

INTEGRATE

Microsoft Dynamics GP

Integrated Innovation: Microsoft Dynamics™ GP and Microsoft® Office

White Paper

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<http://www.microsoft.com/dynamics/gp/default.aspx>



Table of Contents

- Introduction** **3**

- Information for everyone** **3**
 - Integrating Microsoft Dynamics GP data from SmartList with Excel® 4
 - Instant access to data using SmartTags..... 4
 - Viewing Microsoft Dynamics GP as an Excel data source 7
 - Creating Excel pivot tables using Analysis Cubes for Microsoft Office Excel 9
 - Microsoft MapPoint® integration..... 10
 - Business Portal with Key Performance Indicators..... 12
 - Office Web Parts in Business Portal Pages 13
 - Additional integration points that provide information for everyone: 15

- Process management** **16**
 - Sarbanes-Oxley Solution accelerator with Business Portal helps meet legal requirements 16
 - Create vacation requests in Outlook 18
 - Create organization structures in Microsoft Visio® 19
 - Electronic Document Delivery in Business Portal 21
 - Excel-based Budgeting 21
 - FRx® Report Books 22

- Effective teamwork** **24**
 - Windows SharePoint Services document workspaces 24
 - SharePoint Services meeting spaces..... 24

- Personal impact**..... **25**
 - Microsoft Dynamics GP and Office: similar interface, increased efficiency 25
 - Microsoft Dynamics GP Letter Writing Assistant integrates with Microsoft Word 26
 - SmartList Export Solutions..... 28

- List of references** **30**

Introduction

More information is available to more people today than ever before in human history. Having the right information in the right place at the right time is critical to the success of any business, but can be difficult to achieve if you're not using the right software tools. For example, how do you:

- Get information to everyone who needs it?
- Avoid overloading your employees, colleagues, vendors, and customers with unnecessary information?
- Provide access to real-time data that enables the best responses to rapidly changing business situations?
- Maintain appropriate security around sensitive data while not limiting decision maker's abilities to get at the information they need?
- Maintain sound and consistent processes that meet legal requirements?

This paper is directed toward Microsoft Dynamics GP customers to help them understand the ways that Microsoft Office 2003 and Microsoft Dynamics GP form a powerful tool that connects information with the people and processes their organizations use to succeed. This integration offers an approach to managing information that's based on the following four objectives:

Information for everyone Provide more people in the organization with better visibility into the company's operations so they can gain deeper insights, make better decisions, and take more effective action.

Process management Improve organizational ability to anticipate, manage, and respond to changes in the marketplace in order to maximize opportunities.

Effective teamwork Use communication and collaboration to improve the effectiveness of teams within your organization, as well as with partners and customers to reach common understanding so they all can work together with speed and agility.

Personal impact Provide tools that help individuals gain insight into the data they deal with each day, to improve their ability to make the contributions that move your business forward in an increasingly demanding business environment.

This white paper notes specific integration points between Microsoft Dynamics GP and Microsoft Office and suggests business situations in which these points are particularly useful. Some integration takes place between Office and SmartList, and Office and Business Portal. SmartList and Business Portal both are features of Microsoft Dynamics GP.

SmartList SmartList is a Microsoft Dynamics GP querying tool that allows you to instantly create sophisticated queries to find detailed information about customer, vendor, inventory item, and employee records, as well as general ledger accounts. A number of pre-defined queries are included with Microsoft Dynamics GP.

Business Portal Business Portal is a role-based portal that integrates seamlessly with Microsoft Dynamics GP to deliver applications, information, and processes to employees, customers, and partners across the organization in a browser-based environment.

Information for everyone

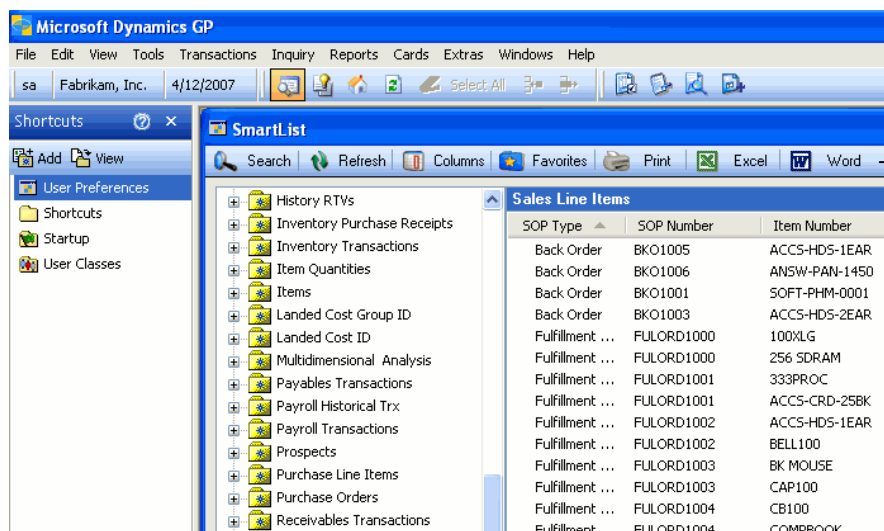
When your business applications share information effectively, your employees can get a better view of what's happening throughout the organization, and gain the insight each of them needs to understand how he or she can help achieve immediate results. The following case studies indicate some of the ways Microsoft Dynamics GP and Office can make the right information available to the right people in your company.

Integrating Microsoft Dynamics GP data from SmartList with Excel®

Management wants to send your sales force a list of the items that have been the most profitable in the last week. In addition, they want to distribute a list of the current prospects that are on file in the customer database.

Access from	Description
The SmartList favorite that contains the information you need, then click the Word or Excel buttons to move information to Word or Excel.	<p>SmartList is a Microsoft Dynamics GP querying tool that allows you to instantly create sophisticated queries to find detailed customer, vendor, general ledger, inventory, and employee information. A number of pre-defined queries are included with Microsoft Dynamics GP.</p> <p>Exporting to Excel is as easy as opening a SmartList favorite and clicking a single button to export to Excel or Word. The data is automatically formatted appropriately so no "cleaning up" is necessary. Distributing data using the world's most widely used office productivity suite ensures that employees who need access to back office data can obtain it easily and reliably and analyze it in an environment that they are already used to.</p> <p>You can include spreadsheets or Word documents as attachments to e-mail messages or embed the data within the message.</p>

Clicking either the Excel or Word button in the SmartList window copies the data in the window to an Excel or Word document, respectively.



The Excel and Word buttons in the SmartList window copy data to Excel or Word, respectively, with a single click.

Instant access to data using SmartTags

In a competitive business environment, employees need to spend their time and energy closing sales and delivering products and services to customers, rather than searching for information. Using the Microsoft Office SmartTag Manager, you can have instant access to detailed information from Office documents that refer to specific item, customer, vendor, and employee records stored within Microsoft Dynamics GP. So, for example, if you're about to send a letter to a customer you can instantly drill back from that letter to see their latest order in real time, then thank them for that order in the letter.

Access from	Description
Word, Excel, and Outlook® documents. (Using SmartTags inside Outlook messages requires that you use Word as your e-mail editor.)	Clicking the SmartTag icon displays a menu that lists the types of information you can view. Access to sensitive data is controlled by restrictions that are set up using Microsoft SQL Server™.

Pausing over a name or ID, such as the customer name in the following illustration of a customer letter in Word, displays a SmartTag icon you can use to access additional information from the Microsoft Dynamics GP database.

SmartTags give you access to a variety of information from within Office documents.

Your company name
 1701 SW 38 Street
 Fargo, ND 58102
 701-222-3333

October 2005

Ⓢ Aaron Fitz Electrical
 One Microsoft Way
 Redmond, WA 98002-6399

Dear Mr. Fitz,

Thank you for choosing to do business with us.

We strive to provide excellent service to our clients. Please let us know if we do not meet your expectations.

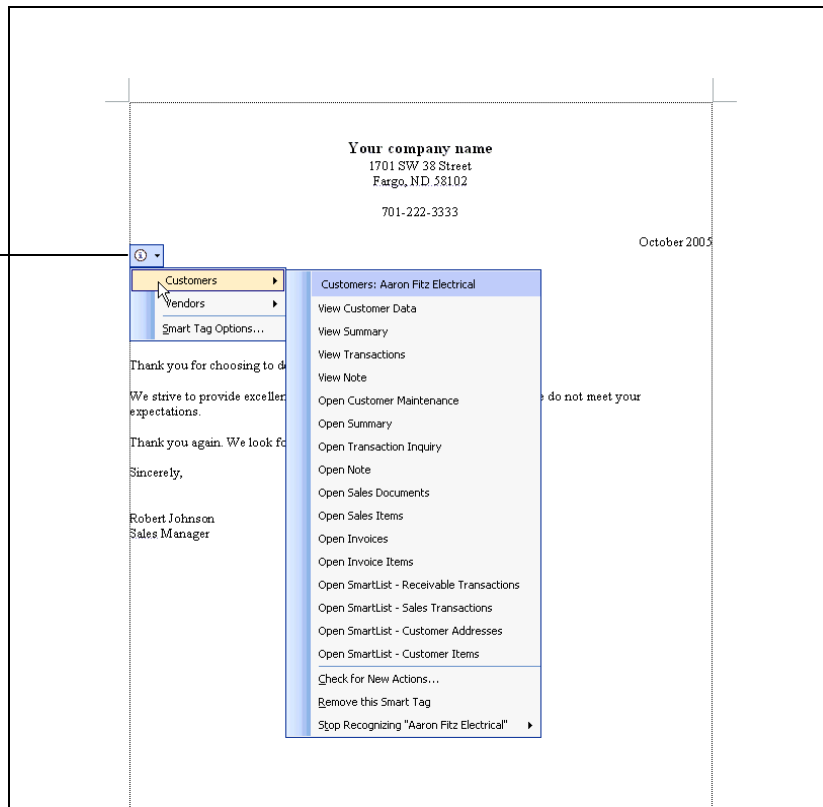
Thank you again. We look forward to working with you.

Sincerely,

Robert Johnson
 Sales Manager

You can display a list of actions by clicking the SmartTag icon, as shown in the following illustration.

Clicking the SmartTag icon opens a menu, showing the information that's available from the Microsoft Dynamics GP database.



When you select one of the items in the menu, a window will open that displays data from the Microsoft Dynamics GP database, which in the following example includes current sales and payment summaries for each accounting period, the current and previous year, and the life-to-date amounts.

Office Smart Tag Viewer - FabrKam, Inc.

Customer Identification Information

Customer ID: AARONFIT0001
Name: Aaron Fitz Electrical

Payment Summary

Period Description:	Period 1	Period 2	Period 3	Period 4	Period 5	Period 6	Period 7
Current	31 - 60 Days	61 - 90 Days	91 - 120 Days	121 - 150 Days	151 - 180 Days	181 and Over	
Period Balance:	\$3,434.09	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$19,899.04

Yearly Summary

	Year-to-Date	Last Year	Life-to-Date
No. of Sales Docs:	54	0	54
No. of Paid Invs:	43	0	43
Sales:	\$58,689.97	\$0.00	\$58,689.97
Cost:	\$18,545.80	\$0.00	\$18,545.80
Cash Received:	\$35,557.10	\$0.00	\$35,557.10
Writeoffs:	\$0.00	\$0.00	\$0.00
Discounts Taken:	\$0.00	\$0.00	\$0.00
High Balance:	\$33,024.56	\$0.00	\$33,024.56

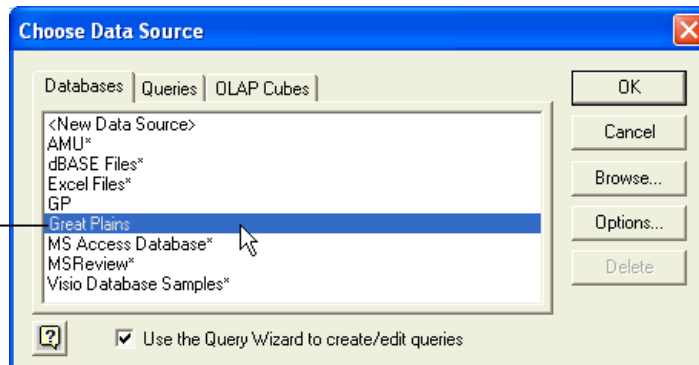
Viewing Microsoft Dynamics GP as an Excel data source

You'd like to explore different scenarios based on recent sales trends by considering price increases, price decreases, and promotions of different durations using your Microsoft Dynamics GP data as a starting point, but you want to do the analysis with a familiar tool. Excel is a great tool for this task, and the Excel data source is ready to use without additional setup.

Access from	Description
The Data menu within Excel, by choosing Import External Data Source >> New Database Query. This executes a query that you must build in Business Portal.	The Choose Data Source window lists a number of data sources, including Microsoft Dynamics GP. The name in the list will be the name of the database that was assigned to the Microsoft Dynamics GP database in SQL Server.

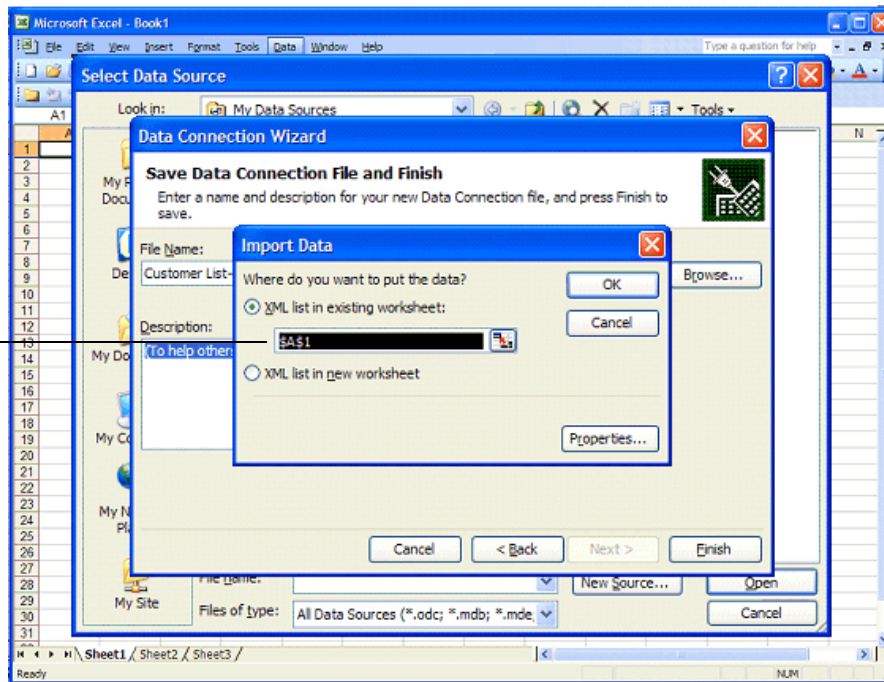
The Data Connection wizard in Excel makes it easy to access data stored in an external source, such as Microsoft SQL Server. In Excel, a data source link to the Microsoft Dynamics GP database is already included, saving you the effort and time needed to complete this setup.

A data source to access Microsoft Dynamics GP data is included in Excel so you don't have to complete this setup work.

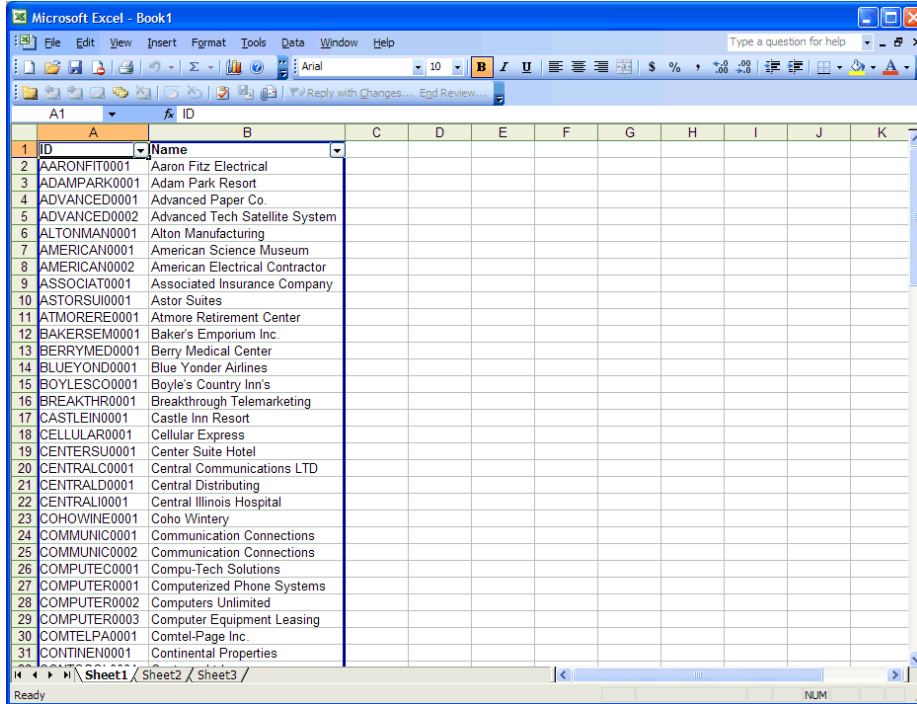


A wizard interface makes it easy to specify the Business Portal query that will be run in Excel. You can use query pages and result viewer Web Parts in Business Portal to create customized queries that provide access to information stored in Microsoft Dynamics GP, including information about customers, vendors, transactions, and items. You can save and rerun commonly used queries, rather than creating them from scratch each time.

The Data Connection wizard makes it easy to bring the data you want into Excel.



When you're looking at the data in Excel, you can experiment with different scenarios and apply macros, filters, and formatting to serve a wide range of purposes. Experienced Excel users should find this a time-saving time tool for analyzing and presenting Microsoft Dynamics GP data.

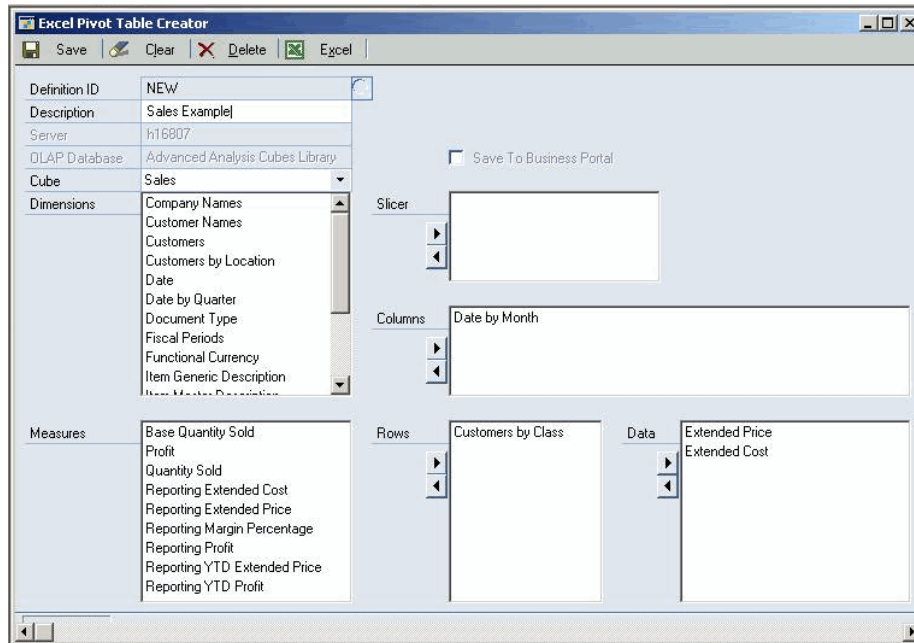


Creating Excel pivot tables using Microsoft Dynamics GP Analysis Cubes for Excel

Without the right tools to sort, sift and filter your business data, it can be hard to spot trends or gain the insight you need to achieve or maintain a competitive advantage. Analysis Cubes for Excel extracts data from Microsoft Dynamics GP using Data Transformation Services (DTS) packages and places it in a data warehouse. The information in the data warehouse is processed to generate the OLAP cubes. (OLAP stands for online analytical processing, which is a way to organize large business databases.) A cube is a data structure that contains OLAP data, organized in dimensions and fields. Data in the cubes can be displayed in Excel worksheets through pivot tables.

Access from	Description
To install Analysis Cubes for Excel, insert the Microsoft Dynamics GP Release 9.0 CD 2 into your CD drive. Double-click the Setup.exe file to start the installation program and choose to install Analysis Cubes for Excel-Server.	The installation program adds Analysis Cubes for Excel to your computer. Start the setup wizard by double-clicking the desktop shortcut. Use the setup wizard to create a data warehouse and OLAP database, and to install data for selected modules into the data warehouse.

You don't have to know how to create pivot tables to use Analysis Cubes for Excel. The Excel Pivot Table Creator window displays cubes and the dimensions that are available within them, to help you include specific data you want to view or work with and then generates the pivot table automatically.



Microsoft MapPoint® integration

Planning more efficient routes for deliveries can help control costs and maintain efficiency for delivery drivers. You can use a SmartList favorite to display a list of all orders for delivery. From that list, you can use SmartList's drill-down capability to access customer information. The MapPoint button in the Customer Maintenance window allows you to open MapPoint right from within Microsoft Dynamics GP.

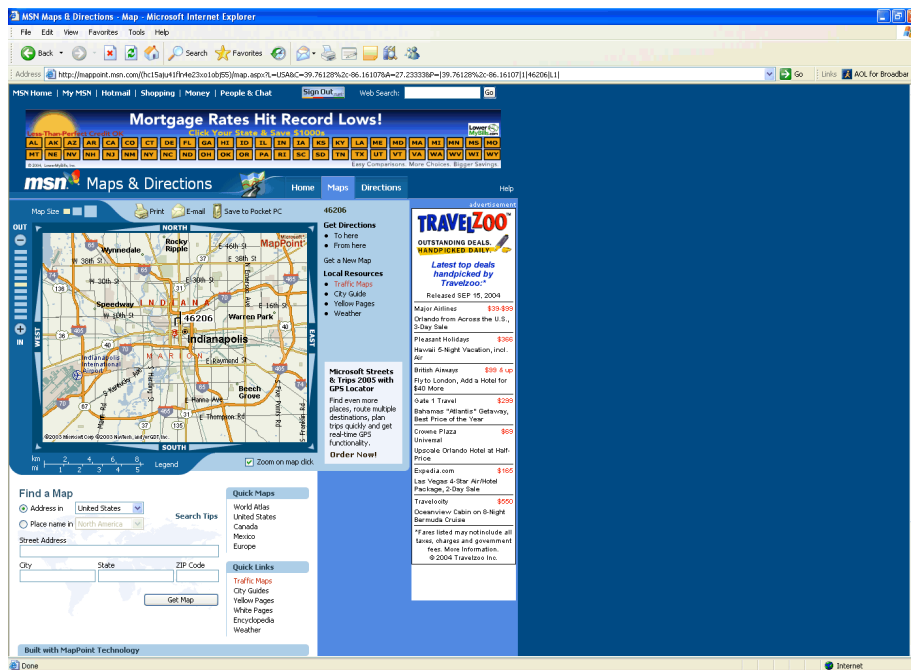
Access from	Description
<p>The MapPoint button next to the Address ID field in most card windows.</p>	<p>You can start planning a route at any point during the day and add additional stops to the list as they're needed. The functionality within MapPoint can optimize routes based on traffic conditions by clicking the Optimize Route button. This provides you with a route planning tool that's available from within Microsoft Dynamics GP.</p> <p>If you have MapPoint installed on your computer, the MapPoint button will open your local copy. If MapPoint isn't installed, but your computer has an active Internet connection, the MapPoint button will open the MapPoint site on the Web.</p>

The MapPoint button, which is available next to the Address ID field, enables you to open MapPoint, whether it's installed on your computer or you're accessing it from the Internet.

Customer ID	ADAMPARK0001	Active	Parent Customer ID	AARONFIT0001
Name	Adam Park Resort		Balance Type	Open Item
Class ID	USA-INMI-T2		Priority	None
Address ID:				
Primary	PRIMARY		[MapPoint Icon]	
Contact	Roberta Masouras			
Address	Suite 9876 321 Chestnut Drive			
City	Indianapolis			
State	IN			
ZIP Code	46206-1391			
Country Code	USA			
Country	USA			
Phone 1	(317) 555-0102 Ext. 0000			
Phone 2	(000) 000-0000 Ext. 0000			
Phone 3	(000) 000-0000 Ext. 0000			
Fax	(000) 000-0000 Ext. 0000			
UPS Zone				
Shipping Method	GROUND			
Tax Schedule	USASTCITY-6*			
Finance Charge	1.50%		Tax Exempt 1	
Minimum Pymt.			Tax Registration	
Credit Limit	\$40,000.00		Comment 1	
Salesperson ID	GREG E.		Comment 2	
Territory ID	TERRITORY 2		Price Level	
Type	Retail		Currency ID	Z-US\$
User-Defined 2				

The MapPoint button is available in a number of windows within Microsoft Dynamics GP.

MapPoint can provide driving directions or just provide a higher-level view of the location of any address.






Business Portal with Key Performance Indicators



A company is trying to fine-tune its operations, but needs faster access to business measurements in a proactive instead of reactive manner. Those measurements enable employees to make decisions more quickly and base them on more accurate information. Key performance indicators (KPIs) are standard business metrics that provide your company’s managers with an easy-to-read assessment of the financial health of the organization. KPIs are available through Microsoft Business Solutions Business Portal.

Access from	Description
Within Business Portal, by clicking the KPI link to view the ratios. You can select any of three views, including bar charts, grids, and alerts, so executives can drill down and cross-reference the information they need.	The KPI wizard walks you through the process of defining KPIs. You can select the originating data, calculation type, and defining calculation, choose a time period, and define alert ranges.

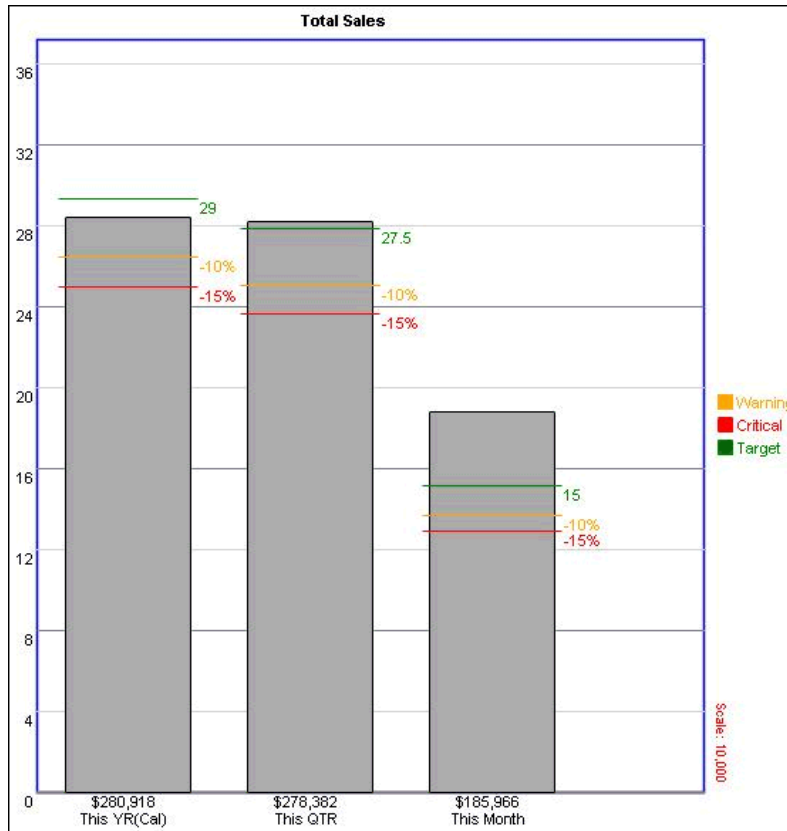
KPIs can also indicate when specified values reach a certain point if you’ve defined warning and critical alert ranges. An alert range is a range of variation – expressed as a percentage – above or below a target value.

Total Sales	Values
 This YR.(Cal)	\$280,918
This QTR	\$278,382
This Month	\$185,966
Total Expenses	Values
 This YR.(Cal)	\$627,058
This QTR	\$211,395
 This Month	\$108,139

These icons indicate when a KPI is within a warning or critical alert value.

 Critical
 Warning
Normal

You also can display KPI information as a bar chart, showing a single KPI, and graphically illustrating company performance for specific time periods.

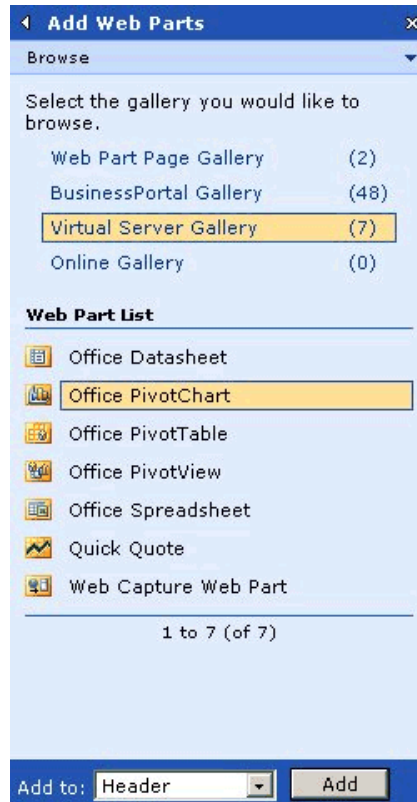


Office Web Parts in Business Portal Pages

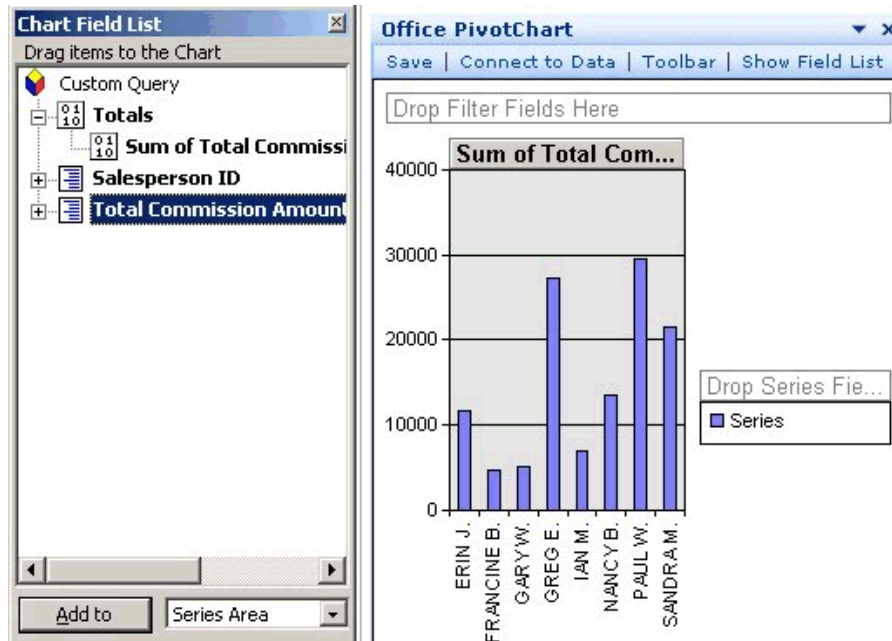
Business Portal is a powerful tool for exposing data to users in a variety of business roles. Role-based access helps provide security to sensitive data because users only see the information that their role is allowed to see. While it's easy to see a broad view of your data, individual users also can display more targeted information that provides the at-a-glance view of the business measurements that are most important to them for making timely, accurate decisions.

Access from	Description
Within Business Portal, by opening the Virtual Server Gallery of SharePoint® Web parts.	You can select from multiple galleries, each of which contains a number of web parts, such as an Excel pivot chart, that you can add to your Business Portal pages.

You can add an Excel pivot chart, in the example shown in the following illustration, by dragging and dropping it from the Virtual Server Gallery to a Business Portal page.



After the Web Part is on the Business Portal page, you can connect it to the data you need, such as commission amounts as shown in the example in the following illustration. You also can select chart styles so the data appears in the most effective format.



Additional integration points that provide information for everyone:

- You can use the Microsoft Dynamics GP Analytical Accounting module to export reports directly to Excel for decision support analysis in a familiar environment.
- You can print virtually any Microsoft Dynamics GP report to a variety of file formats, including a comma separated values (CSV) file that you can open in Excel and scrutinize.
- You can send virtually any Microsoft Dynamics GP report as an attachment to an e-mail message by printing the report to the screen, then clicking the "Send To" button for fast, specifically targeted collaboration and information sharing.
- You can use Business Portal on Windows® SharePoint Server to create cost-effective, robust Intranet sites with real-time, role-based access to back-office data creating a proactive decision support system.
- If you're using FRx, you can select output options that enable you to send any FRx report as an e-mail message or an attachment to a message. You also can send a link to a file that's stored on a shared network location.

Another FRx output option is to export reports to an Excel 5.0 workbook. If you use this option, you can specify whether to open Excel automatically when the report is generated, whether to require a password to view the report, and whether or not to include row formats and export formulas with the report.

Process management

Your company’s business processes can be a competitive advantage, but in today’s business environment, managing business processes is also a legal necessity. The integration between Microsoft Dynamics GP and 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 the storage and management of your process documentation.

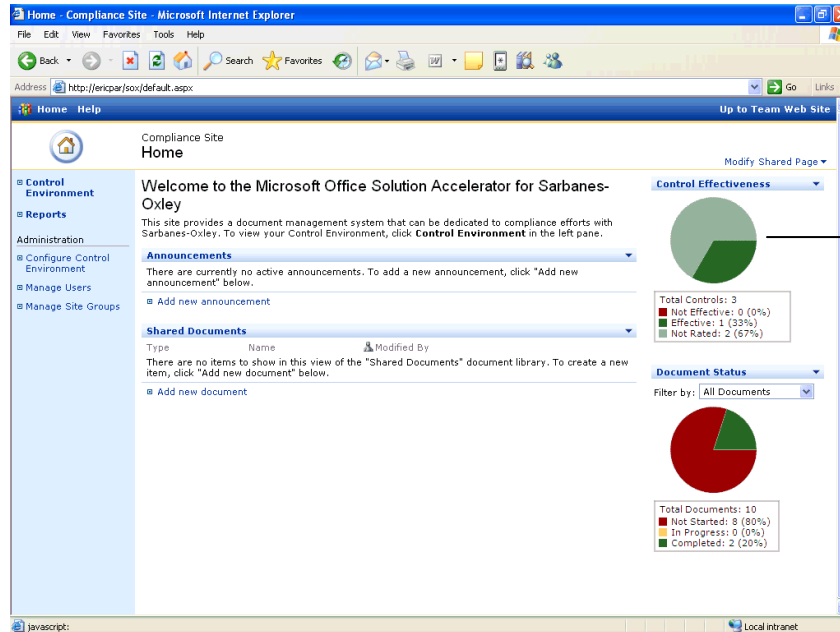
Sarbanes-Oxley Solution accelerator with Business Portal helps meet legal requirements

A company has instituted financial controls, documented its most critical processes, and worked hard to follow the highest accounting standards. But the consequences for non-compliance have never been more stringent; the Sarbanes-Oxley Act holds CEOs and CFOs personally responsible for the accuracy of financial statements. Is the company doing enough? The Sarbanes-Oxley Solution Accelerator within Business Portal works with Windows Server™ 2003, Microsoft SharePoint Services, and Microsoft Office InfoPath®, as well as Microsoft Dynamics GP, to ensure that workers have the necessary alerts, information and routing materials to ensure compliance with the Sarbanes-Oxley Act.

The Sarbanes-Oxley Act affects all publicly traded companies, private companies that are in the process of becoming publicly traded, and private companies that plan to be acquired by a publicly traded firm.

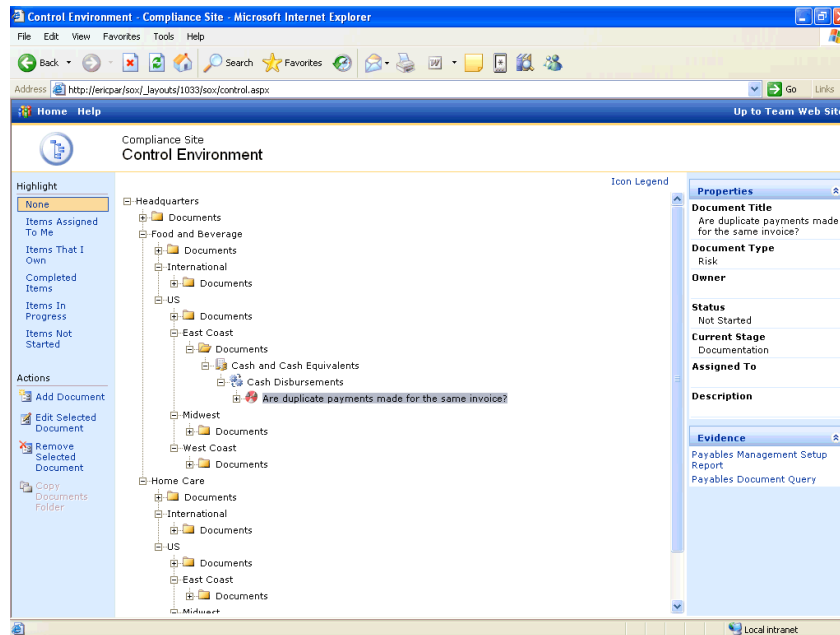
Access from	Description
Business Portal, if you’ve purchased the Microsoft Office Solution Accelerator for Sarbanes-Oxley.	The Microsoft Office Solution Accelerator for Sarbanes-Oxley provides intelligent storage, categorization, and search of compliance documents with XML data structuring and the familiar Business Portal interface. The accelerator tracks document modifications using included audit trail features. It also offers a compliance repository for general reference materials, as well as reusable forms and templates.

The Microsoft Office Solution Accelerator for Sarbanes-Oxley integrates with Windows SharePoint Services; the look and feel is similar to Business Portal. The home page for the Sarbanes-Oxley accelerator allows you to publish project information, and gives you access to all the features in the accelerator.



Pie charts provide users with an at-a-glance view of the company's progress on the Sarbanes-Oxley project.

Controls can be organized around departments and regions within the organization. For example, you can define significant accounts, along with the processes those accounts are used in, such as cash disbursements for a Cash and Cash Equivalents account. The accelerator can alert you to risks, such as duplicate payments paid to the same invoice or cash inflows that are insufficient to cover outstanding payables balances.

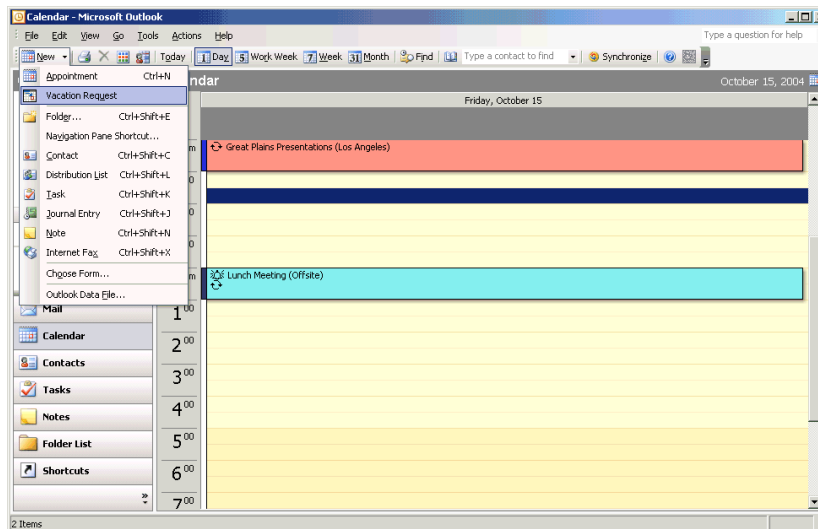


Create vacation requests in Outlook

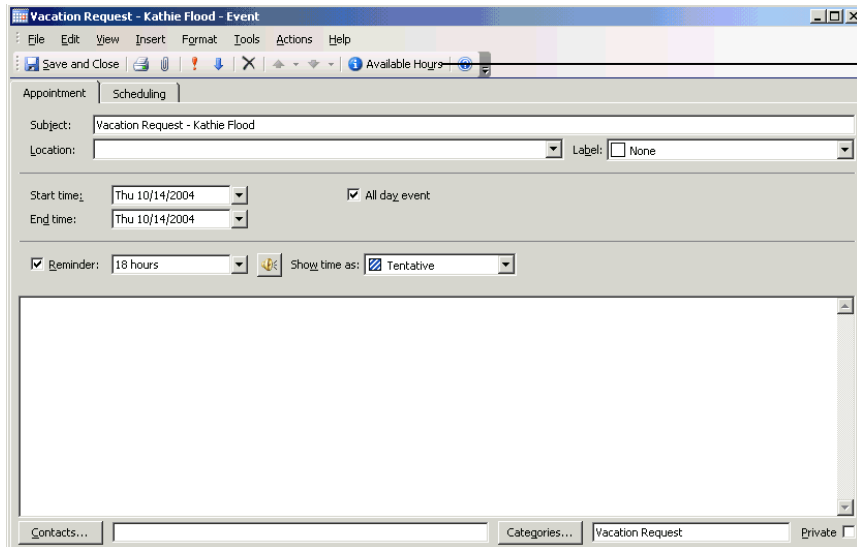
Vacation requests come in by phone, e-mail, and even sticky notes. How do you respond fairly and still manage your organization's staffing needs? Vacation Requests for Microsoft Office Outlook helps you ensure that employee vacation requests get the attention they deserve, and that vacation requests are decided on promptly.

Access from	Description
Business Portal if you've installed the Vacation Requests for Microsoft Office Outlook add-in.	Vacation requests can be entered in Outlook or Business Portal; Vacation Requests for Microsoft Office Outlook add-in will keep the information synchronized automatically. Vacation requests are available within the Business Portal Human Resource Management Self Service Suite. The Outlook add-in integrates with Time and Attendance, a feature in the Business Portal HRM Self Service Suite, and Outlook, allowing you to create and save vacation requests in Outlook and also have the vacation requests available in Business Portal for a manager's approval. Similarly, vacation requests that are approved in Business Portal automatically appear in your Outlook calendar.

The vacation requests appear in an Outlook calendar appropriately labeled.



You also can view the vacation request in the Outlook Event window, which lets you view the number of remaining vacation hours that are available for the employee who is making the request.



Click the Available Hours button in the Event window to see the number of vacation hours available to this employee.

Create organization structures in Microsoft Visio®

Organizations are dynamic and successful companies change their organization structure as needed to adapt to changing business environments. Companies also need a flexible way to access their organization structure online without having to manually illustrate "who reports to whom." Organization Structure in Business Portal lets you choose a manager hierarchy, select fields to display on the chart, and create the chart which opens in Microsoft Office Visio.

Access from

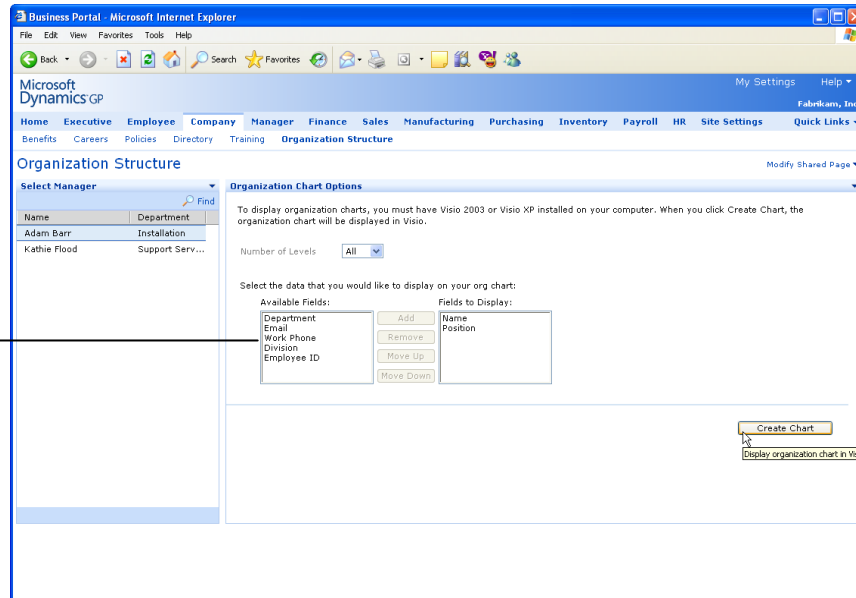
The Business Portal Human Resource Management Self Service Suite

Description

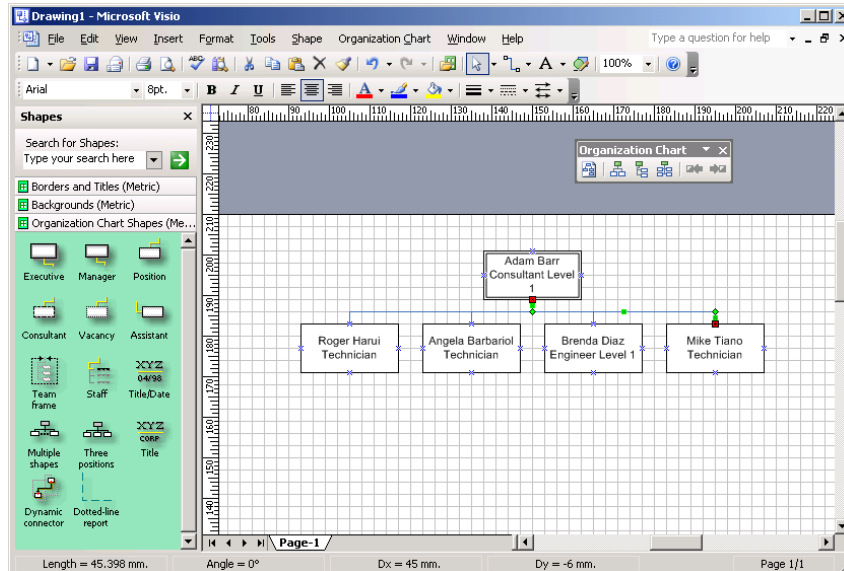
The Organization Structure for Business Portal feature integrates with Microsoft Dynamics GP Human Resource Management data and allows you to create and open organization charts within Visio.

Organization Structure in Business Portal gives you the ability to create a graphical representation of your company's structure that includes the information you want.

When you create an organization chart, a list of available fields to include is displayed. You can then select the fields you want to include on your chart.



After you create your organization chart, the result is displayed in Visio.

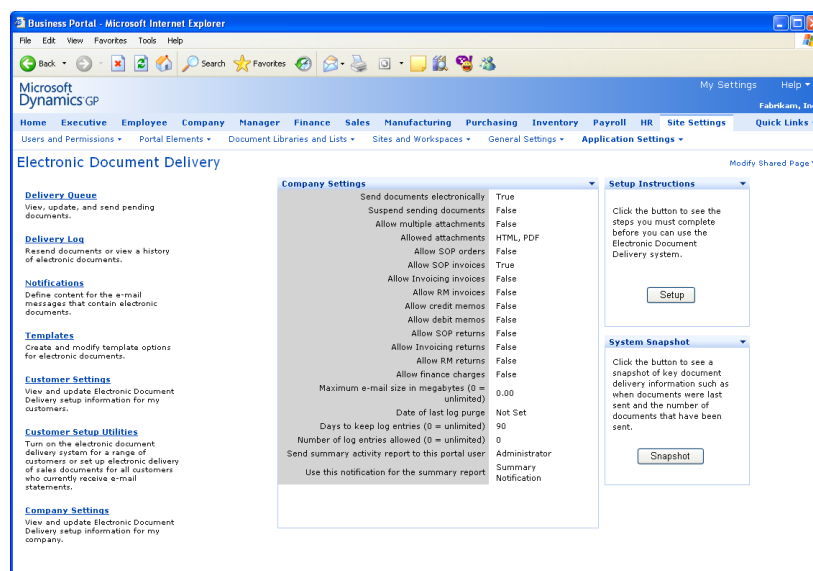


Electronic Document Delivery in Business Portal

A company is working to increase efficiency and respond to customer requests by distributing invoices, billing statements, and credit and debit memos electronically. If employees can respond successfully and efficiently to the requests, they can decrease the chance of those customers moving to a competitor. But while some customers have requested invoices and other documents in electronic format, not every customer is prepared to receive documents this way. Electronic Document Delivery in Business Portal lets you select types of documents to send electronically, specify the customers that will receive them in an electronic format, and select the specific document format, such as HTML or PDF.

Access from	Description
The Company Settings page in Business Portal to begin setting up Electronic Document Delivery.	After Electronic Document Delivery is set up, documents are added to the queue when they are posted in Microsoft Dynamics GP. Documents remain in the queue until the document scheduler runs and the documents are sent. If you need to cancel a pending document or view documents that are waiting to be sent, use the Delivery Queue page in Business Portal.

Electronic Document Delivery includes a company setup step, as well as a customer setup step.

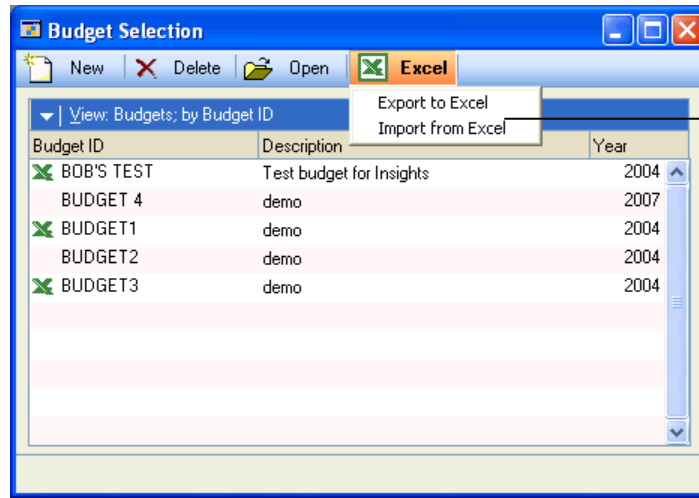


Excel-based Budgeting

Budgeting can involve as much negotiation and educated estimating, as clear mathematical calculation. So, a tool that is widely used and familiar to most people and lends itself to experimentation and flexibility – while at the same time preserving trust – is vital to getting through the budget process successfully. The Excel-based Budgeting tool in Microsoft Dynamics GP allows you to export a range of accounts – for example, all the accounts in a department – to Excel, along with historical years and the current year's actual amounts so that each department manager can develop his or her budget.

Access from	Description
The Cards menu in Microsoft Dynamics GP by selecting Financial and Budgets, then choosing options to export budgets to – or import them from – Excel.	A wizard interface simplifies the process of moving budgets from Microsoft Dynamics GP to Excel and back again. You can move budgets for a range of accounts to a specific worksheet within an Excel workbook, then make the individual worksheets available to managers to submit budgets for their departments.

From within Microsoft Dynamics GP, you can access budgets in either Microsoft Dynamics GP or Excel.



The Open and Excel buttons allow you to import, export, or open selected budgets in Excel.

FRx® Report Books

Financial reports have been distributed one at a time in a piecemeal manner. Text reports are distributed first. Later graphical reports and charts are created; they're shared in meetings or distributed through e-mail. FRx Report Manager enables you to create a report book with all the reports and supporting statements compiled in a single document and target it to a specific audience (department heads, executive staff, board of directors, investors or shareholders), creating a more effective way of sharing critical information.

Access from	Description
The Report Manager module within FRx.	FRx Report Manager can create a report book that includes FRx reports, Microsoft Dynamics GP reports, Excel, Word, and PowerPoint® documents for distribution by e-mail or send FRx report output to an FRx WebPort repository where reports can be viewed using a Web browser.

Effective teamwork

While teamwork has been a critical element of successful businesses for years, the tools that enable information sharing and collaboration to be built into your company's communication infrastructure have never been stronger. Along the departments and functional areas within your own company, today's teams can include vendor organizations and even customers, and Microsoft's integrated applications enable everyone to work together with speed and agility

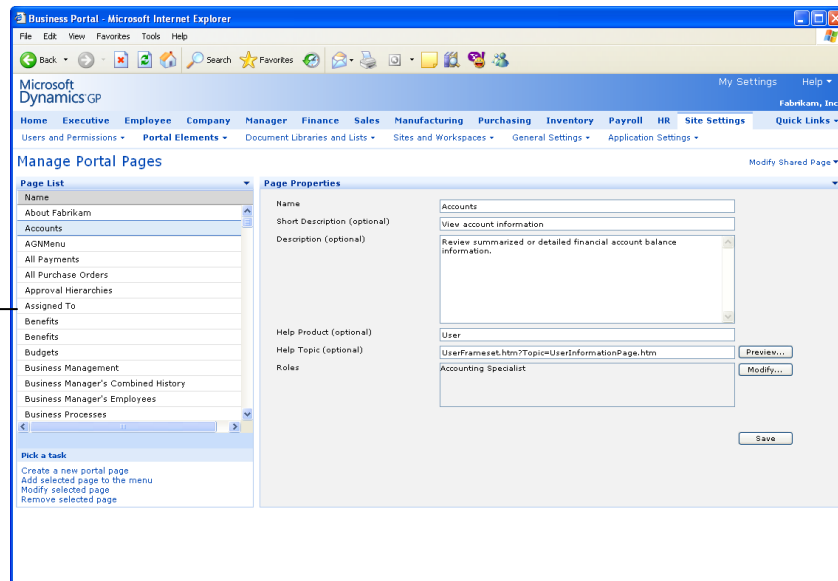
Windows SharePoint Services document workspaces

E-mail attachments are using up an unreasonable amount of server space and employees waste time looking for documents in their overflowing e-mail in-boxes. There's a better way to share documents. Document libraries created using Windows SharePoint Services enable employees to collaborate on documents and post new documents that are available to everyone. When used with Business Portal, you can improve the effectiveness of cross-functional or dispersed teams by creating department or team sites that allow employees to easily read and share documents from a central location, while controlling access to sensitive material, or work in process, through role-based restrictions.

Access from	Description
The Manage Portal Pages Web part, which is used to create a new Business Portal page.	You can link the new page to menus or submenus and then add a document library Web Part.

You can use the Manage Portal Pages page to add a new Business Portal page and link it to another page. From there, you can create a document library Web Part and upload one or more documents at a time. For example, you can include item specifications and pictures to a document library attached to the Inventory Items page.

You can use the Manage Portal Pages page to add a new Business Portal page linked to specific pages within Business Portal.



SharePoint Services meeting spaces

Employees have complained that meetings aren't handled as effectively as they should be. Agendas aren't distributed before the meeting, and notes and action items aren't always available afterward. You can

dramatically improve the efficiency and effectiveness of meetings by setting up meeting spaces using Windows SharePoint Services with Business Portal. This allows agendas to be made available before meetings, giving employees a chance to contribute additional items, and provides a central location for publishing notes, action items, and follow-up activities after the meeting.

Access from	Description
Outlook, using the Meeting Workspace button in the meeting request window.	You can create new meeting workspaces using a template that includes your company's best practices and standards to set consistent expectations for meeting participants as well as facilitators.

Personal impact

Our goal is to help people and businesses throughout the world reach their full potential. Helping individuals improve their ability to contribute in an increasingly demanding business environment is a key part of that objective. When employees have the right tools, they're better able to use their unique talents and experiences to help your organization achieve its potential.

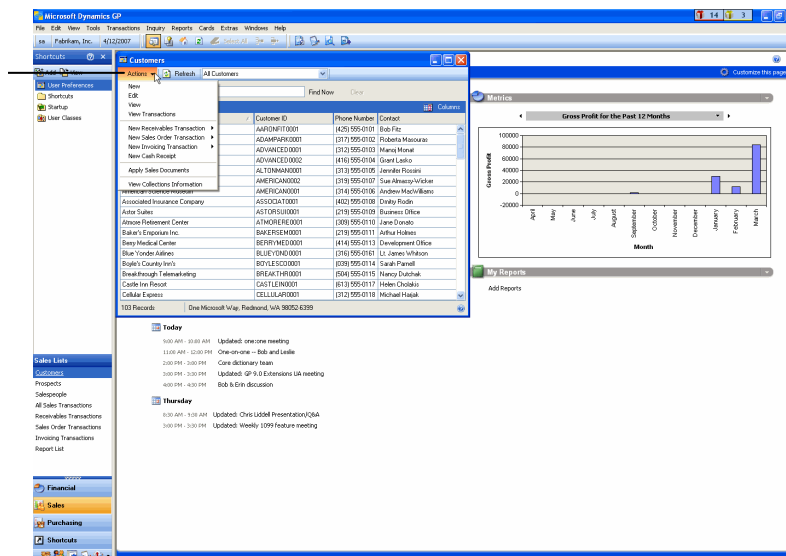
Microsoft Dynamics GP and Office: similar interface, increased efficiency

The user interface in Microsoft Dynamics GP Release 9.0 is similar to the interface in Office applications, particularly Microsoft Outlook. Navigation is list-based; the actions that you can take for a specific record are available from a menu in the Actions list. Cascading menus are used to provide smooth, easy, and fast navigation. In addition, a navigation pane is available to provide an additional way to get to the windows you use most often. So when your employees move seamlessly from one application to the next, they're remaining efficient and productive.

Access from	Description
Microsoft Dynamics GP main window and navigation pane	In addition to the lists and navigation pane, you can open windows using menus, then hide the navigation pane if you prefer.

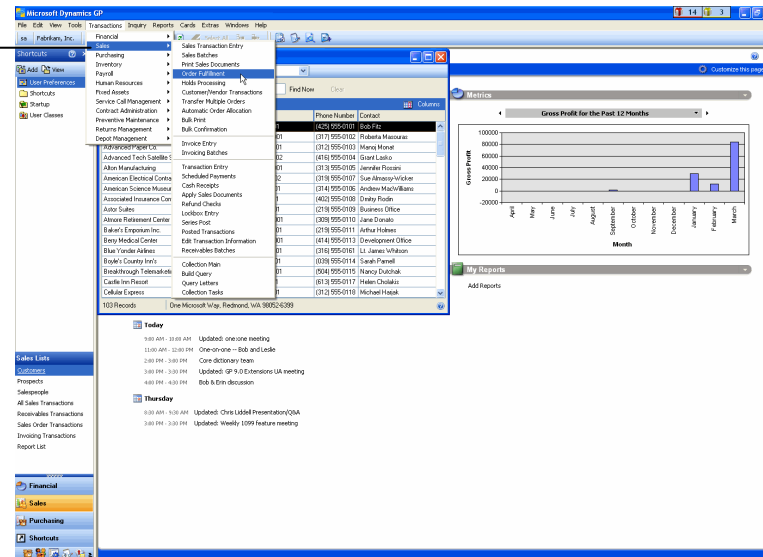
To open a list window, click one of the buttons in the navigation pane at the left edge of the Microsoft Dynamics GP window.

An Actions button in each list window quickly shows you the tasks you can complete for any record that you select from a list.



Navigation throughout Microsoft Dynamics GP enables users to see only items they've been granted access to in the Security Setup window.

Cascading menus keep navigation available at all times.



Microsoft Dynamics GP Letter Writing Assistant integrates with Microsoft Word

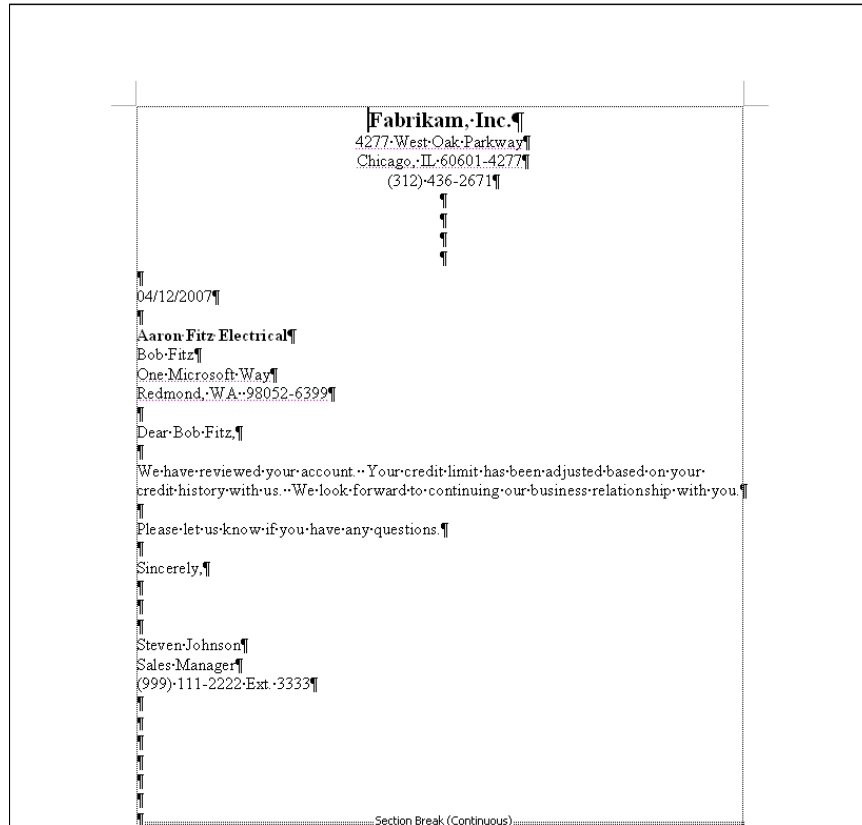
Communicating with customers, vendors and even employees never has been more important and the Letter Writing Assistant makes it easy to build customized communications using the data stored in Microsoft Dynamics GP. A step-by-step wizard lets you automatically insert information from your Microsoft Dynamics GP database into letters creating personalized, timely correspondence that reduces the risk of customers moving to the competition.

Access from	Description
<p>The Reports menu within Microsoft Dynamics GP, or from the Customer Maintenance, Vendor Maintenance, or Employee Maintenance windows.</p>	<p>You can use the templates we've provided or create completely new letters using other Word documents or templates. Templates for the following types of letters are included with Microsoft Dynamics GP.</p> <ul style="list-style-type: none"> • Adjusting a credit limit • Birthday greetings • Collection letter • Customer survey • Employee memo • Letters accepting or denying a credit application • Notification of disputed charges • Offering a proposal • Request for a W-4 form • Request for credit • Request for W-9 form • Thanking customers for their business

The Letter Writing Assistant is available from within Customer, Vendor, and Employee maintenance windows, as well as from the Reports menu in Microsoft Dynamics GP.

The Write Letters button opens the Letter Writing Assistant. You also can open it from the Reports menu. You can use any of the letter templates, regardless of where you opened the Letter Writing Assistant.

You can use the letter templates that are included with Microsoft Dynamics GP. You also can modify them, for example, to add your company's logos or graphics or compose your own letters beginning with a blank Word document. When the process of building the personalized letters is complete, each letter will begin on a new page, ready to print.

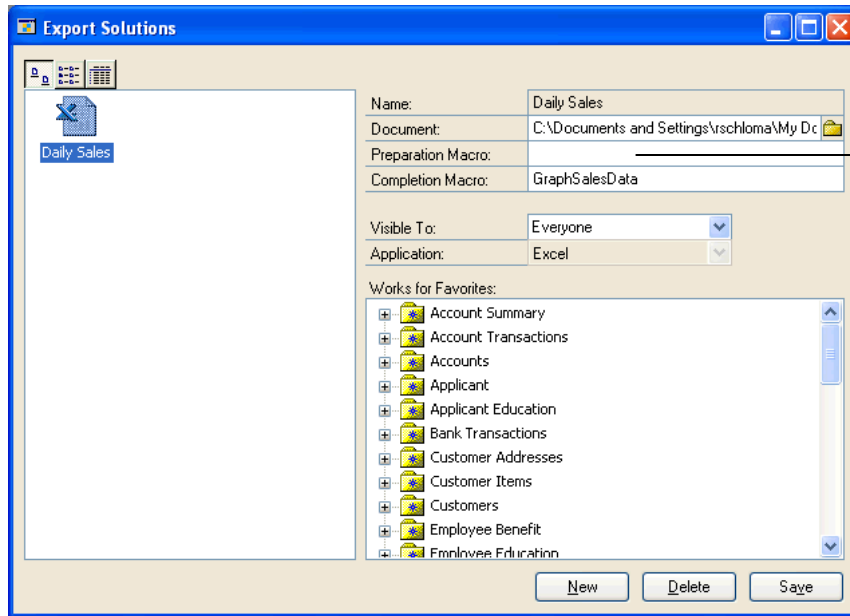


SmartList Export Solutions

Moving data to Word or Excel at the touch of a button is helpful, but that's not all that's possible. You also can create an export solution that brings up-to-the minute data into Excel or Word and specify macros that will run automatically to format the data or perform calculations. This allows you to spend more time analyzing the information instead of configuring and formatting the data. For example, if you'd like to format sales data as a chart for an easy-to-see presentation, you can specify the macro that will format the data and run the macro automatically when you use that export solution. Similarly, you can run the macro that automatically adds a variance column to your spreadsheet.

Access from	Description
The SmartList menu within Microsoft Dynamics GP by choosing Extras >> SmartList >> Export Solutions.	Use the Export Solutions window to define the export solution to use when you copy data from SmartList to Word or Excel. You can specify whether all users can see and use an export solution, or only the user that created it.

You can use the Export Solutions window to create new export solutions, or modify existing ones. You also can view the export solutions you've created previously in different views.



You can specify macros that will run before or after the data is copied to Word or Excel.

List of references

The following table provides references to help you find information about the integration points. The first column lists the integration points described in this document. The second column specifies a resource that contains more information, such as a Web page or online help file. The third column lists selections on a Web page, or the specific index entries, that contain that information.

For information about	Access this resource	And select
Analysis Cubes for Excel	From within Analysis Cubes for Excel	The Analysis Cubes for Excel documentation
Business Portal electronic document delivery	The Documentation Web Part in the Site Settings page within Business Portal	Electronic Document Delivery
Creating vacation requests in Outlook	The Documentation Web Part in the Site Settings page within Business Portal	Human Resources Management Self Service Suite User's Guide
FRx reports as e-mail attachments or opening in Excel	From within FRx	The FRx Report Designer User's Guide
FRx Report Books	From within FRx	The FRx Reports Books documentation
Key Performance Indicators	If KPIs are installed, click the Help menu in Business Portal. You also can see all Business Portal documentation by accessing the Documentation Resources web par from within Business Portal.	The Documentation link in the Resources box, then click the following links: Business Portal >> User Guides >> Key Performance Indicators
Excel-based Budgeting	Microsoft Dynamics GP online help by choosing Help >> Index from within Microsoft Dynamics GP and type the keyword: budgets	calculation methods in Microsoft Excel creating Excel-based budgeting exporting Microsoft Excel formatting rules Overview preparing for import
Excel data source	From within Microsoft Excel open the Choose Data Source window by choosing Data >> Import External Data >> New Database Query	The Help button in the window
Letter Writer Assistant	Microsoft Dynamics GP online help by choosing Help >> Index from within Microsoft Dynamics GP and type the keyword: letter	creating templates deleting templates modifying templates overview preparing letters renaming templates starting the wizard

For information about	Access this resource	And select
MapPoint integration	Microsoft Dynamics GP online help by choosing Help >> Index from within Microsoft Dynamics GP and type the keyword: MapPoint	displaying driving directions displaying maps overview planning routes setting up
Sarbanes-Oxley Solution Accelerator	The Documentation Web Part in the Site Settings page within Business Portal	Office Solution Accelerator for Sarbanes-Oxley Deployment Guide
SharePoint Services	Microsoft TechNet resources: www.microsoft.com/technet	From the TechNet home page, select Products & Technologies >> Servers >> SharePoint Products & Technologies: SharePoint Products & Technologies
SmartList Export Solutions	Microsoft Dynamics GP online help by choosing Help >> Index from within Microsoft Dynamics GP and type the keyword: export solutions	creating export solutions overview export solutions, using

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