish Microsoft Dynamics AX cubes in special executive dashboards and scorecards, use default cubes, or create custom cubes for targeted analysis.</li> <li>• Distribute and upload budget data across divisions and departments with automated management of budget and forecast templates.</li> <li>• Create reports, analyze data from multiple sources, and publish in various formats.</li> </ul>
<b>Integration with Microsoft Office SharePoint Server</b>	<ul style="list-style-type: none"> <li>• Streamline collaboration with tools that collect all necessary input for budgeting and help establish executive buy-off.</li> <li>• Take advantage of real-time dashboards to help decision-makers spot trends, identify problems, and move quickly on new opportunities.</li> <li>• Empower workers, teams, departments, and divisions to track performance using personalized scorecards and reports.</li> </ul>
<b>Integration with Excel Services</b>	<ul style="list-style-type: none"> <li>• Easily manage and reuse security-enhanced spreadsheet models.</li> <li>• Test various “what-if” scenarios and adjust budgets accordingly.</li> <li>• Access and transform real-time data using multi-dimensional analyses to help support enterprise-scale data volumes and hierarchies.</li> </ul>



**Microsoft**

For more information about Microsoft Dynamics AX 2009, visit [www.microsoft.com/dynamics/ax](http://www.microsoft.com/dynamics/ax).

For more information about Microsoft Office PerformancePoint Server 2007, visit [www.microsoft.com/performancepoint](http://www.microsoft.com/performancepoint).

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