



CASE STUDY: INCORRECTLY LICENSING DYNAMICS CAN COST YOU

How an Oil Refinery Rightsized its Microsoft Dynamics Investment

Overview

An oil refinery cooperative wanted to maximize its Microsoft Dynamics AX licensing to ensure the company was getting the full benefits from its software investment. The firm reached out to Fusion Alliance to assess their current Dynamics AX environment, provide an evaluation of existing licensing and outline recommended steps to move forward.

Market Reality

Enterprise resource planning (ERP) software like Dynamics AX is a critical tool many businesses use to manage day-to-day functions. By implementing Dynamics AX, companies can integrate multiple facets of their operations into a single database and interface. Dynamics AX allows clients to customize the software to industry-

and company-specific applications and information. However, in order to maximize the benefits, companies must have the knowledge and resources to implement the software and customize it appropriately. If those assets are not available internally, it is wise to choose a strategic partner with such expertise.

Business Opportunity

This company had implemented Dynamics AX to create an environment where its internal users (employees) and external users (clients) could operate within an enterprise application. But after installing Dynamics AX, the firm realized it was not maximizing the full investment in the software.

The company decided to seek help from industry experts to evaluate

Objectives

- Assess existing customizations of Microsoft Dynamics AX
- Complete a role analysis
- Create a detailed licensing plan

Approach

- Examine how Microsoft Dynamics AX was implemented and then customized to maximize performance and usability
- Interview key staff members to understand role-based usage

Business Impact

- Understanding of current usage patterns
- Identification of opportunities for improvement
- Maximized usability for both employees and clients

Keys to Success

- Participation of key employees and software users
- Extensive Microsoft Dynamics AX knowledge and experience

current software usage and provide recommendations to move forward with fully realizing the benefits. The goal was to save money by utilizing the different licensing roles correctly.

The Solution

The first step toward a solution was to assess the existing installation,

configuration and customization of the current Dynamics AX implementation. Fusion simultaneously collected usage information and reviewed customizations. By interviewing key staff members, Fusion was able to better understand how the client utilized Dynamics AX daily.

The comprehensive evaluation paved the way for the next step, tackling the licensing. Fusion discovered that the existing licensing was set up so that different employees (system users) were given higher, more comprehensive levels of licensing than was required for their particular roles.

To explain, hypothetically, an account clerk who enters accounts receivable should typically need licensing and privileges suited to that role only. But some companies incorrectly assign a highly expensive, full enterprise license that costs significantly more – and then reconfigure that user to suit the limited role. Multiply that by scores of employees, and thousands of dollars are unnecessarily being spent.

For this client, Fusion discovered such issues. The customizations in the existing implementation were developed without specifying an access privilege or were assigned to the wrong roles, privileges or duties, elevating them to enterprise status when unnecessary. After reviewing all the licensing, Fusion provided a new, detailed license matrix that maximized the distribution of Enterprise, Functional, Task and Self-Service licenses. Fusion also provided a custom code review and roles-analysis document.

Overall, by reviewing Fusion's assessment and matrix, the client now understood both the Dynamics AX software customizations and the best

ways to move forward to maximize the licensing investment and distribution of the license by role or duty. After the client completed the recommended action items the company renewed their licensing agreement with Microsoft at a much lower cost, saving around \$100,000.

Relevant Takeaways

Because Microsoft Dynamics AX is highly customizable and allows users to integrate different systems, it is beneficial to bring in industry experts to evaluate the implementation and provide quality recommendations. By relying on an outside evaluation, companies can more objectively look at their applications and usage and make the changes necessary to benefit their bottom line and strategic vision.

About the Client

This client is a Midwestern oil exploration, production, refining and marketing company that serves five states. The company is a farmer-owned cooperative, one of the largest agriculture cooperatives in the U.S.



Fusion Alliance

About Fusion

Fusion Alliance is a Microsoft Gold Dynamics ERP and CRM partner with longstanding roots in the cloud, specializing in digital, data and technology. Fusion is highly regarded as an enterprise solution provider, delivering the practical insights, engaging customer experiences and human-driven technologies that transform the way our clients envision and shape their businesses.

That's why businesses across multiple industries have relied on Fusion's expertise and partnership for over 25 years. Fusion Alliance is the catalyst that moves your ideas to execution.

For more information

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