

# ASI Client Connection

## Project Resource Considerations

One of the most important decisions companies must make these days is deciding how to resource projects. In these economic times, many companies try to solve the request for re-sourcing by going in-house. In most common projects, this is considered the best and cheapest solution. Is this the best approach for implementing Microsoft Dynamics solutions?

To make the right choice for resourcing your project, you need to allow for these three considerations:

1. **Knowledge.** Microsoft Dynamics requires a wide variety of skills. The application has impacts on security, MS SQL Server, workstations and network environment, etc. In most cases, the IT department is divided in classic/traditional structure, which could lead to the following issues:

- The need for cross-department knowledge;
- The tendency of employees to be interested or specialized in only one field;
- Lack of experience with the product or knowledge about best practices in development (cont. on pg2)

# ASI

Associates Solutions, Inc.  
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# ASI Updates

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## Project Resource Considerations (cont. from pg1)

2. **Commitment.** In many organizations, there is a "boundary" between IT, Business and other departments. The commitment is to either the technical side or the business side. This could lead to:

- People losing interest in a project due to interest in only one technique and try to get into another project;
- Due to lack of cooperation between departments, the project will fail and the application wouldn't be used by any department;
- The maintenance and support becomes an issue, because of lack of commitment and interest in the product;
- The introduction involves adaption of a new system and usually a more structural way of working, which could end in not using the system, like an old habit people tend to fall back on as part of old routines.

3. **Available resourcing.** The impact on the organization of a newly introduced system is often underestimated. Often, resources in a traditional organized IT department are not needed full time, which leads to fragmentation in duties within your team. You should consider:

- The project team should have a dedicated core team and, if needed, be extended with a field specialist;
- After the project is completed, the system should be maintained by a team with a cross standard field of knowledge due to the complexity of the system;
- Priority in current or coming projects. Be aware of coming projects, since this might lead to conflicting resource claims;
- Transfer of knowledge between old and new members of your team. Good documentation skills are still rare.

In conclusion, the choice between in house or 'outsourcing' should not been taken lightly. You should consider assigning a dedicated team of professionals to the project. If you tend to choose to do it yourself, keep in mind that the project is more complex due to the fact that it requires knowledge in several fields of interest. For example, a qualified programmer isn't necessarily the right team member. Microsoft Dynamics are complex applications, and require special attention that isn't going to be everyone's cup of tea.



# Dynamics Channel Updates

## Product Lifecycle Resources

As the Microsoft Dynamics Suite grows and additional versions are released it becomes increasingly difficult to manage your product's support lifecycle. Microsoft manages a lifecycle website where you can select from the entire Microsoft suite and view supported life information. The website is at:

<http://support.microsoft.com/select/?target=lifecycle>

This website will allow you to select a product and view all of the details about the supported life of a solution. This can be an essential key to planning and budgeting for upgrades.

## Upcoming Training/ Events

ASI is proud to announce the following Training Class and Event schedule. If you are interested in attending, please contact Joy McRae at 913-384-9677 and we can get you scheduled.

- **Nov. 3rd-Smartlist Builder and Excel Reporter Training class**  
8:30am-12:00pm- Associates Solutions offices
- **Nov. 6th-CRM Basics Training Class**  
8:30am-12:00pm- Associates Solutions office
- **Nov 11th-Frx Training Class**  
8:30am-4:00-pm- Associates Solutions office
- **Nov 17th-Dynamics GP SOP/Inventory/AR Training Class**  
8:30am-4:00-pm- Associates Solutions office
- **Nov 18th-Dynamics GP POP/Inventory/AP Training Class**  
8:30am-4:00-pm- Associates Solutions office



For reference, here are the latest versions and respective support dates for the Dynamics products we support.

### **Microsoft Dynamics GP 10.0**

Service Pack 3

Mainstream Support Ends 10/9/2012

Extended Support Ends 10/10/2017

### **Microsoft Dynamics SL 7.0**

Service Pack 2

Mainstream Support Ends 10/9/2012

Extended Support Ends 10/10/2017

### **Microsoft Dynamics CRM 4.0**

Mainstream Support Ends 4/9/2013

Extended Support Ends 4/10/2018



## Convergence Update

Mark your calendars, Convergence 2010 is set for April 24 – 27, 2010 in Atlanta, GA at the Georgia World Congress Center. Convergence is the premier Microsoft Dynamics event, bringing customers, partners, team members and industry experts together to discuss ways your current Microsoft Dynamics solution can help your company cut costs, improve operational efficiencies, increase employee productivity and maximize your current platform investments.

# Product Spotlight

Avatax by Avalara

Sales Tax Solutions for Microsoft Dynamics

With more sales tax software solutions for Microsoft Dynamics products, Avalara is recognized as the leader in Sales Tax Management for Microsoft Dynamics. Operating as an integral part of Microsoft Dynamics, AvaTax automatically calculates taxes during your transactions in real time, dramatically reducing the amount of time your business needs to spend on complex compliance processing, while improving accuracy and reducing costs. AvaTax provides your business with a fully integrated and automated Sales Tax Management System, which includes functionality to protect against audits, obsolete data, and changing tax laws.

**AvaTax OnDemand** runs seamlessly behind the scenes of **Microsoft Dynamics GP** dropping accurate rates into invoices for accurate calculations with every transaction. Service activation takes a few minutes and end user training is not required. Additionally, with AvaTax OnDemand, your data or accounting system integrity are never at risk because AvaTax populates sales and use tax information which is then incorporated into your ERP internal process.

Seamless integration means there is no change to your existing workflow within Dynamics GP – The import

utility supported by Solution Systems imports accurate rates into Dynamics GP’s native tax tables for correct, accurate tax rates all of the time. Service activation takes a few hours, and no end user training is required. Your data or accounting system integrity are never at risk: **AvaTax OnSite for Dynamics GP** populates sales and information which is then incorporated into your ERP internal process.

The seamless integration of **AvaTax OnSite for Microsoft Dynamics SL** does not require changes to your business’ existing workflow with Dynamics SL. The import utility supported by SVA Consulting enables accurate rates into Dynamics SL’s native tax tables resulting in correct and accurate tax rates with each and every transaction. Service activation is simple, straight forward, and only takes a few short hours. End user training is not required and learning how to use AvaTax OnSite for Microsoft Dynamics SL is simple. The integrity and data of the business’s accounting system isn’t affected or ever at risk. Sales and use tax data is automatically populated by AvaTax OnSite for Dynamics SL and incorporated into the business ERP internal processes and systems.

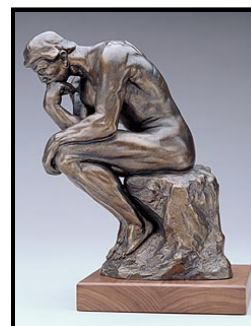
For more information, please visit [www.avalara.com](http://www.avalara.com)

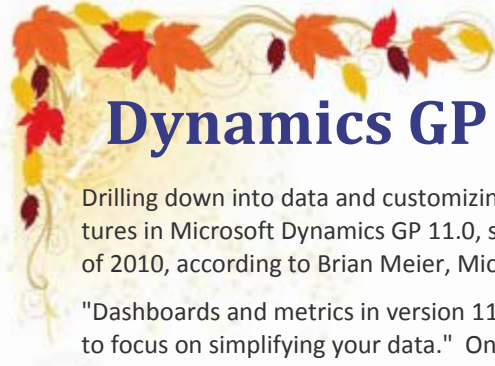
**If you would like to learn more or see a demonstration, please contact  
Joy McRae or Chris Jarvis at 913-384-9677**

**Thought for the Quarter:**

**“Every young man would do well to remember that all successful business stands on the foundation of morality.”**

**Henry Ward Beecher**





# Dynamics GP 11 Preview

Drilling down into data and customizing metrics will be key new features in Microsoft Dynamics GP 11.0, slated for release by the middle of 2010, according to Brian Meier, Microsoft program manager.

"Dashboards and metrics in version 11 will be the same thing. We want to focus on simplifying your data." One way to simplify will be the ability to investigate into data easily, Meier said.

"If you have an issue, you will be able to drill back into that issue," he said. "Instead of sorting through a spreadsheet, it is easier to see a high level and then be able to drill down into the areas that interest you."

Customization was also a prominent topic of the session.

"The Dynamics GP role center, in version 10, is based around Office web components with no option to customize metrics," Meier said. "That is a big issue. We've made an additional option to use reporting services metrics. That will give you the option to create new ones if you choose to."

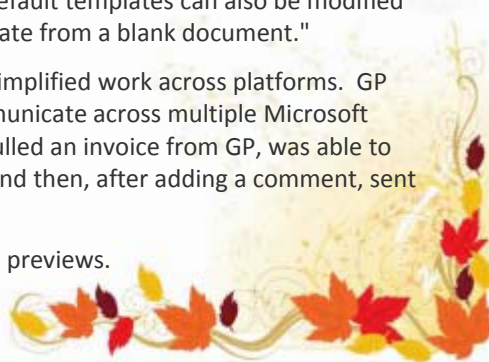
"You will be able to build it once and share it across multiple applications," he added. "We've also added the ability to see those metrics in your Dynamics GP list. Starting at a high level where you can see something is wrong; there will be drill back functionality so you can see more detail. And you can open the window and get into the client application window and drill from there."

Meier focused on the changes version 11.0 would offer customers in regard to Word templates. He said there will be integration with Microsoft Office Word and that GP 11.0 will offer 22 templates "out of the box." Users will also have the ability to create and modify work in Word and that the new version will support a multitude of templates for each Report Writer report.

"Templates simplify reporting," he said. "You can customize a template for a customer or vendor. The default templates can also be modified and you can create a new template from a blank document."

The Office optimization allows simplified work across platforms. GP 11.0 allows users to easily communicate across multiple Microsoft platforms. In the example, he pulled an invoice from GP, was able to import it into Microsoft Word, and then, after adding a comment, sent it out via an Outlook email.

Stay tuned for new features and previews.



## What's New at Microsoft?

### Project 2010

Microsoft Corp. has announced that the public beta of Microsoft Project 2010 will become available later this year, and revealed the product's enhanced project and portfolio management features for the first time. Customers can pre-register for the Microsoft Project 2010 beta at <http://www.microsoft.com/project/2010>.

Microsoft will release three editions of Microsoft Project: Microsoft Project Standard 2010, Microsoft Project Professional 2010 and Microsoft Project Server 2010. Key enhancements designed to appeal to both IT administrators and end users include these:

- **Unified project and portfolio management** with a common user interface and experience across the project life cycle.
- **Improved productivity with effective collaboration** built on Microsoft SharePoint Server 2010.
- **Enhanced user experience and adoption** with the familiar Microsoft Office Fluent user interface and new intuitive design.
- **A scalable and connected platform** with integration across related Microsoft technologies for connected and familiar work management on the PC, mobile phone and browser.

# CRM Update



## ASI Staff News

Congratulations to the following ASI employees who will celebrate anniversaries with us this fall!

Charley Pogue – 11 Years

Terrie Johnson – 11 Years

Don Cumbie – 7 Years

Scott Matteson – 7 Years

Linda Hartman – 4 Years

Tim Lamkin – 2 Years

Sharon Schnare – 2 Years



By now many of you have seen the cute girl on TV professing her love for Windows 7. But for the rest of us in the business world, we wonder how it will work with Dynamics software. Microsoft Dynamics CRM 4.0 works on both Microsoft Windows 7 and Microsoft Windows Server 2008 R2. This also includes the newest version of Internet Explorer, IE8. Both of these operating systems have been released to manufacturing and are available for purchase in October 2009.

Development and testing is in progress for Microsoft Dynamics CRM “V.Next” which encompasses several milestone builds before various external feedback and testing programs are initiated with customers and partners in the lead-up to general release. There is an exhaustive list of investments in Microsoft Dynamics CRM “V.Next” which ranges from small “tweaks” and enhancements to broad new feature areas. Key initiatives are to:

- Deliver a new level of user productivity and collaboration capabilities
- Continued enrichment of the core CRM capabilities
- Provide a best-of-breed business solution platform

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