

More Productivity, Less Effort



Microsoft Dynamics GP and the Microsoft Office System:

Extend the Reach of Your Business Management
Solution to Increase Productivity, Insight,
and Collaboration

White Paper

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Introduction

Businesses need solutions that reflect the way people really work—the tasks they perform, the information they use, the tools and formats that make sense for their individual jobs and that help them work more productively. The guiding principles behind Microsoft Dynamics® GP are designed to meet those needs. They are the foundation for a solution that offers a personalized user experience, deep interoperability with the applications people use every day, and deployment options that fit customers' specific organizational needs.

This paper offers highlights of how Microsoft Dynamics GP and the Microsoft® Office system work together to help people optimize productivity, access and analyze information, and collaborate and connect securely across the entire organization—regardless of whether they're working in Microsoft Dynamics GP or other applications. Microsoft Dynamics GP combines robust business management capabilities with products and technologies that include:

- Microsoft Office system productivity, analysis, and communications applications, including Office Excel®, Office Word, Office Outlook®, and Office PowerPoint®.
- Microsoft Office SharePoint® Server 2007, offering powerful collaboration, workflow, and document management that reaches across internal teams, departments, and beyond to customers, suppliers, and partners.
- Additional Microsoft Office system products and technologies, including Office Visio®, Office InfoPath, Microsoft MapPoint®, and more.

Microsoft Dynamics GP works with Microsoft Office Excel and Office Word so that our people can work in the application they are most comfortable with. People in our accounting department started taking advantage of that capability from day one. They simply took that data synchronization and interactivity for granted—the software works just the way it ought to.

Lee Horton, IT Director, Current Energy

Equally important, Microsoft Dynamics GP offers choice. You can choose to deploy Microsoft Dynamics GP alongside Microsoft Office system applications and gain flexible, multi-faceted productivity, analysis, and information-sharing capabilities. You can also choose to deploy Microsoft Dynamics GP with Office SharePoint Server 2007; this option offers new dimensions for connecting people, processes, and information that greatly adds to the value of Microsoft Dynamics GP. You can pace your implementation and add the solutions that work for you when the time is right. Regardless your choice, Microsoft Dynamics GP enables you to extend the power of your business management solution across your organization.

Extend the Reach of Productivity

Microsoft Dynamics GP fuels the personal impact everyone in your organization can bring to the table, delivering a user experience modeled around role-specific tasks—all connected and consistent with the familiar Microsoft Office system.

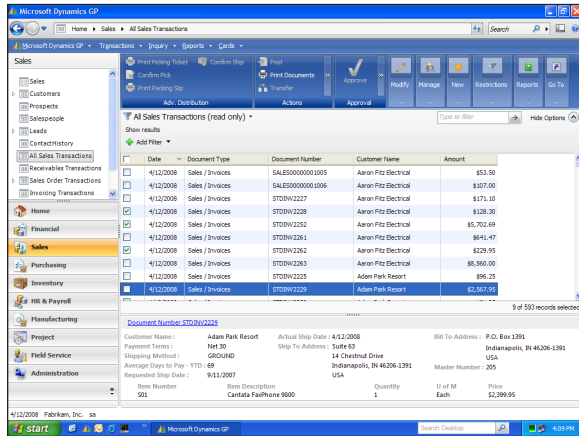
- Our user interface has the look and feel of the Microsoft Office System, so whether employees are working in Microsoft Dynamics GP or the Microsoft Office System, they'll feel at home. The interface reflects the left-hand

Our users really like the Role Center in Microsoft Dynamics GP. They can easily customize the pages to set up to-do lists and quick links, so it's easy for them to access tools relevant to their jobs on a single screen.

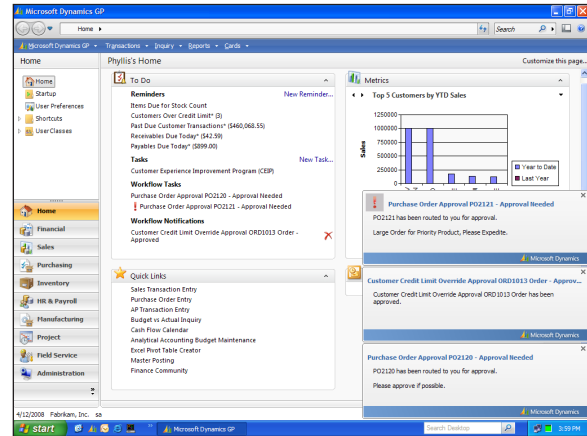
Joe Grlica, Director of IT, SchoolKidz

navigation and user favorites that people already know and use in Office Outlook.

- RoleTailored home pages—called Role Centers—make it easy for people to view their work priorities and access the information and tasks they need for *their* specific job, not just anyone’s job.
- Simplify everyday tasks with Action Panes within Microsoft Dynamics GP—inspired by the 2007 Microsoft Office system. Action Panes are intuitive, task-specific command bars that appear across all navigation lists, making it easy for people to sort and filter records and perform multiple tasks from within a single window.
- Receive automatic alerts and notifications directly within Office Outlook.



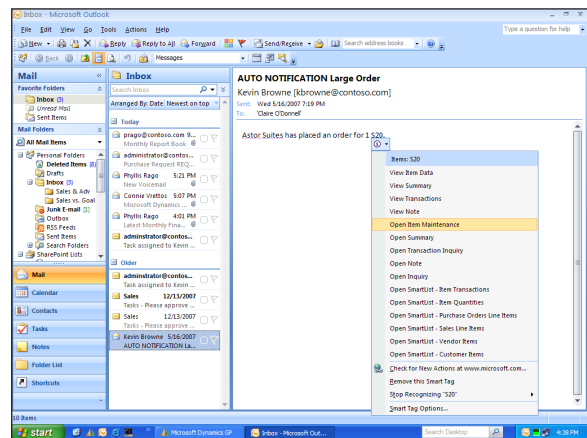
Action Panes make it easy for people to sort and filter records and perform multiple tasks from within a single window.



Users can personalize RoleTailored home pages—called Role Centers—to centralize common and critical daily tasks.

Without leaving the familiar “home” that Microsoft Dynamics GP offers, people can also:

- Use Smart Tags to quickly access Microsoft Dynamics GP data from Office Word, Office Excel, and Office Outlook—including customer, vendor, inventory, and general ledger account information.
- Publish Microsoft Dynamics GP reports for easy access within the Outlook-based interface, so that people can quickly access information they need without logging into the system.
- Send customer statements and invoices through Office Outlook.
- Quickly create customized letters that pull Microsoft Dynamics GP information into Office Word to ensure timely communications with customers and partners.
- Create Office InfoPath forms that capture specified information from Microsoft Dynamics GP and make it widely available to both users and non-users.



Use Smart Tags to quickly access Microsoft Dynamics GP data from applications such as Office Word, Excel, and Outlook.

- Take advantage of Office Visio, Office PowerPoint, and other Office productivity applications to surface Microsoft Dynamics GP data in easy-to-understand, graphical formats.
- Plan efficient delivery and service call routes using Microsoft MapPoint.

That's just a glimpse of the ways Microsoft Dynamic GP and the Microsoft Office system help people work more productively, with tools that are most relevant to their jobs. In the sections that follow, we take a closer look at how combining two innovative systems extend the reach of insight and collaboration.

Extend the Reach of Insight

Business success depends on efficient information analysis, reporting, and budgeting. When people can work with familiar, trusted business intelligence tools, they can spend their time on what's important—capturing, assessing, and sharing information that drives efficient operations, smart and intuitive business decisions, and profit-driving performance. And when people can locate, securely access, analyze, and share information while working outside the system, your organization gains the ability to keep everyone efficient, informed and connected.

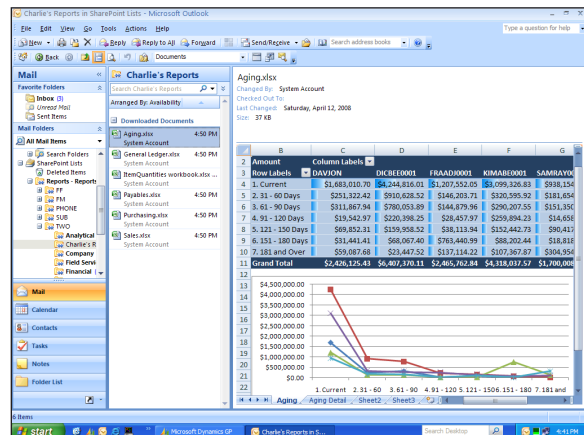
Every business decision that we make can be substantiated by a dashboard that pulls information from Microsoft Dynamics GP.

Renier van der Merwe,
Manager of Business Systems,
Premier Foods

Fuel Strategic Impact with Office Excel

With Microsoft Dynamics GP, people can review, edit, and manipulate data using Office Excel, one of the world's most familiar spreadsheet applications. By taking advantage of Office Excel for data analysis, people working within Microsoft Dynamics GP can quickly provide information to decision makers and stakeholders who aren't logged into the system, extending business intelligence across the entire organization.

- Microsoft Dynamics GP includes more than 200 built-in Office Excel reports that people can customize themselves to meet specific needs.
- Quickly transform Microsoft Dynamics GP data into flexible, at-a-glance insight with Office Excel PivotTables® and graphical charts.
- Build custom Office Excel lists that connect to source data, enabling real time reporting of Microsoft Dynamics GP business information within Office Excel.
- Analyze data from multiple angles and views. Perform up-to-the-minute analyses and comparison with refreshable Office Excel reports. Analysis Cubes, built on powerful Microsoft SQL Server® technologies, enable people to view information in the formats they prefer and share it across their organization.
- Refresh data from a single location. Automatically update data in Office Excel without the need to export from Microsoft Dynamics GP. Quickly deploy Office Excel Reports to Office SharePoint Server 2007, gain access to Report Center reports through Office Out-



With a single click, people can access and view Office Excel reports from within Office Outlook or Office SharePoint Server 2007.

look, and centralize report searches from both structured and unstructured sources.

- Decision makers who want to perform ad hoc queries on Microsoft Dynamics GP data, without logging into the system, can work with Office Excel report templates. Reports can be stored on Office SharePoint Server 2007 for easy access and instantly refreshed at any time to ensure data is current.

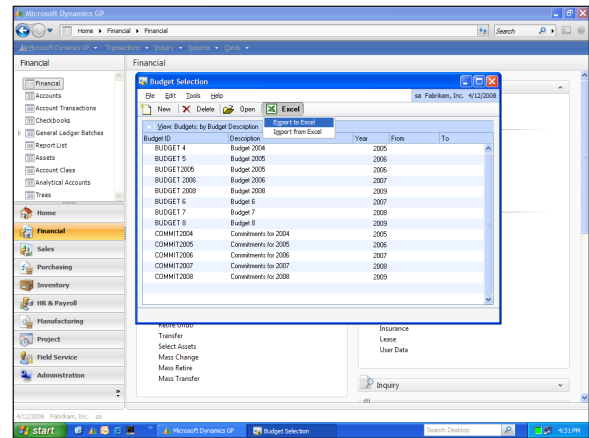
Because we use Office SharePoint Server 2007 to access our business data, we can change absolutely any component of Microsoft Dynamics GP without affecting the way people access the data.

Renier van der Merwe,
Manager of Business Systems,
Premier Foods

Streamline Financial Management with Excel-Based Budgeting

Effective budgeting requires agile negotiation, educated estimating, and clear mathematical calculation. Microsoft Dynamics GP delivers built-in, Excel-based budgeting capabilities that combine the flexibility and accuracy businesses need to manage agile, precise budgeting processes.

- Excel-based budgeting in Microsoft Dynamics GP enables straightforward exporting for a range of accounts—for example, all the accounts in a department. Export into Office Excel also can include historical years and the current year's actual amounts, so that each department manager can develop their own budget.
- A wizard simplifies the process of moving budgets from Microsoft Dynamics GP to Office Excel and back again. You can move budgets for a range of accounts to a specific worksheet within an Office Excel workbook, and then make the individual worksheets available to managers to submit budgets for their departments.

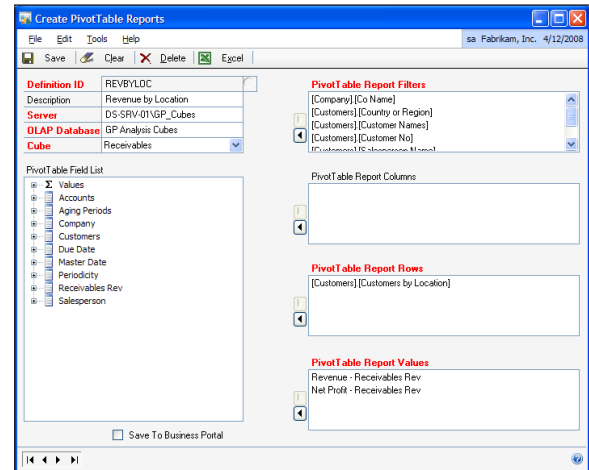


Microsoft Dynamics GP delivers familiar, flexible tools for managing complex budgeting processes.

Strengthen Planning and Performance

Metrics can deliver insight into trends, signal if organizations are on target to meet strategic goals, or highlight opportunities. Microsoft Dynamics GP works with solutions such as Office SharePoint Server 2007 and Office Excel—including scorecarding, analytics, and charts and graphs—to deliver business intelligence across multiple formats and channels.

- Microsoft Dynamics GP data can be exported into a data cube or spreadsheet and published to a portal page as a scorecard, pivot table, or a report. Decision makers can access the information when they need it, without logging into the system.



Define dimensions to view financial information with Analysis Cubes, and then use pivot tables in Office Excel to analyze trends and improve decision-making processes.

- Excel Services—including in Office SharePoint Server 2007—offer a Web-based version of a spreadsheet or pivot table that can be reviewed without working in Office Excel. For deeper analysis, the pivot table can be opened in Office Excel, while maintaining its live link to the data. Decision makers can focus on analyzing information that makes sense to them and use standard Office Excel tools for analysis and reporting.
- Microsoft Dynamics GP data can be surfaced in an Office Visio diagram for hierarchies, in Microsoft MapPoint for geospatial analysis, as graphs in Office PowerPoint or Office Excel, and as reports in SQL Reporting Services—all available on an Office SharePoint Server 2007 portal page.
- Office SharePoint Server 2007 makes it easy to create scorecards that align daily activity with corporate strategic objectives, resulting in a broader and deeper understanding of the business. Scorecards can be defined to compare plans to actuals, or actual to strategic targets and forecasted values.

Create Targeted Queries with SmartLists and Office Excel

SmartList is a Microsoft Dynamics GP query tool that lets people quickly create sophisticated queries to find detailed customer, vendor, general ledger, inventory, and employee information. Microsoft Dynamics GP includes more than 200 predefined SmartList Favorites, along with a SmartList Builder and Excel Report Builder that enables easy interchange of data.

- Exporting query data from SmartList to Office Excel or Office Word is as easy as opening a SmartList favorite and clicking a single button.
- The data is automatically formatted, eliminating time-consuming data cleanup. It's easy to include Office Excel spreadsheets or Office Word documents as e-mail attachments, or embed the data within the message.
- Take advantage of SmartList Builder and the Excel Report Builder to create personalized SmartLists and Office Excel Reports. With a few clicks, people can quickly transform SmartLists into Office Excel reports, or Office Excel Reports into SmartLists, saving time and meeting specific information needs.

Year	Per...	Account Number	Account Description	Credit Amount	Debit Amount
2008	4	000-1100-00	Cash - Operating Account	\$2,365,000.00	\$17,117.00
2008	4	000-1110-00	Cash - Payroll	\$9,136.95	\$14,400.00
2008	4	000-1120-00	Cash - Flex Benefits Pro...	\$0.00	\$0.00
2008	4	000-1130-00	Petty Cash	\$0.00	\$0.00
2008	4	000-1200-00	Accounts Receivable	\$0.00	\$0.00
2008	4	000-1205-00	Sales Discounts Available	\$0.00	\$0.00
2008	4	000-1300-01	Inventory - Retail/Parts	\$2,900.00	\$0.00
2008	4	000-1300-02	Inventory - Finished Goods	\$554.90	\$0.00
2008	4	000-2100-00	Accounts Payable	\$6,000.00	\$0.00
2008	4	000-2120-00	Commissions Payable	\$76.41	\$0.00
2008	4	000-2170-00	Taxable Benefits Payable	\$166.17	\$0.00
2008	4	000-2170-00	Federal Withholding Pay...	\$3,486.46	\$0.00
2008	4	000-2200-00	Payroll Deductions Payable	\$361.86	\$0.00
2008	4	000-2300-00	IL State Sales Tax Payable	\$152.83	\$0.00
2008	4	000-2310-00	Chicago City Sales Tax P...	\$25.48	\$0.00
2008	4	000-4110-01	US Sales - Retail/Parts	\$252,546.97	\$0.00
2008	4	000-4111-01	Canadian Sales - Retail/...	\$350,000.00	\$0.00
2008	4	000-4112-01	Australian Sales - Ret...	\$100,000.00	\$0.00
2008	4	100-5100-00	Salaries and Wages - Ad...	\$0.00	\$0.00
2008	4	100-5100-00	Employee Benefits - Ad...	\$0.00	\$0.00
2008	4	100-5170-00	Payroll Taxes - Administr...	\$0.00	\$0.00
2008	4	200-5170-00	Payroll Taxes - Accounting	\$0.00	\$0.00
2008	4	300-5130-00	Commissions - Sales	\$0.00	\$0.00

SmartList report data can be exported to Excel or Word with a single click.

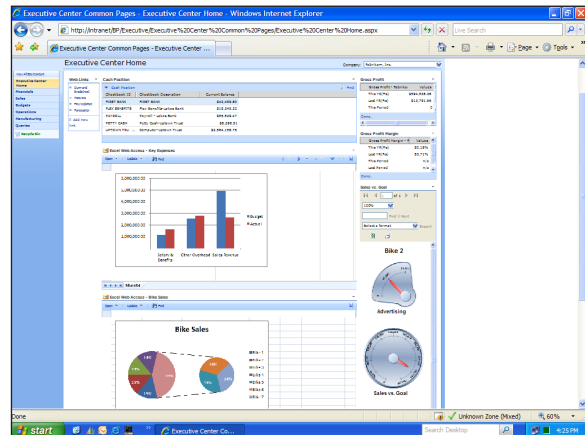
Share Information and Reports

Open the flow of information to people across the organization, whether they're working in Microsoft Dynamics GP or other applications.

- Launch and view reports from within Microsoft Dynamics GP or directly from Office SharePoint Server 2007—whether you're a regular user of Microsoft Dynamics GP or work in other applications, you'll have fast access to information.
- Publish reports to Office SharePoint Server 2007 Report Libraries using the Microsoft Dynamics GP Report Scheduler.
- A straightforward wizard simplifies deployment for Microsoft SQL Server Reporting Services reports. Administrators also can generate Unified Data model (UDM) files for all Microsoft Dynamics GP

reports, and then open them in SQL Server Reporting Services or Office Excel formats.

- More flexible report publishing allows users to publish Microsoft Dynamics GP reports alongside other reports, such as SQL Reporting Services reports.
- Access and share information within Office Outlook or Office SharePoint Server 2007. For example, the CEO can analyze the current status of his company by viewing key performance indicators (KPIs) on 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. Equipped with a role-based portal page for viewing analyses, the CEO can gain contextual insight into all relevant business areas.



Executive dashboards give decision makers fast access to financial, sales, and operational information—without the need to log into Microsoft Dynamics GP.

Extend the Reach of Collaboration

Today's business world is built on connections—starting with internal teams and departments, reaching up to the CEO, and reaching out to customers and partners. Microsoft Dynamics GP and the Microsoft Office system combine to bring together people, processes, and information.

Microsoft Dynamics GP and SharePoint Server 2007 help us bring teams together, collaborate, and create a worldwide ecosystem that enables our staff to get on the same page with a common set of policies and procedures.

**Jack Deeds, Chief Financial Officer,
Search for Common Ground**

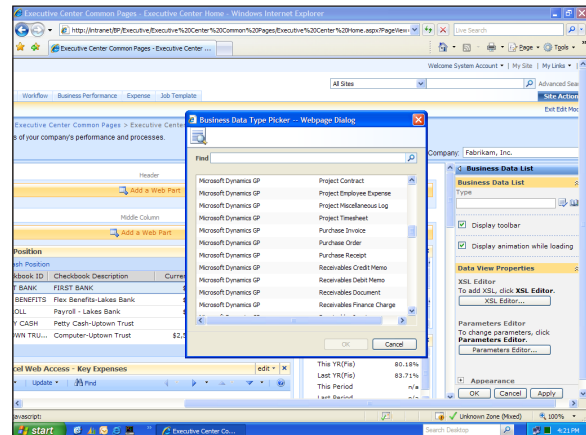
Connect Employees, Customers, and Partners

Office SharePoint Server 2007 technologies facilitate collaboration within an organization and with partners and customers. Designed to minimize IT effort, this industry-leading server solution offers flexible deployment, administration, and application development. Users can easily create, manage, and build their own collaborative Web sites and make them available throughout the organization, with built-in security controls. Team and site managers can coordinate site content and user activity.

- Microsoft Dynamics GP uses document workplaces built on Office SharePoint Server 2007 so that employees can collaborate 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 (BOM) directly from Office SharePoint Server 2007.
- Create company-wide intranets that allow employees to access only what is appropriate for their role. Employees have access to relevant and timely information, which in turn helps increase productivity.
- Simplify the process of creating internal and external portal pages by combining Web Services in Microsoft Dynamics GP and Office SharePoint Server 2007.
- Speed deployment with pre-built pages in Office SharePoint Server 2007 and automatic setup of Web Services in Microsoft Dynamics GP. Without adding new code, administrators can create customer and employee portals that deliver security-enhanced, role-based access to information, along

with executive dashboards that can be accessed from Office SharePoint Server 2007.

- Business Portal for Microsoft Dynamics GP delivers browser-based, role-appropriate access to Microsoft Dynamics GP information and processes. Business Portal can be installed on Windows SharePoint Services or Office SharePoint Server 2007.
 - Eliminate the need to load Microsoft Dynamics GP on every user's desktop machine by delivering portal-based access to Microsoft Dynamics GP windows.
 - Enable users to easily access the Microsoft Dynamics GP windows they use most often by creating quick links within Business Portal pages.
 - Tailor Business Portal to your business. Identify which tasks and information you wish to share by role and add reports, queries, and tasks to each role-tailored page.
 - Include links to other Web-delivered applications, intranets, and external data sources.
 - Enable users to design customized layouts and add Web Parts to their pages.

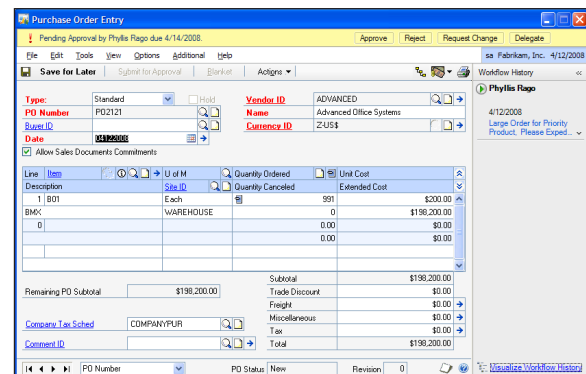


Using pre-built pages and Web services, administrators can create customer and employee portals that deliver security-enhanced, role-based access to information—without the need to add new code.

Drive Teamwork, Efficiency, and Accuracy with Built-In Workflow

When deployed with Office SharePoint Server 2007, Microsoft Dynamics GP delivers straightforward, flexible workflow capabilities built on the Windows® Workflow Foundation. Built-in workflows make it easy to automate notification and approval processes for purchase orders, sales quotes, financial series batches, sales credit limit overrides, and more. You can extend workflows to processes outside of Microsoft Dynamics GP, as well as create additional workflows within Office SharePoint Server 2007.

- Workflow in Microsoft Dynamics GP equips people to collaborate systematically and flexibly on tasks. Workflow processes can be set up to fit business and roles-specific needs, so that managers know who has responsibility for specific actions and where a transaction is within the process—with the assurance that people are getting the right information at the right time.
- Notifications are easy to understand. They can include user-defined messages that clearly outline conditions for approving, rejecting, and delegating or requesting changes for documents.
- People work in the applications that make sense to them. Depending on the rules set



Built-in workflows make it easy to automate notification and approval processes for key business tasks.

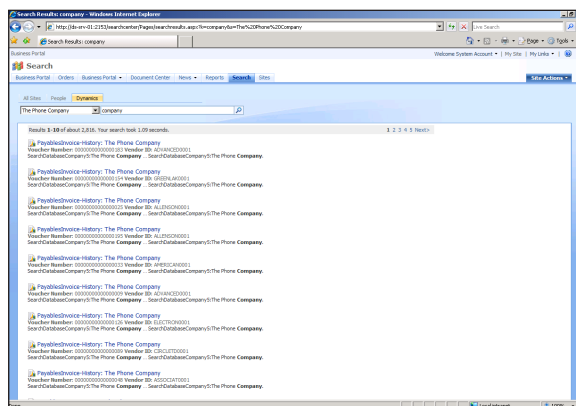
up for a process, they'll receive automatic notifications through Office Outlook, Office SharePoint Server 2007, or the Microsoft Dynamics GP home page.

- Workflow functionality incorporates an audit trail of task ownership and actions to help ensure compliance and accountability.

Quickly Find Information with Targeted Searches

Office SharePoint Server 2007 enables people to quickly find critical business information, regardless of its location, through enhanced search and social networking capabilities. Deployment is seamless—The Microsoft Dynamics GP installation wizard registers Web Services within the Business Data Catalog in Office SharePoint Server 2007. Across the enterprise, people can search for information in the Microsoft Dynamics GP client or portal—not only for structured Microsoft Dynamics GP data, but also for unstructured information, including Office Word documents, Office Excel spreadsheets, and Office Outlook e-mail messages.

- Search Office SharePoint Server 2007 content, Microsoft Office system documents, and Microsoft Dynamics GP data such as sales transactions. For example, if a salesperson is searching for specific information about a customer, they can quickly implement a name search and retrieve all information related to the customer—including sales and service records, Office Outlook e-mail messages, items awaiting approval, and more.
- Searches can be initiated from within Microsoft Dynamics GP, Office SharePoint Server 2007, or the Desktop Search function.
- Searches can be set up and filtered using a straightforward wizard that makes it easy to define what data is searchable, and for whom.
- Information is also returned from SQL Server Reporting Services reports and from reports that have been created in either text or PDF format.
- Administrators can register all Web Services in Microsoft Dynamics GP with the Business Data Catalog, and then easily create new lists of information that can be viewed on Web pages within Office SharePoint Server 2007 and/or Business Portal.



Summary data is returned as you search company databases and SharePoint sites for structured and unstructured data. Users with appropriate access can easily drill down for details.

Summary

It's your people who drive results, regardless of your industry or the size of your organization. Growth and success depend on providing everyone in your business—the CEO, management and teams, individuals—with tools and information that are relevant to their specific roles, within a system that works the way they do. That's precisely what the combination of Microsoft Dynamics GP and the Microsoft Office system offers—an intuitive, role-based solution that lets people work together and access, analyze, and share information. Out of the box, Microsoft Dynamics GP works like and with Microsoft Office system products and technologies. Depending on your needs, your organization can enrich reporting, collaboration, and connection with Office SharePoint Server 2007. All paths lead to an organization that's efficient, informed, and connected.

To learn more about many ways Microsoft Dynamics GP and the Microsoft Office system can extend the reach of your business, visit www.microsoft.com/dynamics/gp

Case Studies:

SchoolKidz:

<http://www.microsoft.com/casestudies/casestudy.aspx?casestudyid=4000002459>

Current Energy:

<http://www.microsoft.com/casestudies/casestudy.aspx?casestudyid=4000001195>

Search for Common Ground:

<http://www.microsoft.com/casestudies/casestudy.aspx?casestudyid=4000001940>

Premier Foods:

<http://www.microsoft.com/casestudies/casestudy.aspx?casestudyid=4000003023>

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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