

STRATEGIC

Microsoft Dynamics™ NAV Statement of Direction

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www.microsoft.com/dynamics/nav



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Introduction

The purpose of this document is to provide Microsoft customers, partners, and business decision makers with plans for ongoing of product development for Microsoft Dynamics[™] NAV. This document replaces all previous versions.

Information about product development strategy and plans for Microsoft Dynamics NAV will help you effectively plan your business activities. This document will give you an overview of the continued rollout plans for Microsoft Dynamics NAV 5.0, insight into the next major product release, Microsoft Dynamics NAV 2009 (formerly known as Microsoft Dynamics NAV 6.0), and the product releases planned thereafter. This document also contains information about how you can prepare for Microsoft Dynamics NAV 2009.

We will update this document as new developments and more information become available. Be sure to monitor [PartnerSource](#) and [CustomerSource](#) for the latest information about updates and changes to this document.

Note: The products addressed in this document are subject to availability in your country or region. Microsoft Partners should check with their local Microsoft office or Microsoft Partner Account Manager for more details regarding product release plans and general availability.

Related Documents and Information

[Microsoft Dynamics Roles-based Business Productivity White Paper](#)
[The Microsoft Dynamics People-Ready Business White Paper](#)

Contact Information

Contact your local Microsoft Partner or Microsoft Partner Account Manager for questions or more information about this document.

Executive Summary

This section provides a summary of the contents of this document. [Skip summary.](#)

The Microsoft Dynamics NAV business is stronger than ever. With over one million users in more than 150 countries and various industry awards and recognitions, Microsoft Dynamics NAV continues to provide customers and partners around the globe with real business value year after year.

Business Strategy

Simplicity, adaptability and ease-of-use for customers and partners remain core product values. Our business strategy includes promoting these core product values and:

- Enabling existing customers to realize more value from their solutions
- Empowering partners with more productivity tools

Read more [here](#).

Product Development Roadmap

A major goal of our product development roadmap is to help protect the investments of customers and partners by helping them gradually move to the new Microsoft Dynamics RoleTailored Client while realizing the benefits of breakthrough technology innovations along the way.

The release of versions Microsoft Dynamics NAV 5.0 and Microsoft Dynamics NAV 2009 represent the first steps into a new technological era for our customers and partners. Together they contain many technology breakthroughs and innovative application features.

While the changes and new enhancements we have made are extensive, we have maintained our focus on keeping things as simple as possible so partners and customers have a clear path and smooth transition to all that's new and different in the product.

Read more [here](#).

Microsoft Dynamics NAV 4.0

Microsoft Dynamics NAV 4.0 is the latest version in some countries.

Microsoft Dynamics NAV 4.0 delivers:

- New and enhanced application functionality to support increased business productivity (see list of the new and enhanced functionality [here](#)).
- Improved integration with other Microsoft products and technologies

Microsoft Dynamics NAV 5.0

Microsoft Dynamics NAV 5.0 is a comprehensive product now available in 27 countries. Microsoft Dynamics NAV 5.0 will soon be released in all countries that currently have Microsoft Dynamics NAV 4.0.

Microsoft Dynamics NAV 5.0 delivers:

- New and enhanced application functionality to support increased business productivity (see list of the new and enhanced functionality [here](#)).
- Even greater integration with other Microsoft products and technologies.
- Microsoft Dynamics NAV Classic Client (C/SIDE) and technology improvements.

Microsoft Dynamics NAV 5.0 delivers breakthrough innovations including:

- Microsoft SharePoint® Portal and Document Approval Workflow
- Microsoft SQL Server Contextual Business Intelligence and
- Online Processes, Collaboration and Community.

Read more [here](#).

Microsoft Dynamics NAV 2009

The release of Microsoft Dynamics NAV 2009, scheduled for release in Q4 CY2008 will add these innovations to the product:

- New three-tier architecture
- The new Microsoft Dynamics RoleTailored Client, and
- Web services-enablement.

This approach will help secure the investments of our existing partners and customers while making Microsoft Dynamics NAV even more attractive to new customers and partners. Read more [here](#).

Beyond Microsoft Dynamics NAV 2009

In addition to introducing Microsoft Dynamics NAV 5.0 in more countries and releasing Microsoft Dynamics NAV 2009, additional product releases and service packs are planned. Read more [here](#).

Upgrade Considerations

Existing customers will have the following options:

- Keep the Microsoft Dynamics NAV Classic Client, upgrade to Microsoft Dynamics NAV 5.0, and wait to move to the Microsoft Dynamics RoleTailored Client at a later time
- Upgrade their current solution to Microsoft Dynamics NAV 2009 and take full advantage of the Microsoft Dynamics RoleTailored Client

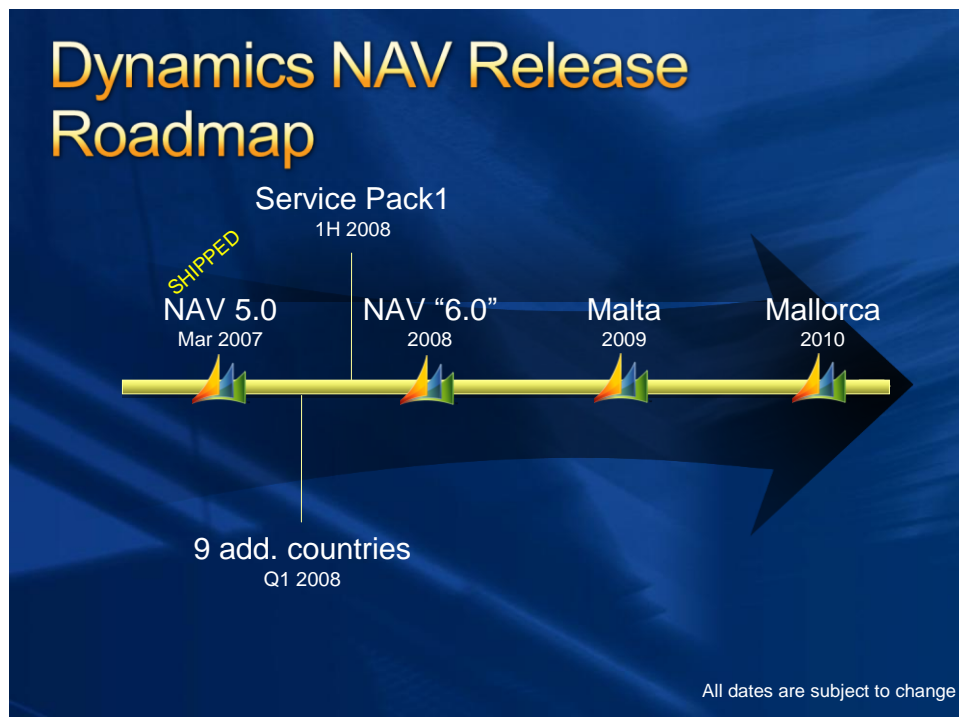
Read more details about upgrade considerations [here](#).

Getting Ready

Microsoft will help partners and customers prepare for the upcoming product release by providing tools, training, activities, and events to enable them to make the most of the opportunities to come. Read more [here](#).

Microsoft Dynamics NAV Release Roadmap

This section provides an overview of the Microsoft Dynamics NAV product release roadmap from Microsoft Dynamics NAV 4.0 to Microsoft Dynamics NAV 2009 and future releases of Microsoft Dynamics NAV. [Skip this section](#).



Timeline of worldwide Microsoft Dynamics NAV releases

Here is an overview of expected general availability dates:

Microsoft Dynamics NAV 4.0 (released 2004)

This release provides significant application enhancements and new features including Microsoft Outlook integration and reversal of journal posting functionality. Microsoft Dynamics Rapid Implementation Methodology was provided for the first time with the product.

Read more about this release in the section entitled: [Microsoft Dynamics NAV 4.0](#).

Microsoft Dynamics NAV 5.0 (released March 2007)

This release provides significant application enhancements and new features including even deeper *Microsoft Office® integration and Record Links* functionality. What's more, *Microsoft Dynamics Sure Step Rapid Implementation Methodology* is now included as part of the product.

Read more about this release in the section entitled: [Microsoft Dynamics NAV 5.0](#).

Microsoft Dynamics NAV 5.0 SP1

The release of Service Pack 1 for Microsoft Dynamics NAV 5.0 will be available in H1 CY2008. Microsoft Dynamics NAV 5.0 or Microsoft Dynamics NAV 5.0 SP1 will be made available in all countries where we are currently selling Microsoft Dynamics NAV 4.0. Microsoft Dynamics NAV SP1 will include a number of quality enhancements, performance enhancements on Microsoft SQL Server, product planning engine re-factoring and costing enhancements.

Microsoft Dynamics NAV 2009 (H2 CY2008)

The Microsoft Dynamics NAV 2009 release will include new three-tier architecture, the new Microsoft Dynamics RoleTailored Client and Web services-enablement

Read more about this release in the section entitled: [Microsoft Dynamics NAV 2009](#).

Microsoft Dynamics NAV Future Releases

Future releases will improve upon a model-driven approach to business processes, made possible by new capabilities, including continued improvements to the technology in Microsoft Dynamics NAV.

Our ongoing strategy for Microsoft Dynamics NAV is to continue to deliver a competitive product that enables midsize businesses to realize their full potential, and further expand the product benefits to small businesses..

With future versions, we will focus on improving reports and documentation and making additional improvements to the user experience, such as expanding the functionality of the user roles. We will also continue to add to and improve on the application functionality. We intend to enable easier localization by providing more inherent global features in the product. In short, with future versions of Microsoft Dynamics NAV, we intend to deliver even more breakthroughs and create even more opportunities for our customers, valued partners, and ISVs—helping them to build and grow a more profitable business.

In addition, another goal with future Microsoft Dynamics NAV versions will be to improve the development environment while continuing to focus on our core development principle of simplicity. Here we aim to help increase the productivity of developers with state-of-the-art development tools and best-of-breed processes so partners and ISVs can continue to take advantage of its unique flexibility to design, build and sell customized as well as vertical solutions for businesses around the world.

Plus, we will keep on providing partners and customers with leading edge technology. This will mean gradually phasing out the Microsoft Dynamics NAV C/SIDE database and eventually moving to one client (the Microsoft Dynamics RoleTailored Client) and one database (Microsoft SQL server).

Microsoft recognizes the importance of enabling businesses to achieve higher levels of environmental sustainability by virtue of the information within their IT solutions, and is driving development of solutions that can help customers get there. Microsoft Dynamics NAV is no exception. We will be looking into this area for future product releases after Microsoft Dynamics NAV 2009.

One of the major goals of the Microsoft Dynamics product roadmap strategy is the development of a RoleTailored user interface to make software functionality available where people need it most in an organization.

For example, some roles may spend the majority of their time in the business management application, such as Microsoft Dynamics NAV, and work without having to leave the application, personalizing their screens for the most practical workflow.

Another type of business role spends a large amount of time in Microsoft Office® applications such as Microsoft Outlook® 2007 or Microsoft Word 2007, but may from time to time need information from the business management application to create a document or support a decision. In a traditional scenario, that role would switch between the Microsoft Office application and the business management solution to retrieve and copy information, or would need to ask for somebody's assistance in locating information from the business management solution.

For this kind of role, Microsoft eliminates the need to switch between software environments or enlist assistance, by extending the Microsoft Office experience into the business management application. In 2006, Microsoft launched Microsoft® Dynamics™ Snap, a new collection of software programs that snap in to Microsoft® Office. These eight new programs enable information workers to easily coordinate and manage data in Microsoft Dynamics applications using the familiar interface of Microsoft Office programs. Find more information about the Microsoft Dynamics Snap applications [here](#).

Microsoft Dynamics Snap applications enhance the productivity of information workers as it enables them to access and use business processes and data from back-end applications like Microsoft Dynamics NAV directly from within Microsoft Office Applications. Microsoft Partners will play an important role in the development of these Snap programs.

These solutions are implemented by Microsoft, but we are making the shared source code available under the [Microsoft Permissive License](#). Microsoft Partners can easily enhance or customize the shipped solutions, or use them as examples to build new composite applications for their customers.

We expect to make this kind of snap-in functionality available out-of-the-box in the releases following Microsoft Dynamics NAV 2009. Until then, snap-in functionality can be enabled via partner-developed solutions.

Additional information about future versions of Microsoft Dynamics NAV will be made available to Microsoft Partners at the appropriate time via [PartnerSource](#) and to our customers via [CustomerSource](#).

Microsoft Dynamics NAV 4.0

This section provides a brief description of Microsoft Dynamics NAV 4.0. [Skip this section.](#)

Microsoft Dynamics NAV 4.0 was released in 2004 and the latest Service Pack 3 was released in 2006. Microsoft Dynamics NAV 4.0 is the most recent version available in some countries.

Microsoft Dynamics NAV 4.0 is designed specifically for medium-sized companies seeking one solution to help increase productivity without disrupting everyday business operations. It delivers integrated functionality to support solutions for:

- Financial Management
- Supply Chain Management
- Customer Relationship Management (CRM)
- E-Business

Microsoft Dynamics NAV 4.0 is easy to customize and simple to use and maintain. With its open development environment and feature-rich application areas, Microsoft Dynamics NAV makes it easy for businesses to speed up decision making, so they can respond more rapidly to new competitive challenges and seize new market opportunities.

Microsoft Dynamics NAV 4.0 is designed to deliver low total cost of ownership by helping companies control the costs associated with upgrading, avoid disrupting business operations, and streamline the customization process.

Employee Portal in released with Microsoft Dynamics NAV 4.0 SP2 makes it easy for a company's employees to work with critical business information on the company intranet. Employees use Microsoft SharePoint ®

—the Microsoft intranet standard—to access real-time business information directly from Microsoft Dynamics NAV.

Microsoft Dynamics NAV 5.0

This section provides a detailed description of Microsoft Dynamics NAV 5.0. [Skip this section.](#)

Microsoft Dynamics NAV 5.0 was released in March 2007 and available today in 17 countries. It is scheduled for release in 9 more countries in the coming months and will be available in all countries shortly.

Microsoft Dynamics NAV 5.0 Availability Overview			
Available today	Available December 2007	Available January 2008	Available throughout CY2008 Q1-Q3
Australia	Indonesia	Finland	Bulgaria
Austria	Malaysia	Iceland	Croatia
Belgium	Mexico	Portugal	Czech Republic
Canada	Philippines	Thailand	Estonia
Denmark	Singapore		Greece
France			Hungary
Germany			India
Ireland			Latvia
Italy			Lithuania
Netherlands			Poland
New Zealand			Romania
Norway			Russia
Spain			Serbia
Sweden			Slovakia
Switzerland			Slovenia
United Kingdom			Turkey
United States			
*W1 (Malta, Cyprus and South Africa)			

New and Enhanced Application Functionality

Microsoft Dynamics NAV 5.0 includes a significant amount of new and enhanced application features that will benefit existing partners and customers while attracting new customers. See the table below for an overview of the new and enhanced features.

What's more, productivity tools for Microsoft Partners are a major focus area for Microsoft Dynamics NAV 5.0. These tools include Microsoft Dynamics Sure Step Rapid Implementation Methodology which is a part of the product in this release. Other tools are the upgrade toolkit and the database resource kit.

Microsoft Dynamics NAV 5.0 New and Enhanced Application Functionality Overview

Feature	Description
Sales and Purchase Document Approval	<ul style="list-style-type: none"> • Ability to approve and reject documents with comments • Ability to delegate approval to another • SMTP mail notification to approvers and overdue approvers notifications • Links to purchase and sales source documents in Microsoft SharePoint
Windows Live Local Search powered by Microsoft Virtual Earth	<ul style="list-style-type: none"> • Show locations on a map from within Dynamics NAV application • Get directions from one location to another • Extended address features
Prepayments	<ul style="list-style-type: none"> • Enables user to create a prepayment invoice(s) based on a sales order, based on percentages or amounts. The system keeps track of created prepayment invoices until the order is fully invoiced. • Prepayments for purchase
Intercompany Purchase Cost Distribution	<ul style="list-style-type: none"> • An enhancement to Intercompany Postings: Distribution of purchase invoice costs to partner companies. The finance accounting for parent companies is made easier allowing direct distribution of purchase cost to subsidiaries.
Inventory Costing	<ul style="list-style-type: none"> • Enhanced traceability of costs and data, improved simplicity and usability including new reporting tools for GL inventory reconciliation and item value dynamics; easier to use • New periodic average costing method
Item Tracking	<ul style="list-style-type: none"> • Enhanced handling and analysis of "item tracked" items including improved usability • User can search and make analysis based on Lot or Serial numbers • A First Expired First Out (FEFO) criterion for the flow of goods has been implemented throughout the system • Enhanced to make it easier for partners to build on
Jobs	<ul style="list-style-type: none"> • Improved handling of fixed price jobs • Handling of fixed price projects by separation of amounts into schedule(budget), usage and contract (sales) • Better integration to item ledger and tracking • IAS compliant WIP and Recognition calculation • Redesigned budget structure with task numbers that are mandatory.
Service Order Handling	<ul style="list-style-type: none"> • Improved consumption handling • Standardization of the integration with item tracking, jobs and costing and improved posting of service orders
Microsoft Office XML	<ul style="list-style-type: none"> • Export any form to Microsoft Word or Microsoft Excel • User-defined style sheets
Microsoft Outlook Integration	<ul style="list-style-type: none"> • More and improved synchronization: • Synchronization with any Microsoft Dynamics NAV entity & any Microsoft Outlook object • Support for Microsoft Outlook custom forms
Record Links to Documents on Microsoft SharePoint	<ul style="list-style-type: none"> • Attach any external document to Microsoft Dynamics NAV records to bridge gap between structured and unstructured data; i.e. attach email to sales order and post on Microsoft SharePoint
Documentation (UA)	<ul style="list-style-type: none"> • Process-oriented topics with broad and deep range of information in selected areas • Improved organization by added overview topics
Address Length	<ul style="list-style-type: none"> • Lengthened to allow names and addresses from 30-50 characters.
Microsoft Dynamics Sure Step Rapid Implementation Methodology	<ul style="list-style-type: none"> • Now an integrated part of Microsoft Dynamics NAV

Microsoft Dynamics NAV 5.0 includes a significant number of new and enhanced features that will attract new customers and benefit existing customers.

In addition to the many new application features and enhancements, Microsoft Dynamics 5.0 delivers:

- Microsoft SharePoint Portal and Document Approval Workflow
- Microsoft SQL Contextual Business Intelligence, and
- Online Processes, Collaboration and Community.

Microsoft SharePoint Portal and Workflow

Our aim is to help customers achieve new levels of collaboration through intranet and extranet environments. Already included in the product is Microsoft SharePoint-based Employee Portal that helps enable customers to access the critical business information they need. Development plans include continuing to leverage Microsoft Office SharePoint® 2007 technology as much as possible by making it easier for partners to utilize this technology to build their own solutions. Looking ahead, Microsoft Dynamics RoleTailored Client in the Microsoft Dynamics NAV 2009 release will include a new Microsoft SharePoint display target that will have the same functionality as Employee Portal and will enable partners to integrate even more with Microsoft SharePoint. And, for our existing customers, who upgrade to Microsoft Dynamics NAV 5.0 but do not wish to switch to the new client, the Microsoft SharePoint-based Employee Portal will continue to run on the existing C/SIDE client.

Another example of how Microsoft Dynamics NAV utilizes Microsoft SharePoint to help customers work more productively together is Record Links—a new feature in Microsoft Dynamics NAV 5.0. Record Links enable users to add links to documents to any record in Microsoft Dynamics NAV, such as a sales order or purchase order. The document or order can be stored in Microsoft SharePoint or on a file server and the user can access the document from Microsoft SharePoint or give access to others.

Microsoft Dynamics NAV 5.0 will also support approval process with Sales and Purchase Document Approval—a new feature that enables the ability to approve and reject documents with comments, delegate approval to another, and SMTP mail notification to approvers and notifications to overdue approvers.

Microsoft SQL Contextual Business Intelligence (BI)

Microsoft believes that the right combination of people, technology and knowledge help companies achieve business success.¹ As ERP systems and applications enable companies to amass enormous amounts of data and information, it becomes even more crucial for companies to be able to access and transform this data into insight and sound decisions in an efficient way. The company who can exploit its own data and information to gain insight and make smarter decisions will have a clear competitive advantage.

The Microsoft vision for business intelligence is to help drive businesses to better performance by enabling all decision makers—essentially empowering all employees throughout the organization—to make better decisions. Microsoft plans to achieve this vision by providing cross-product integration, delivering business intelligence capabilities within Microsoft Office and making its business intelligence offerings scalable so that everyone in the organization is empowered with

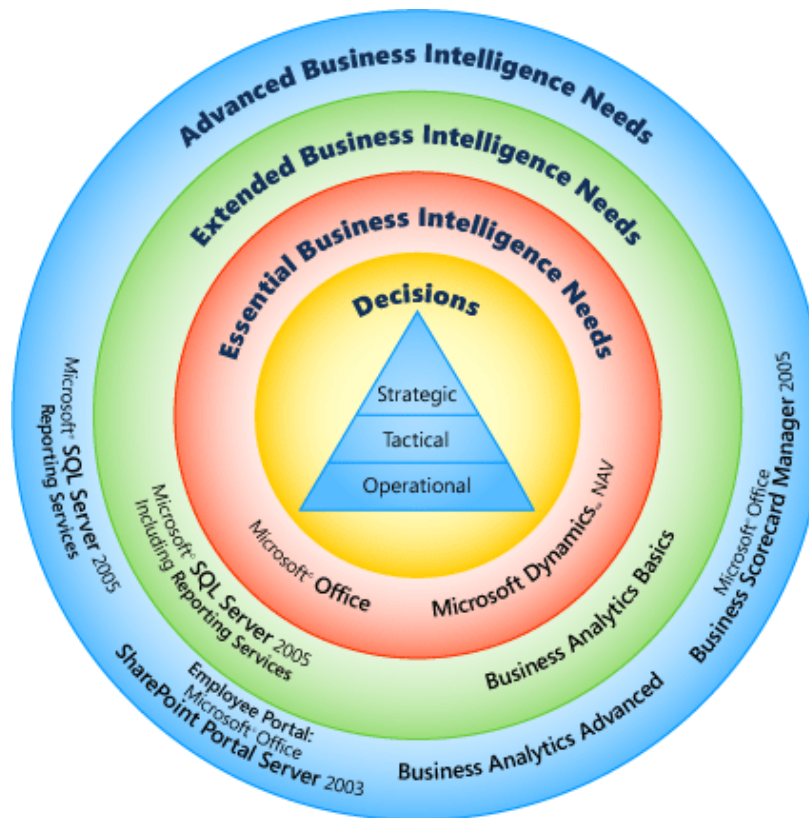
¹ http://download.microsoft.com/download/1/5/3/153753D9-5D5E-41F9-BB05-6776AAA2FAF6/People_Ready_Business.doc

business intelligence tools. Whether they are working on the strategic, the tactical, or the operational level, Microsoft Business Intelligence applications can help all employees make more informed decisions as a natural part of the everyday work experience.

Microsoft Dynamics NAV is a good example of this cross-product integration and offers a range of business intelligence capabilities—spanning from built-in reports and wizards to create reports from scratch, to advanced tools allowing users to gain the insight required to optimize performance across the entire organization. This complete, flexible solution meets the requirements of both small businesses that need easy-to-use, yet effective tools as well as the requirements of larger organizations that need the most technically advanced business intelligence capabilities.

Our development goal with business intelligence is to help our customers make the most of their data and information by making the appropriate information available to the right people when they need it.

Microsoft Dynamics NAV delivers contextual business intelligence by providing flexible business intelligence capabilities and a growth path that helps to reinforce and leverage the customers' existing investments. This makes it an ideal solution for companies who envision that their business intelligence needs will change as their business grows.



Our goal is to help customers make the most of their data and information by making the appropriate information available to the right people when they need it.

Among the business intelligence capabilities in Microsoft Dynamics NAV already are:

- Integration with Microsoft Excel 2007 enables employees to work with Microsoft Dynamics NAV data directly in a Microsoft Excel spreadsheet, create pivot tables, view data, analyze, produce and share reports in an even easier way. Plus, the tools Account Schedules and Analysis Reports as well as Analysis by Dimensions within Microsoft Dynamics™ NAV have the built-in capability to be exported to Microsoft Excel for further processing.
- Microsoft Dynamics NAV Business Analytics is a powerful application that quickly turns data into business information. There are two Business Analytics offerings: Basic and Advanced. Both give users a deeper understanding of the information stored in Microsoft Dynamics NAV.
- OLAP technology and Microsoft SQL Server Analysis Services enable deeper data analysis, and with other Microsoft applications such as Microsoft Office Excel and Microsoft SQL Server Reporting Services
- The Microsoft Office Business Scorecard Manager (BSM) is a business performance management application designed to help companies move forward with a common purpose and direction by making key performance indicators (KPIs) fully available throughout an organization. This dedicated scorecard application is designed for defining, building, deploying and using scorecards and KPIs. With this application, users can consolidate data from a variety of sources. BSM supports the task of linking defined strategies to specific measures and actions throughout all levels of the organization.
- Microsoft SharePoint-based Employee Portal helps employees access timely relevant information online. It provides an easy way for company employees to work with all their business information on the company intranet. Using the Web-based interface, users can basically view all company data online instead of in the back-end application. The framework is intuitive and requires very little training since it looks and feels like the other Microsoft applications. And since access is RoleTailored, users see only the data relevant to their jobs.

Online Processes, Collaboration and Community

Microsoft is extending the value of core business applications with an additive development approach for online business processes, enabling the consumption of rapid innovation at a low cost. This includes a rich set of online business processes from Microsoft and its partners that will give customers many choices when they decide to move to a particular process online in a secure environment. Microsoft Dynamics Live CRM is an example of how customers will experience Microsoft Dynamics in the "Live" era. Other examples could be on-line banking, credit validation and exchange rate update.

Online collaboration services will enable organizations to connect their processes to customers, partners, suppliers and businesses of all types, and bridge the worlds of unstructured and structured data. In Microsoft Dynamics NAV 5.0, we are demonstrating this capability with Record Links. This new feature in Microsoft Dynamics NAV 5.0 will enable users to share information in Microsoft Dynamics NAV by adding links to documents to any record in Microsoft Dynamics NAV, such as a sales or purchase order. The document or order can be stored in Microsoft SharePoint or on a file server and the user can access the order from Microsoft SharePoint or give access to others.

Microsoft Dynamics NAV has over many years been the focal point of an active online community consisting of partners and customers sharing their experience and knowledge. Moving forward, Microsoft and its partners will build on this to deliver a rich set of learning tools in the form of online forums, tutorials and best practices directly integrated with the experience of using Microsoft Dynamics products, based on each user's industry, roles, geographic location and language. Today, user documentation in Microsoft Dynamics NAV 5.0 is an example of how we are moving towards this vision with process-oriented topics and improved organization. And community groups such as [PartnerSource](#) and [CustomerSource](#), and the finance community on www.microsoft.com are supported and encouraged.

Improved Integration to Related Microsoft Technologies

Microsoft is committed to supporting new releases of Microsoft Dynamics NAV with the latest Microsoft technologies, including Microsoft SQL Server 2008. Today, Microsoft Dynamics NAV 5.0 works with the latest editions of these Microsoft products and technologies:

- Microsoft Windows Vista
- Microsoft Office 2007
- Microsoft SQL Server 2005
- Microsoft SQL Server 2005 Notification Services
- Microsoft SQL Server 2005 Analysis Services
- Microsoft SQL Server 2005 Reporting Services
- Microsoft BizTalk Server 2007
- Microsoft SharePoint Portal 2007
- Microsoft .NET

Also, Microsoft Dynamics NAV 5.0 enables users to export data from any form in the system using the Microsoft Office XML format. Microsoft Partners are also able to add additional formats and style sheets. This makes it easier for customers to work with data from Microsoft Dynamics NAV in other Microsoft programs such as Microsoft Excel and Microsoft Word.

Microsoft Dynamics NAV Classic Client and Technology Enhancements

Microsoft Dynamics NAV 5.0 consists of many technology improvements that have been made to make it easier and faster for partners and customers to install, setup, manage and maintain the product and strengthen our competitive advantage in the market.

First, improvements have been made to the Microsoft Dynamics NAV Classic Client, the development environment in Microsoft Dynamics NAV (also known as C/SIDE). These improvements include:

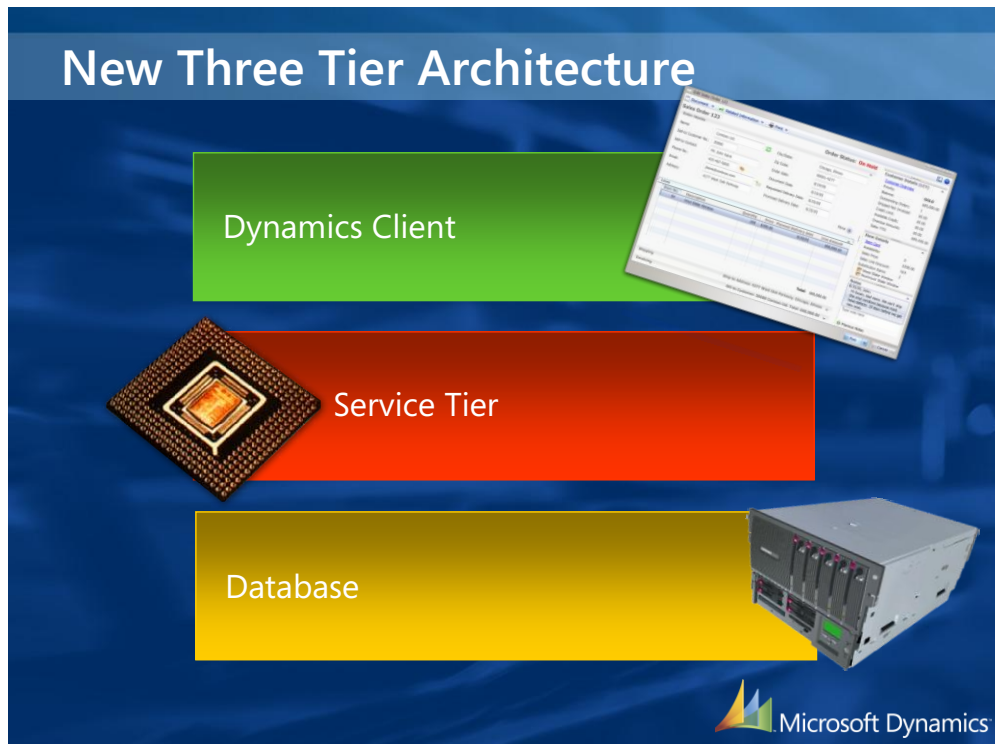
- Support for Simple Mail Transfer Protocol (SMTP)
- New C/AL functions such as Block Indent and
- An easier way to return error text to C/AL; plus

Likewise, improvements have been made to increase performance when Microsoft Dynamics NAV runs on the Microsoft SQL Server database. These include optimizing indexes, FIND and cursors in Microsoft Dynamics NAV, and reducing SIFT usage.

Microsoft Dynamics NAV 2009

This section provides a detailed description of Microsoft Dynamics NAV 2009. [Skip this section.](#)

Microsoft Dynamics NAV 2009 is scheduled for release in H2 CY2008 and includes the new Microsoft Dynamics RoleTailored Client that will provide a breakthrough user interface, a new state-of-the-art technology platform, and Web services enablement.



The technology that enables the RoleTailored client in Microsoft Dynamics NAV 2009

Architecture Overview – Three-Tier and New Microsoft Dynamics RoleTailored Client

One of the most significant developments in this release is the new three-tier architecture.

The first tier, or “the client tier,” will consist of the Microsoft Dynamics RoleTailored Client as well as a SharePoint Client. The Microsoft Dynamics RoleTailored Client has a ground-breaking user experience, such as the user experience in Microsoft Office 2007 that gives users an immediate overview of information, tasks and navigation. The SharePoint client will make use of the same pages as the RoleTailored client but the content will be adjusted to fit a browser environment.

The second tier, or “the service tier,” will be used to service the clients and to enable the configurable Web services to allow application-to-application integration. Having all business logic run on the service tier ensures data consistency since it ensures that no matter where the data is updated from, the same triggers and business logic is run. Microsoft Dynamics NAV 2009 is built entirely on Microsoft .NET.

The third tier, or “the database tier,” is Microsoft SQL Server 2005 or 2008. This means that customers will be able to realize all the latest innovations and benefits that the Microsoft Dynamics RoleTailored Client and Microsoft SQL can offer as one of the leading platforms in the industry.

One Product – Two Environments

Microsoft Dynamics NAV 2009 will have both the three tier architecture with the Microsoft Dynamics RoleTailored Client, as well as the classic environment with the Microsoft Dynamics NAV Classic Client. Both environments will have all the rich application features included in Microsoft Dynamics NAV 5.0.

Customers using earlier versions will have the following options:

- Keep the Microsoft Dynamics NAV Classic Client, upgrade to Microsoft Dynamics NAV 5.0, and wait to move on to the new environment (read more about upgrade considerations [here](#)).
- Upgrade their current solution to the three tier environment to take full advantage of the Microsoft Dynamics RoleTailored Client.

The development experience will remain inside the Microsoft Dynamics NAV Classic Client development tools so partners and customers can continue to code, administer, and customize the application as they normally do. Application code will still be written in C/AL but we will add a new designer for designing pages. In other words, no significant investment in training or tools will be required, except for training for the Microsoft Dynamics RoleTailored Client pages and Microsoft SQL Reporting Services.

The existing forms and reports will have to be transformed into objects that can run on the new architecture. A transformation tool for reports and forms will be provided to partners; however, some manual transformation is to be expected.

New User Interface and Breakthrough User Experience

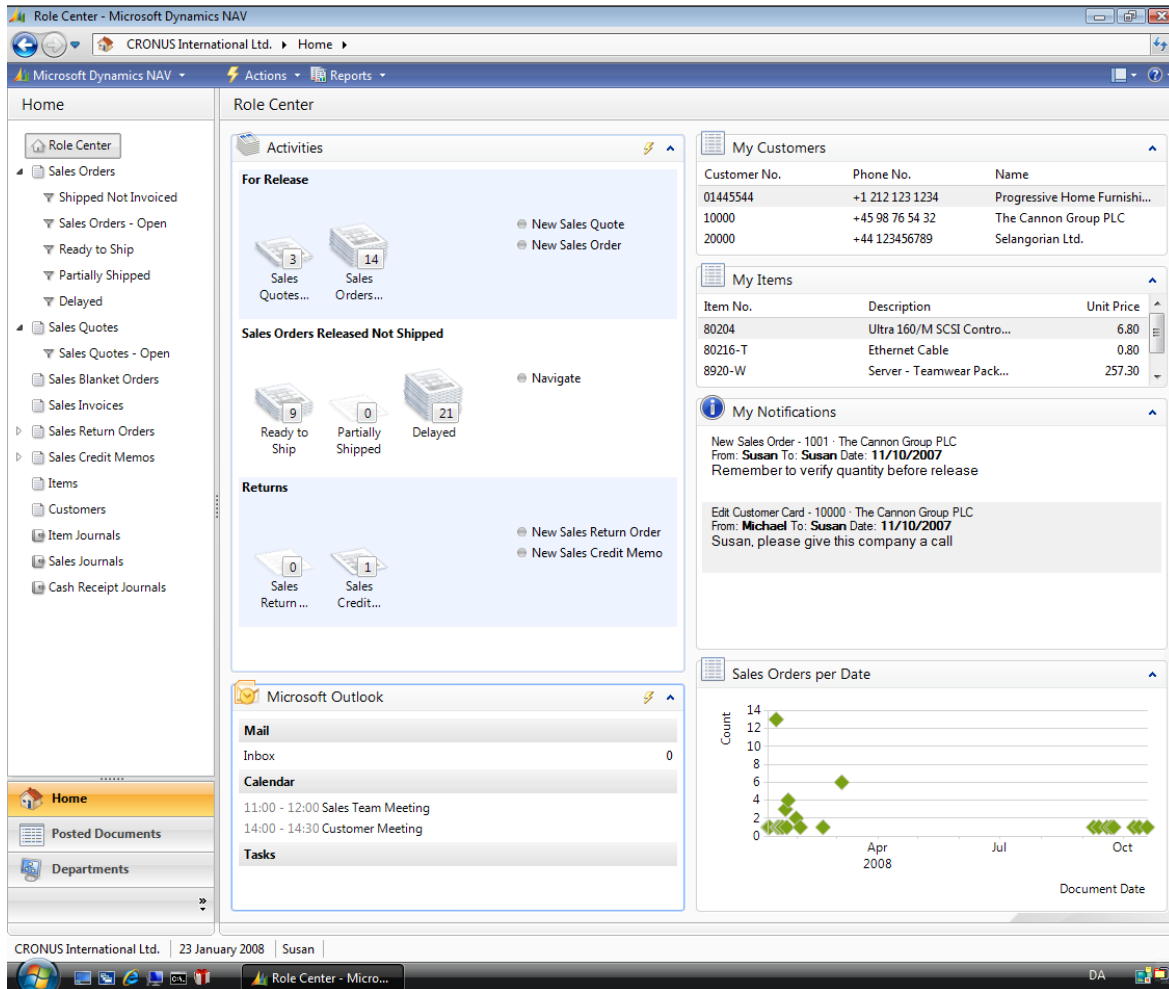
A revolutionary roles and task-based graphical user interface will change the paradigm for the ERP user experience by empowering people with a truly intuitive, faster and more efficient way of working.

Microsoft Dynamics NAV 2009 will have a RoleTailored navigation design optimized for many key employee functions. This RoleTailored interface will give employees access to crucial information with fewer clicks so they can quickly get an overview of their tasks and activities, prioritize and complete them with greater accuracy and efficiency than ever. People will be able to interact more freely with the application and create more intuitive work processes. For example, the processes associated with Microsoft Outlook are an inherent part of the home pages—the user can have calendar, tasks, and e-mail right on their Role Center. Out-of-the-box features will include 21 Role Centers for specific user-types with easy access to the actions and data that most used in those roles.

In addition, the RoleTailored user interface design will make it easier for infrequent users of the system to sit down and start working immediately without knowing the system. For example, users will be able to click the name of a task and then get a user interface tailored for accomplishing that task. The user interface will promote just the fields and commands needed for the task. Secondary fields and commands can be shown when relevant to hint that alternatives are available—but the focus is on the single task.

The Role Center will be the user's main point of entry into Microsoft Dynamics NAV 2009. Its purpose is twofold:

- To provide users with a personal overview of the status of their work
- To provide one or two-click access to the most relevant tasks and information that a particular user profile needs, including seamless access to Microsoft Outlook, notifications, KPI reports, tasks and list pages



This is an example of how the Role Center for a sales order processor may look. All the information and activities concerning her roles can be accessed via this personalized page. With only a few clicks, the sales order processor can, among other things, process orders, receive notifications about pending orders, check her calendar and monitor her performance directly from her home page.

The RoleTailored user experience has been created in keeping with the Microsoft Dynamics NAV core values of simplicity and flexibility. It will be easy for users to personalize their Role Center and for partners to create new Role Centers.

And, compared to previous versions, the new user interface uses the Microsoft Dynamics Tools Client and is even more deeply integrated with Microsoft Office, including Microsoft Outlook, which can be located directly on the home pages.

In addition, the design of the user interface in Microsoft Dynamics NAV 2009 resembles the layout of Microsoft Office Outlook® 2007:

- People have access to important functionality in the navigation pane, on the left side of the screen.
- The command bar appears just like it does in Microsoft Office Outlook 2007, though with fewer menu selections than Microsoft Office.
- The horizontal navigation bar, or address bar, a new feature in Microsoft Windows Vista, also will appear in Microsoft Dynamics NAV, giving people an easy way to track their navigation and gain orientation within the application.

Also similar to Microsoft Windows Vista, Microsoft Dynamics NAV 2009 uses the visual metaphor of stacks of documents (called cues) to show the contents of a folder.

Plus, using a design feature of Microsoft Office SharePoint Services, people will be able to reconfigure screens in Microsoft Dynamics applications by adding or removing user interface parts, much like they manipulate Web parts on SharePoint Portal Server sites.

The following are examples of the roles we intend to include out-of-the-box for Microsoft Dynamics NAV 2009 release. They are representative of the application areas in Microsoft Dynamics NAV which are most used by our customers, partners and ISVs will be able to extend these roles, create new ones and develop RoleTailored vertical solutions:

Name (Persona)	Roles	Department
Phyllis	Accounting Manager	Finance
April	Accounts Payable Coordinator	Finance
Arnie	Accounts Receivable Administrator	Finance
Annie	Bookkeeper	Finance
Kevin	Sales Manager	Sales & Marketing
Susan	Order Processor	Sales & Marketing
Alicia	Purchasing Agent	Logistics/Operations
Sammy	Shipping and Receiving WMS	Logistics/Operations
Sammy	Shipping and Receiving order-by-order	Logistics/Operations
John	Warehouse Worker WMS	Logistics
Tony	Production Planner	Production
Lars	Shop Supervisor	Production
Lars	Shop Supervision Manufacturing Foundation	Production
Shannon	Machine Operator	Production
Reina	Resource Manager	Professional Services
Prakash	Project Manager	Professional Services
Daniel	Dispatcher	Customer Service
Terrence	Outbound Technician	Customer Service
Tim	IT Operations Manager	Company
Charlie	President	Company
Stan	President-Small Business	Company

New Role Centers can easily be created and existing Role Centers modified as well as content can be shared between Role Centers. More information regarding the roles described above is available in this [white paper](#).

Web Services

Another key development goal for the Microsoft Dynamics NAV 2009 release is to make it easier for Microsoft Partners and ISVs to integrate with other service-oriented applications via Web services.

Web Services is a market standard for application to application integration and Microsoft Dynamics NAV 2009 has a robust platform based on .NET that can expose potentially more than 1600 configurable Web services out-of-the-box so developers can use the existing Microsoft Dynamics NAV development environment to add more functionality and build and customize Web services based on standard definitions (SOAP). To expose a page or a codeunit is as easy as a checkmark making it possible to find, create, modify and delete records from applications external to Microsoft Dynamics NAV with all business logic and triggers run by the Dynamics NAV Service Tier. Furthermore it is possible to leverage the investment made in codeunits as these too can be accessed as a web service. This ensures data consistency and one security model. All this makes it possible for partners to develop Web services and build new applications on Microsoft Dynamics NAV using Web services.

Additional Features

Group Policy Deployment

Also, the installation procedure and setup will be improved to support Group Policy deployment, installation of the new Microsoft Dynamics RoleTailored Client, and all the components necessary to run a 3-tier solution.

Customer Relationship Management

Today the integration between Microsoft Dynamics NAV and Microsoft Dynamics™ CRM is available through third party CRM connectors; and, Microsoft intends to release a connector between Microsoft Dynamics NAV and Microsoft Dynamics CRM subsequent to the Microsoft Dynamics NAV 2009 release.

In addition to this connector, partners and customers will continue to benefit from the integrated CRM modules in Microsoft Dynamics NAV consisting of "Sales & Marketing" and "Service Management". The integrated CRM modules provide a powerful solution to customers that need a CRM solution that is fully integrated with Microsoft Dynamics NAV. The integrated CRM modules have a strong integration with Microsoft Office including Microsoft Outlook. And, Microsoft Dynamics NAV 5.0 further enhances the integration between the integrated CRM modules and Microsoft Outlook.

Upgrade Considerations

This section provides information about upgrades. [Skip this section.](#)

It's no secret that the pace of technology change and innovation is increasing almost daily. And the businesses that stay abreast of these changes by utilizing the latest technology gain significant competitive advantages. Not only do Microsoft Dynamics NAV customers realize competitive benefits by running their business on the latest version, it also makes good business sense to be on the latest version when a newer version of the product is released. And, the upgrade process is easier when the customer is upgrading from the latest version to the newest version because the upgrade process will consist of smaller steps than if the customer is upgrading from an even earlier version.

As with any upgrade, one should always consider the unique situation and requirements. Upgrading to Microsoft Dynamics NAV 4.0, Microsoft Dynamics NAV 5.0 and, when available, Microsoft Dynamics NAV 2009 is no different.

Microsoft recommends partners and customers to investigate the value of upgrade through the establishment of an upgrade business case comparing the revenue gains and cost savings with the direct and indirect cost of the upgrade.

In short, we recommend an upgrade to the most recent version of Microsoft Dynamics NAV available in your market if the savings and benefits realized from the upgrade are greater than the cost and savings of waiting for the next version to come.

When making your business case for an upgrade, consider the following:

- When will next version of Microsoft Dynamics NAV and the required add-on solution (if any) become available in your market? The period of availability is important for calculating the ROI of the upgrade business case
- What are the costs for maintaining the current version?
- What are the costs for implementing the new Microsoft Dynamics NAV application functionality? How do they compare to the savings and extra earnings that can be achieved when using the new functionality, including (but not limited to):
 - Productivity increases, process improvements and reduction or re-allocation of staff
 - Savings from reversing customizations if the existing customization functionality is now provided as standard functionality in the most recent release of Microsoft Dynamics functionality or provided via add-on functionality
- If performance and scalability are important parameters, recommendation is to migrate from the C/SIDE database to Microsoft SQL Server at the same time as upgrading to the most recent version

There are a number of ways to reduce the direct and indirect cost of the upgrade. We recommend partners familiarize themselves with the guidelines and directions available on PartnerSource under the [Value of Upgrade](#) to best help customers.

What You Need to Know

Microsoft Dynamics NAV 5.0 and Microsoft Dynamics NAV 2009 are large and comprehensive releases. There are many new features to learn, concepts to consider, and evaluations to make. This section summarizes the most relevant of these to help you prepare for your upgrade.

For Customers

First and foremost, we recommend that customers speak to a Certified Microsoft Partner to plan the best upgrade path. In addition, please keep the following in mind:

- Microsoft Dynamics NAV 5.0 ships with the Microsoft Dynamics NAV Classic Client, all the new application features, and Microsoft Office 2007 integration.
- Microsoft Dynamics NAV 2009 will have two clients: the new Microsoft Dynamics RoleTailored Client intended for new customers, and the existing Microsoft Dynamics NAV Classic Client intended for existing customers who wish to move to the Microsoft Dynamics RoleTailored Client at a later time.
- Customers are advised to subscribe to the Business Ready Enhancement Plan (first-year requirement for new Microsoft Dynamics software customers, optional for all others) that includes the following features:
 - **Unlimited online training:** These are new benefits for all customers enrolled in the Enhancement Plan, available globally.
 - **Upgrades, updates, service packs, fixes, and regulatory/tax updates:** The upgrade and update benefit is stronger than ever for all product lines in all regions with a goal of providing additional product value each year and published product roadmaps so customers can plan for future upgrades. In addition, timely delivery of regulatory updates and hot fixes keep customers in compliance with local regulations. Be aware that customers are always advised to only implement upgrades, updates and “hot fixes” to their Microsoft Dynamics NAV installation with the help of their partner.
 - **Support lifecycle policy:** Provides Microsoft customers with clear and predictable support information for all Microsoft products, including the Microsoft Dynamics product family, enabling customers to effectively plan for their software requirements based on long-term knowledge of the support cycle for Microsoft products. Microsoft provides a five-year minimum of mainstream support for all products released in 2005 and all future releases.
 - **Investment Protection** (formerly called Transformational Assurance): Enables you to move to the future Microsoft Dynamics business solutions suite, when you are ready, without having to re-license the functionality you already have today.
 - **Protected list price:** Protected list price helps customers budget more predictably for their Enhancement Plan renewal year after year, enabling customers to protect their system list price as the basis of future renewals.
 - **Transition investment credit:** This is a new benefit for all Microsoft Dynamics financial management and supply chain management customers, giving them the flexibility and

security in their Microsoft Dynamics solution choice, knowing that if their needs change – they have access to any of the other Microsoft Dynamics solutions that best fit their needs. Customers can apply the full license credit of their Microsoft Dynamics financial management and supply chain management license investment towards a move to any other Microsoft Dynamics financial management and supply chain management solution, such as moving from Microsoft Dynamics NAV to Microsoft Dynamics AX. Or a customer can move from one package to another (Standard to Professional) within a product family, if they are using the same packaging method.

We also recommend that customers regularly visit [CustomerSource](#) for more information and monitor [Microsoft.com](#) for news and updated product information. CustomerSource is the authorized Web site for customers enrolled in the Enhancement Plan from where many of the benefits can be accessed. The site contains a searchable knowledge base, downloads, documentation, discussion boards, online training, news, and other features. These resources can help customers be more productive, empowered, and connected

- Customers who already have access to CustomerSource can find more information [here](#).
- Customer who do not have access but would like to learn more can find additional information [here](#).

For Partners

Partners should monitor [PartnerSource](#) for news and updated product information and be aware of the following:

- The Microsoft Dynamics RoleTailored Client will run on the Microsoft SQL Server database. Also, for reports to be shown on the new platform Microsoft Dynamics NAV 2009 will introduce a new reporting solution based on Microsoft SQL Reporting Services, therefore, we recommend that you update your reporting skills to Microsoft SQL Server 2005.
- A transformation tool for forms and reports will be available to partners on [PartnerSource](#) at the time of release but some manual transformation of the existing reports and forms will be required.
- In addition, the [Microsoft Dynamics NAV Upgrade Toolkit](#) will be available as always, to enable partners upgrade existing customers' solutions.
- Microsoft Dynamics Sure Step Rapid Implementation Methodology will be released as an integrated part of the Microsoft Dynamics NAV product and implementation process; however, we recommend that you familiarize yourself with the [current version of the tool](#) if you haven't already done so.
- [Microsoft Database Resource Kit](#) will be updated after the release of Microsoft Dynamics NAV 5.0