

# SOLUTIONS

## Microsoft Dynamics and the 2007 Microsoft Office System: Integration Highlights

White Paper

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<http://www.microsoft.com/dynamics>



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## ***Introduction***

At Microsoft, we understand the impact your people have on your business: align your employees around a strong business plan and give them the tools they need to contribute and execute, and you can create business success. When people are equipped with the right tools, they can tackle complex business challenges while simultaneously increasing productivity, ultimately contributing to the bottom line. So, how can business management software improve employee productivity? Business solutions must become more intuitive, familiar, and easy to learn.

One of the challenges that have emerged in the workplace is that for people to do their jobs, they are required to switch between unstructured personal productivity tools and structured business applications. The reality of working in both unstructured and structured environments applies not only to the data they work with but also to their daily processes and tasks.

Business management solution users spend most of their time “heads down” in the business application, but they also need to use communication and desktop productivity tools. They manage information differently, and they perform tasks that are specific to the role they have. Business management solutions have very structured data, very controlled data, and appropriately so. To empower these users, the business solution needs a familiar user interface that is easy to learn. It needs to be “process-centric,” organized around the typical things that employees do through the course of a day. It needs to be role-based. And, it needs to provide a bridge between the worlds of structured business applications and unstructured desktop productivity software, all in an efficient and sensible manner.

Then there are the business owners, decision makers, and knowledge workers who spend the majority of their time doing email and creating ad-hoc documents while working within productivity and communication tools like Microsoft® Office Outlook® 2007, Microsoft® Office Word 2007 and Microsoft® Office Excel® 2007. These users need business information captured by the “transactional” part of the business solution. To address the needs of these users, business data must be easily accessible to the employees doing personal productivity work. The need for blurring the line between these two worlds of structured and unstructured data is clear, and Microsoft is delivering solutions to bridge the gap.

The result is a user experience that is familiar and easy to use and built around the way people in the company work. We call this a “role-based” approach. Software that’s role-based and targeted around the specific jobs people do can provide tremendous insight and help drive company-wide productivity.

When a business management solution works the way your current technology works, it can fit easily into your existing systems and can help you maximize your technology investment. Software that’s role-based and targeted around the specific jobs people do can provide tremendous value and insight because it:

- Is familiar, helping reduce the time required to learn how to use it, freeing up time to focus on what matters most.
- Fits with your systems, helping to maximize your investment in Microsoft technology.
- Fuels your business productivity, automating your business-critical operations and adapting to fit into your type of business, helping to ensure the most relevant insight.
- Helps enable confident decision making, providing you with more complete insight across your organization.

This paper is designed to provide Microsoft Dynamics™ customers and partners with examples of how Microsoft Dynamics and the 2007 Microsoft® Office system work together. Common business scenarios are used to demonstrate the business value that can be gained by utilizing the interoperability between Microsoft Dynamics and the Microsoft Office system.

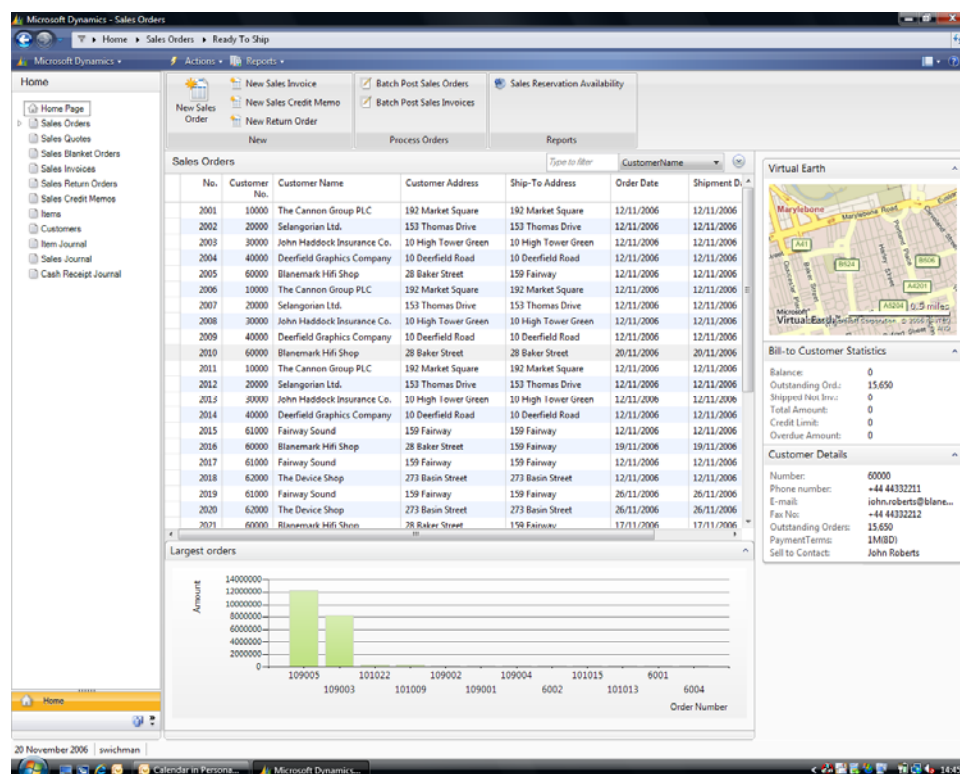
## Familiar to Your People

What if business management technology could free you and your employees to focus on what's truly important for your business? What if technology reflected the ways in which people throughout your company actually work? Microsoft Dynamics works like other Microsoft products you and your people are familiar with, helping reduce the time required to learn how to use it, and freeing up time to focus on what matters most. Designed with a focus on the roles people play throughout your company, Microsoft Dynamics delivers an individualized, task-based user experience and allows your employees to easily customize and automate it based on their own preferences and work style. That can mean less training and development time and a quicker return on your investment.

## Common Interface

Microsoft continues to build integrated, adaptable business management solutions that are evolving toward a common look and feel, mirroring that of Microsoft Office, without sacrificing the requirements for concentrated transaction entry that is appropriate for specific users of a business application. A familiar user experience can help lower training costs while empowering users to get more out of the application.

One of the improvements in the 2007 Microsoft Office release is the new "ribbon," making it easier for users to access the commands they need more easily. The Microsoft Dynamics Quick Access Pane follows the ribbon interface concept, while maintaining the left hand navigation and user favorites. Plus, there will be more visible approval routing and processing of workflow documents.



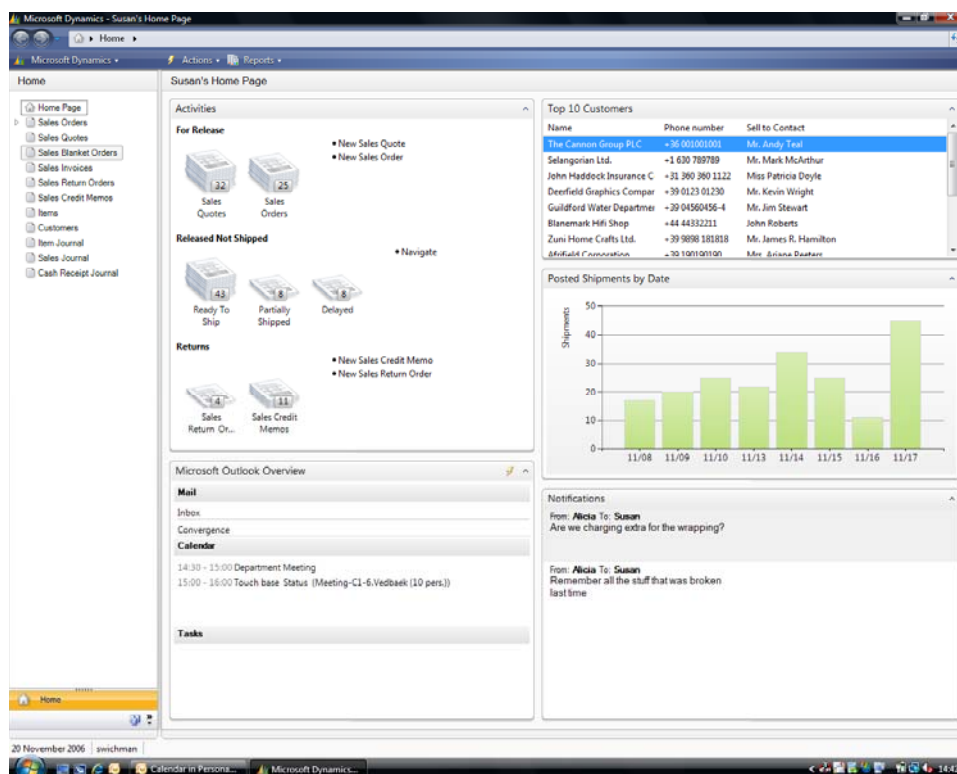
**Figure 1: Microsoft Dynamics shares design concepts with the 2007 Office system to help ensure important information and processes are delivered to your users in an easy-to-understand way.**

## Personalized Navigation

Microsoft Dynamics makes it easy for employees to personalize their views to mirror their processes. Because Microsoft Dynamics offers list-based navigation with cascading menus, users can easily create favorites to give themselves quick access to frequently-used areas of the business solution. Easy customization and personalization of the navigation pane helps improve productivity and employee efficiency.

Microsoft Dynamics' role-based design presents relevant information and processes to individual users in a variety of business roles. Role-based access helps ensure the right data is at every user's fingertips, while simultaneously limiting access to the data the user does not need. Home pages can be customized with more targeted information that provides the at-a-glance view of the business measurements that are most important to a person's role, helping enable them to make timely, accurate decisions. Furthermore, role-based access helps provide security to sensitive data because users only see the information for which their role has access.

For more info on the importance of role-based design, visit <http://www.microsoft.com/dynamics/product/familiartoyourpeople.mspx>



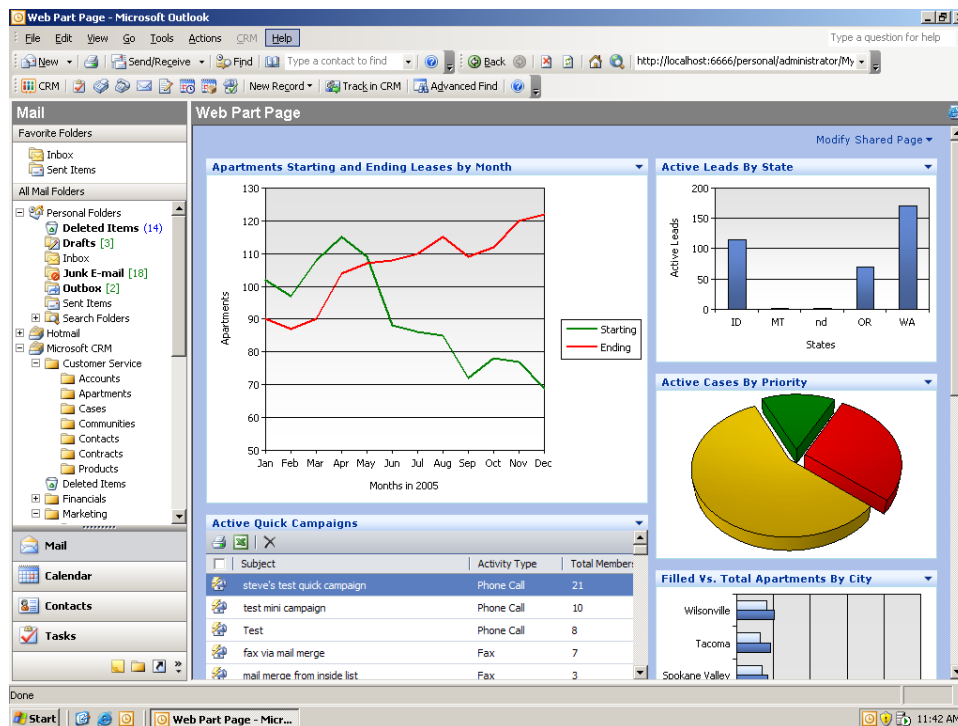
**Figure 2: Microsoft Dynamics has an interface that is familiar to your people. Home pages that are based on an individual person's role, also surface Microsoft Outlook inbox and calendar data to help increase productivity.**

## Managing Information from Within Outlook

At times, organizations find their employees struggle to adopt new technologies and applications, which can result in a poor return on investment for the company. Microsoft Dynamics helps organizations realize the potential of their business applications investment without requiring users to fundamentally change the way they do their jobs. Companies find their employees are empowered by the use of familiar tools that help increase their productivity.

With Microsoft Dynamics™ CRM, a sales representative can manage all sales data, campaigns, and marketing information from within Outlook. Contacts and opportunities can be viewed, updated, and shared across the organization. In addition, current product information, new leads, and contracts related to the sales process can be accessed. This can all be done from within Outlook without the need to learn a different system or toggle back and forth. Additionally, for a Microsoft-centric organization, Microsoft Dynamics CRM enables use of existing IT investments, training, and technologies.

Barriers to successful CRM implementations in the past have been the lack of employee adoption, use, and compliance across the organization. A key advantage of Microsoft Dynamics CRM is its native integration to core Microsoft products, which helps organizations mitigate risks of poor user adoption. Users can easily perform tasks because they are familiar and do not require moving between multiple applications. For example, a sales representative can track customer contacts and sales data in Outlook as well as view activities, accounts, competition, and more.

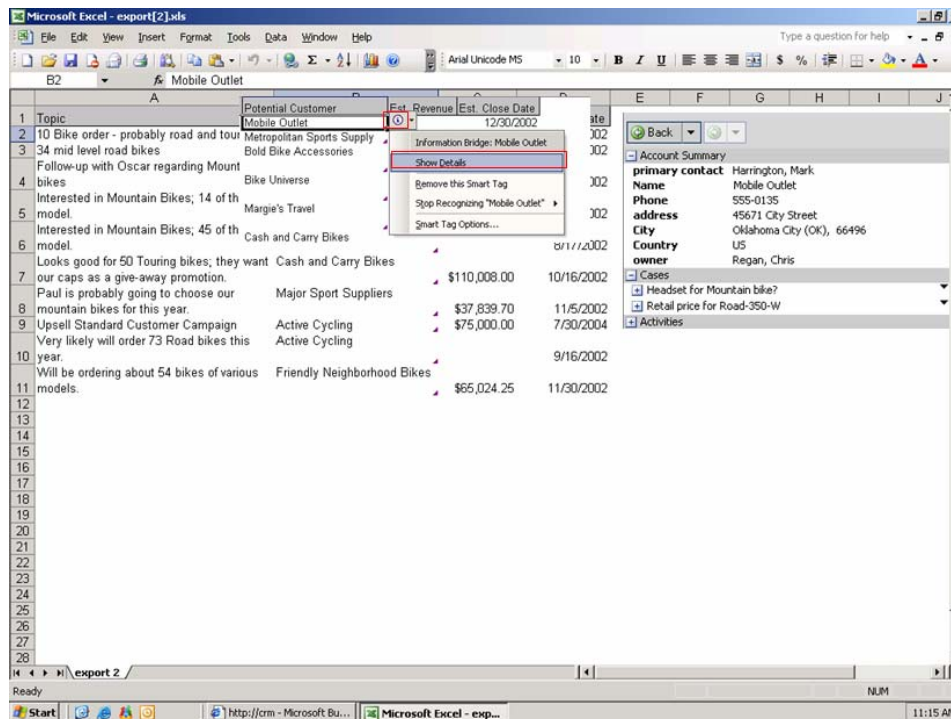


**Figure 3: Microsoft Dynamics CRM allows employees to track customer contacts and sales data in Outlook as well as view activities, accounts, competition, and more.**

## Access Business Data from Within Microsoft Office Documents

Reporting, budgeting, and forecasting can all be exhaustive and time consuming, yet very necessary steps in a successful business. Using trusted tools that are familiar to most people helps increase productivity and decrease the learning curve. Microsoft Dynamics allows users to review, edit, and manipulate data with the widely used spreadsheet application Excel with as little as one click of the mouse.

Additionally, using Excel to view and analyze data from Microsoft Dynamics and Microsoft Dynamics CRM allows users to quickly provide non-system users information they need. For example, using the export functionality from within Microsoft Dynamics, a sales manager can easily export list of the most profitable items to Excel e-mail and email the information directly to the sales team. When the sales team receives the data, they can also drill back to the item detail using Smart Tags functionality, which resides in Microsoft Dynamics and is based on the employee's role-based security access.

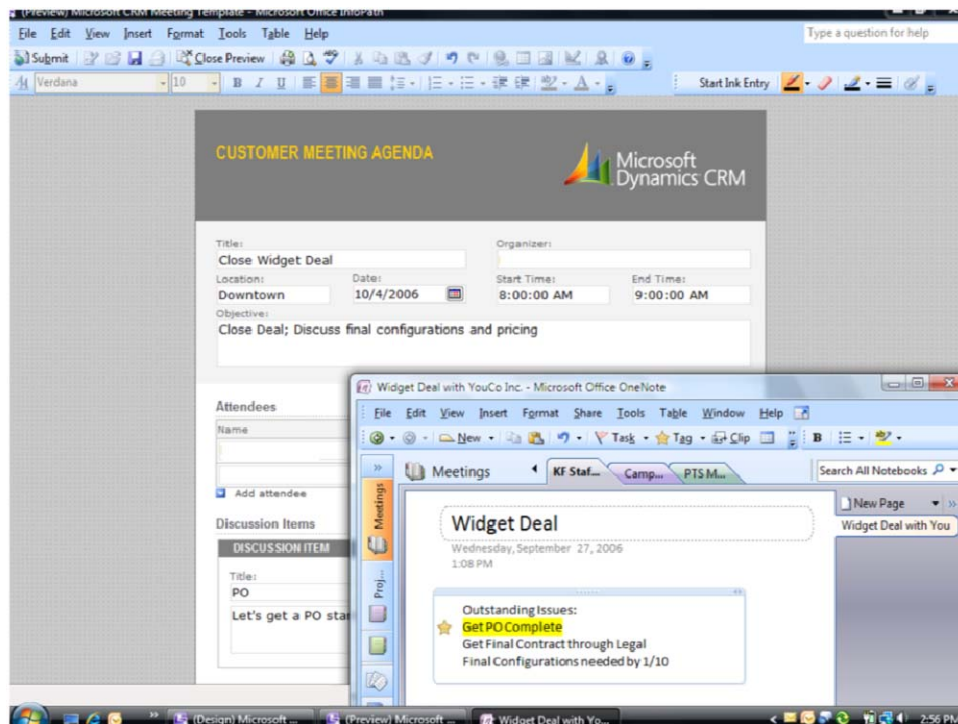


**Figure 4: Microsoft Dynamics data can be shared with non-system users from within Excel through Smart Tags functionality.**



## Capturing and Sharing Business Data with Microsoft® Office InfoPath® 2007 and Microsoft® OneNote® 2007

Creating a defined process for capturing information on prospects, opportunities and other key business data makes it easier to ensure the right information will be available in an organized fashion, resulting in richer data and better-informed decisions. InfoPath enables you to create forms to capture the important details your people need, and to make it easy to access that information when needed.



**Figure 5: CRM information can be gathered with InfoPath forms, and uploaded into Microsoft Dynamics CRM. Take client notes with OneNote, and store links to notes within Microsoft Dynamics CRM.**

## ***Fits With Your Systems***

When a business management solution works the way your current technology works, it fits easily and seamlessly into your existing systems and helps you maximize your technology investment. Microsoft Dynamics works the way your current technology works and fits easily into your systems, helping to maximize your investment in Microsoft technology and ease IT administration. This in turn allows your employees to use a powerful business management solution within a familiar environment.



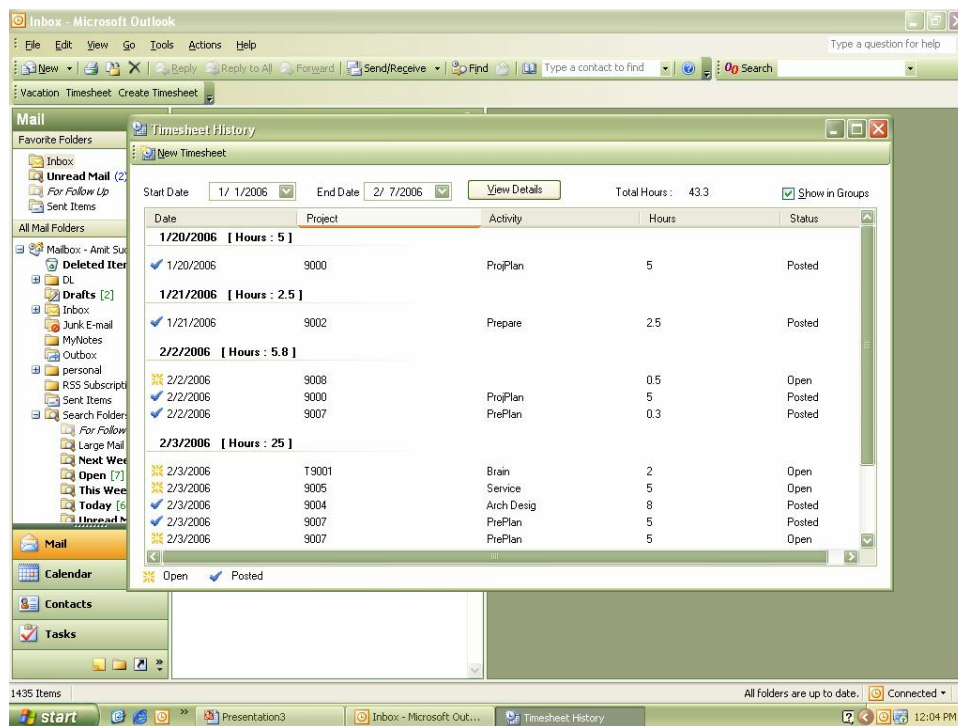
## Manage Business Processes in Microsoft Office using Snap-ins

Microsoft continues to execute on its strategy to deliver business management solutions that fit with customers' existing systems. Microsoft Dynamics Snap, a collection of programs that "snap" into the Microsoft Office system, help enable information workers to easily coordinate and manage data in Microsoft Dynamics business management solutions using the familiar interface of the Microsoft Office system.

The first Microsoft Dynamics Snap solutions include Timesheet Management Snap-In, Vacation Management Snap-In, Customer Journal Snap-In, Customer Report Generator Snap-In, and Business Data Lookup Snap-In.

These solutions are designed for information workers who use Microsoft Office and need to access business information and business processes managed by their back end Microsoft Dynamics business management solutions. Most people want to be able to do this without opening multiple programs, cutting and pasting data, or having to master the full complexity of all of the software in a company.

As an example, a consultant working with a customer can coordinate meetings and appointments using Outlook. These calendar events are linked with, in this case, Microsoft Dynamics time entries, eliminating the need to correlate tasks and helping reduce errors as a result of users having to transpose data from one program to another. Additionally, it is not necessary for the consultant to engage Microsoft Dynamics— all work is completed within Outlook, and time allocation is appropriately tracked in the billing application.



**Figure 6: Outlook calendar events are linked with Microsoft Dynamics time entries with the Timesheet Management Snap-In.**

## Review and Update Customer Information

Customer Journal Snap-in – A Snap-in designed to increase the productivity of a sales meeting by enabling the salesperson to capture key information regarding a customer in Microsoft Dynamics in a summarized view. It also allows the Sales person to make offline modifications to customer data from within this summary view and synch them back to Microsoft Dynamics.

The Snap-in consists of an InfoPath form template which can be stored in a custom forms library at a central location accessible to all sales professionals within the organization. A sales professional can download this form template from this central location and create a Customer Journal form which can be used to fetch information about a specific customer from Microsoft Dynamics. Once filled, the form can be saved locally on the sales professional's laptop and taken along to the sales meeting. During the meeting, the sales professional can take notes and make changes to the various sections containing sales specific information about the customer and save them on the laptop. After returning back from the meeting the sales professional can connect to Microsoft Dynamics using this form and update back all the changes that were made during the meeting to the form's original contents on the click of a button.

The screenshot displays the 'Customer Journal for Microsoft Dynamics AX' form, which is an InfoPath template. The form is divided into several sections:

- Customer Account Information:** Includes fields for 'Customer Account name' (The Lighting Specialist), 'Company' (dms), and a 'Go' button. There are also 'Read-only' and 'Update' buttons.
- Notes:** A section for taking notes, with links for 'View previous meeting notes' and 'Add notes'.
- General Profile:** A sidebar containing 'Basic Information' (Name, Credit Limit, Currency, Customer Classification, Customer group, Customer Account, Invoice to) and a 'View more info' link.
- Sales Quotations summary:** A table showing active quotations with columns: Quotation ID, Name, Status, Discount %, Expiry Date, Prognosis, and Sales Responsible. Below this is an 'Add Quotation' button and a table for adding quotation lines with columns: Item Name, Qty, and Value.
- Payment summary:** A section for viewing recent wins and losses, including a 'View payment summary' link and a table for payment details.
- Service Summary:** A section for viewing service details, including a 'View service details' link and a table for service orders with columns: Service agreement, Service Order No., Service Date, Progress, Service Responsible, and Description.
- Activity Summary:** A table showing activity details with columns: Activity type, Date, Time, Owner, Priority, and Purpose.

**Figure 7: Getting 360° summary information about a customer from Microsoft Dynamics using an InfoPath template.**

## Generate Custom Business Reports in Excel

Microsoft Office Excel is a lifeline tool for a large number of information workers. They use it day in and day out to generate reports and rich visualization and perform ad-hoc analysis on business data.

Yet typically, the data that the information worker needs resides in the business application and does not lend itself to easy access from Excel.

For example, finance professional needs to look at budgeted versus actual figures, cash flow and customer payables, and other dimensions to gauge company performance. The Custom Report Generator Snap-in can be set up to provide an Excel-based solution that displays data from Microsoft Dynamics and also enables the user to insert data back into Microsoft Dynamics.

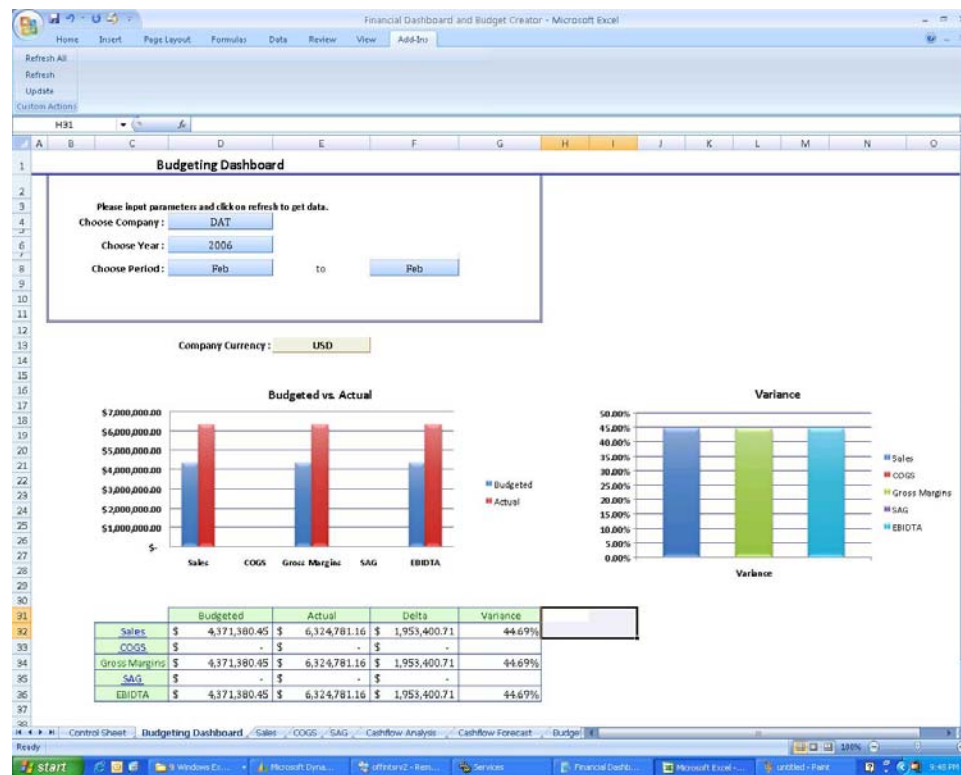
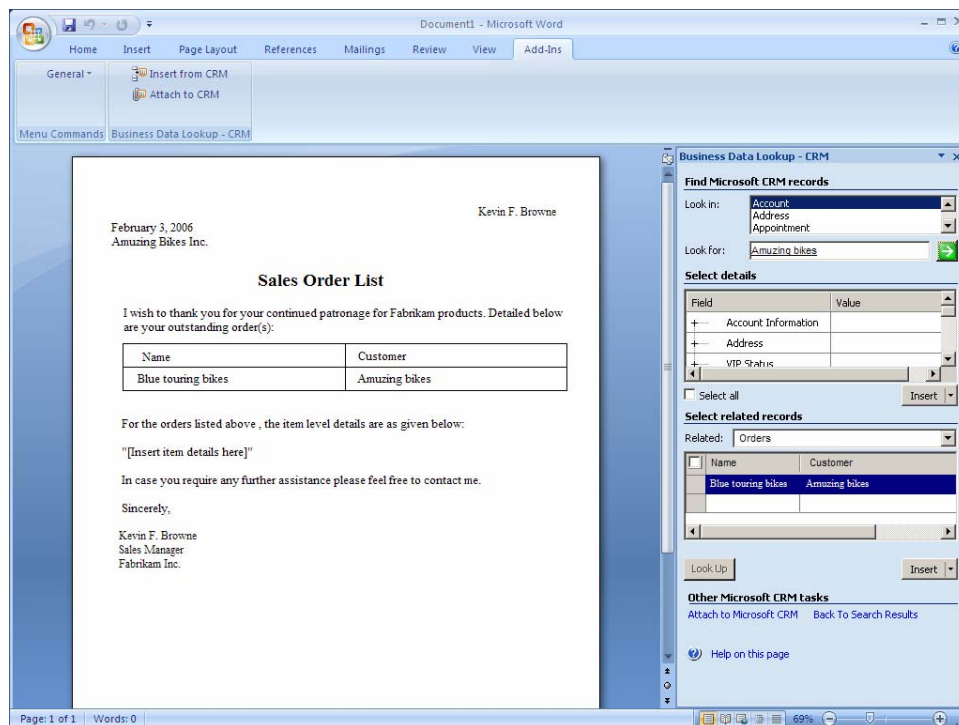


Figure 8: Example of Budgeting Dashboard created using the Custom Report Generator Snap-In.

## Look Up Business Data from Microsoft Office

With the Business Data Lookup Snap-In, users can access Microsoft Dynamics data easily from within the Microsoft Office system as well as store Microsoft Office system documents as part of the Microsoft Dynamics database. With a single repository of customer communications, both structured and unstructured data, employees can increase productivity and experience greater operational efficiency.

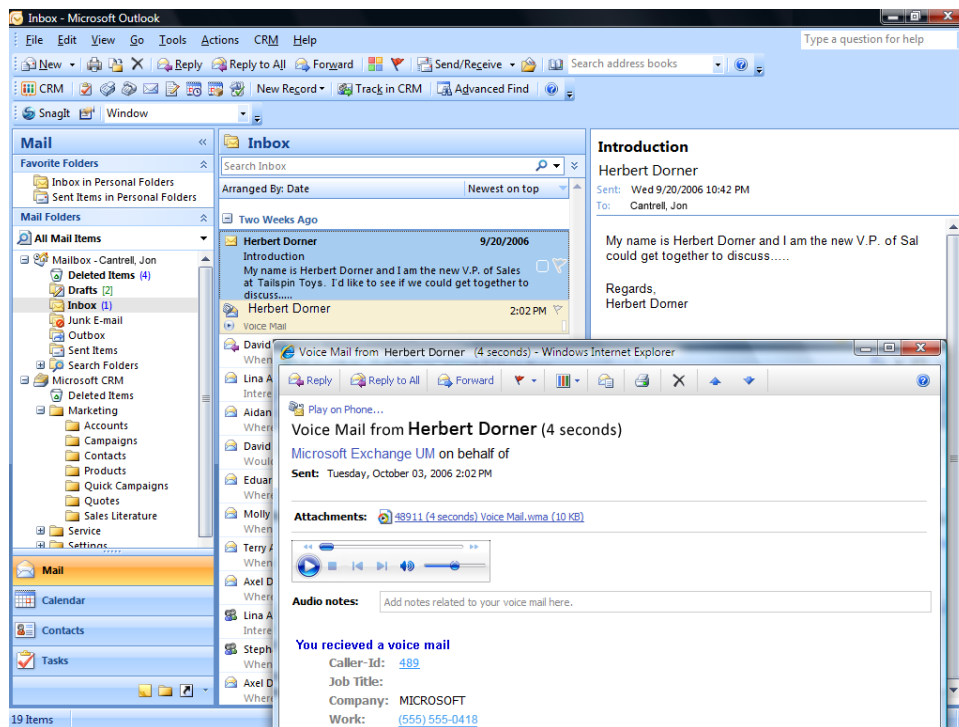
As an example, sales representatives can attach communications to the customer record in Microsoft Dynamics CRM. When working with customers, the sales representative can quickly find all related information since it is stored in one place, eliminating the need to dig through multiple applications and folders to successfully complete a sale. If an individual salesperson is on leave from the office, another salesperson can easily manage the customer relationship, maintaining a high level of customer care.



**Figure 9: Microsoft Word users can link structured and unstructured data and access Microsoft Dynamics and Microsoft Dynamics CRM information.**

## Unify Your Communications

With the power of Exchange Server 2007 Unified Communications, voice mail can now be stored directly in the Outlook inbox and can be tracked in Microsoft CRM, along with your e-mail. Now you have instant access to all your customer communications: print, e-mail, and voice.



**Figure 10: Store and access voicemails, along with print and e-mail communications, in Microsoft Dynamics CRM using Exchange Server 2007 Unified Communications.**

## Fuels Productivity

Microsoft Dynamics helps fuel productivity by automating business-critical operations and adapting to fit into a customer's type of business, helping ensure the most relevant insight. How? With a user experience modeled around tasks and roles and the processes they engage in – all integrated with familiar productivity tools like Microsoft Office system.

## Deliver Role-relevant Information and Processes through SharePoint

Microsoft® Office SharePoint® Server 2007 technologies facilitate collaboration within an organization and with partners and customers. Users in an organization can easily create, manage, and build their own collaborative Web sites and make them available throughout the organization. In addition, team and site managers can coordinate site content and user activity easily. The Office SharePoint Server 2007 environment is designed for easy and flexible deployment, administration, and application development.

With the addition of Office SharePoint Server 2007, which is a new server offering that includes Collaboration, Enterprise Content Management, Search, and Business Intelligence, users can now access both structured and unstructured data with greater ease. The Microsoft Dynamics utilizes many new features that utilize Office SharePoint Server 2007, including:

- The ability to not only search SharePoint Server 2007 content and Microsoft Office documents, but also search your Microsoft Dynamics data, such as sales transactions.
- More flexible report publishing, allowing you to publish Microsoft Dynamics reports alongside other reports, such as SQL Reporting Services reports – all into a common category structure.
- New pre-built pages in Office SharePoint Server 2007 and automatic setup of Microsoft Dynamics Web Services and search catalogs, allowing you to speed implementation time.
- A robust and consistent workflow experience leveraging Windows Workflow Foundation helps ensure user-specified tasks are completed through notifications in Outlook. Additionally, an audit trail of task ownership is maintained for compliance purposes.
- Role-based security and live data connection allows easy sharing, across multiple users, of Excel reports containing Microsoft Dynamics data.

## Streamline Approvals and Notifications

Microsoft Dynamics utilizes the Windows Workflow Foundation for approvals and notification to provide a robust and consistent workflow experience. Easily create workflow routines to streamline invoice approvals, purchase approvals, timecard reviews and other processes, and deliver proactive alerts in Outlook to assist managers and decision-makers in keeping an eye on important metrics of your business such as cost overruns, sales quotas, receivables outstanding and other measures you define.

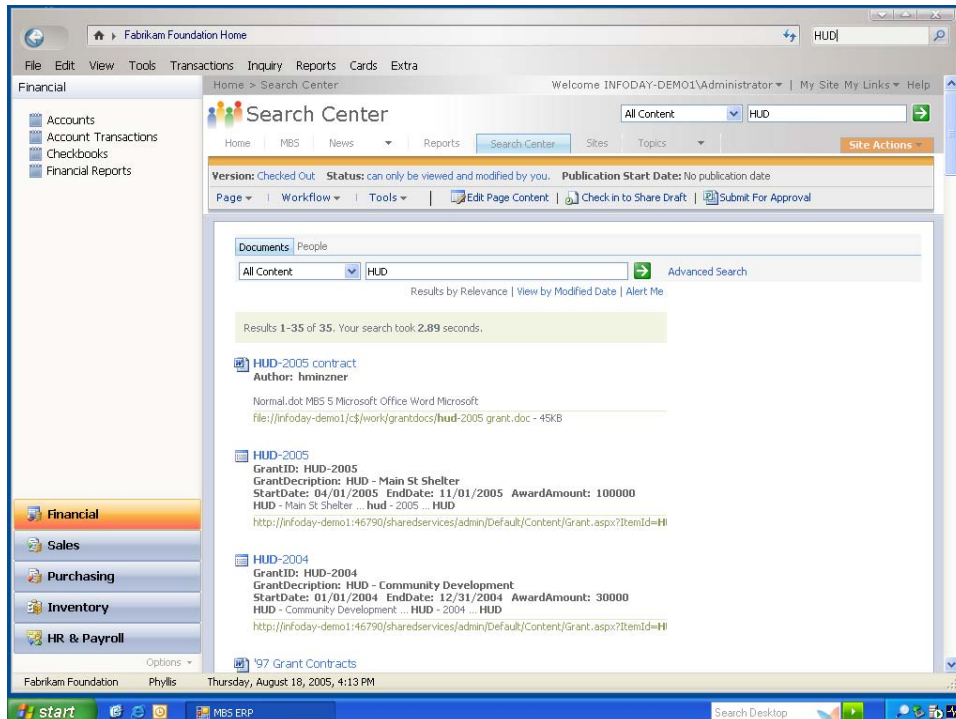
The integration between Microsoft Dynamics and Microsoft Office can improve your organization's ability to anticipate, manage, and respond to changes in the marketplace in order to maximize opportunities. It also can help you streamline management and processes. Microsoft Dynamics includes a robust and consistent workflow experience that leverages Windows Workflow Foundation; ensuring user-specified tasks are complete through notifications in Outlook. Additionally, an audit trail of task ownership is maintained for compliance purposes. Workflow processes enabled with Windows Workflow include sales order hold removal, purchase order approvals, sales order credit limit override, receivables batches, payables batches, and GL batches.

**Figure 11: Receive notifications of actions that need your attention, and quickly complete tasks using Microsoft Dynamics Approvals and Notification, built on windows Workflow Foundation.**



## Global Search of Structured and Unstructured Data

The **search capabilities** in Office SharePoint Server 2007 will increase the users' ability to find the people and data they need, whether structured or unstructured data. Save time by being able to search and obtain information on a customer's transactions, their credit history, as well as communication such as designs and contractual agreements from within one portal. Sales transactions can be reviewed and approved from the same portal.



**Figure 12: The Office SharePoint Server 2007 Search engine using Microsoft Dynamics Web Services enables users to search on Microsoft Dynamics and Microsoft Office data from a single point.**

## Collaborate on Processes

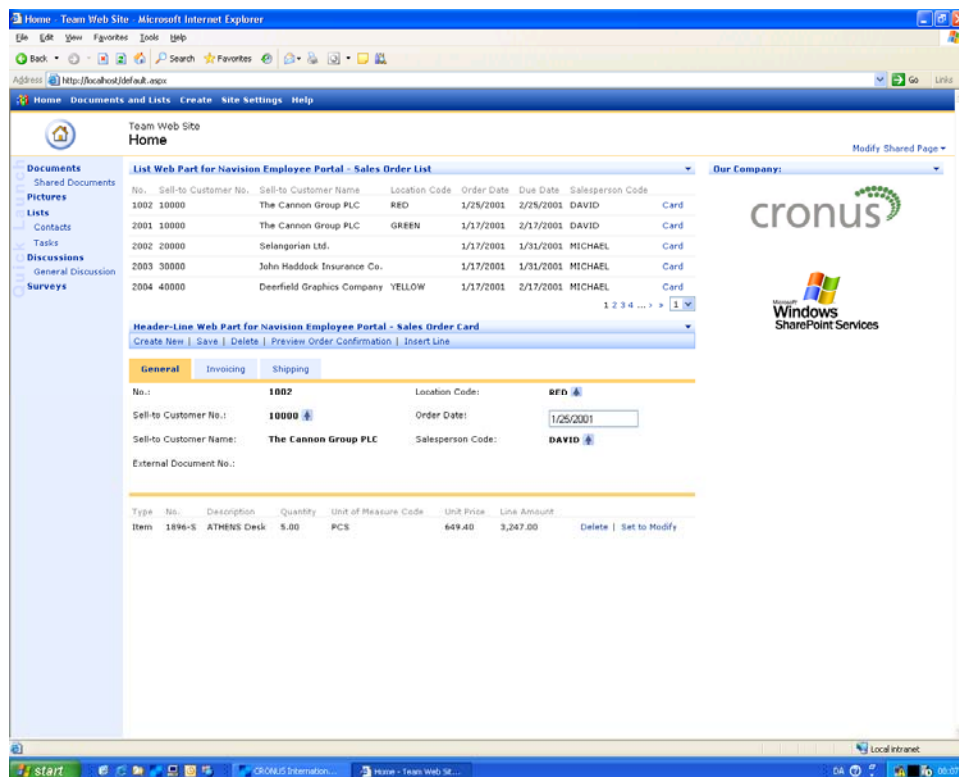
Microsoft Dynamics uses document workplaces created using Office SharePoint Server 2007 to enable employees to collaborate and work together on processes such as invoicing, customer order tracking and reporting. For example, salespeople can access customer accounts and sales history, as well as enter orders. Purchasing supervisors can look up inventory levels and lead time information, and production designers can edit a bill of materials (BOMs) right from Office SharePoint Server 2007.

Companies can create company-wide intranets with security that allows employees to access only what is appropriate for their role. This helps ensure that employees have access to relevant and timely information, which in turn helps increase productivity.



Organizations benefit from their employees utilizing familiar applications that do not require significant additional training. A shipping department could quickly mark a sales order as fulfilled or salespeople could access their customer lists without learning a new system. By utilizing Microsoft Dynamics and SharePoint Server 2007, companies realize time and cost savings, promote educated decision-making, and increase data integrity.

In our example here, employees have the ability to review and edit a sales order or add a customer to the Microsoft Dynamics database simply by accessing the portal. Additionally, by integrating financial, customer relationship and supply chain processes to help maximize both internal and external efficiencies, costs can be reduced and performance can be improved.



**Figure 13: Users can review and edit sales orders easily with Microsoft Dynamics and SharePoint Server 2007.**

## ***Enable Confident Decision Making***

Business is demanding. In order to succeed you have to move faster, perform better and meet requirements outlined by regulatory agencies on a global scale. To help you meet these many challenges, Microsoft Dynamics works with business Intelligence solutions from Microsoft Office to provide you and your organization with the level of insight you need to make timely and informed decisions with increased confidence.

### **Keep an Eye on Business Metrics**

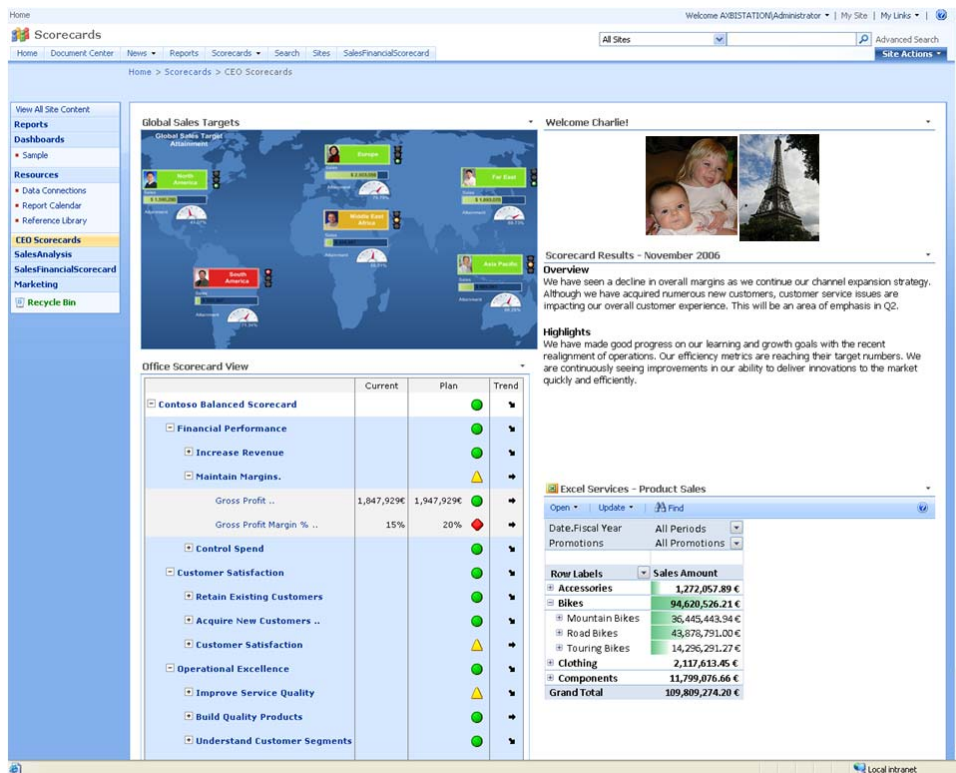
Metrics help you understand where your business has been, where it is, and where it is going. Metrics, driven by the business processes managed by Microsoft Dynamics, can give you insight into trends, signal if you are on target to meet strategic goals, or highlight an opportunity. To help you keep an eye on these metrics, Microsoft Dynamics works with solutions such as Microsoft SharePoint, Microsoft Excel and Business Scorecard Manager to give you business insight to critical data in a format that is easy to understand and in applications with which you are familiar.

By working with Microsoft Office and SQL Server, Microsoft Dynamics data can be exported into a data cube or spreadsheet and published to a portal page as a scorecard, pivot table or a report. This allows you and your decision makers to access the information when it is convenient and timely for you. Taking advantage of Excel Services, a Web-based version of a spreadsheet or pivot table can be reviewed without any need for the Excel client. And, if deeper analysis is necessary the pivot table can be opened in a full Excel client and maintain its live link to the data. Decision makers can focus on analyzing information that makes sense to them and use all the standard Excel tools for analysis and reporting, including direct analysis of tables and records, without having to generate data cubes. Microsoft Dynamics data can be surfaced in an Office Visio diagram for hierarchies, in MapPoint for geospatial analysis, as graphs in PowerPoint or Excel, and as reports in SQL Reporting Services, all of which can be accessed on a SharePoint portal page. The value to you is that your organization can continue to use the solutions and applications you are comfortable using, including Microsoft Dynamics and Microsoft Office, and at the same time improve the efficiency with which information is shared.

Another way Microsoft Dynamics and Microsoft Office enable confident decision making together is through Scorecarding from Microsoft® Office PerformancePoint™ Server 2007 (previously known as Business Scorecard Manager). Providing employees with a balanced perspective that ties daily activity, from Microsoft Dynamics, to corporate strategic objectives, results in a broader and deeper understanding of the business. Scorecards can be defined to compare plan to actual or actual to strategic targets or to forecasted values. In addition, traffic lighting gives an immediate visual cue as to whether a metric is on or off target, enabling quicker notification and action to be taken to correct an issue or take advantage of an opportunity.

By working with Microsoft Office, Microsoft Dynamics enables your organization to access and share information via Outlook or as parts of a SharePoint Web page. Giving your company quick and easy access to the information you need to understand your business, and make decisions with the confidence necessary to drive strong, successful business in today's new world of work.

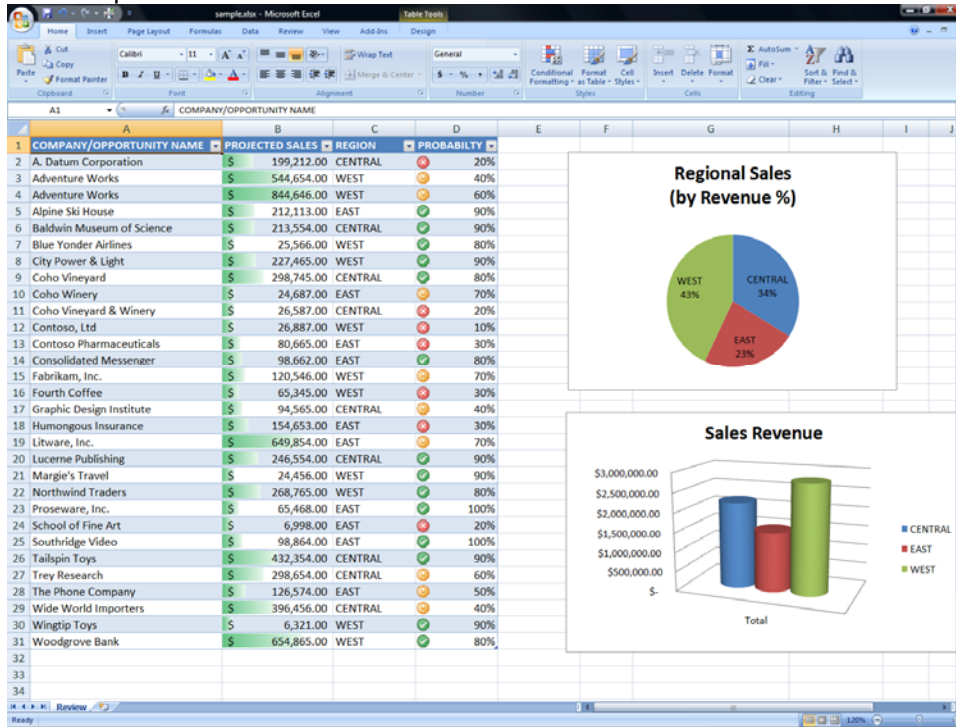
For example, the CEO can analyze the current status of his company from the company portal. Financial and operational activity can be analyzed in relation to target, with the ability to drill into an issue discovered on the scorecard by filtering on an Excel Services pivot table. By viewing a role-based portal page, the CEO gains contextual insight into all relevant business areas. Adding other business intelligence files such as reports, or graphs, linked to other data such as inventory or employee sick days, executives can understand any aspect of the business. By using Microsoft Dynamics in conjunction with Microsoft Office Excel, Business Scorecard Manager, Visio and SQL Reporting Services, your executives gain the insight necessary to make confident decisions to drive business success.



**Figure 14: Organizations can access scorecards to help understand the state of their business by using Office SharePoint Server 2007, Microsoft Office Business Scorecard Manager and Microsoft Dynamics.**

## Visualize Sales Opportunities

Microsoft CRM offers numerous ways to take advantage of integration with Microsoft Office to increase your ability to analyze information and make better informed decisions. By accessing Microsoft CRM information in Excel, you have the ability to visually understand sales information, discover trends and drill into exceptions.



**Figure 15: Understand and visualize your opportunity pipeline using Microsoft CRM with Excel, helping you discover important trends and find exceptions in your customer data. Discover patterns and highlight performance indicators in your data by using rich visualization schemes like gradients, thresholds, and icons.**

## Improved Ability to Export Information to Microsoft Office

Sharing information from Microsoft Dynamics to the 2007 Microsoft Office applications commonly used throughout the organization makes it easy to share vital business information with users in the form they are most familiar with. Using the Microsoft Office XML format to export data from Microsoft Dynamics forms makes it easier to share business data widely, increasing its value to information workers, and enabling them to use Excel, Word and other Microsoft Office programs to analyze and communicate this data easily and efficiently.

Microsoft Dynamics forms, data and information can be exported to Microsoft Excel and Word from the List Pages and Task Page – using the Word icon the sales order is converted into a Word document. The export is using OfficeXML, so it is possible to apply various style sheets to the same information.

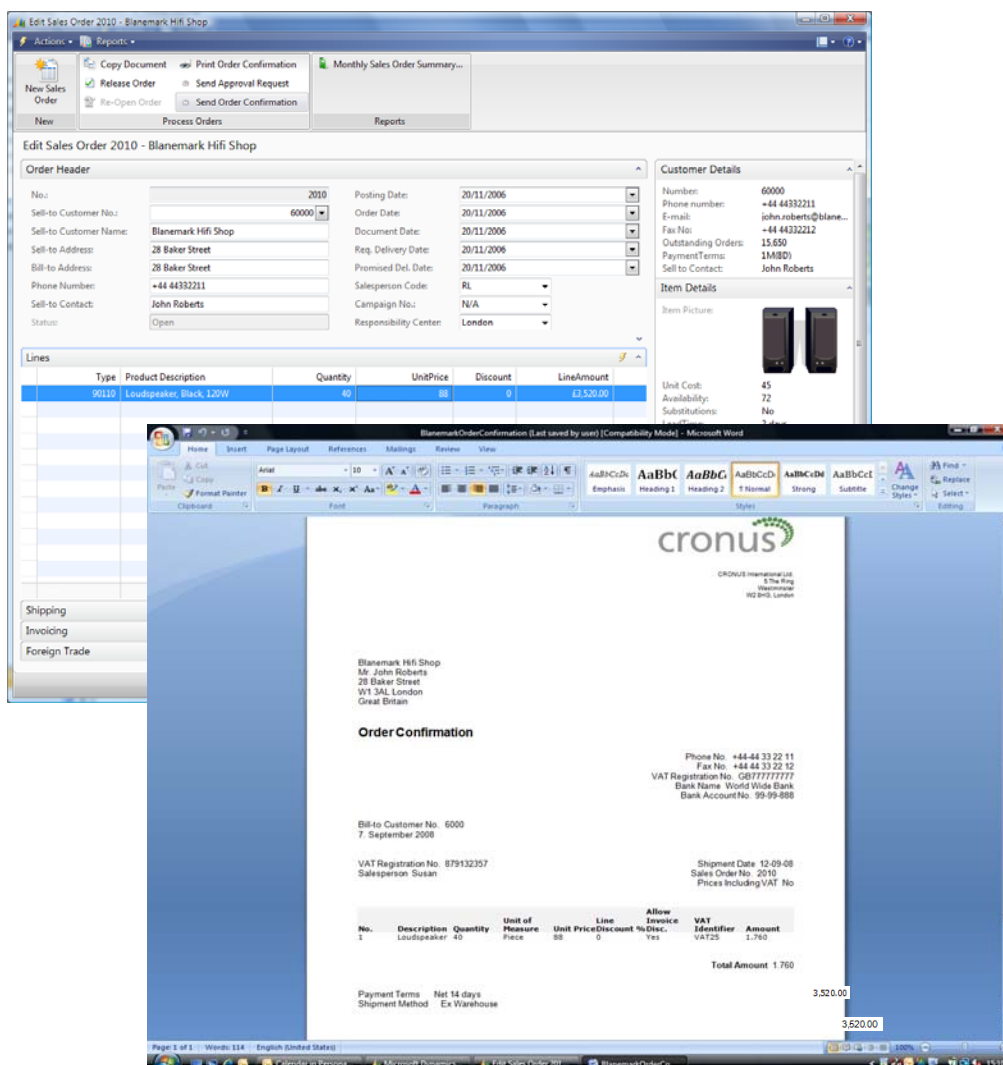


Figure 16: Easily export information from Microsoft Dynamics to Office.

## Contextual Business Intelligence with Refreshable Reports via Excel or Excel Services

Increase consistency and accuracy of financial information throughout your organization with refreshable Excel spreadsheets, automatically pulling real-time data into spreadsheets, PivotTable and PivotChart documents. Microsoft Office SharePoint Server 2007, which provides the ability for users to share and access their Excel spreadsheets via a Web connection, is supported through automated exports directly from within the context of Microsoft Dynamics. The information users are viewing, in the context in which they are viewing it, can be quickly and easily pushed into an Excel or Excel Services format for ease of sharing across the organization.

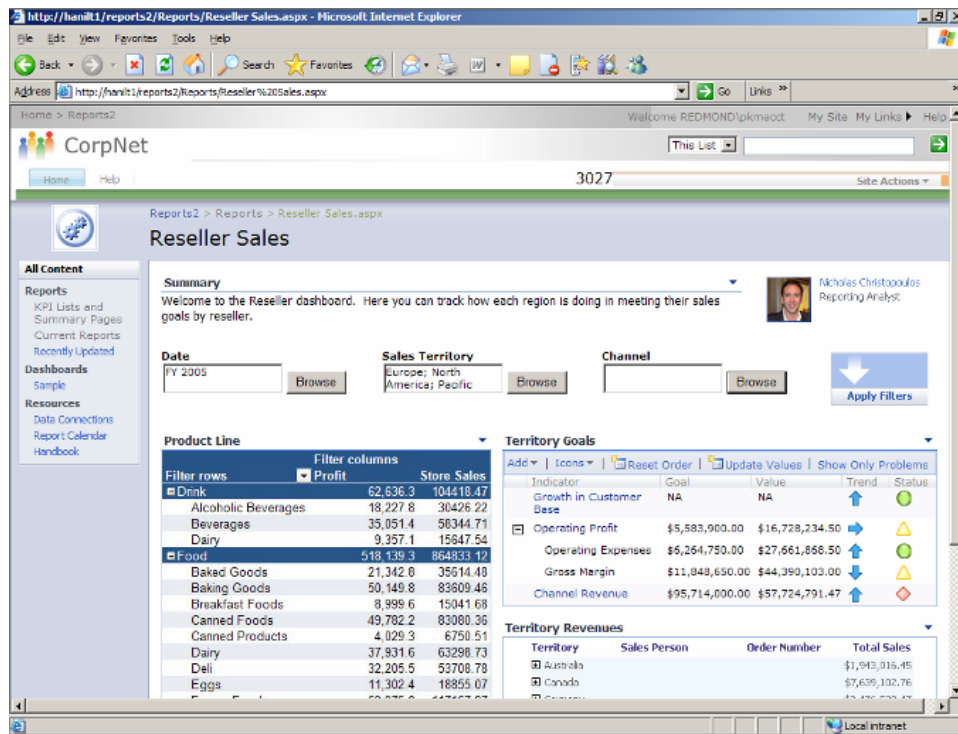


Figure 17: Live Microsoft Dynamics data delivered in refreshable Excel format ensures your entire organization is working with consistent, current, accurate information.

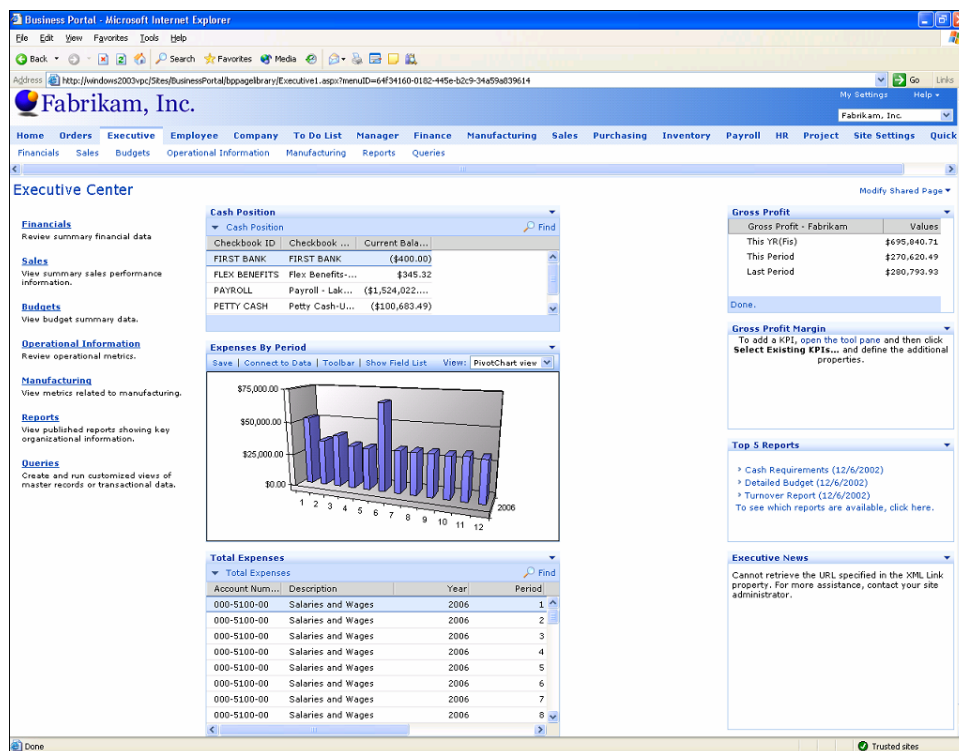


## Key Performance Indicators

With integration between Microsoft Dynamics and Office SharePoint Server 2007 technologies, collaboration is fostered among your employees, vendors and customers. And, by integrating financial, customer relationship and supply chain processes to help maximize both internal and external efficiencies, costs can be reduced and performance can be improved.

For example, a CFO needs the most recent details about the company's cash flow situation or expenses for a given reporting period. Using Office SharePoint Server 2007 and Microsoft Dynamics, a summary of key performance indicators (KPIs) for sales can be displayed on the executive dashboard in real time and can be accessed using a Web browser.

As a result, the CFO has the information needed to make decisions, and can easily “drill down” on any summary-level information to review the individual transactions behind the executive dashboard information. Office SharePoint Server 2007 and Microsoft Dynamics provide an automatic way to display financial and operational information and provide easy access to detailed sales information.



**Figure 18: Microsoft Dynamics shares information with Office SharePoint Server 2007, allowing users to create executive dashboards to view financial, sales, and operational information.**



## Summary

Using Microsoft Dynamics, you can help increase the productivity of employees throughout your business in less time. With an already familiar Microsoft Office system user interface, your employees will be able to take advantage of the innovations within Microsoft Dynamics with a minimal amount of training time. Microsoft Dynamics is designed to correlate with specific roles that people possess in companies like yours. And it's designed to allow employees throughout your business to customize and automate it according to their preferences and work styles. Microsoft Dynamics means business management solutions. For your employees, that means software that works the way they do. For your business, that can mean an accelerated return on your investment – and a business that's managed more smoothly, more effectively and more profitably.

Through continued collaboration, the Microsoft Dynamics and Microsoft Office teams have enhanced their integration, allowing users to access the information they need, in the format they prefer, with relevance and security, to enable deep business insight across the organization.

Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like and with familiar Microsoft software, automating and streamlining financial, customer relationship and supply chain processes in a way that helps you drive business success.

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