

Microsoft Dynamics® NAV

# Statement of Direction

Product strategy and roadmap for Microsoft Dynamics NAV

Date: December 2011

[www.microsoft.com/dynamics/nav](http://www.microsoft.com/dynamics/nav)

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## Welcome

Welcome to the Microsoft Dynamics NAV Statement of Direction. This document will provide insight into our Microsoft Dynamics NAV development plans through the year 2015. Whether you are a new or existing customer or partner, this information will help you plan and get the most from your investments.

Smart mid-sized businesses thrive on change. Their ability to compete with larger organizations relies on maintaining a higher level of customer focus which in turn requires greater agility.

In driving change within your business, you play a key role in defining the direction in which you want the business to go, and in helping your people to embrace it. However your ability to implement change effectively will be largely determined by the business systems that your people use.

Microsoft Dynamics NAV provides a highly functional, flexible, affordable business solution that is designed to:

- Give you **greater control** over the key decisions that affect the success of your business, making sure that the right people are equipped with the right information and use it to make the right decisions.
- **Enhance your margins** - reducing transaction costs and increasing your focus on the most profitable customers, products, and services
- Support the changing needs of your business as you **drive profitable growth** by expanding into new opportunities.

## Simplicity, Value, and Agility

Microsoft Dynamics NAV achieves these objectives through:

- **Simplicity.** Microsoft Dynamics NAV is familiar to your people, so it's easy to understand and use. It also leverages existing technology investments.
- **Value.** Microsoft Dynamics NAV can be configured quickly to support your business needs – using one of the packaged solutions that our Partners provide, or using the standard tools that we offer.
- **Agility.** As your business needs change - Microsoft Dynamics NAV can be quickly and cost effectively modified to support different business processes. As your IT strategy changes – Microsoft Dynamics NAV offers you choices about the way that you want to deploy it.

Recent research has highlighted why these values are so important. For example, the Info-Tech Research Group <sup>1</sup>suggests that organizations should expect to spend about one percent of annual revenues when replacing their ERP systems. The cost includes hardware and software, in addition to internal and external project costs. Of that one percent, the costs are broken down as follows:

- Project staff: 40%
- Consulting & services: 25%
- Internal costs: 10%
- Transition & training: 15%
- Software: 5%
- Hardware: 5%

Microsoft Dynamics NAV has been always been designed to be fast to implement, easy to customize, and simple to use. Microsoft is committed to working hard to further enhance Microsoft Dynamics NAV. We have ambitious development objectives, and we are committed to helping our customers drive costs down and get value faster.

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<sup>1</sup>"Select a Mid-Market ERP Solution", Info-Tech Research Group Inc.

## Overview of Microsoft Dynamics NAV

In November 2008 Microsoft Dynamics NAV 2009 was released. This major release delivered the RoleTailored experience – a significant innovation designed to support the individual needs and focus of each user – and drive increases in productivity, efficiency, and employee satisfaction as a result.

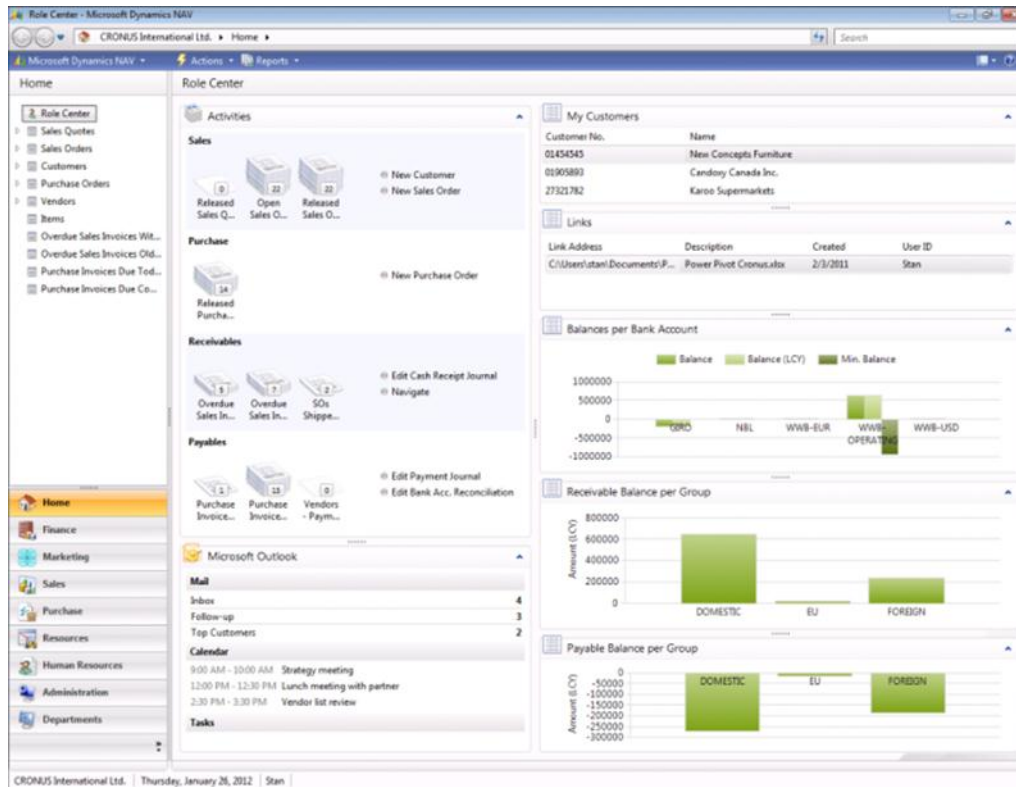


Figure 1: Role Center in Microsoft Dynamics NAV 2009

In addition, Microsoft Dynamics NAV 2009 delivered business intelligence capabilities based on Microsoft SQL Server, which enabled employees to drill into data, identify trends, and monitor how they track against key performance indicators. Microsoft Dynamics NAV 2009 also delivered Web Services, which allow customers to integrate other applications with data and business logic from within Microsoft Dynamics NAV.

In December 2010, we released Microsoft Dynamics NAV 2009 R2, adding Microsoft Dynamics CRM integration and improving the web deployment capabilities of the product.

This release also demonstrated our ongoing commitment to driving further productivity improvements and decision making support through the Role Tailored experience – adding new business data visualization capabilities.

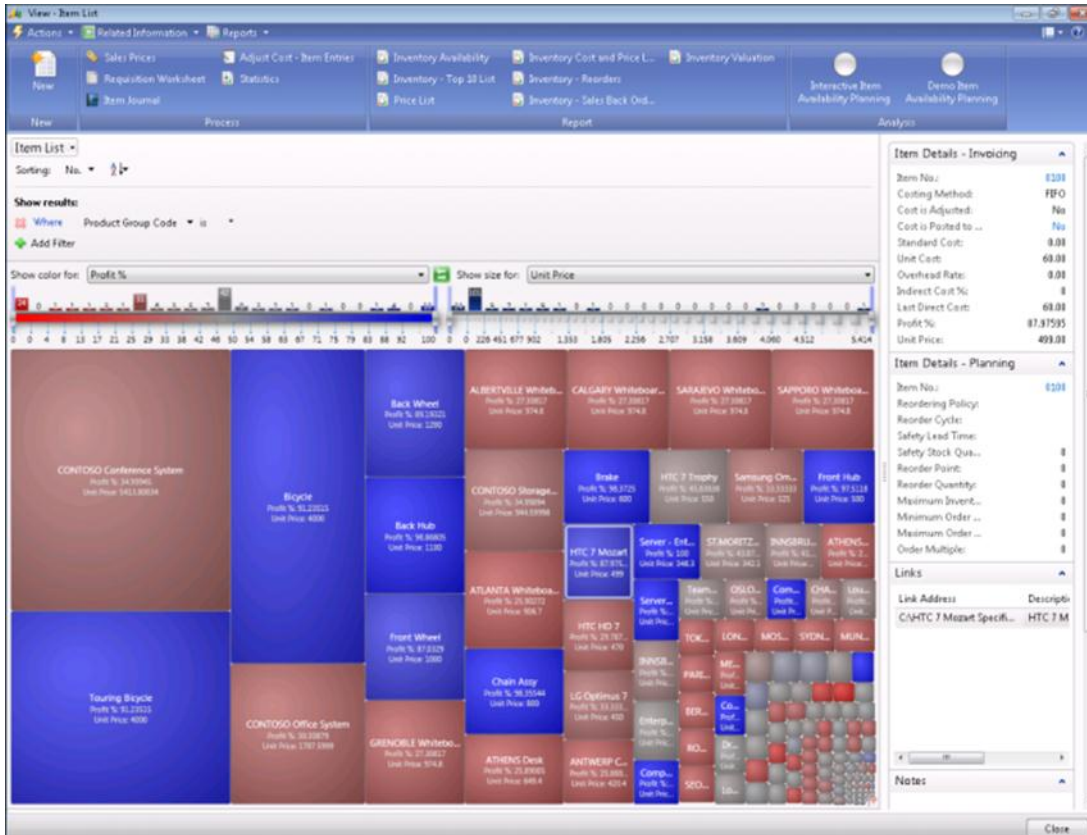


Figure 2: Microsoft Dynamics NAV web client displaying a Role Center (Subject to change)

## ***Microsoft Dynamics NAV Capabilities***

In 2011, two significant new features have been made available for Microsoft Dynamics NAV.

### **JET REPORTS EXPRESS FOR MICROSOFT DYNAMICS NAV**

Jet Reports Express expands the integration of Microsoft Dynamics NAV with Microsoft Excel. You can create, modify, and run your own business reports and analysis in the familiar environment of Excel. Experienced Excel users can use native tools to do analysis on large datasets and understand a wider range of business issues. Jet Reports Express is an integral part of Microsoft Dynamics NAV and includes multiple report templates to fit the needs of small and medium-sized businesses.

Jet Reports Express for Microsoft Dynamics NAV was released September 1, 2011

### **ZETADOCS EXPRESS FOR MICROSOFT DYNAMICS NAV**

You can use the Zetadocs Express drag-and-drop document storage functionality to securely store contracts, orders, and invoices that are received by email, fax, or postal mail. These original documents are stored in a central location for fast retrieval using Microsoft SharePoint Online, which is a component of Microsoft Office 365. You can retrieve and view documents by using the RoleTailored client or from SharePoint Online. You can also set up a basic document approval process using SharePoint Online, send reports using PDF files, and automate email addressing for sales documents.

Zetadocs Express for Microsoft Dynamics NAV was released on October 31, 2011.

## ***Microsoft Dynamics NAV "7"***

Microsoft Dynamics NAV "7" is scheduled to be released in September/October of 2012. The release marks another milestone for the Microsoft Dynamics NAV product by:

- Adding new cloud deployment options and capabilities
- Enhancing the core functionality
- Making Rapidstart for Microsoft Dynamics NAV available

## **EMBRACING THE CLOUD**

Our investments in cloud computing are driven by conversations with customers about their needs today, future growth aspirations, and how consumer experiences are shaping expectations for the role technology can play in their business. From these customer conversations it's clear that our customers are looking for ways to take advantage of cloud services. At the Microsoft Dynamics NAV Convergence customer conference in Atlanta in April 2011, we announced our intention to host Microsoft Dynamics NAV on Windows Azure—Microsoft's cloud platform, beginning with Microsoft Dynamics NAV "7".

We intend to support customers in migrating to the cloud at the right time for their business. But this is only one aspect for how our customers will benefit from our cloud innovation.

### **Cloud – more than just a way to deploy**

The emphasis on cloud computing in the market today has been on deployment to the cloud to reduce costs. At Microsoft we view the cloud as an opportunity to re-imagine business applications that deliver rich experiences with services, information, and capabilities from cloud and on-premises solutions in ways that today are too costly or impractical. To deliver the innovation that enables new business scenarios we intend to extend the integration available today with Microsoft's leading business and productivity applications, including Microsoft Dynamics CRM Online, Microsoft Office 365, and services from Microsoft SQL Azure, and Microsoft Windows Azure Data Market.

## **DEPLOYMENT FLEXIBILITY**

Many customers have decided to have Microsoft Dynamics NAV hosted and managed by a third-party. These customers have decided not to maintain the IT infrastructure and staff that are associated with a traditional on-premises implementation or prefer to pay for their ERP solution on a per-user, per-month basis. They use operational expenditure instead of capital expenditure to pay for their business systems.

Microsoft is committed to providing the widest range of options for how you choose to deploy your Microsoft Dynamics NAV-based business solution. You can already deploy your solution on your premises or choose to engage a hosting Partner who will run the software from their data centers. Some Partners will choose to run your solution from one of several very large scale Microsoft data centers around the world. Regardless of how you choose to deploy the product, the Microsoft Dynamics NAV software and user experience is the same.



## WEB CLIENT

Microsoft Dynamics NAV "7" will include a web browser capability that will enable users, whether they are running on premises or in the cloud, to access Microsoft Dynamics NAV – with only Internet Explorer on their PC.

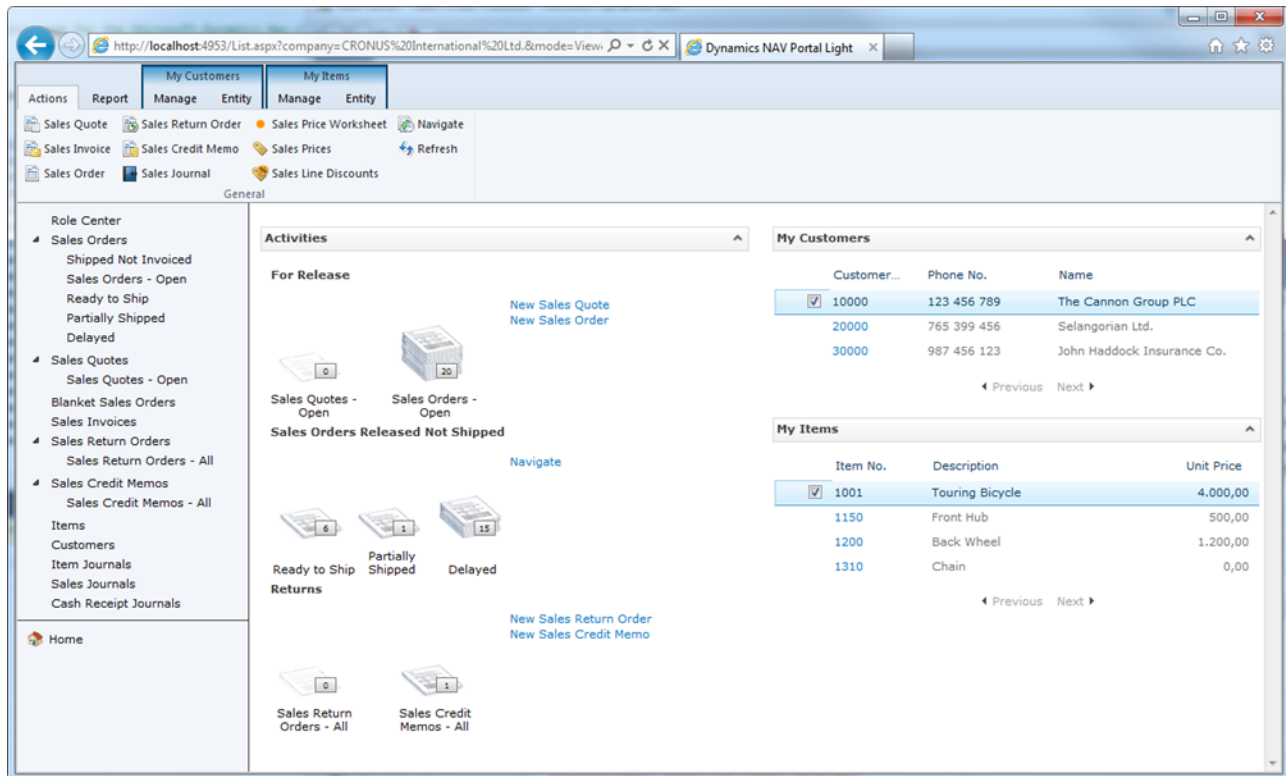


Figure 3: Microsoft Dynamics NAV web client displaying a Role Center (Subject to change)

This capability will reduce the time taken to deploy the solution, because no software will need to be installed on individual user's computers. More significantly however, many customers will see a web browser as a more appropriate way to extend the reach of the application to many of the people within their business.

## SharePoint Integration

With the widespread use of Microsoft SharePoint Services and Microsoft SharePoint Server, we will introduce integration to SharePoint that will allow your users to get more out of both SharePoint and Microsoft Dynamics NAV. The SharePoint integration will enable the following scenarios:

- Delivering Microsoft Dynamics NAV through SharePoint
- When Microsoft Dynamics NAV is deployed through SharePoint, no software needs to be installed on a user's individual PC. Rather, like the web client

described above, this will reduce the cost of deploying and maintaining the product across a distributed user environment.

### Self-Service Applications

- SharePoint provides an environment to engage a much wider population of users throughout your business. Now self-service solutions can be deployed with data going directly to and from Microsoft Dynamics NAV. For example, time registration can be more effectively delivered through SharePoint instead of requiring individuals to log onto an ERP system.

### Rich Business Applications

- You can choose to deploy Microsoft Dynamics NAV Portal Framework to tightly integrate ERP data and processes with content that is typically found in SharePoint. For example, you could add purchasing functionality to a procurement portal where contracts, specifications, and details of alternative suppliers are stored.

Type	Job No.	Job Task	Description	Service	Cause	Status
Job	J00010	INTERVIEW...	Interview stakeholders	0		Submitted
Job	J00010	WRITE	Write specifications	0		Submitted
Absence			Sick	0	SICK	Approved
Job	J00010	MEETING	Contribute to customer...	0		Submitted
Job	J00010	WRITE	Write specifications	0		Approved
Absence			Holiday	0	HOLIDAY	Submitted
Absence			Holiday	0	HOLIDAY	Submitted

Period Summary	
28 Monday	11.00
29 Tuesday	6.00
30 Wednesday	13.00
31 Thursday	11.00
1 Friday	17.00
2 Saturday	0.00
3 Sunday	4.00
<b>Total</b>	<b>62.00</b>
<b>Total Presence</b>	<b>48.00</b>
<b>Total Absence</b>	<b>14.00</b>

Activity Details	
Open	0.00
Submitted	36.00
Rejected	0.00
Approved	26.00
<b>Total</b>	<b>62.00</b>
Posted	8.00

Schedule Summary	
28 Monday	8.00
29 Tuesday	8.00
30 Wednesday	8.00
31 Thursday	8.00
1 Friday	8.00

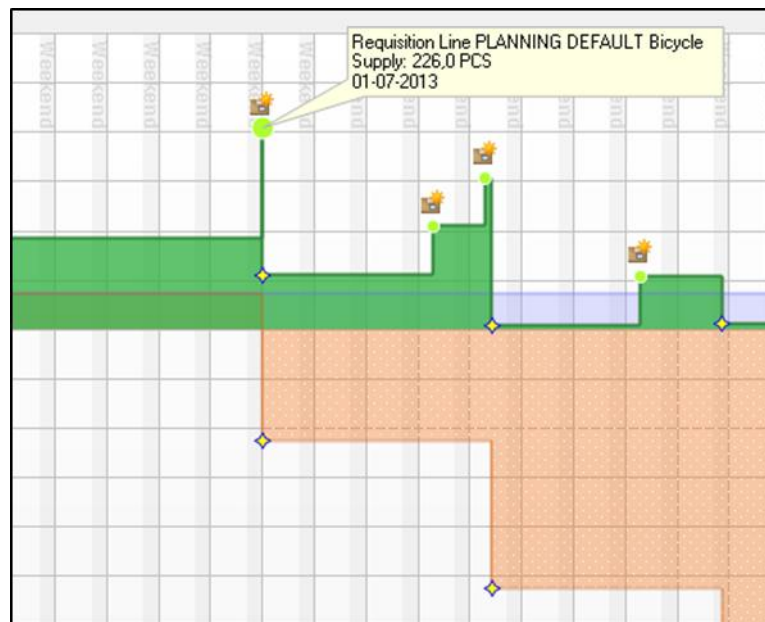
Figure 4: Microsoft Dynamics NAV Timesheet data entry in Microsoft SharePoint (Subject to change)

Integration with SharePoint works with Microsoft SharePoint Foundation 2010 and Microsoft SharePoint Server 2010. SharePoint Foundation can be downloaded at no cost for users of Windows Server.

## ENHANCEMENTS TO APPLICATION FUNCTIONALITY

Microsoft Dynamics NAV "7" will enhance the already compelling application functionality that is available in Microsoft Dynamics NAV by:

- Further enhancing the RoleTailored user interface. By adding context-sensitive charts and Fact Boxes that give the user better access to relevant data and by minimizing keystrokes for roles with volume transaction entry.



**Figure 5: Microsoft Dynamics NAV data visualization capabilities**  
(Subject to change)

- Building on the data visualization capabilities in the product. This supports better decision making, where users can see projected availability, supply/demand, forecast, and suggested planning changes in one integrated view.



**Figure 6: Cash Flow Chart in Microsoft Dynamics NAV "7" (Subject to change)**

- Continuing to concentrate on core functionality. Simplifying VAT compliance and tax reporting. Upgrading kitting, cost accounting and cash flow forecasting capabilities in the product.
- Making Microsoft Dynamics NAV data available through the new industry standard interface (ODat) and enabling integration to PowerPivot for Microsoft Excel.

## MICROSOFT DYNAMICS ERP RAPIDSTART SERVICES

Microsoft Dynamics ERP RapidStart Services significantly accelerate the configuration of Microsoft Dynamics NAV. By using RapidStart, you can drive down the number of days that it takes to deploy the product and make it easier to engage the right people and different teams in your business in the implementation process.

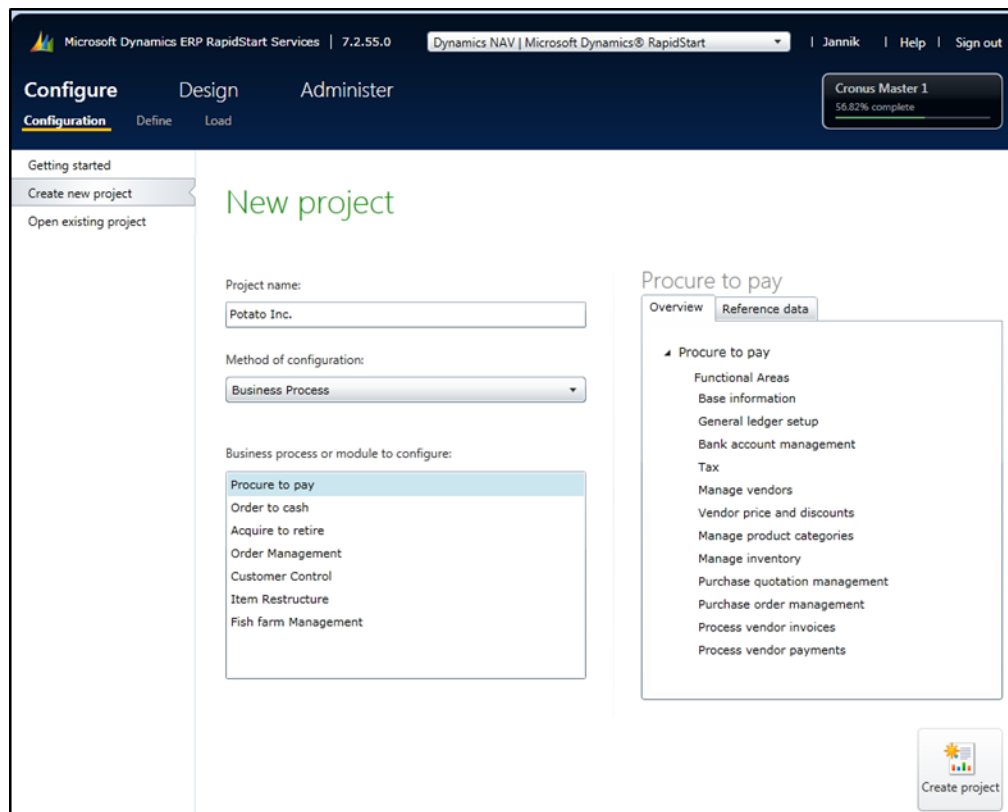


Figure 7: Microsoft Dynamics RapidStart Service Screenshot

Microsoft Dynamics RapidStart Services gives an overview of the setup process, including what information is needed before the system can be used and who is going to do what. Additionally it will be possible to select from a set of existing data templates in order to speed up the configuration for example with generic data for Postal Codes, Currencies, Country Codes and much more.

## Enhancements for New and Existing Customers

We are also making some exciting platform changes for both new and existing customers:

- **Clients and Display Targets.** In Microsoft Dynamics NAV "7", you can choose between the RoleTailored client, web client, and SharePoint client user experience. The Microsoft Dynamics NAV Classic client and its architecture will be discontinued in Microsoft Dynamics NAV "7", allowing for more focus on the tasks and goals of the end user.
- **Microsoft Dynamics NAV Server.** Because 64-bit processors have become standard for most business application servers and because there are performance benefits with these servers, you can only install Microsoft Dynamics NAV Server for Microsoft Dynamics NAV "7" on 64-bit hardware and 64-bit editions of Windows. You can still install the RoleTailored client on 32-bit editions of Windows.
- **Microsoft SQL Server Database.** Some exciting new capabilities that we are delivering in Microsoft Dynamics NAV "7" and future releases cannot be supported by the legacy native (C/SIDE) database. In Microsoft Dynamics NAV "7", you must use Microsoft SQL Server. You may need to rewrite some reports by using Jet Express for Microsoft Dynamics NAV or by using SQL Server Reporting Services.
- **Microsoft Windows 8 and Microsoft SQL Server 2012.** Microsoft Dynamics NAV "7" will run on Microsoft Windows 8 and Microsoft SQL Server 2012.

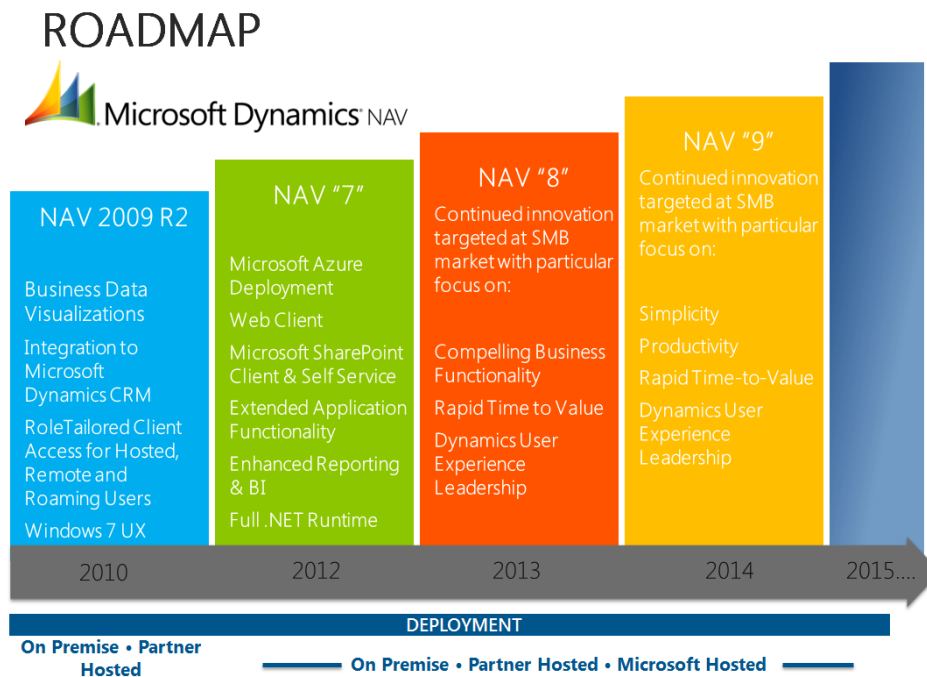
## Roadmap

In 2013, we plan to release Microsoft Dynamics NAV "8". In this release, we will focus on:

- Driving down the costs of both on premises deployment and cloud deployment. We will provide additional tools to help partners manage greater numbers of deployments.
- Enhancing the compelling core functionality that is available in Microsoft Dynamics NAV.
- Aligning Microsoft Dynamics NAV with new product releases across the Microsoft product portfolio, including Windows, Windows Server, and SQL Server.

## COMMITMENT TO DEVELOPMENT

Microsoft is committed to further enhancing Microsoft Dynamics NAV. We have made a significant investment in new releases and scheduled upcoming releases.<sup>2</sup>



Our ambitions for Microsoft Dynamics NAV extend well into the future, including the development plans that are required to support our business objectives. We will continue to ensure that Microsoft Dynamics NAV has the appearance and behavior of other Microsoft products and works with Microsoft products and online services. We will continue to drive

**Figure 8: Microsoft Dynamics NAV product release timeline**

<sup>2</sup> Note: This represents Microsoft's current view of its product direction and should not be interpreted as a commitment on the part of Microsoft. Until Microsoft releases any version of this software in a particular country, product availability, features and dates are subject to change without notice.

simplicity, value, and agility into all that we do. Our success relies on our ability to help you become a dynamic business.

## COMMITMENT TO SUPPORT MICROSOFT DYNAMICS NAV

Major releases of Microsoft Dynamics NAV, such as Microsoft Dynamics NAV 2009, 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, you can purchase up to an additional five years of extended support.

Product	General availability	Exit date from mainstream support
Microsoft Dynamics NAV 5.0	April 2007	April 2012
Microsoft Dynamics NAV 2009	February 2009	April 2014
Microsoft Dynamics NAV "7"	September/ October 2012	Five years after generally available

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. We also want to be transparent and provide greater visibility of our commitment to individual product releases and key dates when these commitments change. This will help you develop your own version upgrade plans.

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





- Mainstream Support Phase (5 yrs): Hot fixes, tax/regulatory releases, security updates
- Extended Support Phase (5 yrs): Hot fixes, tax/regulatory releases
- Self-Help Online Support (10 yrs +): Customized

Figure 9: Microsoft Support Lifecycle

## COMMITMENT TO PARTNERS

The success of Microsoft Dynamics NAV is largely due to the strength and capability of the Partner community that has developed around the product. Our Partners take many different forms – they include:

- Solution Providers, often referred to as VARs or Resellers, provide local and/or sector-specific expertise to help customers implement the product quickly and effectively.
- ISV's – who have developed their own software, based on the Microsoft Dynamics NAV platform, to address the specific needs of customers in particular industries.
- Hosting Partners – who make Microsoft Dynamics NAV available on a hosted basis.

Microsoft values the contribution that all these Partners have made to the ongoing success of the product. We will continue to do so.

## COMMITMENT TO YOU

Our commitment to our partners reflects the value that they add to your business. We seek to complement that value by offering information and content through CustomerSource, which is a web portal that provides a wealth of product information, online training, and access to the wider community of Microsoft Dynamics NAV customers.

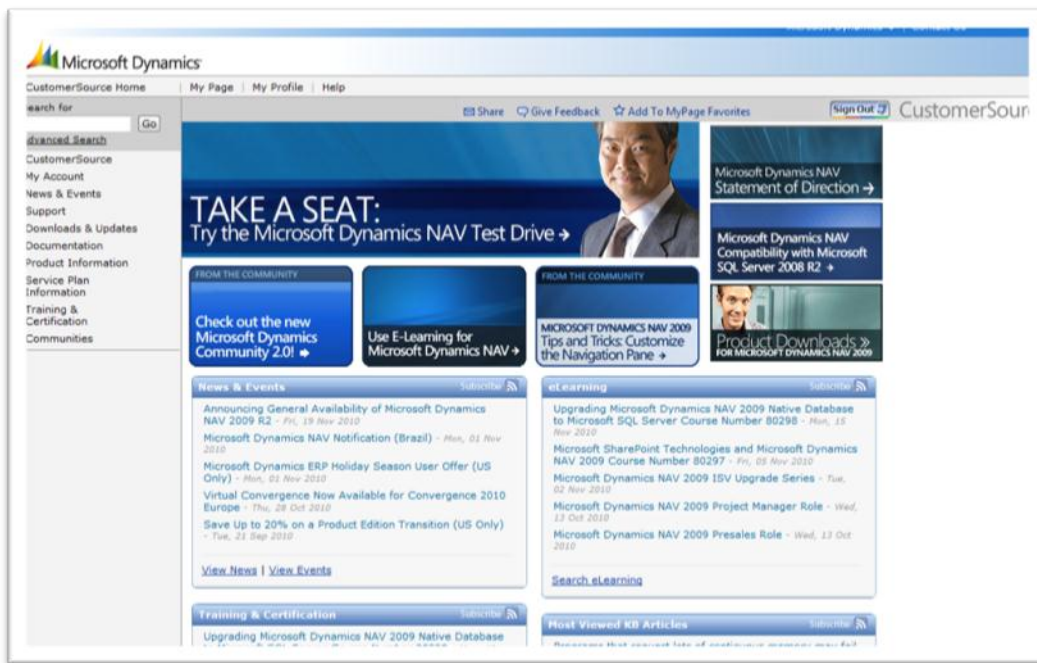


Figure 10: Microsoft Dynamics NAV CustomerSource

## Dynamic Business

Dynamic Business is our vision for how for how an organization can be transformed by equipping the individuals in it. It is a vision for success and Microsoft is uniquely capable of delivering the breadth and depth of technologies businesses need to help you win, now and in the future.

Learn more about Microsoft Dynamics and read the White Paper: [Making Business Dynamic](#).

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