ERP Software Review: Adeaca's Advanced Projects for Microsoft Dynamics AX

for ERP for Services

Ted Rohm, Sr. ERP Analyst // August 2015

TEC CERTIFICATION REPORT

TEC Certification Reports provide detailed analysis of leading software solutions that have successfully completed TEC's Certification Program

Technology Evaluation Centers

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About This Report

Product: Advanced Projects for Dynamics AX
Version: Release 14 for Dynamics AX 2012 R3
Release date: July 2014

Certification by

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Technology Evaluation Centers (TEC) is pleased to announce that Adeaca's Advanced Projects Feature Release 14 for Dynamics AX 2012 R3 is now TEC Certified for online evaluation of enterprise resource planning (ERP) for services solutions. The ERP for Services model enables you to compare and evaluate functionality based on TEC's comprehensive model of ERP for services software. Data used in the model are obtained from the vendor's responses to TEC's research questionnaire. Certification ensures that Adeaca has demonstrated Advanced Projects for Microsoft Dynamics AX's support for specific real-world business processes chosen by TEC analysts, and that TEC analysts have analytically and comparatively reviewed research questionnaire data about Advanced Projects for Microsoft Dynamics AX against known benchmarks.

Compare ERP for Services Solutions Now!

»

Use TEC Advisor to compare Adeaca's Advanced Projects for Microsoft Dynamics AX with other ERP for Services solutions, according to your organization's needs and characteristics. It's free, fast, online, and easy— and you'll see the results immediately.

Adeaca—Providing ERP for Project-driven Companies

Adeaca's Advanced Projects solution for Microsoft Dynamics AX is built to fully manage the needs of complex, project-driven companies. Project-driven companies exist in many industries including project manufacturing and engineering, civil engineering and construction, and professional services organizations. The solution can replace the multiple disparate systems employed by many project-driven companies to support their business needs. Advanced Projects brings control to business processes in these industries by bringing together the capabilities of point solutions for planning and scheduling—such as Oracle Primavera or Microsoft Project—and the world-class enterprise resource planning (ERP) capabilities of Microsoft Dynamics ERP into a single unified solution.

Figure 1 depicts the difference between an Advanced Projects setup and a typical setup employed by project-driven companies today.
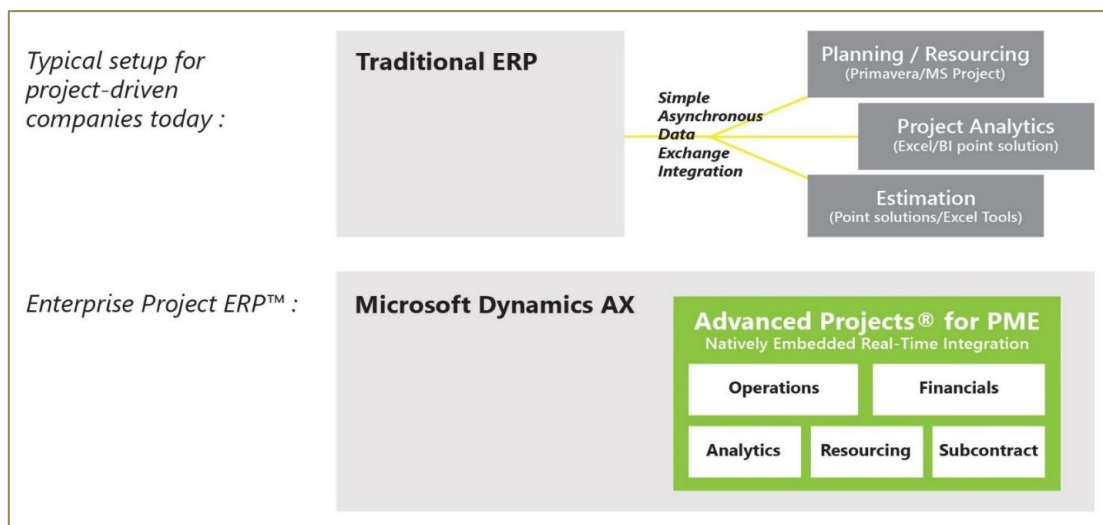

Figure 1: Advanced Projects vs. traditional ERP setup

Adeaca was founded in 2007 by one of the principal architects of what is now the Microsoft Dynamics AX ERP solution (formerly known as Damgaard Axapta), and is today led by former Microsoft, Oracle, and other industry experts. The company has its headquarters in Atlanta, Georgia, and international offices in Jakarta, Indonesia and Fredensborg, Denmark.

Advanced Projects is offered in three configurations targeted at the following industries: project manufacturing and engineering (PME), civil engineering and construction (CEC), and professional services organizations (PSO). PME industries include research and development; aviation, aerospace and defense; renewable energy; and industrial equipment and machinery. CEC industries include engineering and architectural services; communications infrastructure; oil and gas; and mining and resource development. PSO organizations include information technology and consulting services; advertising, marketing, and public relations (PR) services; and management consulting services.

Adeaca sells exclusively through a network of certified partners and resellers in most countries where Microsoft Dynamics AX is sold. Adeaca's employee focus is primarily on product development. Other services include a partner training and certification program and an implementation quality assurance program primarily for new partners. The Adeaca partner program aligns with and is modeled after the Microsoft Partner Network.

According to Elliott Ichimura, Microsoft Global Service Industries Director, "Adeaca is one of only five Global AX ISVs [independent software vendors] engaging service industries worldwide."

Adeaca is a longtime partner of Microsoft and a private beta participant, working closely with the development teams to bring out new versions of the Microsoft Dynamics AX ERP platform. The solution is certified for Microsoft Dynamics AX 2012 by Microsoft.

The following customer success story is an example of what Advanced Projects delivers. API Group, Inc. is the multi-billion-dollar parent company of 39 independently managed construction companies located in more than 200 locations worldwide. API group had been thinking about implementing Microsoft Dynamics AX for about two years, but wasn't convinced that it could meet its needs. After seeing what Advanced Projects could do, the company decided to go with Adeaca and Microsoft over SAP and Oracle. Explains API Program Manager Neil Ammentorp, "Incorporating Adeaca's Advanced Projects into the solution was the key that finally unlocked our selection of Microsoft Dynamics AX."

Benchmark Results for Adeaca's Advanced Projects for Microsoft Dynamics AX

The TEC Focus Indicator presents the results of benchmarking Advanced Projects for Microsoft Dynamics AX against an **Industry Average**. TEC calculates the industry average for a given software market space based on product data from real-world software solutions, scoring solution support for hundreds to thousands of features and functions. The Industry Average circle in the middle of the graph is a normalized representation of the average of the scores.

- The Focus Indicator represents neither the quality of the product nor an absolute quantity of supported functionality. Rather, the **graph is normalized** to show *support relative to the average quantity of functionality supported*.
- The functional criteria have been equalized (attributed equal weight).
- High and low thresholds have been set in order to create the "Dominant," "Competitive," and "Minimal Support" zones (see below for more details).

Reading the TEC Focus Indicator

The axes represent the main modules of a typical ERP for Services product and the red dots show the relative support of the product compared with the Industry Average. The closer a red dot is to the center, the more functionality the product supports for that module.

The **Industry Average circle** marks the relative support of the average ERP for Services product within the indicated market space.
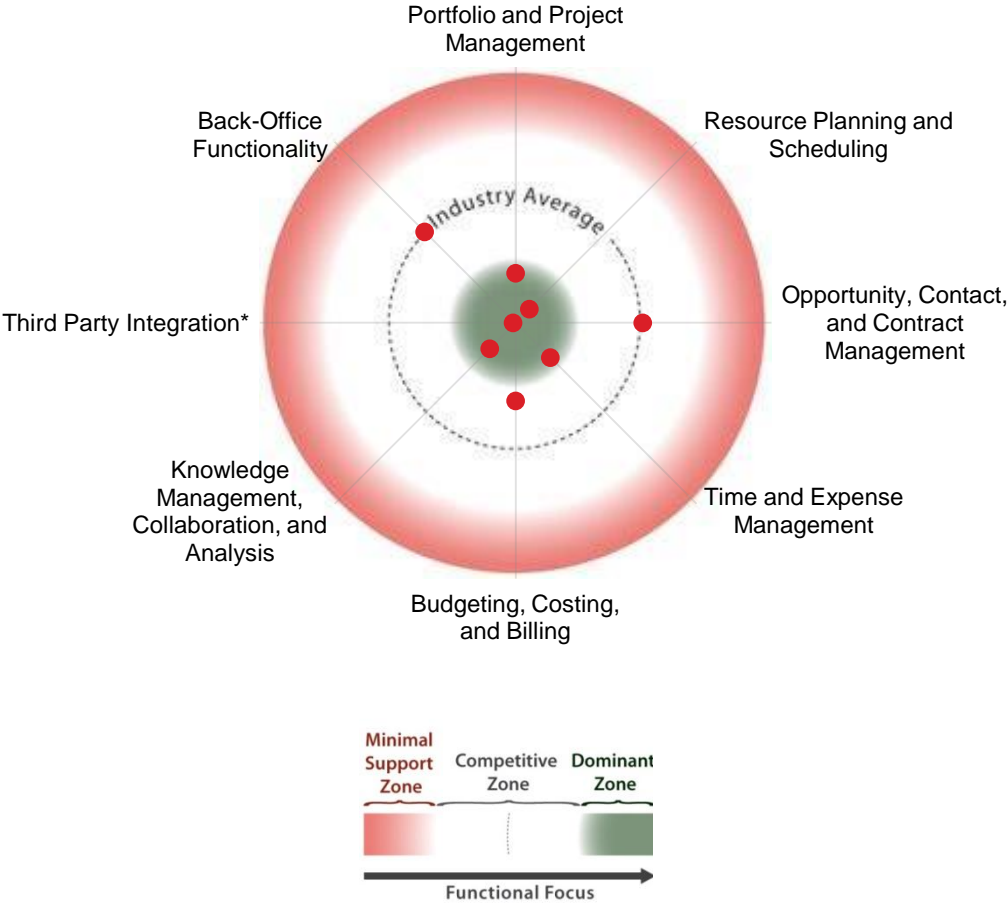
The **Dominant Zone** (green) shows where the product supports more functionality than the average solution. Dominant modules are likely to be competitive differentiators for the vendor.

The **Competitive Zone** (white) shows where the product supports about the same amount of functionality as the average solution. This typically indicates that most vendors in this market space support this functionality.

The **Minimal Support Zone** (red) shows where the product supports less functionality than the average solution. Minimal Support modules might indicate less of a focus for this functionality, as it may not have as much of an importance within the vendor's target market.

If your needs correspond to modules ranked closer to the center of the Focus Indicator, Adeaca's Advanced Projects for Microsoft Dynamics AX may be an application worth evaluating.

This **TEC Focus Indicator™** shows you which types of functionality are likely differentiators for Adeaca's Advanced Projects for Microsoft Dynamics AX solution in the ERP for Services software space.

*This module scores in the maximum range of functionality.

TEC Focus Indicator for Adeaca's Advanced Projects for Microsoft Dynamics AX

Advanced Projects for Microsoft Dynamics AX delivers a complete, competitive ERP solution for services organizations. The Adeaca software solution is competitive in all the functional areas of TEC's model of ERP for Services solutions: portfolio and project management; resource planning and scheduling; opportunity, contact, and contract management; time and expense management; budgeting, costing, and billing; knowledge management, collaboration, and analysis; and all of the back-office functionality needed to support a services organization's needs.

The Adeaca product ranks in the dominant zone in five of the eight functional modules. This ranking highlights Advanced Projects' competitive strength in these important areas.

Use TEC Advisor to compare Advanced Projects for Microsoft Dynamics AX with other solutions for ERP for services, according to your organization's needs and characteristics. Compare now.

Product Review: Advanced Projects for Microsoft Dynamics AX

Advanced Projects extends the capabilities of Microsoft Dynamics AX with a number of add-on modules, as shown in figure 2. The modules can be individually purchased to match the unique needs of a particular organization.
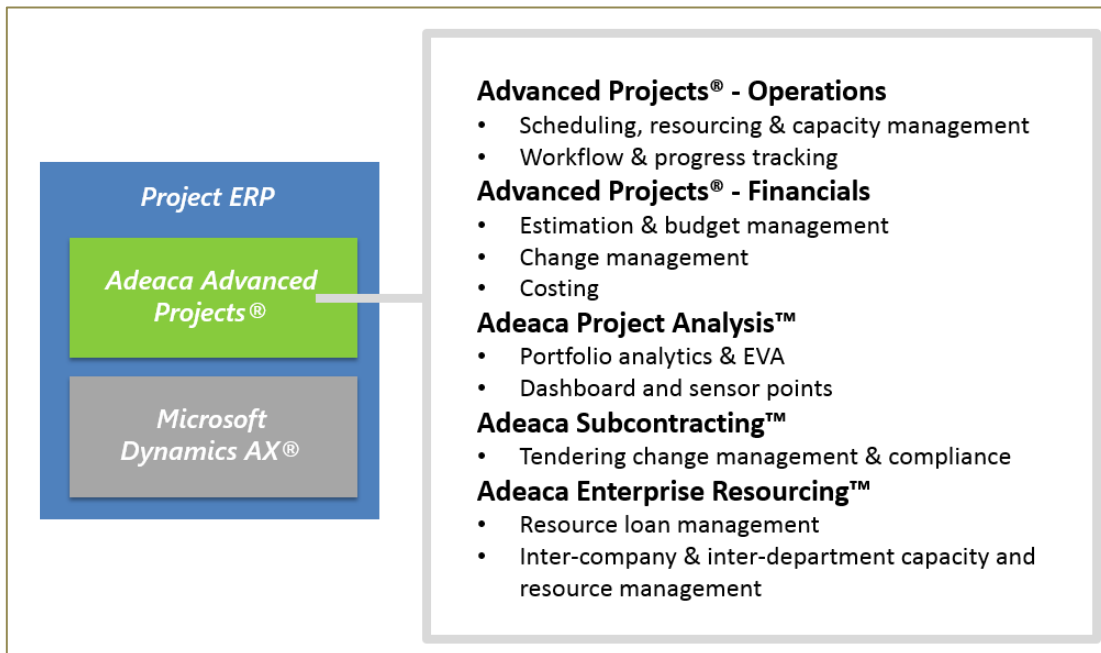

Figure 2: Advanced Projects add-on modules for Microsoft Dynamics AX

Adeaca's Advanced Projects enables companies to efficiently manage business operations by taking control of how projects are estimated, planned, delivered, and monitored. With complete integration of the financial and operational management disciplines into Microsoft Dynamics AX, companies can gain real-time insight and reliable metrics.

Support of Processes

Adeaca was tasked with demonstrating a number of real-life business processes in a live demonstration. To showcase benefits for project-based organizations, the demonstration featured processes required to support enterprise portfolio management, project definition and management, manufacturing project management, and project accounting. This section highlights how Advanced Projects supports the management of these key business processes.

Enterprise Portfolio Management

Adeaca delivers a portfolio performance dashboard (see figure 3) that provides management with a view of how all projects in the company are performing. This is an interactive screen that lets a user—who has the

appropriate privileges—drill around portfolios to easily analyze the current status of a portfolio in order to determine where there are portfolio problems or successes.
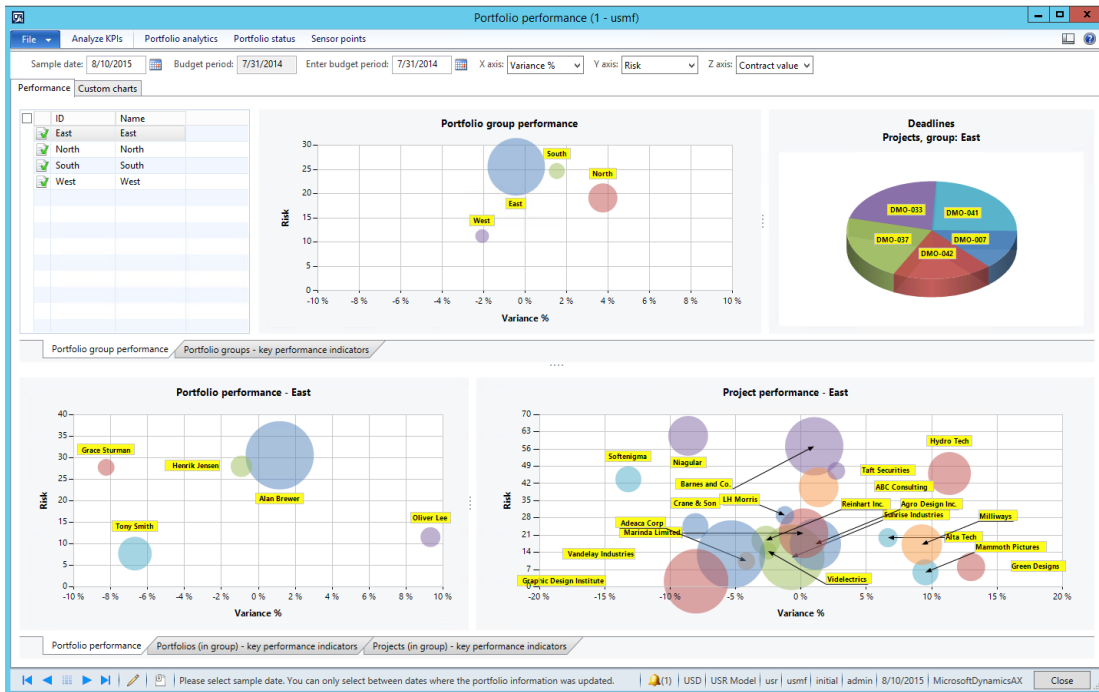

Figure 3: Portfolio performance dashboard

From this screen, a user can drill down into a particular portfolio to get a more detailed view of the status of the projects within the portfolio (see figure 4). The portfolio and project analytics tools report on data collected from an extensive array of key performance indicators (KPIs) that are extracted from the system. KPIs come from work breakdown structures (WBSs), project schedules, issues, milestones, quotes, revisions, budget a completion (BAC), estimate at completion (EAC), cost to complete, and numerous other attributes in the system. The interface uses familiar traffic light indicators that show the status of various KPIs.
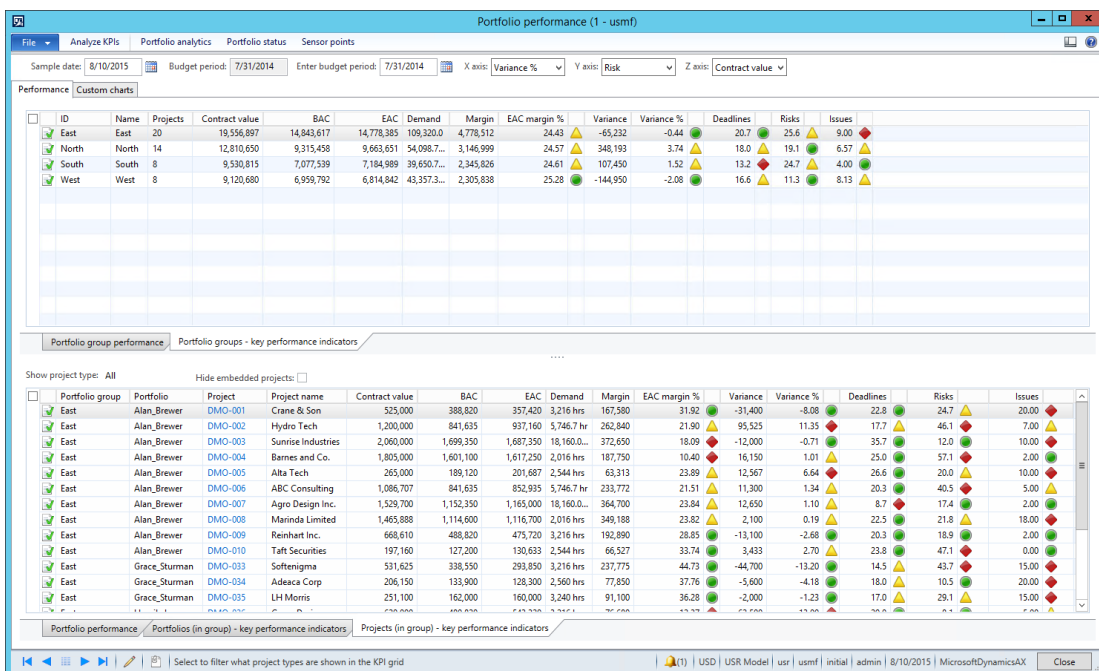

Figure 4: Portfolio project KPIs

Users can define their own groupings in order to do analysis outside of the standard portfolio groupings. For example, projects can be grouped into engineering projects, construction projects, and professional services projects.

Project Definition and Management

Project management and definition is fully supported by the Advanced Projects solution. Currently, Advanced Projects provides two distinct mechanisms for managing project schedules. Projects can be managed from either the visual planning tool or the advanced planning tool. The visual planning tool allows users to manage the project schedule via a Gantt chart graphical interface. The visual planning and advanced planning screens will be combined in a pending release (see the Major New Functionality section of this report).
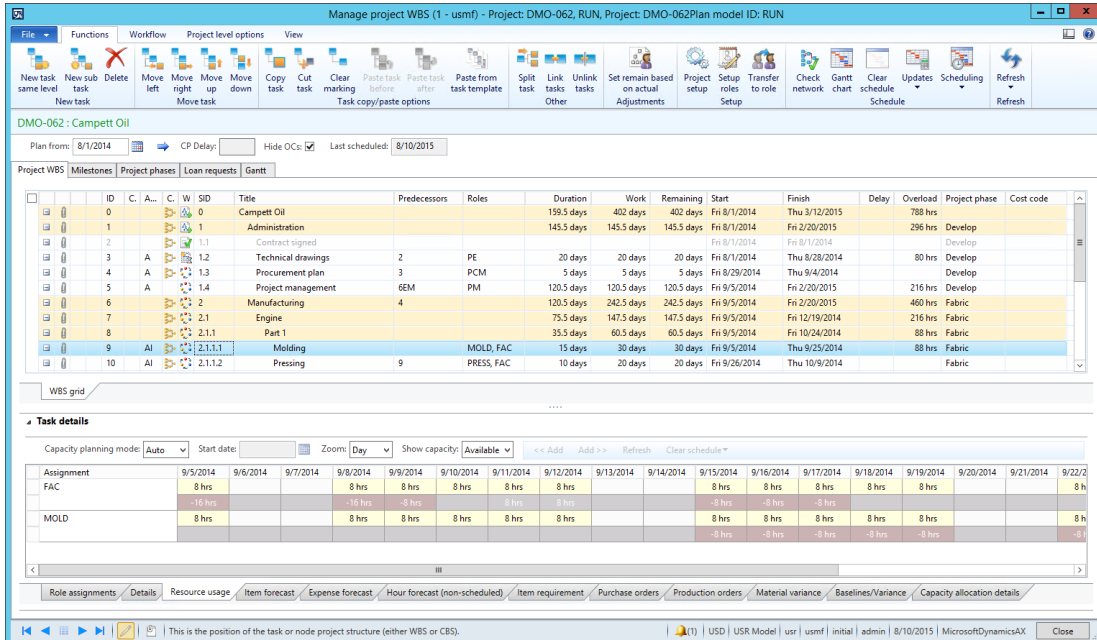

Figure 5: Advanced planning screen

Note: Advanced Projects is built into Microsoft Dynamics AX and, therefore, adopts all the capabilities of the Microsoft Dynamics AX user interface. Within a form, one can rearrange the order of columns, sort and filter columns, show and hide, etc. A form layout can be saved for later use. At no point does a user leave the Microsoft Dynamics AX system.

The advanced planning screen gives a project manager complete visibility into and control of his or her project (see figure 5). The project WBS, milestones, project phases, load requests, and Gantt charts are quickly viewed from the tabs at the top of the screen. In the screenshot above, a particular task's complete set of detailed information can be displayed while the user is working through the project plan tasks. Details include all functionality available in Microsoft Project plus associated items such as purchase orders, production orders, and capacity allocation details.

The Advanced Projects system provides features typical of a robust project management tool, including project creation from a template library, baseline tracking, audited change control, issue tracking, and risk management. Project managers can develop an unlimited number of project simulations and choose the most appropriate simulation to move forward with. Support for different project types is provided in order to drive how a project is invoiced and billed. Project types include milestone, progress, time and material, fee or fixed price, and unit of delivery.

The Advanced Projects solution also provides the tools needed to perform resource planning and management. The system supports different organizational structures for resource management. Larger organizations normally have resource managers who are responsible for managing the resources assigned to projects. Advanced Projects comes with a resource dispatch board to assist these managers in assigning the right resources based on employee skill set and availability. The system has a full complement of resource utilization reports to view individual, group, or corporate resource pools and optimize their usage.

Product Differentiators

Infinite or Finite Capacity Planning—Project managers can run infinite or finite capacity planning on schedules. When infinite capacity planning is run against a project, it will create "overload" situations which can then be manually leveled. During finite capacity planning, leveling can be run by resource or role.

Gateway Reviews—The system allows for managing project gateway reviews at defined project gates. For the project phases requiring gateway reviews, all required documents needed at the completion of a phase are tracked against the project. During gateway review, different project characteristics such as within budget, on time, quality, and risks are rated.

Cost Structure, **Cost Breakdown Structure (CBS),** or **Work Breakdown Structure (WBS)**—Many project-centric industries manage project invoicing and billing separately from the work breakdown structure. Advanced Projects provides this capability by layering a cost breakdown structure over a project. Of course, the WBS can also be used to drive the project billing and invoicing. In Advanced Projects, this is called the cost structure of the project. Selecting WBS for the cost structure means that the work breakdown structure will be used for the cost breakdown structure. Selecting CBS allows you to have a separate CBS for billing, along with managing the WBS. Professional services organizations use mainly a WBS, but the majority of the other project-based industries use a CBS.

Backward and Forward Project Scheduling—A project schedule can be forward or backward scheduled. It is also possible to do forward and backward scheduling on the same project. For example, a manufacturer may be making three identical products, but these all have delivery dates that are spread out over three months. In this case, it's desirable to have all the engineering and component manufacturing complete for all three products on a particular date. But then the final assembly for the three products is only done when the delivery is required. In such a scenario, the initial project tasks can be forward scheduled up until the point in time where the component manufacturing is complete, and then the final assembly is backward scheduled from the requested delivery dates.

Major New Functionality

Adeaca is committed to a release schedule tied to the major product releases of Microsoft Dynamics AX. Its releases are called Feature Releases (named FR11, FR12, etc.), and are typically aligned around various releases coming from Microsoft (e.g., AX2012 CU8 is FR13). The company supports all major version upgrades and most updates releases (CUs). Adeaca is currently dedicating significant resources to the upcoming Microsoft Dynamics AX 7 release.

Adeaca's feature roadmap is prioritized by customer feedback, and may be modified as conditions warrant. One such request is to merge the capabilities of the Advanced Projects visual planning screen with the advanced planning screen. A sneak preview of this new screen, to be released over the next calendar quarter, is shown in figure 6.
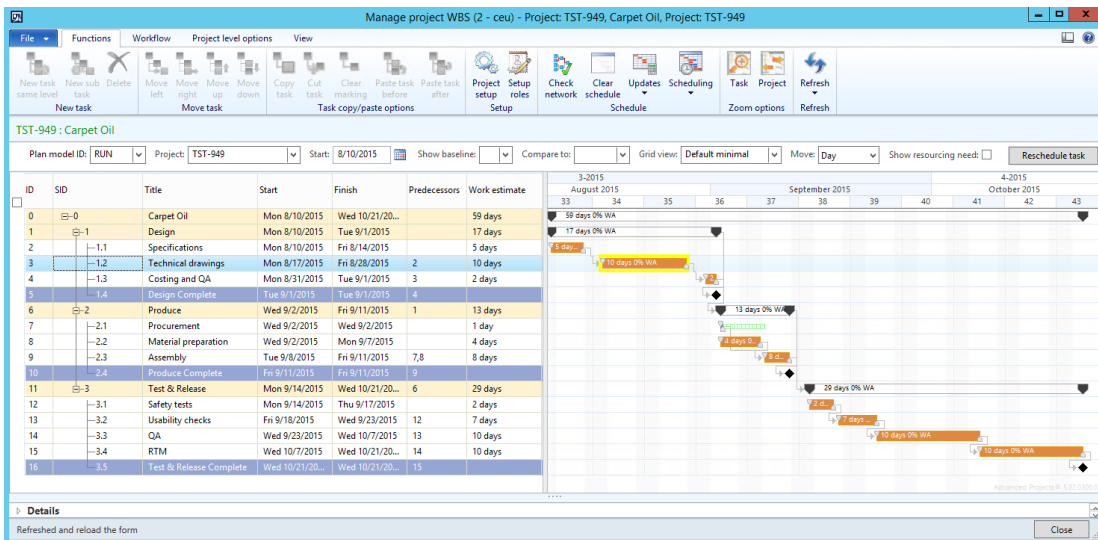
Figure 6: Advanced and Visual Planning Screen

> *TIP:* *Creating a demo script is an essential part of the software selection process to ensure your most important business requirements are addressed. TEC offers demo script creation as part of its comprehensive offerings for software evaluation and selection projects—for more information see* *TEC's Software Evaluation and Selection Services.*

TEC Analyst Observations on Adeaca's Advanced Projects for Microsoft Dynamics AX

Large and complex project-based organizations are often forced to run a separate ERP solution along with a project management solution such as Microsoft Project or Oracle Primavera. Adeaca's solution for project-based organizations combines a market-leading project and portfolio management solution with the power of Microsoft Dynamics AX ERP. For these organizations—which span project manufacturing and engineering, civil engineering and construction, and professional services industries—this combination delivers a level of capabilities that is difficult to match with any other single ERP solution.

With Advanced Projects for Microsoft Dynamics AX, project-centered organizations are able to:

- Manage all critical business processes in a single integrated solution

- Eliminate reliance on point solutions and error-prone data translations between business applications

- Standardize and improve process coordination across the enterprise

- Achieve real-time visibility into project performance for timely and informed decision making

The solution competes with Tier 1 ERP solutions from SAP, Oracle, and IFS, and indirectly with the point solutions for project management such as Oracle Primavera and Microsoft Project. The majority of its customers are large organizations. Adeaca currently has installations serving more than 40 global customers with revenues between $30 million and $28 billion (USD) that have more than 120 locations and 12,000 users in total.

Per the data collected and reviewed by TEC, Advanced Projects for Microsoft Dynamics AX has industry-leading capabilities in five of the eight modules in the ERP for Services software model. These industry-leading modules are: portfolio and project management; resource planning and scheduling; time and expense management; knowledge management, collaboration, analysis; and third-party integration.

The product demonstration given to TEC gave a great look into the power and capabilities built into the solution. And, being built on and certified for Microsoft Dynamics AX, the product has a familiar interface—making it is easy to learn and use.

Any project-based organization struggling to bring complex projects and portfolios under control should take a serious look at Advanced Projects. The solution is one of the few that will help the organization fully integrate operational and financial processes into a single, advanced ERP system.
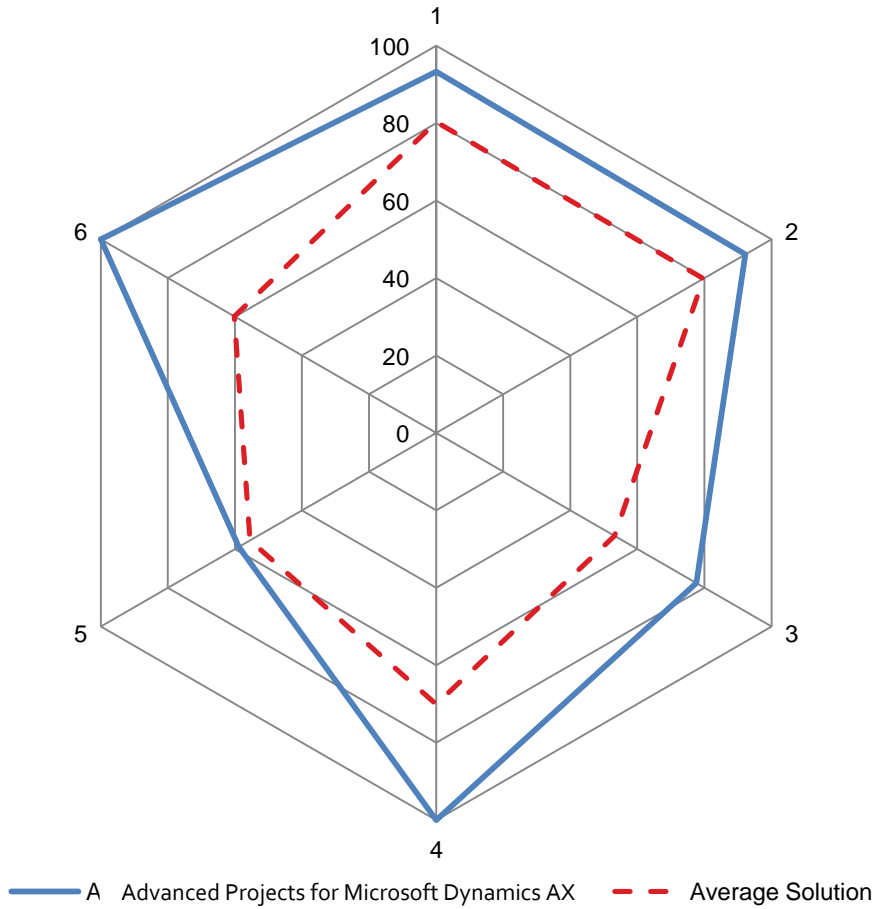
Detailed Functionality Graphs for Adeaca's Advanced Projects for Microsoft Dynamics AX

The following functionality benchmark graphs represent the quantity of support by Advanced Projects for Microsoft Dynamics AX for the functionality within each module identified in the TEC Focus Indicator, on a scale of 0 to 100 points. The closer the plotted value is to 100 (toward the outside in spider graphs, toward the top in bar graphs), the more functionality Advanced Projects for Microsoft Dynamics AX supports. The functionality of Advanced Projects for Microsoft Dynamics AX is shown in blue; an average of what competitor solutions offer is shown in red.
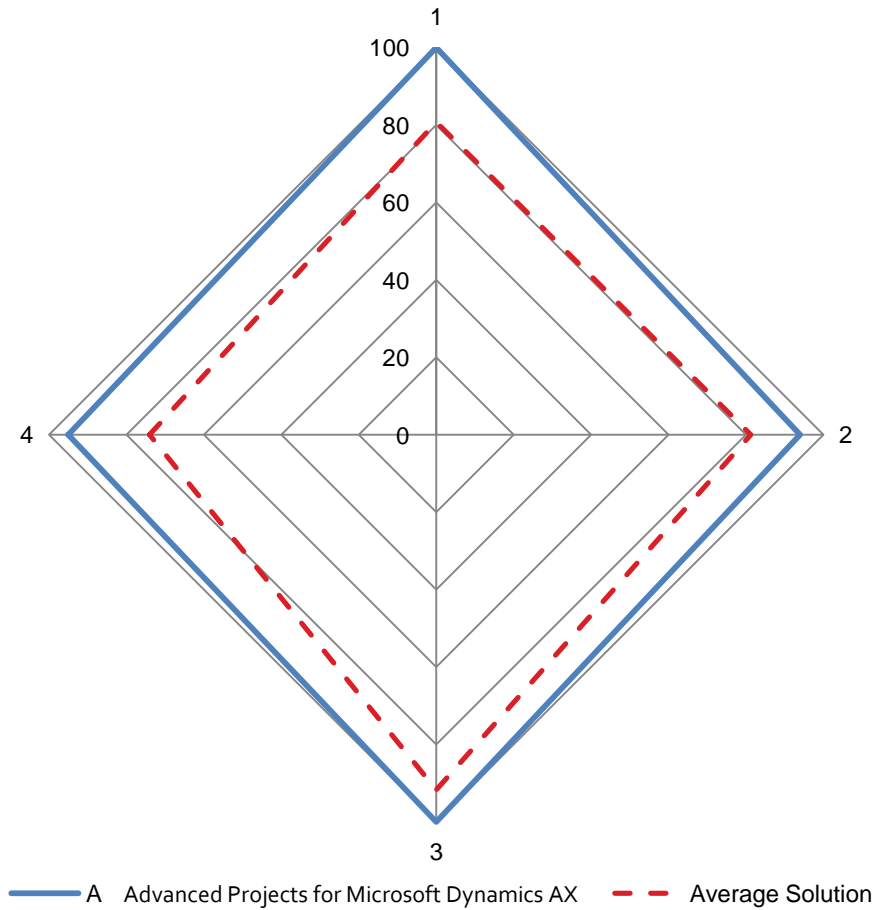
Portfolio and Project Management

Project portfolio management organizes a series of projects into a single portfolio consisting of reports that capture project objectives, costs, timelines, accomplishments, resources, risks, and other critical factors. Executives can regularly review entire portfolios, spread resources appropriately, and adjust projects to produce the highest departmental returns. As its name implies, project portfolio management groups projects so that they can be managed, the same way an investor would manage stocks, bonds, and mutual funds.

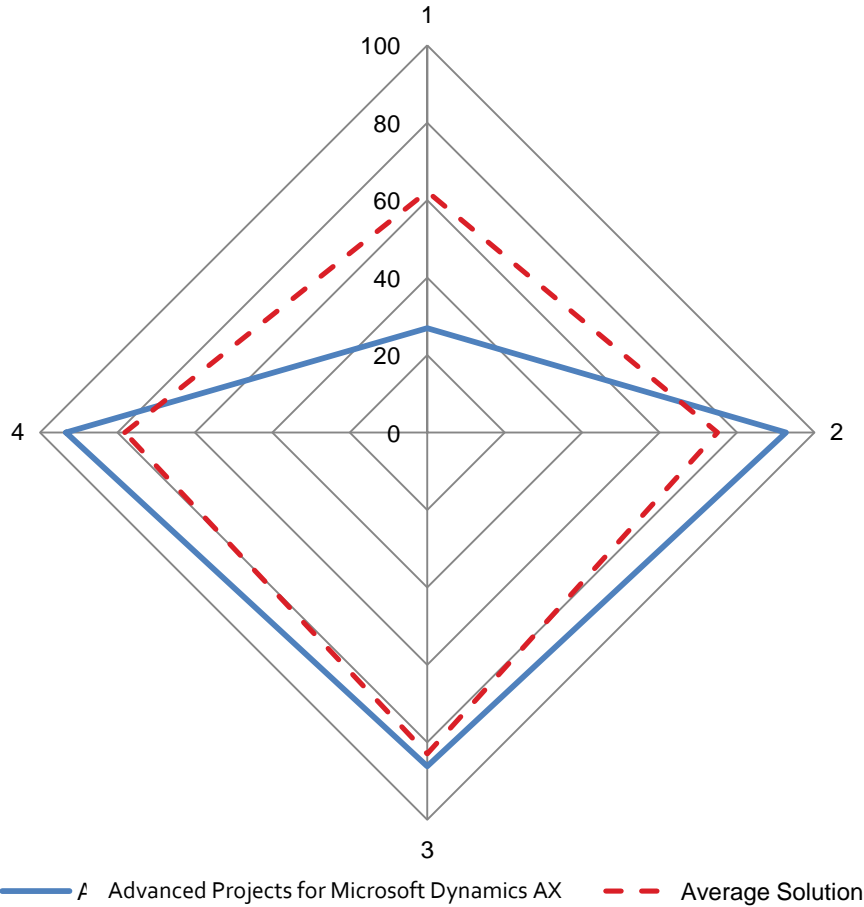|	Criteria	Advanced Projects Score	Average Score
1	Portfolio Management	93.3	80.3
2	Project Management	92.2	79.7
3	Process Management	77.6	53.2
4	Workflow Management	100	70.1
5	Risk Management	58.8	55.5
6	Earned Value Management	100	60.2

Resource Planning and Scheduling

Resource planning and scheduling comprises the efficient and effective deployment of an organization's resources when they are needed. Such resources may include financial resources, inventory, human skills, production resources, or information technology.

	Criteria	Advanced Projects Score	Average Score
1	Resource Allocation	100	80.7
2	Multiple User Management	94.0	81.3
3	Contacts	100	91.7
4	User Preferences	95.0	74.0

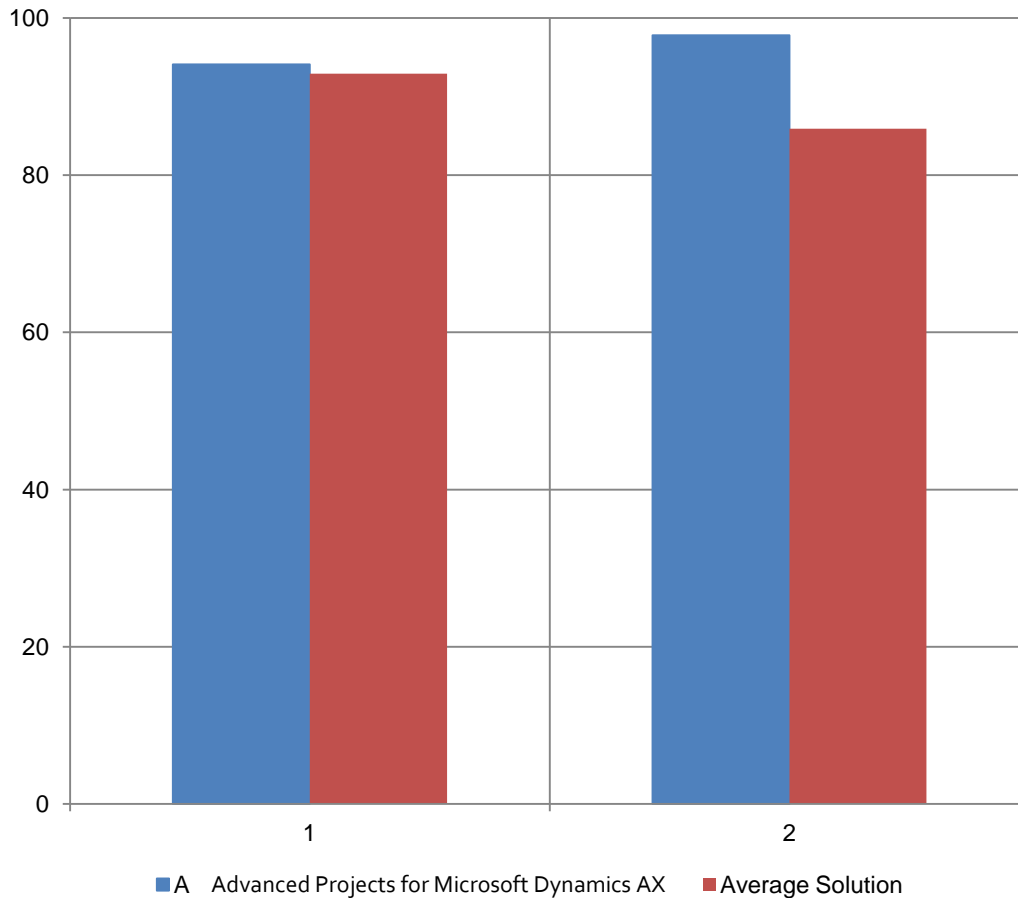## Opportunity, Contact, and Contract Management

Opportunity management systems (OMS) store sales opportunities and related information. Each sales lead can be tracked with information such as source, type, worth, status, likelihood of closure, etc. An OMS can also perform other related tasks, such as prioritizing sales calls and generating analyses that assist the fine-tuning of marketing strategies. Contract management systems provide tools to create and edit contracts, as well as to monitor and manage the provision of service in line with the agreed upon terms and conditions. Contact management systems enable organizations to easily store and find contact information such as names, addresses, and telephone numbers. Sophisticated contact managers provide reporting functions and allow several people in a workgroup to access the same database of contacts. Some also provide calendar functions, which blurs the line between contact managers and personal information managers (PIMs).

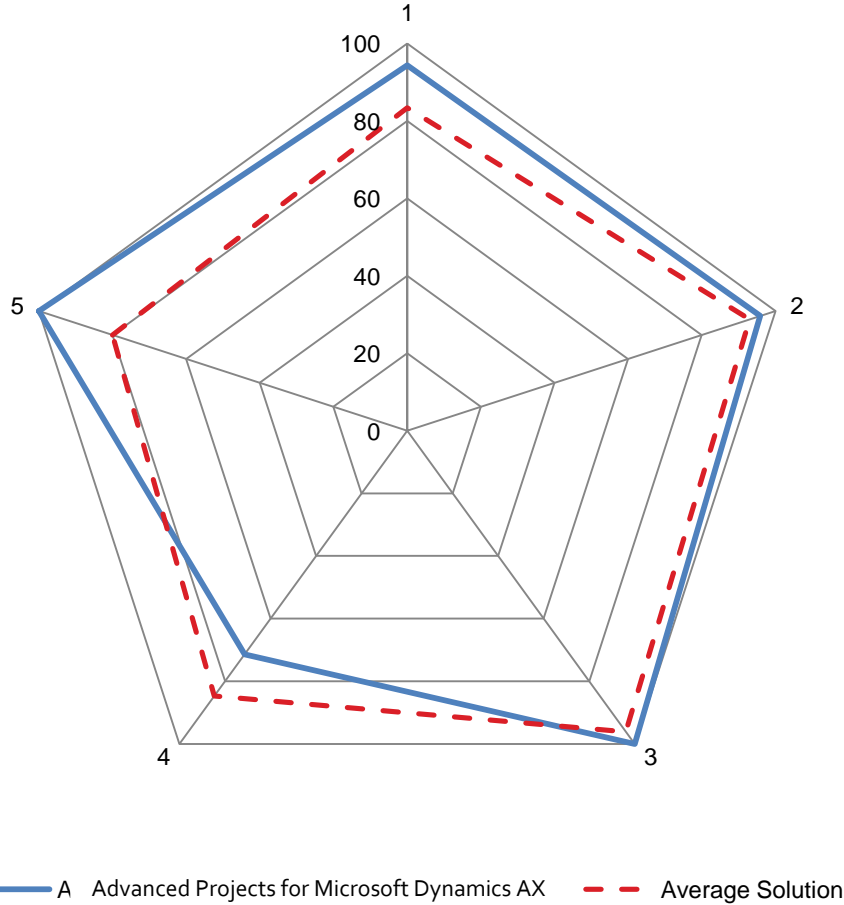|	Criteria	Advanced Projects Score	Average Score
1	Customer Service and Support	26.9	62.2
2	Sales Management	92.7	75.0
3	Contract Management and Creation	86.2	83.0
4	Account and Contact Management	93.3	78.1

Time and Expense Management

Time management refers to the development of processes and tools that increase efficiency and productivity. Time management tools include electronic time sheets that capture both work- and non-work-related activities, thus allowing organizations to capture and track data for payroll and project-related activities. Expense management refers to tools that streamline and automate the submission and approval of multiple expenses and expense types, such as travel, lodging, car rentals, meals, etc.

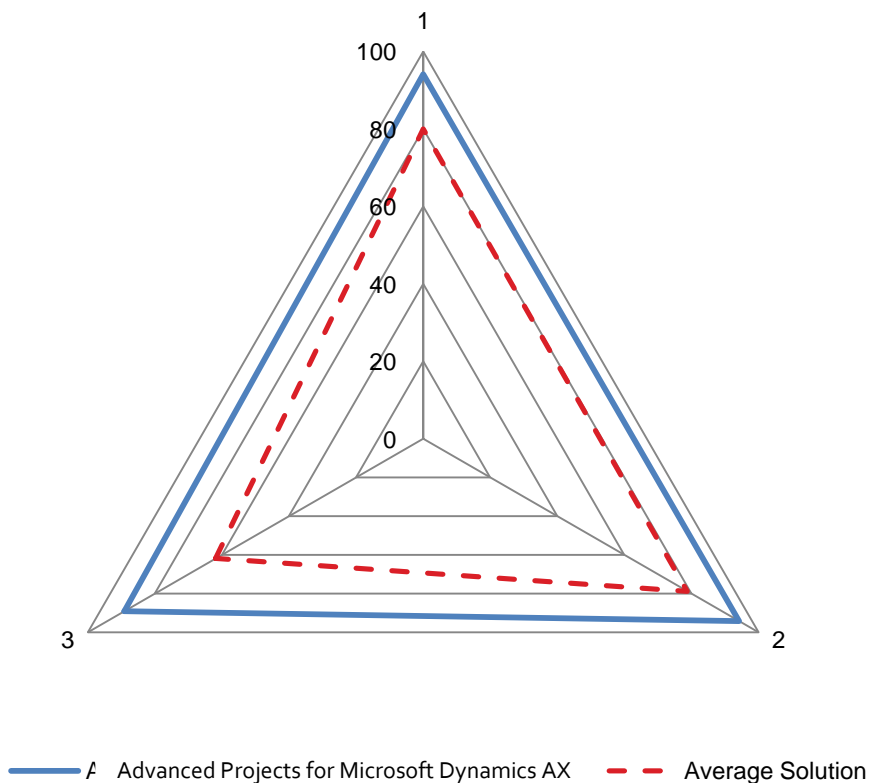|	Criteria	Advanced Projects Score	Average Score
1	Time Management	94.1	92.9
2	Expense Management	97.8	85.9

Budgeting, Costing, and Billing

A financial management system as part of a professional services automation (PSA) solution automates the tracking and submission of project budgets, costs, and assets. In addition, it provides the capability to track multiple billable details and generate customized invoices.

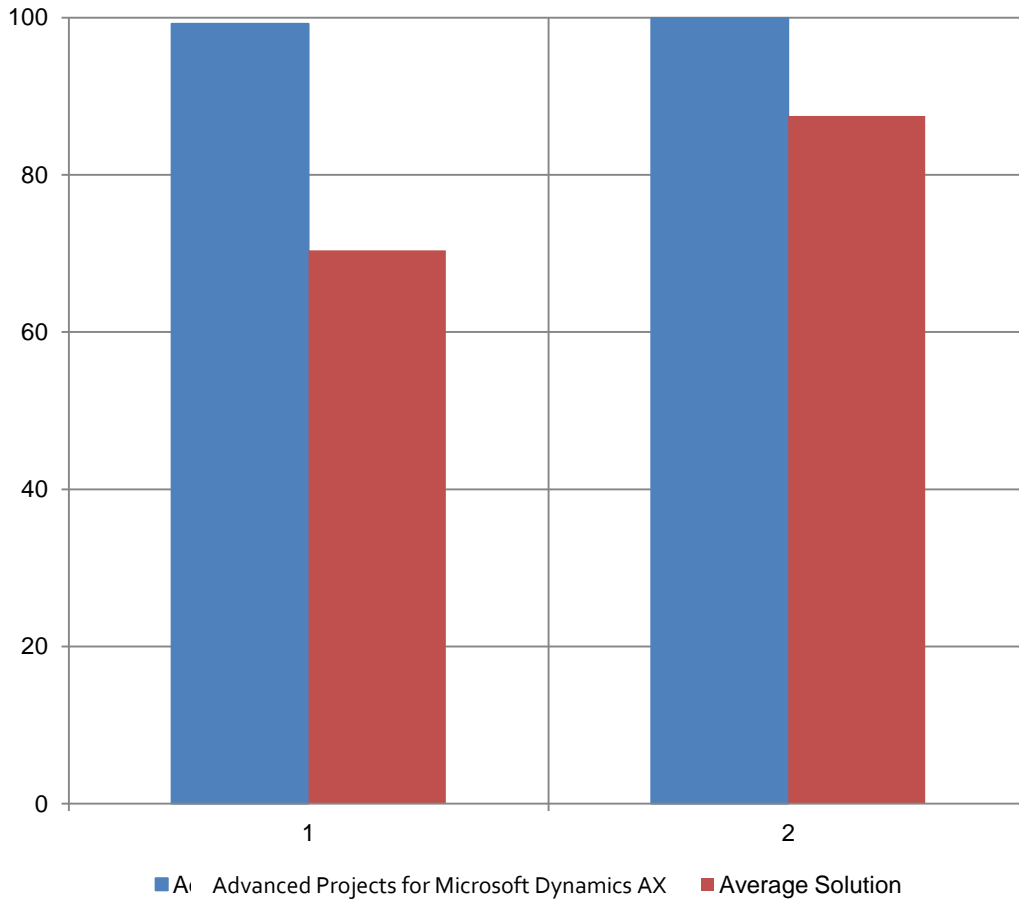|	Criteria	Advanced Projects Score	Average Score
1	Budgeting and Transactions	94.4	83.4
2	Project Billing	95.9	93.0
3	Invoice Generation	100	96.1
4	Project Costing	71.4	84.7
5	Resource Sharing	100	80.0

Knowledge Management, Collaboration, and Analysis

A major focus of knowledge management is to identify and gather content from documents, reports, and other sources and to be able to search that content for meaningful relationships. Collaboration and analysis capabilities are also vital to services organizations.

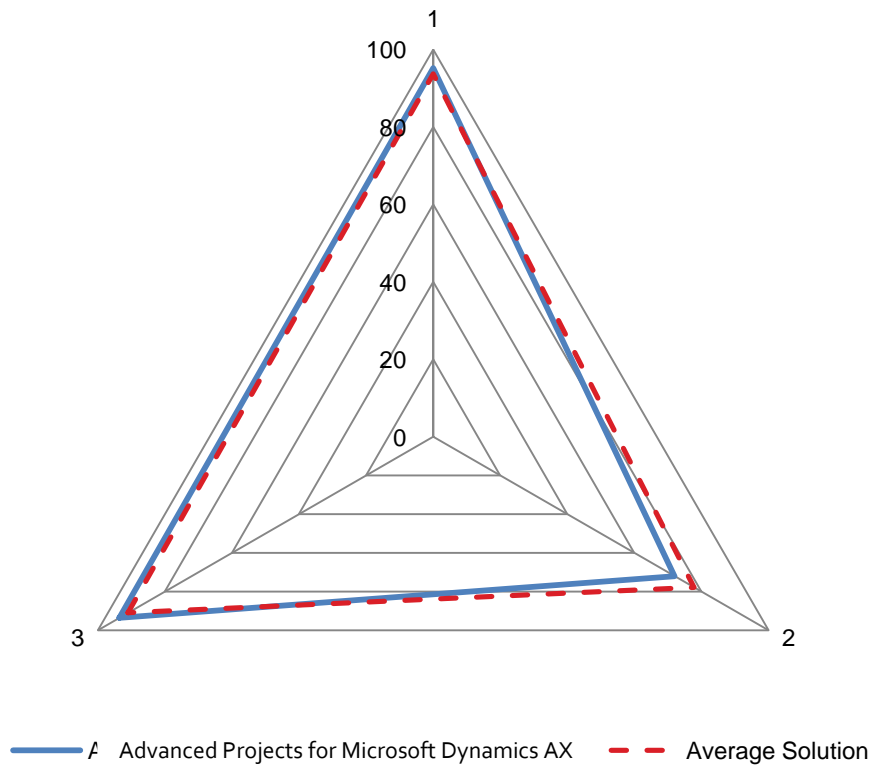|	Criteria	Advanced Projects Score	Average Score
1	Business Intelligence and Reporting	94.1	80.0
2	Document and Records Management	94.2	78.8
3	Collaboration	89.1	61.9

Third-party Integration

Numerous best-of-breed professional services automation (PSA) and project portfolio management (PPM) solutions integrate with third-party project management systems, customer relationship management (CRM), and back-office systems to provide complete PSA functionality for organizations.

	Criteria	Advanced Projects Score	Average Score
1	Project Management Application	99.2	70.4
2	Integration with Other Applications	100	87.5

Back-office Functionality

Back-office functionality refers to the components of the solution which do not interact directly with the customer. It provides the functionality for internal operations, such as financials, human resources, and procurement.

	Criteria	Advanced Projects Score	Average Score
1	Financials	95.2	93.7
2	Human Resources	72.0	77.8
3	Procurement Management	93.6	91.0

About Technology Evaluation Centers

Technology Evaluation Centers (TEC) is a software advisory firm helping organizations take the complexity and risk out of finding the right software solution. TEC helps organizations of any size, from both the private and public sector, through all phases of the technology decision life cycle, with practical, impartial, and expert decision support services that drive business success.

TEC's online evaluation centers contain in-depth research and catalog vendors' support for thousands of enterprise software features and functions, making TEC a leading resource for IT decision makers around the world.

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