# IT IS active®
2010 for AX

Information Brochure

Get to know the most versatile and experienced solution for Microsoft Dynamics AX and SharePoint 2010

The new portal and web client integration for Microsoft® Dynamics® AX on Microsoft SharePoint 2010 / 2007, Microsoft SharePoint Foundation and Windows SharePoint Services 3.0

we create **wo**rlds on the **w**eb

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IT IS

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2010 **for AX**

The one stop
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Now IT IS time for the team

Be it sports or business, you only score big if your team plays in tune together. Information and communication must be in harmony with each other. Be it sport or business, that's how you play the ball perfectly back and forth, and finally score. In business, transparent communication lets you and your team score better when using your business processes. The quotes and orders are managed with the accounting software. Office documents for business correspondences and data calculations are adding towards the full picture Information now produces results that count.

Finally find everything.
Finally you have the view of the transactions, without searching around and do complex queries. That's how it should work!

Information from various programs come together to be managed in one dedicated location. A location that is more than just a *place*, it is a share point where all information is easily found.

For example: Sales works at a fast pace so they always need information rapidly to fully prepare for customers visits. The "customer site" contains all documents, information and sales figures in addition to links to the customer's websites.

The marketing people always want to be informed about recent sales meetings so they are filled in with knowledge to plan and direct their efforts. Customer visit reports can create success stories and joining planning calendars and contact segments from Dynamics gives insight for campaigns.

Even business partners such as customers and vendors can access certain information. That way they are all in the team!
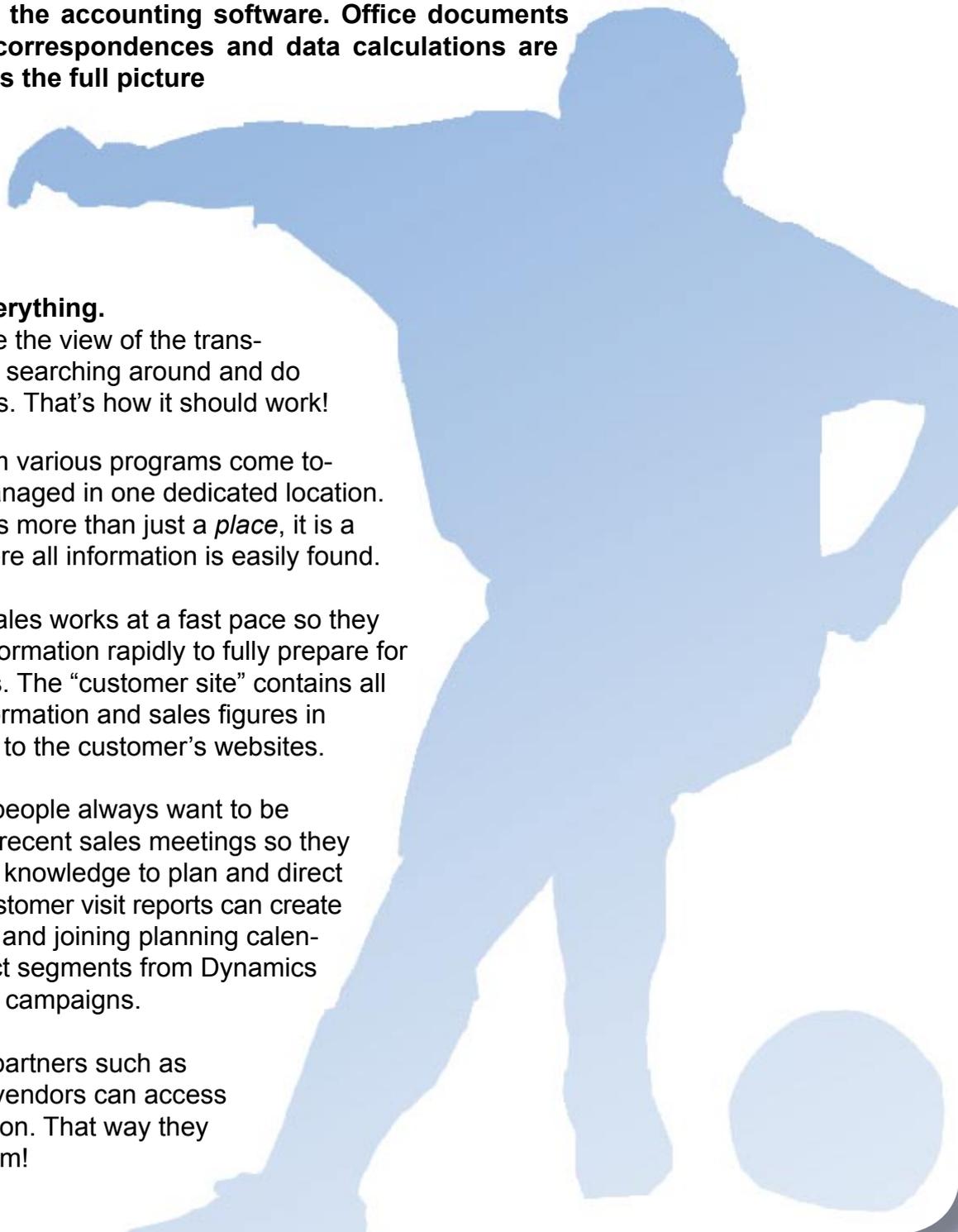
"IT IS active 2010 for AX gets your teams joined together on all relevant data of your enterprise"

Enterprise Resource planning (ERP) is about processes in organizations. Fitting together, they can tremendously lower the amount of work. Centralizing the flow of financial data

Optimize daily business processes for your company's success

You will get an enormous increase of effectiveness of your daily work. This is the SharePoint story, now extended towards your most crucial business system and fully leveraged throughout your organizations.

Customer List

Filter

	General	Finance					
Account No.	Party type	Name	City	State	Country code	Phone	Currency
1101	Organization	Forest Wholesales	Bothell	WA	US		USD
1102	Organization	Sunset Wholesales 1	Artesia Wells	TX	US	123-555-0160	USD
1103	Organization	Cave Wholesales	Abbeville	GA	US	123-555-0161	USD
1104	Organization	Desert Wholesales	Washington	DC	US	123-555-0162	USD
	Organization	Sparrow Wholesales	Arvada	CO	US	123-555-0163	USD
	Owl Wholesales	Los Angeles	CA	US	123-555-0164	USD	
1203	Pelican Wholesales	Burlington	WA	US	123-555-0165	USD	
1204	Kingbird Wholesales	Guangzhou		CN	123-555-0166	CNY	
1301	Organization	Whale Wholesales	Springfield	MA	US	123-555-0167	USD
1302	Organization	Turtle Wholesales	Aberdeen	MD	US	123-555-0168	USD

Details
Go to ▶ Quote List
Order List
Invoice List

◄◄ ◄ 1 ► ►►   Showing 1 to 10 of 70 entries   Page Range 10 ▾

The new list view of IT IS active 2010 for AX with tabs: A role based approach let you decide which information you want to show to your staff. The universal web part can connect to any info in AX.

and data on goods and resources is the heart and soul of it. But it is locked in!

Imagine what's possible when you have the same access to your data on the road just as at your desk in the office. Now manage and use ERP data and documents across the entire line of business and create a system where all resources of your company can be wisely used and managed. Again, look at it just for sales: Use your customer information from ERP and CRM systems, combine with Microsoft Office documents, shared information about the intranet and link and feed internet sites with particular information.

Free up your ERP: IT IS active 2010 for AX is the best foundation for your web based business

There are numerous information buried in your ERP system that would be so helpful to provide to the trustworthy members of your organization. Sometimes this vital info is just copied to Excel sheets, which can get lost and outdated. Here you can let your people work on the actual data at any time. With our solution, you can share all kind of data on a web basis. A web browser is sufficient to get things done. Easy - IT IS.

The role based configuration makes it more straightforward than ever for you to maintain access to your data. Corporate departments (like Marketing, Sales, Accounting, etc...) can be defined as roles and can consequently be assigned to various groups (i.e. - sales areas, districts, type of users) with their respective users. Using this configuration provides you with an efficient and failsafe access policy to your ERP data.

All the needed information at hand, whether it is data or documents

Visualizing business documents of all types is one of the great advantages of IT IS active 2010 for AX. In this manner invoices, inventory and customer data as well as project sheets from Microsoft Dynamics AX can be stored in multiple SharePoint document libraries. Using filters and parameters such
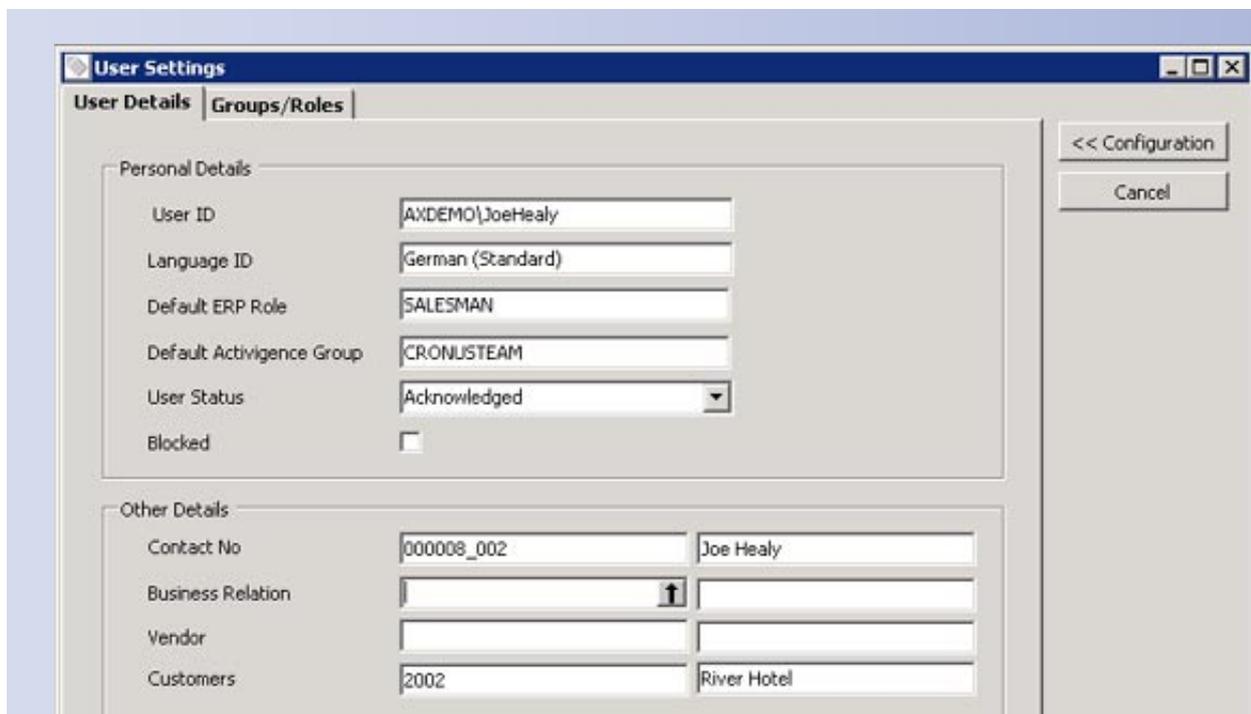
With the "ERP connector configuration tool", which is a part of IT IS active 2010 for AX, you can define which user has access to certain data. You can assign various people to different groups; and in combination with a role, a particular user only gets access to particular data and functionality.

The web based client is built around a unique web part. This web part allows different views and is the heart and soul of IT IS active 2010. However, the configuration takes place in the ERP connector close to the AX client. Our solution requires at least Microsoft Dynamics AX 2009, runs on 2012 and we are continuing developing on the latest Dynamics Ax versions. This choice let you run the application your way and you can decide when to move to the next version of the ERP system.

as user permissions, predefined search information and other information makes up for the full picture. Get documents and data about customers, product and order data together at one place accessible when you need them.

Document uploading can occur through Microsoft Dynamics AX as well as through web parts in SharePoint. This makes it possible for you to fully automate document handling archiving from documents such as invoices.

Improved Report Handling

IT IS active 2010 for AX offers an improved creation and presentation of reports when displaying the images in a web-preview.

For the majority of AX based reports, a start filter value with parameters can be

Only one web part: IT IS active 2010 for AX keeps it simple

When we did the design of the product we had the universal approach in mind. Just on web part should be able to show and transact with all the information in the AX system.

The web part as a card view: You now can choose horizontal tabs. Use this way of switching between various panes as a configurable alternative to the regular "tabs" and pick from a nicely animated open and close screen effect, too.

set, controlling the content and behavior of the report. Reports can be created as PDF files now and saved together with images as compacted zip files which can be uploaded as document archives into a SharePoint server document library. This gives easy access for downloading the report content when needed.

The flexible report management for your company's intranet and extranet let your people use those more efficiently.

Whatever information the web part shall display will be put in as a configuration, thus allowing for versatility and adaptability without a hassle. At the end, the administrator can pick three different basic views and derive on screen displays and appropriate security settings with this easily.

At the same time the configuration of the action bar and action menus allow for direct triggering of typical methods inside the ERP system. Triggers like Insert, modify and deletion of data are accessible as well as the methods of running the business logic.

AJAX technology:

With technologies such as AJAX, we offer enhanced security for your business processes. During data input, the program can process in the background, hence better program performance and improved processing time. Without loading the whole website again information between server and client can be exchanged in an asynchronous manner.

Web part implemented AJAX elements like calendar and slider control, numeric up-down and fast tab panes are more comfortable and easy to use.

Little Helpers – Big Impact:

Does your system help you? With us, you will know when it's about time purchase new items when the qty light becomes red. Now you can use the new "slider function" to add them. In our sample you can define the reordering quantity as well as a safety threshold. Of course you are able to configure the slider behavior in Microsoft Dynamics AX. The values set for minimum, maximum and size are easy to adapt and you can pick CSS everywhere to make your style work.

Yes, you can: here you fill in a sales order, where AJAX is in action for fast and comfortable creation of order data with quick entry lines.

Instead of entering numbers directly you can use the "multi-slider" to select a numeric value by dragging.

Field based filtering in lists

The enhanced local search bar available in lists is an ideal way to gain fast access towards the desired information. The input fields will be shown directly below the field labels. Here example is the chart of accounts. Even a combination of several search terms is possible. That way, you gain more efficiency in finding suitable matches.

Fast navigate: Find topics in lists quickly

Sometimes lists with particular data can get very long. Take the list of inventory or the list of your customers - they will contain many pages. Do you know, on which page the particular item is located?

Guesswork ends now, since IT IS active contains a fast navigation function that guides you to the pages of interest with a link.

Setting a filter on the beginning of the list show the results fast and directly as list. Some filter entries are configured as "drop down list" and for other columns you can enter the filter criteria in a text box.

After the search is performed, the filtered records are ready for further processing. Especially for large lists, the new tool is a great time saver when searching for designated data. Another way of getting towards the desired information is within the next function, so please read on.

Just enter the search term into the search field, and get the results quickly.

The yellow sticker pop up will display your search results in a tree view. Just use one of those links to simply get to the right page with the data of your choice.

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Search globally and find quickly

Retrieve additional information within the search from SharePoint in addition to global search in Microsoft Dynamics AX. This gives you an unique combination of results from Dynamics AX and SharePoint in just one view. Furthermore IT IS active 2010 has included several possibilities and can use various criteria to show the results of your query.

The global search itself is easy: Just enter the term you like into one field. the search automatically provide this value to all the particular local searches and will highlight hits with a bold caption. Just click on the plus sign to unfold the particular search group and continue to the results with the link provided herein.

IT IS active 2010 Global Search Web Part

Sales 🔍

⊞ Serach Contact
⊞ Search Customer
⊞ Search Invoice
⊞ Search Order
⊞ Search Posted Invoice
⊟ **Search Quote**

QA-100002   Owl Wholesales

More search results
⊟ **SharePoint Search**
🔍 CRM & Sales
Welcome to CRM & **Sales** ! .... Manage in the Customer Relationship Management the whole customer and contact data. .... View lists of the customers, contacts, orders, quotes, invoices, opportunities and items ....
http://partnersps/crm - - 9/30/2010 12:27:08 PM

Perfect results with the global search functionality combined with the SharePoint search. With a simple click on the search result, you get directed immediately to the document or the page of the portal.

The global search is very powerful, since it derives it's results from the various local search functionalities. Here you define the tables and fields to be searched at. You also may decide which local search is available for the global search.

Furthermore you decide who will have the rights to view information within this search. This is useful as the global search inherits these rights to the global search and will not open a loophole for retrieval of unprotected data therefore.

One additionally benefit with the global search is the combination with the Share-Point search. Here you can retrieve and select various pages and files like PDF, Excel sheets, or Word documents and many more other formats where an iFilter for SharePoint is installed. With just a click you can open those pages and files and get started.

"SharePoint search combined with global search in Dynamics AX - a powerful synergy"

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Configuration of request types

The user role "salesman" just sees the relevant CRM information configured for him.
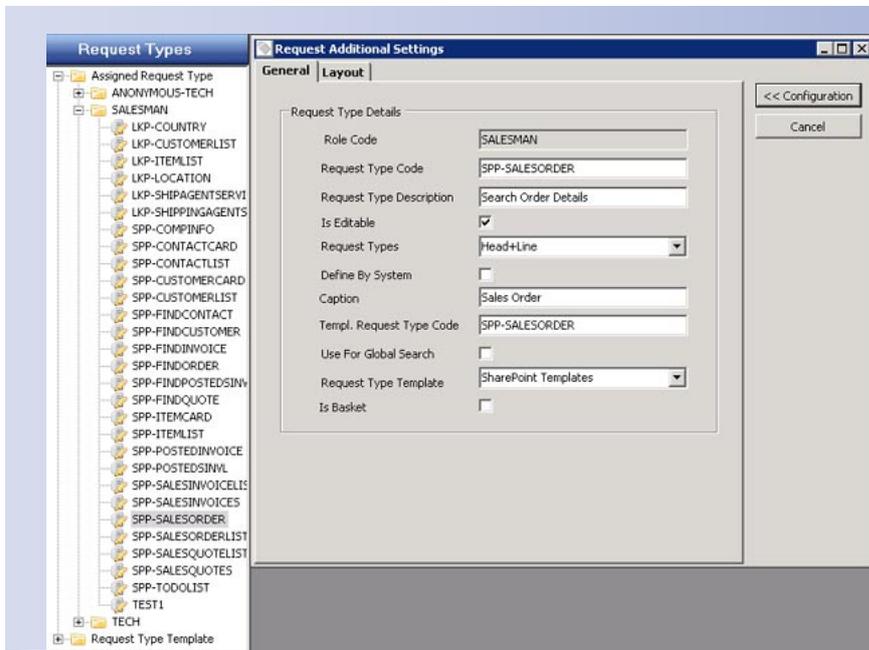
groups as well as you configure the possibilities of usage for each portal user with request types.

As portal operator you want to provide a friendly and easy to use system to every user. With configuring request types you control the attributes of every field a user sees. Long list can be opened in new windows so called lookups, or short list are shown with a drop-down control element.

With our solution, you decide if a user has the permission to enter or change data of a field.

You decide on the display size of a text field and how the alignment is set.

In IT IS active 2010 for AX you have the possibility to assign user to various roles and user groups as we have presented to you on a previous page. Different user receive different information and have different user rights as well. For example a sales person can view and generate new quotes, but a member of the marketing team must not change those and just will see the various quotes.

To generate such a variable and flexible intranet or extranet platform we have developed the IT IS ERP connector. With this tool you can configure the rights for the roles and
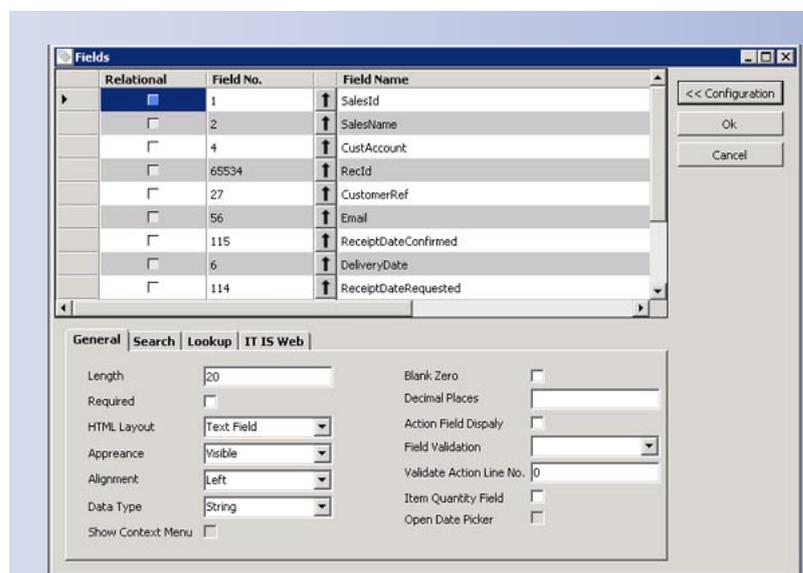
Just configure which fields a portal user will get in his view.

You decide how user friendly and beautiful your portal will look and which possibilities your team gets at hand.

Use all the advantages from your ERP and business system combined with Microsoft´s SharePoint.

Here you set the ability for data read/write.
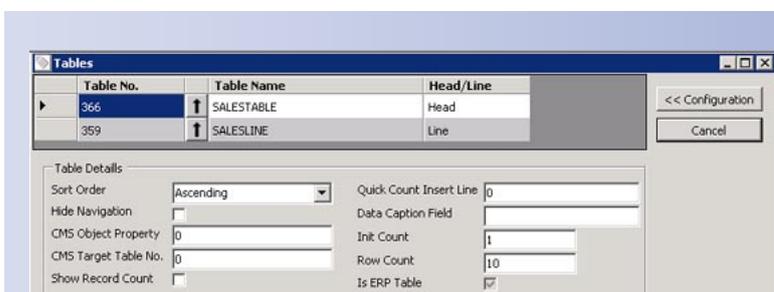
Do more the way you want to:

More People work directly or indirectly with Microsoft and the web Front End via IT IS active 2010 and associated products.

More requirements of enterprises and business processes fulfilled by new platforms

More user friendly solutions leads to faster insight, better communication and increased productivity

More flexibility with Internet and Cloud based computing

More usability trough easy to handle web parts and applications using the latest technology

More room for innovation and upcoming solutions

"anywhere, at any time, any web device"

Mobile solutions available:

An IT IS active 2010 for AX portal can also be used with a tablets like the iPad. But what is it good for?

Here is the answer: A portal solution for tablet devices is very useful for sales people on the road. It is embedded in a fully featured intranet platform but will consist of pages well formatted for tablet computers or phones.

This works for a big customer in the U.S.A. today: With their iPad solution, sales people are able to create new orders while they visit the customer. They also can have a look into older orders together with the customer.

As usual, with IT IS active 2010 the data is immediately available in Microsoft Dynamics AX. For example, the new order will immediately be sent to the production department or to the warehouse for delivery. Thus the sales person can inform the customer that the items just ordered are on their way already.

With the new sales portal the output for quotes and orders will increase. As soon as the appointment is over, the sales people can prepare for the next customer and sees if there are any changes in the contact.
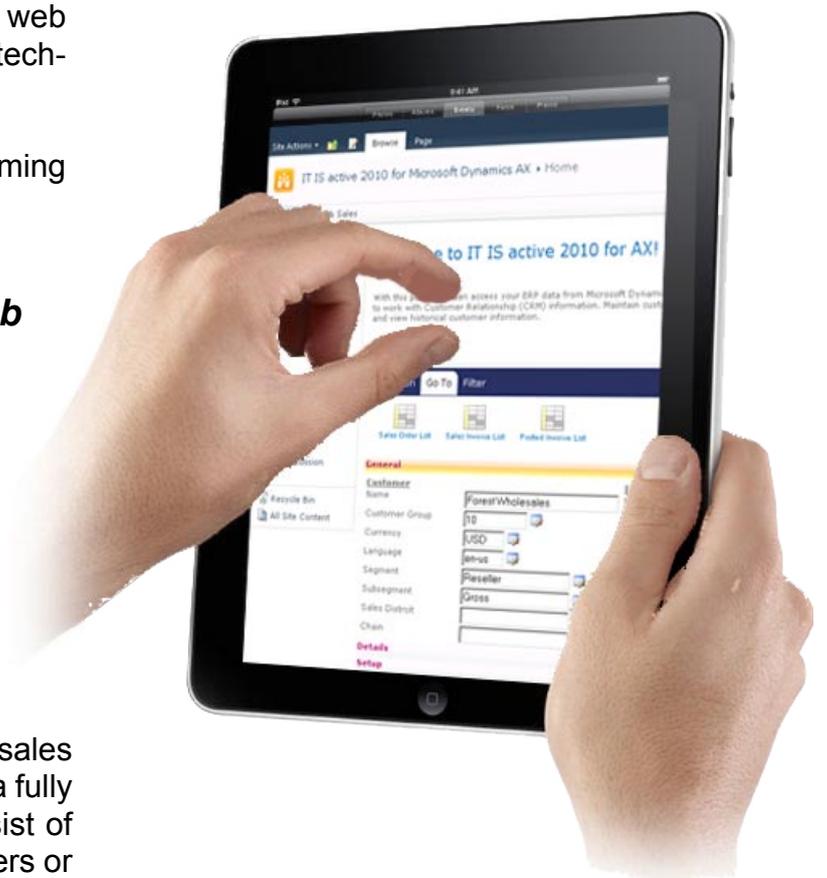
We recommend using our IT IS active add on for tablet computers or phones, since the special adaptation for the touch interface enhances the usability by a large extend.

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Solid and safe architecture:
IT IS active 2010 for Microsoft Dynamics AX
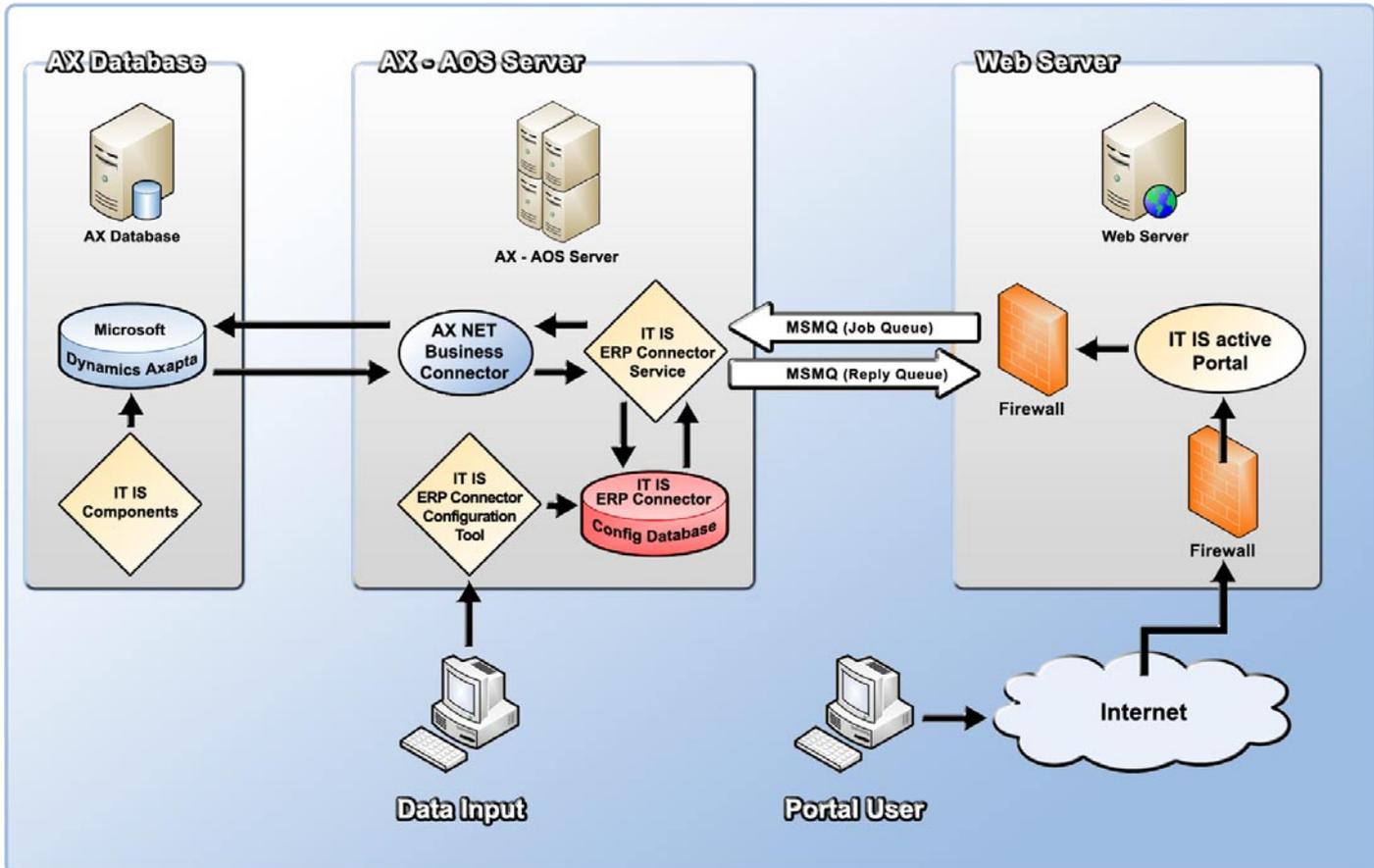
Communication with the Front End takes place trough the Microsoft Message Queue Service. The IT IS ERP Connector component is receiving the request and prepares it for communication with the Microsoft Dynamics AX ERP system.

Via the AX-.NET Business Connector the IT IS ERP Connector is accessing the functionality of Microsoft Dynamics AX directly. Here data can be determined, modified, added or deleted.

Based on your configuration, collected information will be prepared by the IT IS ERP Connector Service for displaying it in your SharePoint portal.

Prepared data will be sent over the Message Queues to the web server that displays the information graphical and well arranged in HTML.

Configure the IT IS ERP Connector is intuitive and more than easy to achieve. With the provided configuration application, you are able to determine different user settings for editing and displaying data of the AX system.

Additionally you can define the layout of the displayed information and the usage opportunities for portal users. Various individual settings are available to adjust your portal according to your desire and/ or your customers needs.

IT IS active 2010 for AX

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You will receive IT IS active 2010 for AX just through your local qualified ERP dealership.

Please ask your Microsoft Dynamics Partner to use the tremendous advantages of this ground breaking product.

Please do not hesitate to conctact us
via e-mail under contact@itis.de or just call us by phone.

Your IT IS active 2010 for AX Dealer

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