

# CHAPTER 1: INTRODUCTION TO MICROSOFT DYNAMICS SURE STEP

## Objectives

The objectives are:

- Define the purpose of Microsoft Dynamics® Sure Step.
- Describe the value of the Microsoft Dynamics Sure Step methodology.
- Describe the benefits of using Microsoft Dynamics Sure Step.
- Describe the components of the Microsoft Dynamics Sure Step model.
- Describe who uses the Microsoft Dynamics Sure Step and during what phases of an implementation project.
- Differentiate between Microsoft Dynamics Sure Step and other Microsoft frameworks.
- Identify the components that comprise the Microsoft Dynamics Sure Step platform and interface.
- To learn how to navigate Microsoft Dynamics Sure Step.
- To learn how to install Microsoft Dynamics Sure Step.

## Introduction

Microsoft Dynamics Sure Step is a comprehensive implementation methodology that provides prescriptive guidance, project management library, tools, and templates that Microsoft partners can use to implement Microsoft Dynamics products for their customers.

Microsoft Dynamics Sure Step is available to all Microsoft partners for Microsoft Dynamics. It can be downloaded from PartnerSource and is easy to install, configure, and use.

### What is Microsoft Dynamics Sure Step?

Microsoft Dynamics Sure Step is a client-based tool that provides a systematic methodology for implementing Microsoft Dynamics solutions.

Microsoft Dynamics Sure Step supports the following Microsoft Dynamics products:

- Microsoft Dynamics® CRM
- Microsoft Dynamics® AX
- Microsoft Dynamics® GP
- Microsoft Dynamics® NAV
- Microsoft Dynamics® SL

Microsoft Dynamics Sure Step provides detailed guidance for the complete implementation life cycle. It consists of field-tested implementation best practices based on the implementation experience derived by Microsoft Consulting Services and Microsoft Dynamics Partners.

Microsoft Dynamics Sure Step includes project management guidance and tools integrated throughout the implementation methodology. Therefore, Microsoft Dynamics Sure Step provides guidance on how to manage implementation projects and how to perform the functional and technical tasks comprising the core of the Microsoft Dynamics implementation process.

The most useful components of Microsoft Dynamics Sure Step are the tools and templates that it provides to create the technical and project management deliverables produced during an implementation project. Microsoft Dynamics Sure Step provides a rich set of Microsoft® Office templates that are used to create implementation deliverables. Microsoft Dynamics Sure Step also provides many process flow diagrams that visually illustrate each phase in the implementation process; also use Microsoft Dynamics Sure Step to browse the methodology to display specific information about implementation tasks.

Additionally, you can use Microsoft Dynamics Sure Step to create and manage projects within the client-based tool. Use these user-defined projects to customize Microsoft Dynamics Sure Step so that it can support customer-specific implementation tools. Add tools and templates, and add or modify tasks, process, and guidance so that the methodology more closely supports a specific practice or industry.

### The Value of Microsoft Dynamics Sure Step Methodology

Microsoft Dynamics Sure Step is an end-to-end, scalable implementation methodology. It provides a model based on best practices, tools, and templates to help partners and Microsoft Services perform successful implementations of Microsoft Dynamics solutions. The implementation methodology model includes implementation guidance, industry focused, product-specific content, and project management strategies and guidance.

The following list identifies the key attributes of Microsoft Dynamics Sure Step:

- End-to-end methodology
- Scalable
- Systematic
- Modular
- Repeatable
- Industry focused
- Partner focused

## **End-to-end Methodology**

Microsoft Dynamics Sure Step addresses all phases of an implementation project, from the sales phase with diagnostics, planning and analysis, to design, development, deployment, and operations. Microsoft Dynamics Sure Step provides guidance for optimizing or upgrading an existing Microsoft Dynamics deployment.

## **Scalable**

Microsoft Dynamics Sure Step is scalable:

- Utilize the methodology to implementation projects for small businesses, mid-market companies, and enterprise customers.
- Configure Microsoft Dynamics Sure Step to support a specific Microsoft Dynamics product and industry or vertical solutions.
- Configure Microsoft Dynamics Sure Step to support different types of implementation projects, such as Rapid, Standard, Enterprise, or Agile.
- Configure Microsoft Dynamics Sure Step to support other types of projects, such as Upgrade or Optimization Offerings.

## **Systematic**

Microsoft Dynamics Sure Step provides a systematic, consistent, and repeatable approach to implementing Microsoft Dynamics products. The model has a number of phases, with each phase divided into phase specific processes or cross phase processes. The processes include the activities or steps to follow. In most cases, the results of activities are documented in a deliverable. These deliverables typically form the basis for subsequent activities in the same phase or a subsequent phase. Therefore, the output of one activity or phase provides the input into the next activity or phase.

### **Modular**

Microsoft Dynamics Sure Step supports a modular approach to implementation projects. This capability allows partners to focus on specific phases, offerings, deliverables, or project management disciplines so that they can best address the specific needs and requirements of an implementation project.

### **Industry Focused**

Microsoft Dynamics Sure Step references a compelling suite of technologies and solutions to address the customer's industry-specific requirements. Delivered through a network of channel partners providing specialized services, these adaptable business solutions and strong industry capabilities provide robust end-to-end enterprise solutions for organizations in key industries and related vertical segments.

Microsoft Dynamics Sure Step also provides diagnostic and implantation (Analysis through Operation) guidance at a horizontal solution level. Partners can build on the standard functionality to deliver Line of Business (LOB) applications across multiple industries.

### **Partner Focused**

Microsoft Dynamics Sure Step helps partners take advantage of their strengths, use consistent and repeatable processes, and collaborate among the consultants in the organization. This approach allows partners to shift the balance between implementation revenue and business consulting revenue. Much of the content, guidance, project management strategies, tools, and templates are derived from the lessons learned in real-world implementation projects conducted by partners and Microsoft consultants.

Using Microsoft Dynamics Sure Step can also help partners manage and reduce the risk associated with implementation projects. The clearly defined set of processes and deliverables, built-in project management processes, including risk management tasks, and the systematic approach, will help reduce the risk in the projects.

The consistent approach to implementation supported by Microsoft Dynamics Sure Step also allows partners to work together on the same projects because each partner can use the same methodology. This is also the case when partners work together with the Microsoft Consulting Services organization.

## **Benefits of Using Microsoft Dynamics Sure Step**

Microsoft Dynamics Sure Step provides the following benefits to Microsoft Dynamics partners and the Microsoft Services organization:

- Repeatable, consistent methodology and processes that provide a better implementation experience for partners and customers.

- An implementation framework that allows multiple partners working on the same project to "speak a common language" and work together toward a common implementation methodology.
- Flexible methodology that can be customized for Microsoft Dynamics products, size of customer organization, implementation type, and vertical markets.
- Integrated project management processes, tools, disciplines, and best practices.
- Decision Accelerator Offerings to help partners decrease the sales cycle.
- Optimization Offerings to aid partners in reducing risk and improving customer satisfaction.
- Incorporation of implementation best practices from Microsoft and partners.
- Reduced risk for consulting companies and their partners.
- Increased partner productivity and profitability.
- Greater customer satisfaction.

### **Microsoft Dynamics Sure Step Model**

The Microsoft Dynamics Sure Step model defines a standardized, phased-based approach to implementation projects. Microsoft Dynamics Sure Step is flexible enough to use in many different scenarios and will help to meet different customer needs and improve the implementation experience.

The implementation model that forms the basis of Microsoft Dynamics Sure Step consists of the following:

- Project Types
- Phases
- Processes
- Deliverables and milestones
- Industry/vertical solutions
- Cross-industry/horizontal solutions
- Decision accelerator offerings
- Cross phase processes
- Optimization offerings
- Project management processes and disciplines
- Consultant and customer roles

## Project Types

The Microsoft Dynamics Sure Step model can be distinguished into five separate Project Types:

- Enterprise
- Standard
- Rapid
- Upgrade
- Agile

Each project consists of a set of defined phases, cross phases and Optimization Offerings which represents a standardized approach for implementing Microsoft Dynamics Solutions.

## Phases

The Microsoft Dynamics Sure Step model divides a full Microsoft Dynamics implementation project into six primary phases:

- Diagnostic
- Analysis
- Design
- Development
- Deployment
- Operation

Each phase in the Microsoft Dynamics Sure Step model consists of a set of defined activities and tasks. The result of the work performed in an activity is usually documented in a deliverable that provides guidance and direction in later steps in the implementation process.

## Processes

The Microsoft Dynamics Sure Step model identifies the steps that are required to complete the activities and tasks in each phase. This allows partners to follow a systematic step-by-step approach to implementing Microsoft Dynamics products. Microsoft Dynamics Sure Step presents the processes for each phase in two ways:

- A hierarchical list of activities, tasks, and subtasks; presented in the tree structure of Microsoft Dynamics Sure Step.
- Process flow diagrams presented as Microsoft® Visio® diagrams that present a visual representation of the activities in each phase of the methodology.

In both cases, each step in the process is hyperlinked to the page that contains specific information about the activity or task.

### **Deliverables and Milestones**

The work performed during the phases in Microsoft Dynamics Sure Step results in creating deliverables that document the decisions, scope, and plan-of-action for a phase, activity, or task. The deliverables that result from one activity or phase usually provide input and guidance to the next activity in the phase or the next phase in the methodology.

Microsoft Dynamics Sure Step guides the project team through the activities and tasks that are required to create the deliverables that help to conduct and manage implementation projects. Common deliverables include:

- Architecture assessment
- Project plan
- Functional requirements
- Go-Live plan/checklist

Microsoft Dynamics Sure Step also provides partners with milestones for each phase, so that the progress of the project can be tracked. Example milestones include:

- Customer accepts the Statement of Work
- Formal Project Kick Off Meeting
- Performance Testing which completes the introduction page for each phase in Microsoft Dynamics Sure Step and lists the deliverables and milestones produced during the phase. The commonly used tools, templates, and links are found in the Tools, Templates and Links section on each activity.

### **Industry/Vertical Solutions**

A vertical solution is designed to deliver solutions to address the industry-specific requirements of a business. The goal is the foundation on which partners can build on the standard approach. The goal is delivered through a network of channel partners providing specialized services and end-to-end enterprise solutions for organizations in key industries (manufacturing, distribution, retail, professional services and across the public sector).

Microsoft Dynamics Sure Step provides diagnostic and implementation guidance at an Industry level and at a vertical and subvertical (or solution) level. Examples of the subset of the Industry-Vertical breakdowns include the following:

- Process Industries
  - Food and Beverage
  - Chemicals
  - Life Sciences and Pharmaceuticals
- Public Sector
  - Government
  - Health
  - Education
  - Non-Profit Organizations

### Cross Industry/Horizontal Solutions

The Cross Industry/Horizontal Solutions are intended to address industry-generic common business processes or needs by which partners can build on the standard functionality to deliver Line of Business (LOB) applications across multiple industries. Purchasing, Payroll and Banking applications are examples of horizontal solutions.

Microsoft Dynamics Sure Step can be used to help determine the appropriate Microsoft Dynamics products and associated horizontal extensions that can be used to best meet the customer's needs through diagnostic and implementation guidance at a horizontal solutions level. Cross Relationship Management (XRM) is the only cross-industry and horizontal area addressed in this release of Microsoft Dynamics Sure Step, however, all three of the following areas are intended to be supported in Microsoft Dynamics Sure Step with access to detailed guidance and valuable tools, templates, and links:

- **XRM - with Microsoft Dynamics CRM as the platform:** Generally consists of Relationships and Interactions, Business Process Driven and Collaborative efforts.
- **Microsoft Dynamics - SharePoint:** A family of Microsoft enterprise portals used to aggregate SharePoint sites, information and applications into a single portal.
- **Contact Center Solution:** This solution helps an organization's contact center meet its high-level business goals by making the most out of every customer interaction and empowers the contact center agents with the right set of tools to quickly and precisely resolve or escalate issues.



### Decision Accelerator Offerings

The seven optional Decision Accelerator offerings defined in the Diagnostic phase of Microsoft Dynamics Sure Step are designed to assist the customer with their decision making process for the implementation of a Microsoft Dynamics solution. A partner can deploy one or more of the Decision Accelerator offerings to support a variety of customer requirements.

Partners can select one or more Decision Accelerator offerings that best describe the specific needs of the customer and allows them in their due diligence process for the selection of an enterprise resource planning (ERP) or customer relationship management (CRM) solution.

Microsoft Dynamics Sure Step supports the following Decision Accelerator offerings:

- **Requirements and Process Review:** Review current processes to determine the requirements for the future state.
- **Fit Gap and Solution Blueprint:** Determine degree of fit with the Microsoft Dynamics solution.
- **Proof of Concept:** Validate requirements with customer's sample data.
- **Business Systems Architecture Assessment:** Confirm the architectural design for the Microsoft Dynamics solution.
- **Scoping Assessment:** Estimate high-level cost and resource plan to deploy the Microsoft Dynamics solution.
- **Business Case:** Prepare a business case for implementation of the Microsoft Dynamics solution.
- **Upgrade Assessment:** Review current release of the Microsoft Dynamics solution, to ascertain the best approach to upgrade to a subsequent release.

### Optimization Offerings

Microsoft Dynamics Sure Step provides seven optimization offerings to use to perform a thorough independent review of an implementation. Optimization offerings are designed to help reduce risk and improve customer satisfaction for complex blended engagements that include consultants from several partners. The Optimization offerings provide:

- Functional design guidance for reviewing the proposed design for business and industry solution fit.
- Technical design guidance for reviewing the proposed technical design for performance, scalability, integration with other systems and third party software.
- Proactive quality management with access to expert technology specialists at appropriate checkpoints in the Sure Step

implementation to mitigate integration risk across the complete technology stack.

There are seven Optimization offerings; employ more than one offering for a given engagement, if desired:

- **Architecture Review:** Reviews the overall architecture and infrastructure to meet the customer's business requirements.
- **Design Review:** Reviews the design of the customizations and integration between Microsoft Dynamics AX and Microsoft Dynamics CRM with existing systems based on various scenarios.
- **Customization Review:** Reviews the custom code to improve performance, increase stability, improve security, and reduce costs.
- **Performance Review:** Reviews performance impact of the design and code based on guidance, tools, methods, and best practices.
- **Health Check:** Delivers proactive problem identification and suggested resolution of issues.
- **Upgrade Review:** Provides guidance to customers upgrading their current implementation of Microsoft Dynamics.
- **Project Governance and Delivery:** Provides proactive **full project lifecycle** governance and delivery execution support for the Microsoft Dynamics implementation project through regular assessment and provision of findings and recommendations.

Each Optimization is an umbrella offering with more detailed offerings listed under the tree structure.

### Cross Phase Processes

A cross phase process is a group of related activities that span multiple implementation phases in a specific project scenario. The Microsoft Dynamics Sure Step model provides step-by-step guidance for important cross-phase processes by providing specific views that include the following:

- All the tasks that are performed.
- The phase in which each task is performed.
- Deliverables produced.

Microsoft Dynamics Sure Step has nine cross phase processes, grouped into three further areas.

- **Organization** - The Organization cross phase processes include:
  - Program Management
  - Training
  - Business Process Analysis

- **Solution** - The Solution cross phase processes include:
  - Requirements and Configuration
  - Custom Coding
  - Quality and Testing
- **Technology** - The Technology cross phase processes include:
  - Infrastructure
  - Integration and Interfaces
  - Data Migration

### Project Management Processes and Disciplines

Project management activities and tasks are embedded throughout the phases and activities of Microsoft Dynamics Sure Step. Following the project management best practices integrated in Microsoft Dynamics Sure Step can help support the success of Microsoft Dynamics implementation projects.

The implementation methodology also provides detailed how-to information and best practices for the following project management disciplines:

- Risk management
- Scope management
- Issue management
- Time and cost management
- Resource management
- Communication management
- Quality management
- Procurement management
- Sales management

### Roles Supported by Microsoft Dynamics Sure Step

Many different job roles are typically involved in Microsoft Dynamics implementation projects. The Microsoft Dynamics Sure Step model identifies and provides guidance for the consulting and customer roles that are involved in specific phases, activities, and tasks in an implementation project. Examples of the primary roles supported by Microsoft Dynamics Sure Step include the following:

<b>Consulting roles</b>	<b>Customer roles</b>
Project manager	Business decision maker
Engagement manager	Project manager
Solution architect	IT manager
Application consultant	Key user

Consulting roles	Customer roles
Development consultant	End-user
Technology consultant	Customer Executive Sponsor
Test Lead	Subject Matter Expert
	Customer Test Lead

Some consultant and customer companies might have only one person perform the functions of multiple roles. For example, in small companies, some people will function in multiple roles. By defining and supporting the roles involved in implementation projects, Microsoft Dynamics Sure Step is scalable for use by small and large partner organizations and customers.

## Who Uses Microsoft Dynamics Sure Step?

Microsoft Dynamics Sure Step is designed to support all roles participating in a Microsoft Dynamics implementation project. In the progression of an implementation project, different roles are more engaged during specific phases, and less engaged in other phases. The project manager, while busiest during the start and early phases of the project is consistently engaged throughout the project.

In addition to project managers, engagement managers and team leads will focus heavily on the guidance contained in the Diagnostic and Analysis methodology phases and in the Offerings section. However, they must be aware of the content and activities contained in the Design, Development, Deployment, and Operation phases because they will be managing the work undertaken in those phases.

Application, functional, and technical consultants who deliver the solution must focus heavily on the Design, Development, Deployment, and Operation phases. Application and functional consultants will also be intricately involved in the Analysis phase, driving the finalization of the deliverables which feed into the Design documents. These consultants also have to familiarize themselves with the offerings supported by Microsoft Dynamics Sure Step and they can provide input into selecting the offering that best meets a customer's requirements.

## Microsoft Dynamics Sure Step Model and Other Microsoft Frameworks

The Microsoft Dynamics Sure Step model incorporates some activities and best practices from other Microsoft methodology frameworks. Although it is not intended to replace these frameworks, Microsoft Dynamics Sure Step is designed specifically for implementing Microsoft Dynamics solutions.

The complete implementation life cycle supported by Microsoft Dynamics Sure Step overlaps the following Microsoft frameworks:

- Microsoft Solution Sales Process (MSSP) provides a framework for selling Microsoft solutions.
- Microsoft Solutions Framework (MSF) provides a framework for technical and software development projects.
- Microsoft Operations Framework (MOF) provides a framework for planning, operating, delivering, and managing an existing Microsoft solution.

Because the Microsoft Dynamics Sure Step model defines an end-to-end process, from planning and diagnostics through operation and optimization, it corresponds to the other Microsoft frameworks in the following ways:

- Processes in the Diagnostic phase correspond with phases in MSSP.
- Processes in the Analysis, Design, Development, and Deployment phases correspond to the processes in MSF.
- Processes in the Operation phase correspond to processes in MOF.

## Microsoft Dynamics Sure Step Platform Structure

The Microsoft Dynamics Sure Step model is presented within a client-based tool that includes a Reference view and a Documents view of the methodology. Use the Reference view to navigate through the phases, processes, and activities of the model. The documents view provides users a documents-centric view of the Microsoft Dynamics Sure Step methodology across phases.

### Tree Structure

The tree structure in the navigation pane of Microsoft Dynamics Sure Step contains the following nodes:

- Sure Step
- Diagnostic Phase - Decision Accelerators and Activities
- Project Types and Implementation Phases
- Optimization Offerings
- Project Management Library
- Roles
- Additional Resources

### Filters

Microsoft Dynamics Sure Step supports all Microsoft Dynamics products and multiple service offerings. Manage this flexibility by using the filters provided to configure Microsoft Dynamics Sure Step so that it corresponds to the requirements of specific implementation projects.

Microsoft Dynamics Sure Step provides the following filters:

- **Solution:** Use this filter to display general product guidance or guidance for a specific vertical or horizontal solution.
- **Product:** Use this to display the content that is relevant to a specific Microsoft Dynamics product. When configuring this filter, Microsoft Dynamics Sure Step displays general content plus the content relevant to the selected Microsoft Dynamics product. Product specific information is displayed in the following locations:
  - In the Tools and Templates box on an activity page.
  - In a product-specific section on selected activity pages.
- **Project Type:** Use this filter to display content relevant to one the specific project types: Standard, Enterprise, Rapid, Upgrade, or Agile.

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***NOTE:** By default, the filters are not selected after installation. This results in displaying content for all Microsoft Dynamics products and all project types. After selecting a filter, the new selection is maintained until it is changed, or upon closing Microsoft Dynamics Sure Step.*

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## Activities, Tasks, and Subtasks

The activities and tasks that comprise each phase in the methodology are organized in a hierarchical structure. The first level under a phase is called an *activity*. Activities consist of *tasks*, which comprise the second level of the hierarchy. Some tasks are divided into *subtasks*, the third and lowest level in the hierarchy. Each of these levels will have the standard activity page. The figure shows an example of this three-level hierarchy.

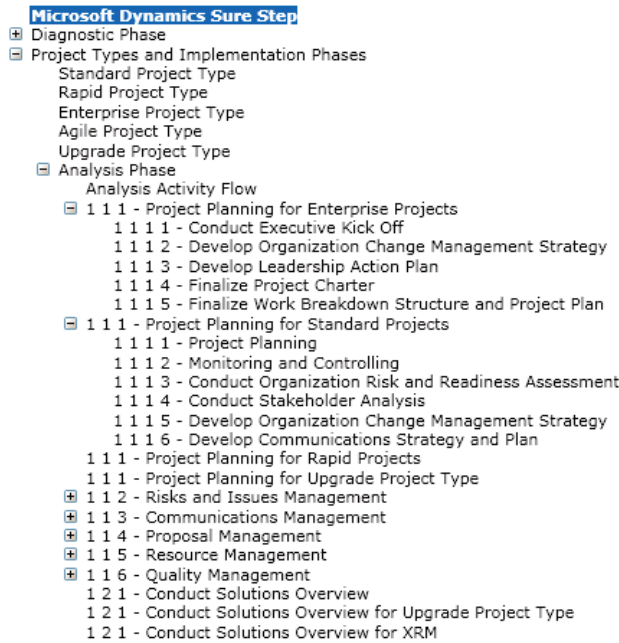


FIGURE 1.1 ACTIVITIES, TASKS, AND SUBTASKS IN THE TREE STRUCTURE

## Activity Page Structure

Each activity, task, or subtask page consists of the following sections:

- **Tools, Templates and Links:** Activity Pages display the corresponding Templates for the activity in this section. Templates can be Shell Templates, which can form the basis for the projects, or Sample Templates, which illustrate the use of the template at a fictitious company. Activity Pages also contain Tools or links, which redirect to other content in the methodology or to an external site.
- **Purpose:** Describes the purpose of the phase, activity, or task described on the activity page.
- **Description:** Defines the activity and how to perform the activity or task.

- **Pre-conditions:** Identifies the items that must be completed or deliverables that must exist before the activity can start. Because Microsoft Dynamics Sure Step defines a systematic approach to implementation, the output of one phase, activity, or task becomes the input into the next part of the process. Therefore, a post-condition from one activity becomes the pre-condition for the next activity. This is also the case for phases. Successfully completing one phase is the pre-condition for the next phase.
- **Diagrams:** Visio diagrams appear on introductory, activity, and many task pages. These diagrams provide another way to illustrate and navigate the methodology.
- **Roles:** Identifies who is involved in the activity, as an owner, a primary or optional participant.

### Visio Process Diagrams

The introductory pages for each phase and activity (level 1) contain a Visio diagram that illustrates that phase or activity in a flowchart. For a phase, the Visio diagram shows the activities in that phase and any kind of decision tree logic for the phase. For an activity, the Visio diagram shows the tasks and decision logic that comprise that activity.

In addition, if a task (level 2) consists of subtasks (level 3) the activity page will also include a Visio diagram that shows the subtasks. If a task has no subtasks, it will not have a Visio diagram.

### *Using Visio Diagrams for Navigation*

The shapes in the Visio diagram are hyperlinked to the corresponding page for the task or activity. Visio diagrams provide an alternative way to browse through Microsoft Dynamics Sure Step.

### *Pan and Zoom*

Each Visio diagram includes pan and zoom controls to increase or reduce the size of the diagram. The pan and zoom feature includes a collapsible thumbnail diagram and a movable red frame that is used to display different areas of the flowchart.

### Additional Resources

One of the key features of Microsoft Dynamics Sure Step is the resources it provides. Use the Additional Resources node in the tree structure to access these and other resources. This node contains the following components:

- **Information Flow from Functional Requirements to Design Documents:** This diagram details the flow of information from the Functional Requirements Document to the Solution Design Document.



- **Sure Step - SDM Alignment:** This diagram shows the mapping of Microsoft Dynamics Sure Step and Service Line Offerings to Microsoft Services Delivery Methodology (SDM), Microsoft Solutions Framework (MSF) and other related methodologies.
- **Onsite-Offshore Conceptual Work-Split across Implementation Phases:** This diagram shows a conceptual split of the work effort between onsite and offshore resources for the deployment of a Microsoft Dynamics solution using Microsoft Dynamics Sure Step.
- **Guidance for Partners and Customers on Project Type Selection:** This document provides guidance on which project type to choose.
- **Other Resource Links:** This provides links to additional resources available with respect to the Microsoft Dynamics Sure Step Methodology.
- **Environmental Management Accounting Project Guidance Document:** This document provides guidance on Environmental Management Accounting so that partners can determine if their project must adhere to best practice.
- **Product-Specific Resources:** This section contains a node for each Microsoft Dynamics product. Each node lists links to all the product-specific resources that are referenced throughout Microsoft Dynamics Sure Step. Use these links to quickly identify and access all the product specific tools that are included in and linked to Microsoft Dynamics Sure Step.
- **Glossary:** This node contains a list of definitions for frequently used implementation terms.
- **Sure Step Templates:** This section provides document templates for custom document creation, matching the standard Microsoft Dynamics Sure Step document look and feel.

## Navigating Microsoft Dynamics Sure Step

Microsoft Dynamics Sure Step includes two ways to view and navigate through the methodology and resources:

- **Reference view:** This view provides a way for users to navigate through the methodology. Its key features include:
  - Project Type and Product filters
  - Forward and Back buttons
  - Breadcrumbs
  - Collapsible window sections
- **Documents view:** This view provides a way for users to view, filter, and access project documents across all phases of the methodology. Its key features include:

- Deliverables filter
- Locate content in Sure Step
- View documents for a single phase

### Tabs

Microsoft Dynamics Sure Step includes the Sure Step Methodology, Projects, Resources, and Preferences tabs. Use each tab to perform particular tasks, such as:

- **Sure Step Methodology:** Use this tab to navigate through Microsoft Dynamics Sure Step using either the Reference View or the Documents view.
- **Projects:** Use this tab to create and manage projects. A project is a collection of Microsoft Dynamics Sure Step documents which can be edited and are created for a specific Project Type and Microsoft Dynamics Product. Customize each project to meet the requirements of each customer, if necessary.
- **Resources:** Use this tab to link to useful resources such as the Microsoft Dynamics Sure Step User Guide. Also use this tab to check for updated versions of Microsoft Dynamics Sure Step.
- **Preferences:** Use this tab to specify configuration preferences, such as the storage location for projects, a customized logo for deliverables, and the page that opens when Microsoft Dynamics Sure Step starts.

### Reference View

There are a number of ways to browse the Reference view of Microsoft Dynamics Sure Step:

- **The tree structure:** Expand the various nodes on the tree structure and then click an item in the tree structure to browse to the corresponding activity page.
- **Visio process diagrams, including the diagram on the Sure Step page:** Browse the content pages for phases, offerings, project management disciplines, cross phase processes, and roles.

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***NOTE:** Most diagrams in Microsoft Dynamics Sure Step contain hyperlinks to content pages.*

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- **Solution, Project Type and Product filters:** Use the Solution, Project Type and Product filters to refine the displayed content.
- **Forward and Back buttons:** Use these buttons to move through hyperlinked content the same way as in a Web browser.
- **Breadcrumbs:** Use Breadcrumbs to verify the current location and quickly move to higher levels in the hierarchy.

- **Collapsible window sections:** Customize the Reference view by collapsing the window sections that are not required.

### Documents View

The Documents view provides many options for viewing documents across the phases of Microsoft Dynamics Sure Step.

- **Deliverables filter:** Use this filter to view only the customer-facing deliverables, or all deliverables.
- **Locate content in Sure Step:** Right-click a document and choose this option to switch to the corresponding Microsoft Dynamics Sure Step activity.
- **View documents for a single phase:** By clicking the column heading for a particular phase, view only the documents for that phase.

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***NOTE:** Open documents in read-only mode from the Documents view. To open copies of these documents that can be edited use the Sure Step Projects tab.*

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### Tools, Templates and Links

Open specific tools and templates in the methodology in the following ways:

- The **Tools, Templates and Links** box on an activity page.
- In the **Additional Resources** node in the tree structure, locate templates in two ways, by:
  - Implementation phase
  - Alphabetical order

In addition, Project management templates are located under Overview in the Project Management node in the tree structure.

## Installing Microsoft Dynamics Sure Step

For Microsoft partners who have enrolled in a Partner Service Plan for Microsoft Dynamics, Microsoft Dynamics Sure Step is available for installation from the Microsoft Dynamics PartnerSource site.

### Installation Requirements

Installing and using Microsoft Dynamics Sure Step requires the following:

- Microsoft® Internet Explorer® 7 or Microsoft® Internet Explorer® 8
- Microsoft® .NET® Framework
- 287 MB of hard disk space (for the full installation)

To use the templates and the other Microsoft® Office tools requires the following:

- Microsoft® Office 2007 or later versions
- Microsoft® Office Project® 2007 or a later version
- Microsoft® Office Visio® 2007 or a later version
  - The .NET Programmability Support option for Visio must be installed.

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***NOTE:** To support Microsoft® Office® 2003 users, Microsoft Dynamics Sure Step supports the Office 2003 Compatibility pack. Each document must be saved as a Microsoft Office 2003 compatible document before it is sent to a customer.*

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For more information about how to install Microsoft Dynamics Sure Step, refer to the Microsoft Dynamics Sure Step *User Guide* included in the download package from PartnerSource.

### Microsoft Dynamics Sure Step Components

When installing Microsoft Dynamics Sure Step, the following components will install:

- **The static content:** This consists of the HTML content, HTML-based video diagrams, and templates displayed in the Internet Explorer browser.
- **The source content:** This consists of the source HTML files, Visio files, and Microsoft Office templates. Use these components to generate the static content. Source content is required for modifying Microsoft Dynamics Sure Step.

### Installing Microsoft Dynamics Sure Step from PartnerSource

From the Microsoft Dynamics Sure Step download page on PartnerSource, download the setup file and then run it from the local computer to install Microsoft Dynamics Sure Step and its components.

#### To install Microsoft Dynamics Sure Step:

1. Visit the following Web site:  
<https://mbs.microsoft.com/partnersource/partneressentials/serviceplans/surestep>.
2. Browse to the download page for Microsoft Dynamics Sure Step.
3. Download the Microsoft Dynamics Microsoft Dynamics Sure Step setup file to the local computer.
4. Double-click the setup file to begin the installation.

In the **Microsoft Dynamics Microsoft Dynamics Sure Step- Installation Wizard**, use the information in the following table to complete the installation.

Setup Wizard Page	Options
End-User Agreement	Review and accept the terms of the License Agreement.
Destination Folder	Select to install Microsoft Dynamics Sure Step in the default location or select a different location.
Confirm Installation	Click <b>Next</b> to start the installation.

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**NOTE:** By default, the user guide is not installed and is a separate download available on the download page for Microsoft Dynamics Sure Step.

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### Default Installation Folder

The default installation folder for Microsoft Dynamics Sure Step depends on the operating system that is being used. The following table shows the default installation folder for Windows® XP and Windows Vista®:

Operating system	Default installation folder
Windows XP	%systemdrive%\Documents and Settings\All Users\Documents\Microsoft Dynamics\SureStep
Windows Vista	%systemdrive%\Users\Public\Documents\Microsoft Dynamics\SureStep

### After Completing the Installation

After completing the installation, a new submenu called **Microsoft Dynamics Sure Step** will be available in the **Start > All Programs > Microsoft Dynamics Sure Step** menu. When all the components are installed, the following items are installed:

- **Microsoft Dynamics Sure Step:** Click to start Microsoft Dynamics Sure Step, content is displayed in the Microsoft Dynamics Sure Step client.
- **Microsoft Dynamics Sure Step User Guide:** The User Guide provides an overview for using the Sure Step tool.

## Lab 1.1 - Exploring Microsoft Dynamics Sure Step

You are a Project Manager for your organization, researching the potential of Microsoft Dynamics Sure Step to help manage a range of projects of different sizes, durations and types. You need to become familiar with the Microsoft Dynamics Sure Step interface.

### Scenario

In this lab, you will:

- Use a variety of navigation methods to browse Microsoft Dynamics Sure Step.
- Use additional features such as Visio diagrams, Additional Resources, and the content filters to locate information.

In the first exercise in this lab, use the Reference view to navigate to content in Microsoft Dynamics Sure Step.

In the second exercise, explore the Microsoft Dynamics Sure Step Document view.

### Exercise 1: Challenge Yourself!

Complete the following tasks by using the Reference view in Microsoft Dynamics Sure Step:

Use the Microsoft Dynamics Sure Step tree structure to navigate to the following pages:

- The GO LIVE activity in the Deployment Phase of a Standard and Enterprise project
- The Analysis Phase of an implementation project
- The Business Analyst customer role

Use the Microsoft Dynamics Sure Step diagram on the Sure Step page to navigate to the following pages:

- The Rapid Implementation project type
- The Analysis phase
- The Project Manager consulting role
- The Training cross phase process

Use the Visio diagrams to navigate to the Deployment Phase of an Enterprise project.

### Exercise 2: Challenge Yourself!

Complete the following tasks by using the Documents view in Microsoft Dynamics Sure Step:

- Display the customer facing deliverables for all phases.
- Display all documents for the Design phase.
- Locate the Project Charter in the Development phase within the Customer Facing Deliverables of the Document view.
- Navigate to an activity that uses the Business Case Customer Report document in the Microsoft Sure Step Dynamics Reference view.

### Exercise 3: Challenge Yourself!

Complete the following tasks by using the tabs in Microsoft Dynamics Sure Step:

- View the list of existing projects.
- View the languages installed and additional resources available for Microsoft Dynamics Sure Step.
- Identify the location of the Project Repository.

### Exercise 1: Need a Little Help?

Complete the following tasks by using the Reference view in Microsoft Dynamics Sure Step.

Use the Microsoft Dynamics Sure Step tree structure to navigate to the following pages:

- In Microsoft Dynamics Sure Step, ensure that you are in the Reference view.
- Use the tree structure on the left to navigate to the pages.

Use the Microsoft Dynamics Sure Step diagram on the Sure Step page to navigate to the following pages:

- In Microsoft Dynamics Sure Step, ensure that you are in the Reference view.
- Navigate to the Sure Step page.
- Click the appropriate area of the Sure Step Methodology diagram to navigate through the pages.
- Use the **back** button to return to the Sure Step page.

Use the Visio diagrams to navigate to the Deployment Phase of an Enterprise project.

- In Microsoft Dynamics Sure Step, ensure that you are in the Reference view.
- Click the appropriate area of the diagrams on each page to navigate through the pages.

### Exercise 2: Need a Little Help?

Complete the following tasks by using the Documents view in Microsoft Dynamics Sure Step.

Display the customer facing deliverables for all phases.

- In Microsoft Dynamics Sure Step, ensure that you are in the Documents view.
- Use the Deliverables filter.

Display all documents for the Design phase.

- Use the Deliverables filter.
- Use the column headings to specify the required phase.

Locate the Project Charter in the Development phase within the Customer Facing Deliverables of the Documents view.

- Use the Deliverables filter.
- Navigate to the required phase.

Navigate to an activity that uses the Business Case Customer Report document in the Microsoft Sure Step Dynamics Reference view.

- Use the **Show All Phases** button.
- Right-click the required document.

### Exercise 3: Need a Little Help?

Complete the following tasks by using the tabs in Microsoft Dynamics Sure Step.

View the list of existing projects.

- This information is available on the **Projects** tab.
- The list might be empty.

View the languages installed and additional resources available for Microsoft Dynamics Sure Step.

- This information is available on the **Preferences** tab.
- There might only be one language installed.



Identify the location of the Project Repository.

- This information is available on the **Preferences** tab.
- The location of the Projects Repository can vary.

### Exercise 1: Step by Step

Use the following step-by-step procedure to complete the procedures in Exercise 1:

Use the Microsoft Dynamics Sure Step tree structure to navigate to the following pages:

1. The GO LIVE activity in the Deployment Phase.
  - a. In Microsoft Dynamics Sure Step, click the **Reference** tab.
  - b. In the tree structure, double-click **Project Types and Implementation Phases**.
  - c. Double-click **Deployment Phase**.
  - d. Click **4 4 2 - GO LIVE for Standard and Enterprise Projects**.
2. The Analysis Phase of an implementation project type.
  - a. In the tree structure, if it is not already expanded, double-click **Project Types and Implementation Phases**.
  - b. Double-click **Analysis Phase**.
3. The Business Analyst customer role.
  - a. In the tree structure, double-click **Roles**.
  - b. Double-click **Customer Roles Overview**.
  - c. Click **Business Analyst**.

Use the Microsoft Dynamics Sure Step diagram on the Sure Step page to navigate to the following pages:

1. Navigate by clicking the appropriate part of the **Sure Step Methodology** diagram on the **Sure Step** page:
  - a. Under Project Types, click the **Rapid** Project Type.
  - b. Under Phases, click **Analysis**.
  - c. Under Consulting Roles, click **Project Manager**.
  - d. Under Cross Phase Processes, click **Training**.
2. Use the Visio diagrams to navigate to the GO LIVE activity in the Deployment Phase of an Enterprise project.
3. On the Sure Step page, on the **Sure Step Methodology** diagram, in the **Project Types** section, click **Enterprise Implementation**.
4. On the **Enterprise Project** page, on the diagram, click **Deployment**.

## Exercise 2: Step by Step

Complete the following tasks by using the Documents view in Microsoft Dynamics Sure Step:

1. Display the customer facing deliverables for all phases.
  - a. In Microsoft Dynamics Sure Step, click the **Documents** tab.
  - b. In the Documents view, click the **Deliverables** filter, and then click **Customer Facing Deliverables**.
2. Display all documents for the Design phase.
  - a. In Microsoft Dynamics Sure Step, if you are not already in the Documents view, click the **Documents** tab.
  - b. In the Documents view, click the **Deliverables** filter, and then click **All Documents**.
  - c. Click the **Design** column heading.
3. Locate the Project Charter in the Development phase within the Customer Facing Deliverables of the Documents view.
  - a. In the Documents view, click the **Deliverables** filter, and then click **Customer Facing Deliverables**.
  - b. Navigate to the **Development** phase.
  - c. Locate the **Project Charter**.

Complete the following tasks by using the Documents view in Microsoft Dynamics Sure Step:

1. Navigate to an activity that uses the Business Case Template Word document in the Microsoft Sure Step Dynamics Reference view.
2. In the Documents view, click **Show All Phases**.
3. In the **Diagnostic** column, right-click **Business Case Customer Report**, and then click **Locate content in Sure Step**.
4. Verify that you are taken to the **Business Case** page in the Reference view.

## Exercise 3: Step by Step

Complete the following tasks by using the tabs in Microsoft Dynamics Sure Step:

1. View the list of existing projects.
  - a. In Microsoft Dynamics Sure Step, click the **Projects** tab.
  - b. On the **Projects** tab, view the list of projects. The list might be empty.

2. View the languages installed and additional resources available for Microsoft Dynamics Sure Step.
  - a. In Microsoft Dynamics Sure Step, click the **Preferences** tab.
  - b. On the **Preferences** tab, in the **Content Language** section, view the languages and updates installed.
  - c. There might be only one language installed.
3. Identify the location of the Project Repository.
  - a. In Microsoft Dynamics Sure Step, click the **Preferences** tab.
  - b. On the **Preferences** tab, in the **Project Repository** section, view the location.
  - c. The location of the **Project Repository** can vary.

### Lab Discussion

Discuss any questions about exploring Microsoft Dynamics Sure Step.

### Summary

Microsoft Dynamics Sure Step provides systematic, prescriptive guidance for implementing Microsoft Dynamics solutions. It provides product specific content, best practices, tools, and templates to support large and small Microsoft Dynamics implementation projects.

Microsoft Dynamics Sure Step is built on an easy-to-use client-based platform, and includes the facility to create customizable projects so that Microsoft Dynamics Sure Step can be modified to meet business needs. Using Microsoft Dynamics Sure Step can help to minimize and manage the risk in implementation projects.

## Test Your Knowledge

Test your knowledge with the following questions.

1. For each of the following elements, match the component from the Microsoft Dynamics Sure Step model with its definition.

_____ 1. Phases	a. The steps that are required to complete the activities and tasks in each phase.
_____ 2. Decision Accelerators	b. Consists of defined activities and tasks that result in the creation of deliverables.
_____ 3. Processes	c. How-to information and best practices for groups of related project management tasks.
_____ 4. Cross Phase Processes	d. Offerings that assist the customer in the decision making process.
_____ 5. Project Management Disciplines	e. A group of related activities and tasks that span multiple implementation phases.
_____ 6. Project Management Processes	f. Definable work outputs from the processes performed that the project is chartered to deliver in each phase.
_____ 7. Deliverables	g. Provides guidance for starting, executing, or closing an implementation.

2. What are the ways to navigate to a template in Microsoft Dynamics Sure Step? Select all that apply.
- The diagram on the Sure Step page
  - Documents view - identify the template by phase
  - Resources tab
  - Tools, Templates and Links box on an activity page
3. On a computer running Windows Vista, on which of the following locations is the default installation folder for Microsoft Dynamics Sure Step?
- C:\Documents and Settings\All Users\Application Data\Microsoft Dynamics\Microsoft Dynamics Sure Step
  - C:\Users\Public\Documents\Microsoft Dynamics\Sure Step
  - C:\ProgramData\Microsoft Dynamics\Microsoft Dynamics Sure Step
  - C:\Documents and Settings\All Users\ Microsoft Dynamics\Microsoft Dynamics Sure Step

## Quick Interaction: Lessons Learned

Take a moment and write down three key points you have learned from this chapter

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2.

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3.

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## Solutions

### Test Your Knowledge

1. For each of the following elements, match the component from the Microsoft Dynamics Sure Step model with its definition.

<u> b </u> 1. Phases	a. The steps that are required to complete the activities and tasks in each phase.
<u> d </u> 2. Decision Accelerators	b. Consists of defined activities and tasks that result in the creation of deliverables.
<u> a </u> 3. Processes	c. How-to information and best practices for groups of related project management tasks.
<u> e </u> 4. Cross Phase Processes	d. Offerings that assist the customer in the decision making process.
<u> c </u> 5. Project Management Disciplines	e. A group of related activities and tasks that span multiple implementation phases.
<u> g </u> 6. Project Management Processes	f. Definable work outputs from the processes performed that the project is chartered to deliver in each phase.
<u> f </u> 7. Deliverables	g. Provides guidance for starting, executing, or closing an implementation.

2. What are the ways to navigate to a template in Microsoft Dynamics Sure Step? Select all that apply.
- (√) The diagram on the Sure Step page
  - (√) Documents view - identify the template by phase
  - ( ) Resources tab
  - (√) Tools, Templates and Links box on an activity page
3. On a computer running Windows Vista, on which of the following locations is the default installation folder for Microsoft Dynamics Sure Step?
- ( ) C:\Documents and Settings\All Users\Application Data\Microsoft Dynamics\Microsoft Dynamics Sure Step
  - (●) C:\Users\Public\Documents\Microsoft Dynamics\Sure Step
  - ( ) C:\ProgramData\Microsoft Dynamics\Microsoft Dynamics Sure Step
  - ( ) C:\Documents and Settings\All Users\ Microsoft Dynamics\Microsoft Dynamics Sure Step