

Microsoft Dynamics AX

Licensing Guide

Microsoft Dynamics AX
May 2016



Table of Contents

Subscription Licensing Requirements	2
Internal and External Users	2
Licensing Requirements for Internal Users.....	3
Multiplexing.....	4
Business Process Outsourcing	5
Dual Use Rights.....	5
Scoping Based on Security Roles	6
Overview of Security Roles.....	6
Available SLs for Microsoft Dynamics AX	7
Microsoft Dynamics AX Self Serve User SL	7
Microsoft Dynamics AX Task User SL	7
Microsoft Dynamics AX Enterprise User SL.....	8
Microsoft Dynamics AX Device SL	8
Subscription Capacities	8
Default File/BLOBs Storage Capacity.....	8
Default SQL Storage Capacity.....	8
Default Production Instance.....	9
Default Sandbox Tier 1	9
Default Sandbox Tier 2	9
Power BI	9
Optional Add-ons for Microsoft Dynamics AX.....	9
Sandbox Tier 1 Add-on	10
Sandbox Tier 2 Add-on	10
Sandbox Tier 3 Add-on	10
Sandbox Tier 4 Add-on	10
Sandbox Tier 5 Add-on	10
Additional Storage Add-On.....	11
Retail Scale Unit.....	11
eCommerce	11
Visual Studio	11
Support Policies	11
Subscription Support Plan.....	11
Professional Direct Services	12
International Availability	13
Microsoft Dynamics Lifecycle Services.....	14
Licensing Programs	14
Microsoft Volume Licensing.....	14
What is Volume Licensing?	14
Eligible Volume Licensing Programs.....	14
Cloud Solution Provider Program (CSP).....	15
Existing Customers.....	15
On-Premises Customers Transitioning On-Premises.....	15
On-Premises Customers wishing to Access the Microsoft Dynamics AX – Microsoft Cloud ERP Service.....	15
Appendix A: Customization and Licensing Requirements	18
Assigning Multiple Roles to a Single User.....	18
Changing Menu Items Associated with a Role.....	18
Changing Menu Items Associated with an Individual	18
Creating Menu Items.....	18
Appendix B: Security Roles by User SL Level.....	20
Appendix C: Severity Definitions	26
Appendix D: Ensuring Accurate Licensing	27

Using This Guide

Use this guide to improve your understanding of how to license Microsoft Dynamics AX, Microsoft's new cloud ERP service, built on and for Microsoft Azure. It provides organizations with a service that supports their unique requirements and helps them rapidly adjust to constantly changing business environments, without the hassle of managing infrastructure.

Microsoft Dynamics AX brings together a set of ERP, BI, Infrastructure, compute and database services in a single offering, that enables organizations to run industry-specific and operational business processes that are extendable with specific solutions from (business) partners. Organizations can match their business growth by easily adding users and business processes with a 'pay-as-you-go' model.

Designed to accelerate business, Microsoft Dynamics AX helps people make smarter decisions quickly with an intelligent user interface, transforms business processes faster with proven methodologies and practices, and enables organizations to do business virtually anywhere, anytime with the choice, flexibility, and powerful data security of the Microsoft cloud.

This document does not apply to Microsoft Dynamics NAV, Microsoft Dynamics GP, Microsoft Dynamics SL, or Microsoft Dynamics AX 2012 or prior versions. This guide is not intended to influence the choice of Microsoft Dynamics products and services. Some dates, features, and functions that Microsoft anticipates will be included in a future release of Microsoft Dynamics AX are based on current expectations, and are subject to change without notice. The examples presented in this guide are illustrative. Microsoft reserves the right to review or update this document at any time without notice.

For help determining the right technology solution for any given organization, including the license requirements for a specific product or scenario, consult with your Microsoft account team.

This guide is a part of the online services terms and product terms solely as applicable to Microsoft Dynamics AX.

Introduction

Microsoft Dynamics AX provides a simple and transparent cloud pricing model. The new multi-tiered licensing model offers a variety of benefits, including:

- **Predictable Pricing:** This new model provides customers with a cloud friendly per user per month model that is inclusive of infrastructure.
- **Faster Quoting:** The new Microsoft Dynamics AX has three user types instead of four, which helps speed up the quoting process.
- **Cross Product Value:** Adding read access across Dynamics products can reduce concerns around multiplexing for companies implementing multiple dynamics products.
- **Self-Serve Value:** Adding Read access within Microsoft Dynamics AX to the self-serve user helps drive incremental value at a low cost to customers.
- **Driving Broad Adoption:** Moving all time and expense to the self-serve user allows companies to drive broader adoption of Microsoft Dynamics AX.

Please note that all implementations require a profiling of the project in the pre-purchasing phase. This profiling is intended to help improve the success of the implementation. Organizations interested in

Microsoft Dynamics AX should work with the sales representative to use this profiling exercise in their purchasing cycle. Objectives of the profiling are:

- First of all, with a release as innovative as Dynamics AX using all the cutting edge Microsoft technologies in a business critical application, it is crucial to do these implementations right.
- The release of Dynamics AX is a rolling thunder; we are rapidly rolling out country- and industry capabilities, deployment options, and upgrade tools.
- Azure is innovating at cloud speed and we are bringing relevant innovation with the same speed to ERP customers, as it relates to performance, security and data protection.
- We believe in continuous learning, we learn from every customer we onboard and it is this learning that makes the next one better.

To learn more please contact your sales representative.

Updates in This Version of the Licensing Guide

This is a summary of the updates to this document as part of the May 2016 revisions.

- Sandbox 2 is now provided for the life of the customer's subscription
- Updated the default Power BI section
- Added Visual Studio section
- Updated the Cloud Solution Provider Program section

Subscription Licensing Requirements

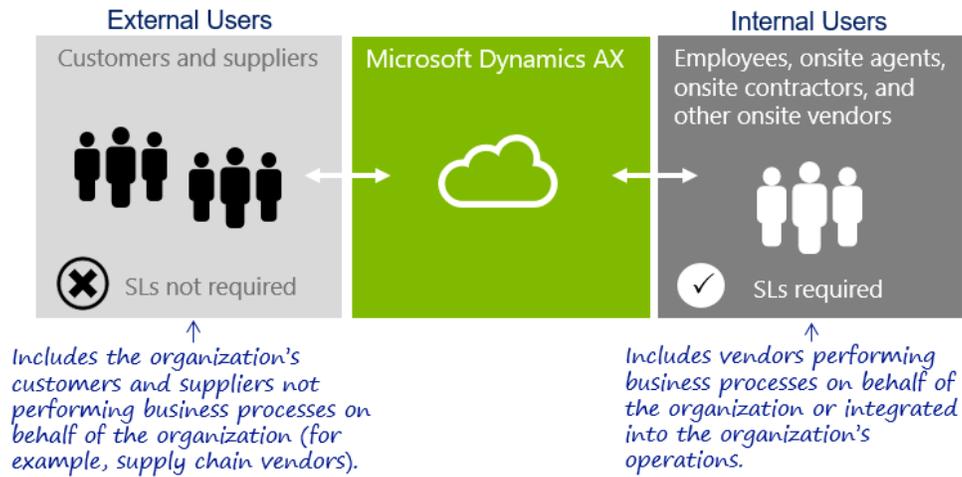
Internal and External Users

With Microsoft Dynamics AX you must license each internal user who will access the service. However, access by external users is included with the subscription and do not require subscription licenses ("SLs"). External users are users that are not an employee, onsite contractor, or onsite agent of the customer or its affiliates.

In other words, end customers (customers of the Microsoft Dynamics AX customer) do not require a SL to access Microsoft Dynamics AX to manage their accounts and orders. However, end customers may not use Microsoft Dynamics AX to manage any portions of their business. In this sense, the definition of external users does not extend to onsite contractors or vendors. External user licenses cannot be used to provide business processes on the customer's behalf.

Note: Offsite vendors are considered external users only when their time is shared in between multiple customer organizations (for example, IT support service vendors serving multiple customer organizations) and they are not in an employee-like relationship.

Figure 1: Internal vs. external users



Licensing Requirements for Internal Users

You license access to the Microsoft Dynamics AX service by purchasing a subscription license (SL) for every internal user who directly or indirectly accesses the service.

Microsoft Dynamics AX has two types of SLs:

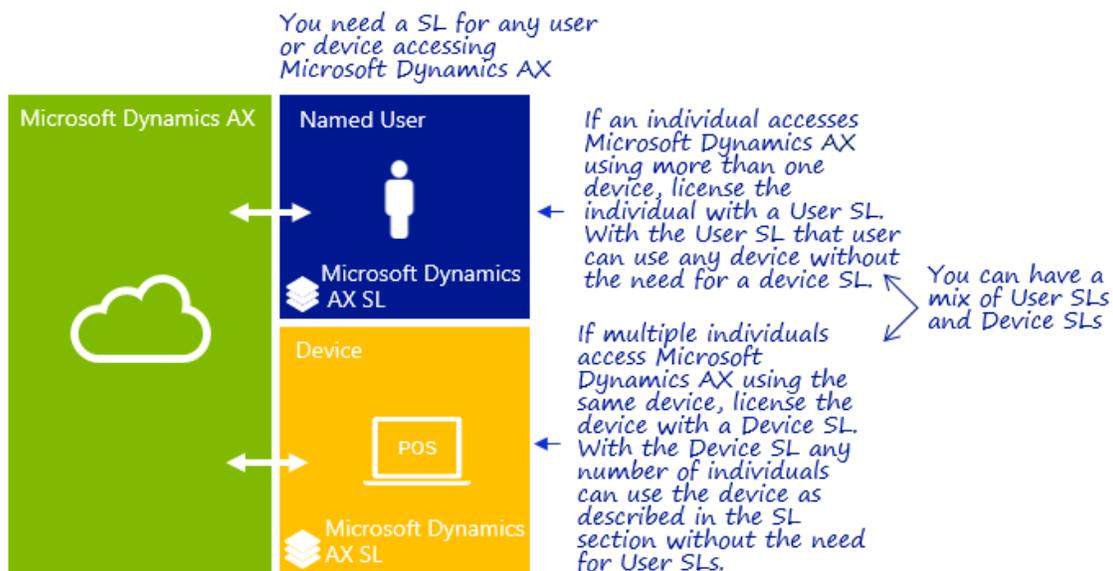
- User SLs are assigned on a “named user” basis, meaning each user requires a separate User SL; User SLs cannot be shared but an individual with a User SL may access the service through multiple devices.
- Device SLs are assigned to license a device. With the device SL any number of users can use the licensed device without the need for a separate User SL.

The User and Device SL grants non-perpetual rights (with no buy-out rights) to the use of the Microsoft Dynamics AX service. As long as you are current on your subscription payments and adhere to the Terms found in the [Product Terms and the Online Service Terms](#), you will have access to the current version of Microsoft Dynamics AX.

Note: Only the user or the device requires a SL, not both. If the user of a device is licensed with a User SL, then the device *does not* need a Device SL. Likewise, if the device is licensed with a Device SL, then the user *does not* need a User SL.

The license includes access rights to the default Microsoft Dynamics AX production instance included in the subscription account, and every additional Microsoft Dynamics AX sandbox instance associated with the same subscription account

Figure 2: Basic licensing requirements for Microsoft Dynamics AX



Multiplexing

Multiplexing refers to the use of hardware or software that customer uses to pool connections, reroute information, reduce the number of devices or users that directly access or use the Microsoft Dynamics AX service. Multiplexing does not reduce the number of SLs of any type required to access the Microsoft Dynamics AX service. Any user or device that accesses the Microsoft Dynamics AX service—whether directly or indirectly—must be properly licensed.

- Users and devices are required to have the appropriate license regardless of their direct or indirect connection to the Microsoft Dynamics AX service.
- Any user or device that accesses the service, files, data, or content provided by the service that is made available through an automated process requires a Microsoft Dynamics AX SL.
- The number of tiers of hardware or software between the Microsoft Dynamics AX service and the user or devices that ultimately use its data, services, or functionality does not affect the number of SLs required.

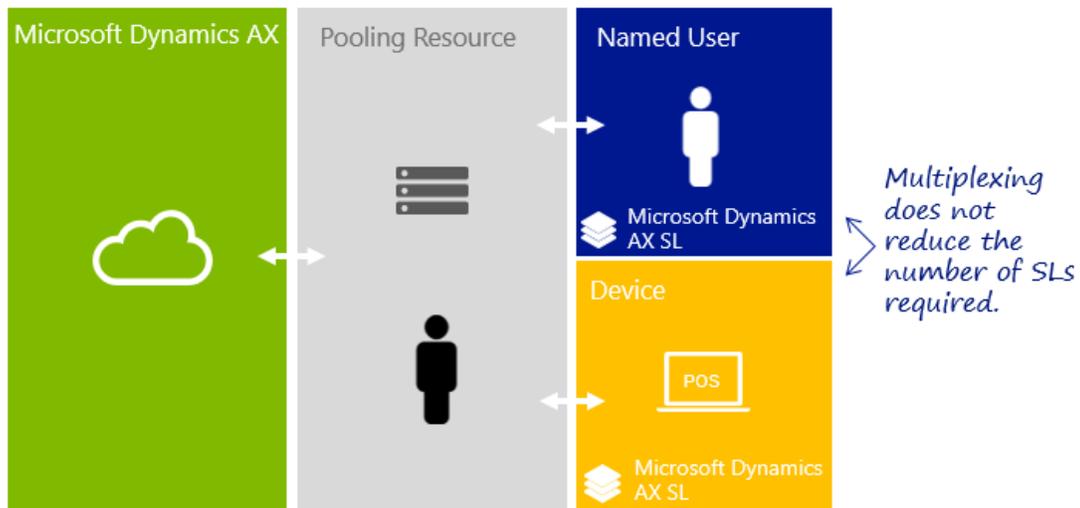
Microsoft Dynamics AX SLs are required for users or devices that directly input, query, or view data from the Microsoft Dynamics AX service. Similarly, Microsoft Dynamics AX SLs are required for users or devices that input data into, query, or view data from Microsoft Dynamics AX service through a pooling device. This includes users or devices who view data through web-based applications or enter information into a database through an intermediary product.

Please note that Microsoft Dynamics CRM Online Professional or Enterprise User SL have the right to indirectly read Microsoft Dynamics AX application data without a Microsoft Dynamics AX User SL. They are, however, not licensed to copy such data to Microsoft Dynamics CRM Online, nor access the Microsoft Dynamics AX interface.

For additional information about multiplexing refer to the Microsoft Volume Licensing Brief [Multiplexing—Client Access License \(CAL\) Requirements](#).

Note: Licensed users may manually rekey information (when coming from non-licensed users) into the Microsoft Dynamics AX service. This scenario is not considered multiplexing.

Figure 3: Multiplexing



Business Process Outsourcing

You may not use Microsoft Dynamics AX to provide business process outsourcing services to your clients or customers.

Dual Use Rights

One of the advantages of Microsoft Dynamics AX is the option to deploy either in Microsoft’s cloud or in a private on-premises or partner-hosted cloud. In some cases, customers may want to deploy both modes simultaneously, for migrating a Microsoft Dynamics AX on-premises to Microsoft Dynamics AX cloud, running private Dev/Test deployments in Microsoft Azure. With Dual Use Rights, Microsoft Dynamics AX users licensed with the required SL do not need to acquire CALs to access AX Server instances.

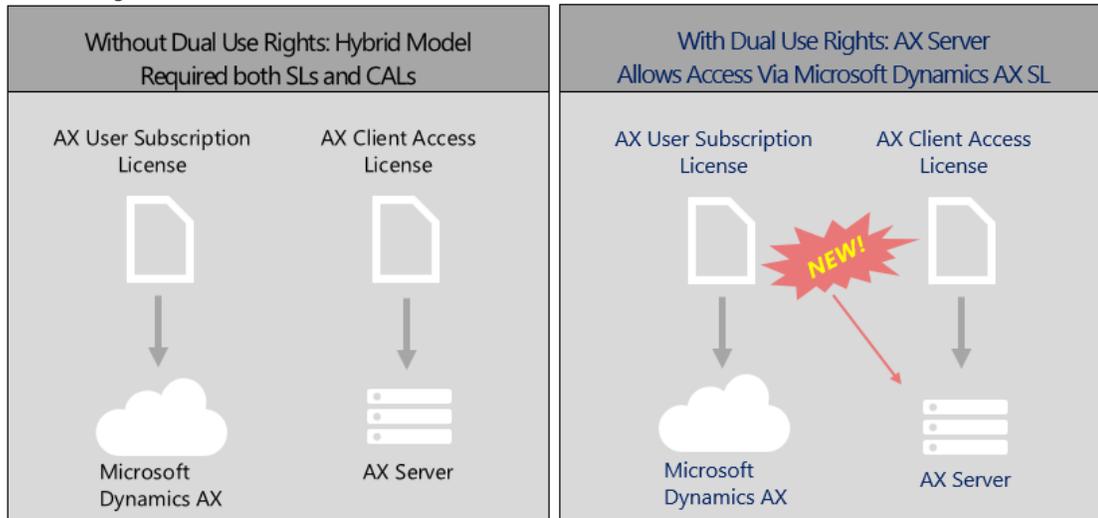
Users licensed with Microsoft Dynamics AX SLs have use rights equivalent to a CAL for the purpose of accessing equivalent on premise workloads. Microsoft Dynamics instances must still be licensed with the appropriate Microsoft Dynamics AX server licenses, as must all related CALs and supporting servers (e.g., Windows Server and CAL(s)).

Dual Use Rights convey Microsoft Dynamics AX Server license access rights to Microsoft Dynamics AX SLs. Microsoft Dynamics AX Server CALs have no reciprocal rights to access functionality provided exclusively to Microsoft Dynamics AX SLs, nor do Dual Use Rights imply equivalent capabilities between Microsoft Dynamics AX Server and Microsoft Dynamics AX licenses.

Qualifying License:	AX 2012 R3 Server CAL Right:
Microsoft Dynamics AX Enterprise User SL	AX 2012 R3 Enterprise User CAL AX 2012 R3 Functional User CAL
Microsoft Dynamics AX Task User SL	AX 2012 R3 Task User CAL
Microsoft Dynamics AX Self-Serve User SL	AX 2012 R3 Self-Serve User CAL
Microsoft Dynamics AX Device SL	AX 2012 R3 Task Device CAL

Dual Use Rights are conveyed through the Microsoft Dynamics AX 2012 server license, so Dual Use Rights may be exercised only with servers licensed with Microsoft Dynamics AX 2012 or subsequent versions.

Figure 4: Dual Use Rights

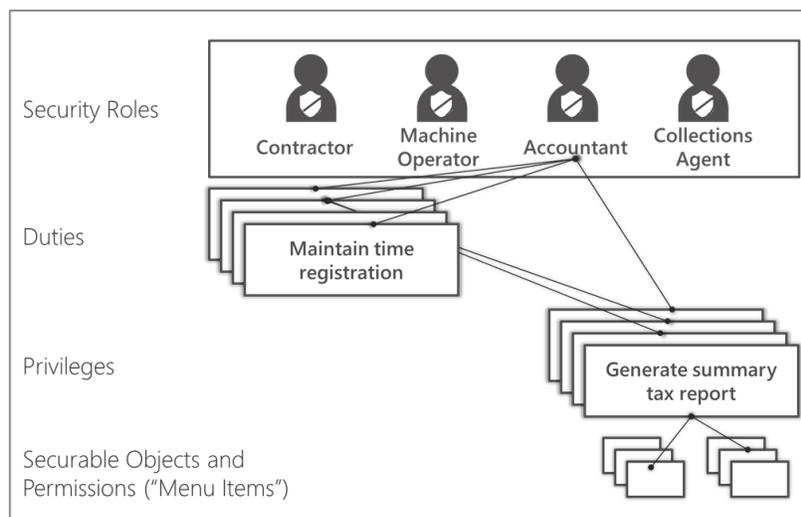


Scoping Based on Security Roles

Overview of Security Roles

Providing users with access to the solution functionality is done by assigning each user one or more Security Roles. Microsoft Dynamics AX Security Roles combine meaningful packages of solution functionality and access rights required to perform actions relevant to that role.

Figure 5: Assigning a Security Role to a user provides access to solution functionality



To make it easier to understand the licenses required, each Microsoft Dynamics AX Security Role has a pre-determined user type. When you assign Security Roles to users, you then know what User SL those users require.

For example, in a manufacturing organization, the Accountants and Field Service Technicians require different use rights. By assigning those user groups to the appropriate Security Role, they get the functionality they need and you know the User SL type that is required.

Figure 6: Examples of SLs based on use rights

User Examples	Use Rights	SLs
Accountant	Financials	Enterprise SL
Field Service Tech	Maintain service logs	Task SL
All employees	Update personal HR information	Self Serve SL

Notes:

- Customers can assign multiple Security Roles to one user, in which case the highest user SL type required covers all the user rights.
- Customers have the flexibility to configure or customize Security Roles. This may impact the license required for the new/modified Security Roles. Please refer to the [Appendix A](#) for more information about how such customization can impact licensing requirements.

Refer to [Appendix B](#) for a list of the standard Security Roles and their associated User SLs.

Available SLs for Microsoft Dynamics AX

Microsoft Dynamics AX offers three levels of User SLs and one Device SL. To provide you with the flexibility to license the service based on how your users use Microsoft Dynamics AX functionality you have the ability to mix-and-match these licenses within a deployment.

As you progress from the lowest level User SL (Self Serve) to the highest level (Enterprise), the user is licensed to use Microsoft Dynamics AX in ways that will help provide more value. Customers therefore have the flexibility to decide which level of investment to make for any given individual based upon the functions that user is performing on behalf of the organization.

Please note there is a minimum of 50 Enterprise User SLs and/or equivalent Device SL per tenant. It takes 2.5 Device SLs to equal 1 Enterprise User SL. For example, a customer could meet the minimum requirement with 10 User SLs and 100 Device SLs.

Microsoft Dynamics AX Self Serve User SL

Self Serve User SL grants a user rights for their own use and not for, or on behalf of, other individuals: (i) to record any type of time, (ii) to record any type of expenses, (iii) manage personal information, (iv) create requisitions, and (v) manage budgets related to these activities. In addition, the Self Serve User SL can be granted read access to any data contained in Microsoft Dynamics AX by the administrator.

Microsoft Dynamics AX Task User SL

The Task User SL grants a user rights to: (i) approve invoices, (ii) approve all Self Serve related transactions, and (iii) write access to document, record, edit and respond to inquiries related to the following capabilities: quality control, warehousing, receiving, shipping, transportation operations, service orders, production orders and purchasing and sales orders.

Microsoft Dynamics AX Enterprise User SL

Enterprise User SL grants an employee unrestricted full access rights to Microsoft Dynamics AX. In addition, Microsoft Dynamics AX Enterprise User SL may only read CRM Online application data, but are not licensed to copy such data to Microsoft Dynamics AX, nor access the Microsoft Dynamics CRM Online interface.

Microsoft Dynamics AX Device SL

The Device SL grants rights for multiple users assigned to a device to (i) operate a point of sale device, (ii) operate a warehouse device, and (iii) operate a store manager device.

- “Point of Sale Device” means one device located in the Commerce location, used by any individual, for the purpose of completing customer facing sales of goods or services transactions.
- “Warehouse Device” means one device dedicated to Performing Warehousing Functions, and that may not be used for any other purposes. Each Warehouse Device must (i) not have cellular capabilities, and (ii) if the device is hand held, have a built-in barcode scanner.
- “Performing warehousing functions” means receiving, putting-away, doing internal stock transfers, picking, packing, and shipping goods plus performing inventory count checks in the context of a warehouse management system and posting output and materials consumption against production orders when captured as transfers of raw materials and finished goods between a warehouse and a production line (all other types of transactions are excluded).
- “Commerce Location” or “Store” means a physical location (static or itinerant) operated by you when closing goods or services transactions with customers.
- “Store Manager Device” means one device located in the Commerce Location, used by any individual, dedicated to performing the following tasks solely for that Commerce Location (i) managing and replenishing inventory, (ii) balancing cash registers and processing daily receipts, (iii) configuring and maintaining menu options displayed by the ISV Devices, (iv) purchasing supplies and services required to run the Commerce Location operations, (v) managing Commerce Location staff, (vi) processing reports required to analyze and manage Commerce Location results, and (vii) managing master data related to Commerce Location operations.

Subscription Capacities

Each customer enrolled in a Microsoft Dynamics AX subscription receives certain default storage, one production instance of Microsoft Dynamics AX, and some sandbox environments.

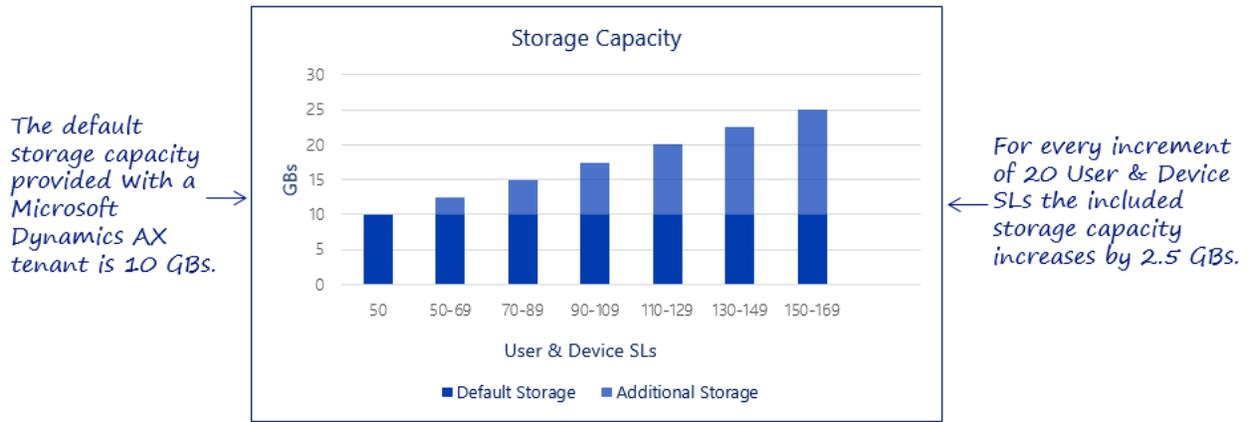
Default File/BLOBs Storage Capacity

Each customer will receive 100 GB of file/Azure Binary Large Objects (BLOBs) cloud storage for files and binary data. Additional file/blob storage if required can be purchased directly through Azure.

Default SQL Storage Capacity

At a minimum, each Microsoft Dynamics AX subscription includes 10 GB of Azure SQL database storage at no additional charge per tenant. Additional storage capacity is granted at no charge as an organization increases the number of User (Enterprise, Task, or Self Serve) and Device SLs. For every increment of 20 SLs, the included storage capacity increases by 2.5 GB. So a customer with 50 SLs receives a default storage capacity of 15 GB. At 100 SLs, the included storage capacity increases to 22.5 GB, and so on. The total SQL storage of Microsoft Dynamics AX is capped at 1 TB.

Figure 7: Storage Capacity



Default Production Instance

Each Microsoft Dynamics AX subscription offers one production instance per tenant. The production instance comes with Disaster Recovery and Highly availability. As a reminder, there is a minimum of 50 Enterprise User SLs and/or equivalent Device SL per tenant. It takes 2.5 Device SLs to equal 1 Enterprise User SL.

Default Sandbox Tier 1

One Sandbox Tier 1: Developer Instance is provided for the life of the tenant. Additional Developer Instances can be purchased separately as an optional add-on. This is a non-production single box instance that customers can use to customize Microsoft Dynamics AX and unit test their changes. The Non-Production Developer Instance Add-On license does not include any incremental default storage capacity.

Default Sandbox Tier 2

One Sandbox Tier 2: Standard Acceptance Testing Instance is provided for the life of the tenant. Additional Standard Acceptance Testing Instances can be purchased separately as an optional add-on. This is a non-production multi-box instance that customers can use for User Acceptance Testing, integration testing, and training. The Non-Production Standard Acceptance Testing Instance includes 10 GB of default storage at no additional charge.

Power BI

With Platform Update 1, the Enterprise SL will include the Power BI Pro license which provides this user access to PowerBI.com and the ability to mash up data from multiple data sources in addition to Microsoft Dynamics AX.

In addition, with the release of platform update 2, all subscription license types will include the Power BI Embedded license. This will allow all users access to the BI reports embedded within the Microsoft Dynamics AX application.

Optional Add-ons for Microsoft Dynamics AX

If you require additional subscription capacity (such as additional instances or storage), you can include these optional add-on licenses to your subscription. Subscription add-ons apply across an entire organization; they are not tied to a specific user. Subscription add-ons can be purchased at any time and remain a part of the subscription for the remainder of the subscription term.

Sandbox Tier 1 Add-on

This is a non-production single box Developer Instance that customers can use to customize Microsoft Dynamics AX and unit test their changes. Licensed users associated with a Microsoft Dynamics AX subscription can access the default Microsoft Dynamics AX Developer instance included in the subscription, and every Microsoft Dynamics AX additional instance associated with the same customer. The additional Non-Production Developer Instance Add-On license does not include any incremental default storage capacity.

Sandbox Tier 2 Add-on

This is a non-production multi-box Standard Acceptance Testing instance that customers can use for User Acceptance Testing, integration testing and training licensed users associated with a Microsoft Dynamics AX subscription can access the default Microsoft Dynamics AX Standard Acceptance Testing instance included in the subscription and every Microsoft Dynamics AX additional instance associated with the same customer. The additional Non-Production Standard Acceptance Testing Instance Add-On license includes 10 GB of default storage at no additional charge per instance.

Sandbox Tier 3 Add-on

This is a non-production multi-box Premium Acceptance Testing instance that customers can use for larger scale user acceptance testing, integration testing and training. This sandbox environment can also be used for performance testing for smaller customers or customers with lighter loads. Licensed users associated with a Microsoft Dynamics AX subscription can access every Microsoft Dynamics AX additional instance associated with the same customer. The additional Non-Production Premium Acceptance Testing Instance Add-On license includes 10 GB of default storage at no additional charge per instance.

Sandbox Tier 4 Add-on

This is a non-production multi-box Standard Performance Testing instance that customers can use for performance testing, load testing and staging along with user acceptance testing. This sandbox environment will be a representative of production environment for smaller to medium sized customers or customers with medium load. Licensed users associated with a Microsoft Dynamics AX subscription can access every Microsoft Dynamics AX additional instance associated with the same customer. The additional Non-Production Premium Acceptance Testing Instance Add-On license includes 10 GB of default storage at no additional charge per instance. Additional storage capacity is also granted at no charge per instance as an organization increases the number of User (Enterprise, Task or Self Serve) and Device SLs. For every increment of 20 SLs, the included storage capacity increases by 2.5 GB. Again, the total SQL storage of Microsoft Dynamics AX is capped at 1 TB.

Sandbox Tier 5 Add-on

This is a non-production multi-box Premium Performance Testing instance that customers can use for performance testing, load testing and staging along with user acceptance testing. This sandbox environment will be a representative of production environment for larger sized customers or customers with heavier load. Licensed users associated with a Microsoft Dynamics AX subscription can access every Microsoft Dynamics AX additional instance associated with the same customer. The additional Non-Production Premium Acceptance Testing Instance Add-On license includes 10 GB of default storage at no additional charge per instance. Additional storage capacity is also granted at no charge per instance as an organization increases the number of User (Enterprise, Task or Self Serve) and Device SLs. For every increment of 20 SLs, the included storage capacity increases by 2.5 GB. Again, the total SQL storage of Microsoft Dynamics AX is capped at 1 TB.

Additional Storage Add-On

The Additional Storage Add-On provides flexibility to increase the SQL storage capacity associated with your Microsoft Dynamics AX subscription in increments of 1 GB per Additional Storage Add-On license, for a max of 1 TB. This Additional Storage Add-on can be used to increase SQL storage across the production and/or non-production instances.

Note: The subscription storage corresponding to a customer subscription is calculated as cumulative across Microsoft Dynamics AX instances associated with the tenant.

Figure 10: Storage Add-On



Retail Scale Unit

As part of our future offering, we are considering offering a scale unit (Retail Scale Unit) that will enable businesses to run in distributed environment across datacenters to support proximity to physical locations as well as allow distributed storage and help scale out needs of retail and commerce operations. This offering will allow the ability to add one or more identical scale units that can meet the transactional compute needs of retail and commerce channels. Additional details coming soon.

eCommerce

Details coming soon.

Visual Studio

Microsoft Dynamics AX development requires Visual Studio Professional 2015 for standard development, customization and extension activities. However, if you want to run performance and load tests, you will need Visual Studio Enterprise 2015. Please note that Visual Studio licenses are not included as part of the Microsoft Dynamics AX Subscription Licenses and must be acquired separately.

Support Policies

Subscription Support Plan

The benefits included in the [Subscription Support Plan](#) are applicable for customers who license Microsoft Dynamics AX.

The support offerings include the following benefits:

Unlimited Break/Fix Support: Unlimited online and phone incident submission where support engineers identify and resolve technical issues with next business day responses.

Microsoft guarantees support in International English and provides local language support in select markets around the world, wherever possible.

CustomerSource: A wealth of quality personalized information, unlimited access to training courses, self-help options, downloads, tips, and more. Take advantage of this online customer portal during the term of your subscription to find answers to the most common Microsoft product questions, including troubleshooting steps, easy access to Knowledge Base to find solutions to common issues, and how-to articles. CustomerSource is available in multiple languages and local country sites.

Microsoft Dynamics Community: A central place to get ideas, ask questions, and discuss solutions with your peers and other Microsoft Dynamics Online Service experts around the world. Take advantage of the [Microsoft Dynamics Community](#) to help answer your questions.

“Getting Started Catalog” and Self-Help Resources: Self-directed support with online learning tools, easy access to knowledge base, and troubleshooting steps to help solve issues quickly.

Environment Monitoring: Utilize Microsoft Dynamics Lifecycle Services (LCS) for a quick review or deep analysis of your overall application health. This environment monitoring within LCS can provide important at a glance and will allow for detailed troubleshooting of system issues.

Ask the Expert Webinars: A monthly online webinar where Microsoft experts share their knowledge and expertise on specific Azure, CRM, or AX topics. Webinars are offered twice a month to accommodate global time zones, with varying topics driven by customer feedback. Webinars are one hour long, with time for Q&A.

Professional Direct Services

[Professional Direct Services](#) includes all of the Support Subscription Plan benefits, plus:

Unlimited Access to Online Training:

- **E-learning:** Benefit from online, self-paced courses dedicated to Microsoft Dynamics solutions on specific topic areas, comparable to classroom training.
- **Training Materials:** Download courseware content for use as a study tool or as a desktop reference.
- **Learning Plans:** Use these plans as a training roadmap for users, including detailed training and certification options available for each module or specific functionality.

For a full listing of all of the training courses available for Microsoft Dynamics AX, please refer to the [Microsoft Dynamics Quick Start Guide](#).

Support Incident Response Time: Response time for Severity A cases less than one hour, two hours for Severity B, and 4 hours for Severity C. Case Severity definitions are included in [Appendix C](#).

24x7 Support: Available for Severity A cases only.

Technical Call Routing: Direct access to tier 2 escalation engineers.

Service Delivery Management: Receive access to a dedicated, pooled team of Professional Direct Service Delivery Managers (PDM) to manage your support experience, and provide services such as: light advisory services, onboarding assistance, upgrade & release readiness.

The Service Delivery Management team provides the following services:

- **Escalation Specialists:** If your submitted support case becomes a critical issue your Escalation Specialist can assist by escalating your incident for faster resolution and will manage the case until closure.
- **Red Carpet Welcome:** A formal welcome meeting is scheduled to establish relationships and to ensure you have a deep awareness of the key benefits that are included in your service offering, including a walk-through of how to use your benefits.

- **Light Advisory Services:** Advisory Services helps you get to the right resources for your needs and facilitates information transfer. When you request additional guidance that goes beyond your billing and technical break/fix needs, Advisory Services acts as your liaison with groups at Microsoft providing high level guidance on resolution of how-to questions. The Service Delivery Manager proactively works with you to understand your large pain-points, directs you to suggested self-service content, and acts as your voice to drive your insight upward in Microsoft.
 - Professional Direct does not provide detailed advisory assistance specific to an individual customer such as code or architecture reviews, design reviews, detailed instructions for application or configuration tuning (e.g., performance tuning), or the verification of specifications. Also, Service Delivery Manager does not engage in implementation activities such as, but not limited to, coding or configuration for customer development or deployment.
- **Release Upgrade Readiness:** The Professional Direct Service Delivery Manager will prepare and manage the customer's experiences for new product/version releases and upgrades by working directly with customer through the upgrade process to help ensure test/dev environments are upgraded and customer's concerns and conflicts are resolved prior to production upgrade.
- **Monthly Review:** The monthly review is designed to develop a rapport between the customer and its Service Delivery Manager. During this meeting the Service Delivery Manager gets to know customer's organization, reviews open service requests, seeks feedback, and, if needed creates a go-forward strategy to get the customer's service back on track. Additional topics covered during discussions are product feature requests, service incidents or outage related experiences, and future product adoption plans.
- **Service Interruption Handling:** At first notification of a Service Interruption Event (SIE) the Professional Direct Service Delivery Manager will look into the effects it may have on a customer's organization and will proactively contact impacted customers. The Service Delivery Manager will monitor service requests as needed until resolution and will also work with the customer if a credit for downtime is required by working with Microsoft billing teams.
- **Case Wellness:** The Service Delivery Manager *proactively* reviews a customer's high priority support requests (SRs), and collaborates with Microsoft's Service Engineering teams to ensure faster resolution. Severity A and Severity B cases are monitored on a daily basis.
- **Product Onboarding Assistance:** With rapid product releases, customers may feel inundated with the new features and services. The Service Delivery Manager reviews the customer's product setup and subscription purchase to ensure understanding and provide guidance. An introductory session on new features and services is conducted with follow-up to help you configure the product.

Customers can only have one (1) Support offering across the tenant: Mixing and matching of support offerings is not allowed.

Professional Direct Support offerings purchase requirements: Each user licensed with User SL (or equivalent service) must also be licensed for the support option.

- Professional Direct purchase requirement is \$900USD per month (equivalent to 100 seats). When purchasing through Volume Licensing, ensure the minimum threshold is entered when placing the order.

International Availability

Country, language, and localization availability for Microsoft Dynamics AX is available [here](#).

Professional Direct support is available where Microsoft Dynamics AX is released.

Microsoft Dynamics Lifecycle Services

[Microsoft Dynamics Lifecycle Services \(LCS\)](#) provides a cloud-based collaborative workspace that you and your customers use to manage Microsoft Dynamics AX projects from pre-sales to implementation and operations. Once you sign up for Microsoft Dynamics AX, you are provided with a project workspace with custom methodology and services that help you manage your Microsoft Dynamics AX lifecycle. LCS provides a variety of services to assist and help navigate you through the various phases of the project including define, develop and operate more robust systems, proactively monitor implementations, reduce the time it takes to resolve issues, and help realize greater return on investment while reducing the total cost of ownership.

Licensing Programs

Microsoft Dynamics AX is licensed through the Microsoft Volume Licensing and the Cloud Solution Provider program.

Microsoft Volume Licensing

What is Volume Licensing?

Microsoft Volume Licensing is the most cost-effective, flexible, and manageable way to license Microsoft software and cloud services. Simply stated, volume licensing makes it easier and more affordable to use software and online services across an organization.

Licensing online services through your Volume Licensing agreement allows you to:

- Transition to cloud services at your own pace
- Match and adjust online service plans to meet users' needs

Microsoft offers several Volume Licensing programs, each tailored to the needs of different sizes of businesses and types of organizations. To find the right program for your organization, you'll first need to determine the type and size of your organization, the software that you want to license, and how you will use it. [Learn more about how Volume Licensing works.](#)

Participating in a Volume Licensing program typically involves signing an agreement and/or enrollment, meeting a minimum purchase requirement, and ordering licenses through a Microsoft Reseller. Visit the [Microsoft Volume Licensing website](#) to learn more about how to buy through Volume Licensing, find a reseller partner, and more.

Eligible Volume Licensing Programs

Microsoft Dynamics AX is available through the following Volume Licensing programs:

- **Enterprise Agreement:** The Microsoft Enterprise Agreement (EA) is the licensing program for commercial and government organizations that want to standardize IT across the enterprise yet retain the flexibility to choose from on-premises and cloud services. The EA includes attractive volume pricing, the flexibility to transition to cloud services at your own pace, and simplified license management through a single company-wide agreement. [Learn more.](#)
- **Enterprise Subscription Agreement:** An option under the Enterprise Agreement that provides lower initial cost based on a three-year subscription, the ability to increase or decrease subscription counts on an annual basis, and non-perpetual licenses that end with your subscription term. [Learn more.](#)

- **School Enrollment:** The School Enrollment is for primary/secondary schools and preschools and offers the simplicity of licensing all products organization-wide where you can order any product for a quantity that matches the annual count of your organization's PCs/devices. [Learn more.](#)
- **Enrollment for Education Solutions (under the Campus and School Agreement):** The Enrollment for Education Solutions (EES) is a subscription licensing offering available to both primary/secondary and higher education institutions and offers the simplicity of counting people instead of PCs/devices and the flexibility to add additional products in any quantity as needed. [Learn more.](#)

Cloud Solution Provider Program (CSP)

The Microsoft Cloud Solution Provider program enables partners to directly manage their entire Microsoft cloud customer lifecycle. Partners in this program utilize dedicated in-product tools to directly provision, manage, and support their customer subscriptions. Partners can easily package their own tools, products and services, and combine them into one monthly or annual customer bill.

Existing Customers

Existing customers that are active on a maintenance plan and want to upgrade to Microsoft Dynamics AX will have multiple paths made available to them in the future.

On-Premises Customers Transitioning On-Premises

On-Premises Customers that are active on a maintenance plan and wish to transition to Microsoft Dynamics On-Premises will have a SKU Mapping option available in H2 2016.

On-Premises Customers wishing to Access the Microsoft Dynamics AX – Microsoft Cloud ERP Service

On-Premises Customers that are active on Software Assurance (SA) and wish to access the Microsoft Dynamics AX – Microsoft's Cloud ERP Service have the option of purchasing the For SA SL. Please note that the For SA SL is only available on the Microsoft Enterprise Agreement (EA).

Please note that the same minimums apply to the For SA SL: 50 Enterprise User SLs and/or equivalent Device SL. It takes 2.5 Device SLs to equal 1 Enterprise User SL. For example, a customer could meet the minimum requirement with 10 User SLs and 100 Device SLs.

If you have Microsoft Dynamics AX CALs covered by active SA, you will be able to add access to Microsoft Dynamics AX by acquiring the SL for SA licenses, thus protecting your on-premises investments in Microsoft licensing, and permitting you to maintain non-perpetual rights to online service for the duration of your service agreement.

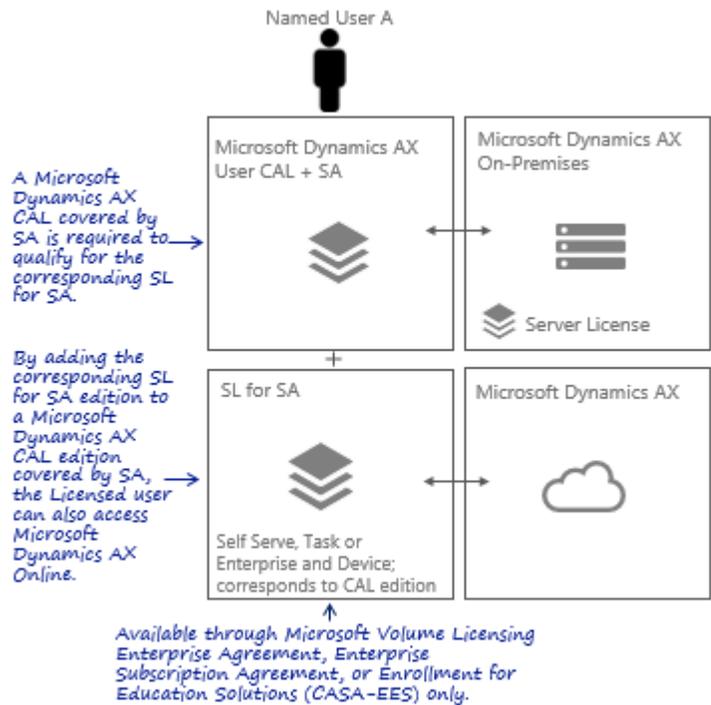
The For SA SL will be available for purchase through the Microsoft Volume Licensing Enterprise Agreement, Enterprise Subscription Agreement, and Enrollment for Education Solutions (under a Campus and School Agreement).

Notes:

- The User SL must be used for the same user of the User CAL. The User SL cannot subsequently be transferred to another user unless the corresponding CAL is also transferred to the new user.

- The User SL level will correspond to the CAL level. For instance, an Enterprise CAL with For SA SL will be granted the Enterprise User SL use rights.

Figure 11: User SL for Software



The User SL For SA model includes two parallel agreements:

1. A new or existing Software Assurance agreement that the customer will continue to maintain and renew, and
2. An additional SL For SA License Agreement that provides rights to the Microsoft Dynamics AX service.

The following Microsoft Dynamics AX SL For SA licenses are available for Microsoft Dynamics CALs active on Software Assurance:

Qualifying License:	Qualifies for:
Enterprise CAL with SA	Enterprise For SA
Functional CAL with SA	Enterprise For SA
Task User CAL with SA	Task For SA
Self Serve CAL with SA	Self Serve For SA
Task Device CAL with SA	Device For SA

Links for Additional Information

Microsoft Dynamics AX	https://www.microsoft.com/en-us/dynamics/erp-ax-overview.aspx
Microsoft Dynamics Blog	https://community.dynamics.com/b/msftdynamicsblog
Microsoft Volume Licensing	www.microsoft.com/licensing
Software Assurance	http://www.microsoft.com/licensing/software-assurance/default.aspx
Activate Software Assurance Benefits	https://www.microsoft.com/en-us/Licensing/existing-customer/product-activation.aspx
Microsoft License Advisor	http://www.microsoft.com/licensing/mla/default.aspx
Contact a Licensing Specialist	www.microsoft.com/licensing/contact/default.aspx
Microsoft Dynamics Online Support	http://www.microsoft.com/en-us/dynamics/dynamics-online-support.aspx
CustomerSource	https://mbs.microsoft.com/customersource/
Microsoft Downloads Center	http://www.microsoft.com/downloads
Country Availability	http://aka.ms/lj5utf
Cloud Solution Provider Program (MPN)	https://mspartner.microsoft.com/en/us/Pages/solutions/cloud-reseller-overview.aspx

Appendix A: Customization and Licensing Requirements

Microsoft Dynamics AX is fully customizable to provide customers with the right experience for every user. Microsoft Dynamics AX has over 10,000 Menu Items which are mapped to the three user types. To make it faster and easier to deploy the solution and determine licensing requirements, these Menu Items are associated with certain Security Roles.

The required SL for a given user is determined by the highest user type classification of the Menu Items to which the user will have access. For example, if you assign an Accountant to a Role that includes access to a Menu Item classified as "Enterprise", then that person requires an Enterprise SL. Menu items that are classified at the "Self Serve" level are available to all users to which you have assigned a Self Serve User or higher level User. Likewise, Menu Items classified at the "Task" level are available to all users with a Task SL or higher level, and so on.

For an even better fit in their organizations, customers can change which actions may be performed by specific individuals or Roles. When customizing, it is important to remember that the license required is determined by the highest level Menu Item to which that individual has access.

Assigning Multiple Roles to a Single User

The straight forward way to customize which actions a specific employee may perform in Microsoft Dynamics AX is by assigning multiple Roles to that employee. For example, an employee could be assigned both the Customer Service Rep and the Field Technician Roles, and could therefore perform actions associated with both Roles. In this case, the employee would still only need a single User SL. Since the Customer Service Rep Role is designated at a higher user type level (Enterprise) than the Field Technician Role (Task), the employee would only need the Enterprise User SL in order to perform actions associated with both Roles.

Changing Menu Items Associated with a Role

Another way to customize what actions users may perform is by changing which Menu Items are associated with a Role. For example, if a customer wants everyone who is assigned the Field Technician Role to be able to also approve posting of service orders (which is designated as an Enterprise level action), then they can customize the Role to include the "Approve posting of service order" Menu Item. Because the required SL is determined by the highest level action the user may perform, all users assigned to the Field Technician Role would then require the Enterprise User SL.

Changing Menu Items Associated with an Individual

Further, customers may assign specific actions to specific users. Following the example above, if the customer has 20 employees assigned to the Field Technician Role and wants to allow only five of those employees the ability to approve posting of service orders, they may assign the "posting of service order" Menu Item to those five individuals. Those five individuals would then require the Enterprise User SL, while the remaining 15 employees assigned to the Field Technician Role would require the Task User SL.

Creating Menu Items

Partners and customers may also create Menu Items to fit specific customer scenarios. When doing so, those new Menu Items must be mapped to the User SL type that best matches the type of use based on the definitions in the "Available SLs for Microsoft Dynamics AX" section of this document.

Notes:

- Roles in Microsoft Dynamics are not the same as job titles.
- “Menu Item” means an object that allows users to display or view a form, sub-form, or URL in a browser application; run a task that triggers a system class, function, workflow or web-action initiated by a user; or cause an output in the ERP solution or a separate device.

Menu Items are classified at one of the User SL types. Users with a given SL have access to each Menu Item classified at—or below—that User SL type.

Appendix B: Security Roles by User SL Level

The list of Security Roles out of the box can be modified granting different access rights to allow user access what they need to perform their activities. Those changes may impact the required User SL. If multiple Security Roles are going to be assigned to a user, then the higher level User SL required must be acquired to properly license the user.

Role	Role Name	Description	User SL
AuditPolicyManager	Auditor	This role is designed for in-house or external auditors. It provides read-only access to a majority of the system. It is also used for audit policy management	Enterprise
BOMProductDesigner	Product designer	Designs new and modifies existing BOM structures	Enterprise
BOMProductDesignManager	Product design manager	Reviews the product BOM structures	Enterprise
BudgetBudgetClerk	Budget clerk	Documents budget events and responds to budget inquiries	Enterprise
BudgetBudgetManager	Budget manager	Reviews budget process performance and enables the budget process	Enterprise
CollectionLetterCollectionsAgent	Collections agent	Documents collections events and responds to collections inquiries	Enterprise
CollectionLetterCollectionsManager	Collections manager	Reviews collections process performance and enables the collections process	Enterprise
CompanyChiefExecutiveOfficer	Chief executive officer	Reviews the financial and operational performance	Enterprise
CompanyChiefFinancialOfficer	Chief financial officer	Reviews the financial performance	Enterprise
CRMMarketingCoordinator	Marketing coordinator	Produces and distributes marketing materials	Enterprise
CRMMarketingManager	Marketing manager	Manages product marketing	Enterprise
CustInvoiceAccountsReceivableClerk	Accounts receivable clerk	Documents customer invoice events and responds to customer inquiries	Enterprise
CustInvoiceAccountsReceivableManager	Accounts receivable manager	Reviews customer invoice process performance and enables the customer invoice process	Enterprise
DataManagementAdministrator	Data Management Administrator	Super user for the data management activities in the system. In addition to the capabilities of the DataManagementMigrationUser and DataManagementOperationsUser, this role provides access to the DataManagementITWorkspaceMenuItem - an operational workspace to monitor all data management activities	Enterprise
DataManagementMigrationUser	Data Management Migration User	User that controls permission to all entities in the system. This role is extended in all models where entities exist and need to be provisioned for data management activities for users. The current pattern is to create -	Enterprise

Role	Role Name	Description	User SL
		<p>per Entity View and Maintain privileges and then add it to</p> <p>The entity's category bound View and Maintain duties defined in that model. These duties are all part of the DataManagementMigrationUser extension that will be defined in the model.</p>	
DataManagementOperationUser	Data Management Operation User	Provides access to all data management workspace menu items. Note that this role does not control access to any of the entity privileges that are required to actually perform the data operation. As such this role can be assigned to any other application role for users that require access to specific entity sets or can be added to any custom roles where users can simply only perform data activities for a restricted set of entities	Enterprise
ERDeveloper	Electronic reporting developer	Maps database to adversary data models	Enterprise
ERFunctionalConsultant	Electronic reporting functional consultant	Maps data models to formats	Enterprise
FBTaxAccountant_BR	Tax accountant	Documents fiscal events and responds to fiscal inquires	Enterprise
HcmCompensationAndBenefitsManager	Compensation and benefits manager	Documents compensation and benefit events, responds to compensation and benefit inquiries and records the financial consequences of compensation and benefit events	Enterprise
HcmFMLAAdministrator	FMLA administrator	Information and functionality around managing employees who are out an FMLA leave	Enterprise
HcmHumanResourceAssistant	Human resource assistant	Documents human resource events and responds to human resource inquiries	Enterprise
HcmHumanResourceManager	Human resource manager	Periodically reviews human resource process performance and enables the human resource process	Enterprise
HcmPayrollAdministrator	Payroll administrator	Documents payroll events, responds to payroll inquiries and records the financial consequences of payroll events	Enterprise
HcmPayrollManager	Payroll manager	Authorizes activity in the payroll process	Enterprise
HcmRecruiter	Recruiter	Documents recruiting events, responds to recruiting inquiries and records the financial consequences of recruiting events	Enterprise
HcmTrainingManager	Training manager	Documents training events, responds to training inquiries and records the financial consequences of training events	Enterprise
InventCostAccountant	Cost accountant	Documents and responds to costs, inventory valuations, and cost accounting	Enterprise

Role	Role Name	Description	User SL
		events and inquiries	
InventCostCostClerk	Cost clerk	Authorizes and maintains costs, inventory valuations, and cost accounting calculations; responds to costs, inventory valuations, and cost accounting inquiries	Enterprise
InventMaterialsManager	Materials manager	Enables and reviews processes, maintains master data, and responds to inquiries within logistics and material management	Enterprise
InventQualityControlManager	Quality control manager	Enables and reviews processes, maintains master data, and responds to inquiries within quality control	Enterprise
JmgShopSupervisor	Shop supervisor	Ensures the day-to-day execution of orders/jobs so Machine operators know what to work on, who is available and can respond to the main requests from Machine operators	Enterprise
LedgerAccountant	Accountant	Documents accounting events and responds to accounting inquiries	Enterprise
LedgerAccountingManager	Accounting manager	Reviews accounting, customer invoice, vendor invoice, and payment process performance and enables those processes	Enterprise
LedgerAccountingSupervisor	Accounting supervisor	Reviews accounting process performance and enables the accounting process	Enterprise
LedgerFinancialController	Financial controller	Reviews all accounting process performance and enables those processes	Enterprise
PaymAccountsPayableCentralPaymClerk	Accounts payable centralized payments clerk	Documents accounts payable centralized payment events and responds to centralized payment inquiries	Enterprise
PaymAccountsPayablePaymentsClerk	Accounts payable payments clerk	Documents accounts payable payment events and responds to payment inquiries	Enterprise
PaymAccountsReceivableCentralPaymClerk	Accounts receivable centralized payments clerk	Documents accounts receivable centralized payment events and responds to centralized payment inquiries	Enterprise
PaymAccountsReceivablePaymentsClerk	Accounts receivable payments clerk	Documents accounts receivable payment events and responds to payment inquiries	Enterprise
PaymTreasurer	Treasurer	Documents treasury events and responds to treasury inquiries	Enterprise
ProdProductionManager	Production manager	Reviews the production plan and ensures the proper resources are available	Enterprise
ProdProductionSupervisor	Production supervisor	Enables the production process	Enterprise
ProjProjectAccountant	Project accountant	Maintains project accounting policies	Enterprise
ProjProjectClerk	Project assistant	Documents project accounting process events and responds to project accounting process inquiries	Enterprise
ProjProjectManager	Project manager	Documents the project forecast/budget events and responds to project forecast/budget inquiries. Maintains project	Enterprise

Role	Role Name	Description	User SL
		accounting master information and responds to project accounting master information inquiries. Authorizes project accounting process events	
ProjProjectSupervisor	Project supervisor	Enables and reviews the project accounting process	Enterprise
ReqProductionPlanner	Production planner	Schedules and plans productions	Enterprise
RetailCatalogManager	Retail catalog manager	At the head office, the retail catalog manager maintains and publishes retail catalogs	Enterprise
RetailMerchandisingManager	Retail merchandising manager	At the head office, the retail merchandising manager maintains and replenishes retail products and assortments	Enterprise
RetailOperationsManager	Retail operations manager	The retail operations manager is responsible for all non-merchandising operations at the head office, such as configuring stores, registers, and staff	Enterprise
RetailService	Retail service	Retail service account	Enterprise
RetailStoreManager	Retail store manager	The retail store manager performs store management functions at the store, such as managing sales reports, inventory movements, and inventory counts	Enterprise
RetailStoreIT	Retail store IT	Performs retail point of sale client configuration and installation at the retail store level	Enterprise
RetailWarehouseManager	Retail warehouse manager	Manages order picking, shipping and receiving for retail channels	Enterprise
RouteProcessEngineer	Process engineer	Defines processes to make new products	Enterprise
RouteProcessEngineeringManager	Process engineering manager	Reviews new products, materials, and processes	Enterprise
SMAServiceDeliveryManager	Service delivery manager	Reviews and enables the service order process	Enterprise
SYSADMIN	System Administrator	System Administrator role for Dynamics AX	Enterprise
SysDocuBrandAdmin	SysDocuBrandAdmin	Controls access to the Document Branding Management forms	Enterprise
SysSecSecurityAdministrator	Security administrator	Maintains user and security setup in Microsoft Dynamics AX, grants the ability to create and maintain security roles, duties, and privileges and the ability to assign users to roles, define role assignment rules, and maintain data security policies	Enterprise
SysServerITManager	Information technology manager	Maintains servers and software for Microsoft Dynamics AX. Maintains and configures settings for batch servers, load balancing, databases, Enterprise Portal,	Enterprise

Role	Role Name	Description	User SL
		Services, and Workflow	
TMSLogisticsManager	Logistics manager	Set up, maintain, and configure the network planning that are used in transportation management processes	Enterprise
TradeBuyingAgent	Buying agent	Documents purchase events and responds to purchase inquiries	Enterprise
TradeCustomerServiceManager	Customer service manager	Reviews customer service process performance and enables the customer service process	Enterprise
TradeCustomerServiceRepresentative	Customer service representative	Documents customer service events and responds to customer service inquiries.	Enterprise
TradePurchasingManager	Purchasing manager	Reviews purchasing process performance and enables the purchasing process	Enterprise
TradeSalesClerk	Sales clerk	Documents sales events and responds to sales inquiries	Enterprise
TradeSalesManager	Sales manager	Reviews sales process performance and enables the sales process	Enterprise
TradeSalesRepresentative	Sales representative	Documents sales events and responds to sales inquiries	Enterprise
VendInvoiceAccountsPayableClerk	Accounts payable clerk	Documents vendor invoice events and responds to vendor inquiries	Enterprise
VendInvoiceAccountsPayableManager	Accounts payable manager	Reviews vendor invoice process performance and enables the vendor invoice process	Enterprise
VendPurchasingAgent	Purchasing agent	Documents purchasing events and responds to purchasing inquiries	Enterprise
VendPurchasingAgent_PSN	Purchasing Agent - Public Sector	Documents purchasing events and responds to purchasing inquiries	Enterprise
VendVendorAccountManager	Vendor account manager	Documents vendor events and responds to vendor inquiries	Enterprise
WHSWarehousePlanner	Warehouse planner	Warehouse planner	Enterprise
WMSWarehouseManager	Warehouse manager	Enables and reviews processes, authorizes recordings, maintains master data, and responds to inquiries within warehouse management	Enterprise
HcmManager	Manager	Supervisor in reporting relationship with subordinates	Task
InventQualityControlClerk	Quality control clerk	Documents quality control events and responds to quality control inquiries	Task
InventReceivingClerk	Receiving clerk	Documents receiving operation events and responds to warehouse receiving operation inquiries	Task
InventShippingClerk	Shipping clerk	Documents shipping operation events and responds to warehouse shipping operation inquiries	Task

Role	Role Name	Description	User SL
JmgMachineOperator	Machine operator	Works on production orders and makes registrations in Manufacturing execution	Task
LeanWaterspider	Waterspider	Responds to inventory needs on the production line	Task
RetailWarehouseClerk	Retail warehouse clerk	The retail warehouse clerk performs picking, receiving, and stock counting in a store or warehouse	Task
SMADispatcher	Dispatcher	Organizes the service technicians and prioritizes service orders	Task
SMAFieldServiceTechnician	Field service technician	Visits customers in the field to perform service orders	Task
TMSTransportationCoordinator	Transportation coordinator	Enables inbound, outbound, rating, routing, and handling of transportation process	Task
WMSWarehouseWorker	Warehouse worker	Documents warehouse operation events and responds to warehouse operation inquiries	Task
HcmContractor	Contractor	Worker in contractor relationship with legal entities	Self Serve
HCMEmployee	Employee	Worker in employment relationship with legal entities	Self Serve
JmgAdvTimeWorker	Time registration worker	Worker enabled to use advanced features for time registration	Self Serve
PaymPositivePaymentClerk	Accounts payable positive payment clerk	Document accounts payable positive pay events	Self Serve
ProjProjectManager_PSN	Project manager - Public Sector	Documents the project forecast/budget events and responds to project forecast/budget inquiries. Maintains project accounting master information and responds to project accounting master information inquiries. Authorizes project accounting process events	Self Serve
ProjTimesheetUser	Project timesheet user	Enables creation and approval of project timesheets	Self Serve
SystemUser	System user	System role for all users	Self Serve
VendVendorContact	Vendor (external)	Views and responds to purchase orders in the Vendor Portal, for the vendor accounts where the user is a contact person	Self Serve
AnonymousApplicant	Applicant anonymous (external)	External user application for employment	None
WHSMobileDeviceService	Warehouse mobile device user	Used to access the Warehouse Mobile Device Portal service	None

Note: Management Reporter functionality is included in the Microsoft Dynamics AX. In order to get the use rights, the Management Reporter Designers require an Enterprise SL and Management Reporter Viewers require a Self Serve SL.

Appendix C: Severity Definitions

SEVERITY	CUSTOMER'S SITUATION	EXPECTED MICROSOFT RESPONSE	EXPECTED CUSTOMER RESPONSE
A	<p>Critical business impact:</p> <ul style="list-style-type: none"> -Customer's business has significant loss or degradation of services. -Needs immediate attention 	<p>Initial response:</p> <ul style="list-style-type: none"> -1 hour or less for Professional Direct and Premier -2 hours or less for Enhanced -Next business day for Subscription 	<ul style="list-style-type: none"> -Allocation of appropriate resources to sustain continuous efforts all day, every day¹ -Accurate contact information on case owner
B	<p>Moderate business impact:</p> <ul style="list-style-type: none"> -Customer's business has moderate loss or degradation of services but work can reasonably continue in an impaired manner 	<p>Initial response:</p> <ul style="list-style-type: none"> -2 hours or less for Professional Direct and Premier -4 hours or less for Enhanced -Next business day for Subscription 	<ul style="list-style-type: none"> -Allocation of appropriate resources to sustain continuous effort unless customer requests to opt-out of 24x7² -Accurate contact information on case owner
C	<p>Minimum business impact:</p> <ul style="list-style-type: none"> -Customer's business is substantially functioning with minor or no impediments of services 	<p>Initial response:</p> <ul style="list-style-type: none"> -4 hours or less for Professional Direct and Premier -8 hours or less for Enhanced -Next business day for Subscription 	<ul style="list-style-type: none"> -Accurate contact information on case owner

¹ 24x7 support is only available for Professional Direct and Premier. Premier customers, login to your Premier portal to [submit](#). 24x7 support for Severity B incidents is only available for Premier

² Microsoft may downgrade the severity level if the customer is not able to provide adequate resources or responses to enable Microsoft to continue with problem resolution efforts.

Appendix D: Ensuring Accurate Licensing

Microsoft Dynamics customers have asked for easier ways to implement Software Asset Management (SAM) across their organization, because they realize that SAM can help them:

- streamline IT resources and improve visibility and control of their environment now and in the future,
- increase awareness of the organization’s overall software purchasing needs and better work with software vendors to meet those needs, and
- get greater insight into how to manage the organization’s assets, helping them to make more informed decisions to reduce risk and plan for the future.

To help customers navigate through the product flexibility and its impact on licensing, we have created a report within (LCS) that looks at all of the Menu Items associated to each user directly accessing Microsoft Dynamics AX and computes the assigned number of users by user type. Customers are responsible for determining the number and SL level of third party users directly accessing Microsoft Dynamics AX and subtracting these users from the report generated by the system. Customers are also responsible for determining the number and SL level of internal users indirectly accessing Microsoft Dynamics AX and manually adding these users to the report generated by the system. As the actions of indirect users are not associated with Menu Items tracked by Microsoft Dynamics AX, the customer determines appropriate SL levels for indirect users according to the access rights detailed in the [Product Terms and the Online Service Terms](#).

By comparing this to their license purchase information from the Volume Licensing Service Center (if purchasing through Volume Licensing) or CustomerSource, they can identify discrepancies in their licenses.

Figure 1: Compare Usage Report to License Purchases



© 2016 Microsoft Corporation. All rights reserved.

This document is for informational purposes only. MICROSOFT MAKES NO WARRANTIES, EXPRESS OR IMPLIED, IN THIS DOCUMENT. This information is provided to help guide your authorized use of products you license; it is not your agreement. Your use of products licensed under your license agreement is governed by the terms and conditions of that agreement. In the case of any conflict between this information and your agreement, the terms and conditions of your agreement control. Prices for licenses acquired through Microsoft resellers are determined by the reseller.