

INTEROPERABILITY

Microsoft Dynamics

Microsoft Dynamics™ Snap and Duet™ for Microsoft® Office and SAP

White Paper

Two approaches for integrating the user experience of Microsoft Office 2003 with business management solutions and enterprise applications.

Date: May, 2006

<http://www.microsoft.com/dynamics/product/officesnapin.msp>



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Introduction

At Microsoft, we're believers in the impact of people on business. Amplify the impact of your people and you help drive 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. One of the challenges that has 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.

From a software standpoint, there are a number of options for Microsoft and SAP customers to extend information access to users as well as improve their productivity including:

- 1) **Microsoft Dynamics** – The vision and promise behind the Microsoft Dynamics line is that software works the way people do, is familiar and easy to use, and lets people engage productively with others both within and outside of the organization. The strategy driving development of these solutions is based on the goal of bridging the gap between business processes and business productivity through interoperability with Microsoft Office.
- 2) **Microsoft Dynamics™ Snap** – This collection of software programs known as “snap-ins” (released February 2006) helps information workers improve productivity through collaboration and process enablement by extending Microsoft Dynamics business processes and data. Microsoft Dynamics Snap applications “snap in” to a customer’s existing systems, allowing users to complete their tasks in familiar applications.
- 3) **Duet™ for Microsoft Office® 2003 and SAP** – This joint effort between SAP and Microsoft integrates specific processes of business applications into the Microsoft Office environment. SAP is providing the “business process content”, while Microsoft provides the basic framework for integration to Office.

We believe that the best way to address the challenge of working between unstructured personal productivity tools and structured business applications is by blurring the lines between Microsoft Office and Microsoft Dynamics so that to a user there is no obvious switching between applications – the interoperability of the two applications appears seamless. Any solution provider that builds on the Microsoft platform can do this with the documented APIs in Microsoft Office; for Microsoft Dynamics, we've chosen to make it a priority. You can learn more about this design philosophy in the *Microsoft Dynamics* section of this paper. The *Microsoft Dynamics Snap* and *Duet for Microsoft Office and SAP* sections provide insight about how these software applications can help address this business productivity challenge and improve access to business applications. Use this information to help you make an informed decision about the solution that can best address your business needs. (Refer to the *Discover for Yourself* section of this paper for additional resources covering the complete story for interoperability between Microsoft Dynamics and Microsoft Office.)

Microsoft Dynamics

The underlying philosophy for Microsoft Dynamics puts people at the center of the application design. From a comfortable, familiar, consistent user interface that works with and looks like Microsoft Office programs to an individualized, task-based user experience, the Microsoft Dynamics line is built with the goal of helping make people more effective in conducting business processes. Businesses can implement Microsoft Dynamics solutions rapidly and see them be adopted immediately, as users are already familiar with the interfaces and can start working the way they enjoy. As the Microsoft Dynamics roadmap plays out, applications in the line will look even more like familiar Microsoft Office programs and will also become more similar to one another.

A productive, comfortable user interface is just one aspect to helping improve productivity. We also understand the need to bring structured and unstructured data together in a cohesive manner. Scenarios that help integrate Microsoft Dynamics and Microsoft Office work together are a great way to accomplish this. With a focus on interoperability with Microsoft Office, the Microsoft Dynamics product development teams continue to bridge the gap between processes and productivity in other ways including:

- **“Native” Office Experience** – Using publicly available APIs, Microsoft Dynamics CRM was designed to integrate with Microsoft Office Outlook, making it easier for people to make sales decisions, market products, solve problems, and get strategic views of the business from within a software environment they probably use every day.
- **Smart Tags** – Microsoft Dynamics supports a variety of Smart tags that enable users to easily access the business data within Microsoft Dynamics from within familiar Microsoft Office products like Microsoft Office Excel® 2003, Microsoft Office Outlook® 2003, and Microsoft Office Word 2003.
- **SharePoint** – Microsoft Dynamics uses Windows® SharePoint® Services as its portal infrastructure for intranet and extranet scenarios, enabling teams of people to easily engage in ad hoc collaboration and combine structured information from Microsoft Dynamics business management applications with unstructured data from Microsoft Office programs via a portal, making the information available for collaborative workflows.

Microsoft Dynamics Snap

Microsoft Dynamics Snap applications deliver integrations that are extensible to fit specific roles and vertical markets. Snap applications are developed by Microsoft, but are delivered as shared source under the Microsoft Permissive License. This allows Microsoft Dynamics partners to more easily extend, customize, or use components of the snap-ins within their own applications and build composite applications that help enhance productivity and empower information workers.

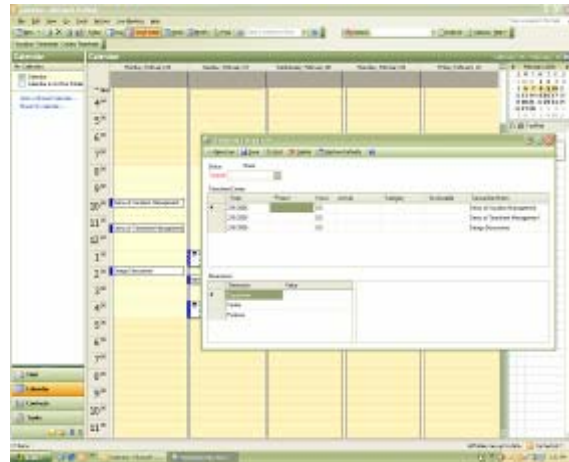
Microsoft Dynamics Snap includes the following applications:

Timesheet Management Snap-In, developed for Microsoft Dynamics AX 3.0, allows users to use Microsoft Outlook to view or submit time entries for tasks that are performed on a periodic basis. This solution links Microsoft Dynamics AX time entries with Outlook appointments and meetings, automatically filling in the data and helping track changes the user makes to linked appointments or meetings. This helps save users the time and trouble of correlating those tasks, and reduces errors as a result of users having to transpose data from one program to another. This will be very useful for Microsoft Dynamics AX customers in service industries or who have a requirement for employees to track how they allocate their time across multiple internal projects.

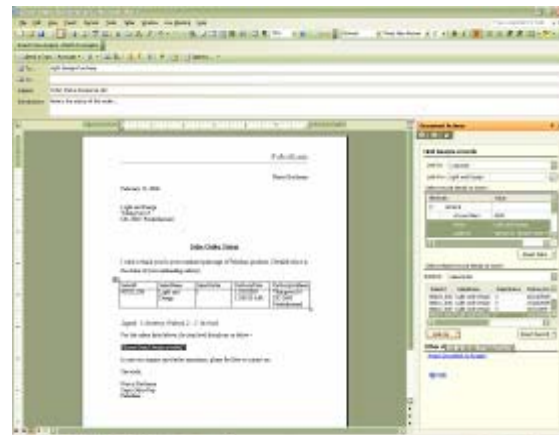
Vacation Scheduler Snap-In, developed for Microsoft Dynamics AX 3.0, allows users to submit vacation requests using Microsoft Outlook. This triggers an e-mail to the approver, who can view details of the request along with the requestor's vacation history, and approve or reject the request. The vacation time entry is then automatically updated into the Microsoft Dynamics time and attendance module.

Business Data Lookup Snap-In, developed for Microsoft Dynamics AX 3.0, allows business workers to use the Microsoft Dynamics AX task pane to search and browse Microsoft Dynamics AX data using Microsoft Office Word, Excel or Outlook, and to copy selected data into Office 2003 documents or attach the Office documents to Microsoft Dynamics AX records. One of the many useful scenarios for this includes sending order status e-mails to customers.

Business Data Lookup Snap-In, developed for Microsoft Dynamics CRM 3.0, allows business workers to search and browse customer relations management (CRM) data using the familiar Office 2003 environments of Microsoft Word, Excel and Outlook. Using a CRM task pane, users can copy data into Microsoft Office documents or attach the Microsoft Office documents to CRM records.



Create timesheets directly from Outlook Calendar items.



Easily look up and insert Microsoft Dynamics data into documents.

Duet for Microsoft Office and SAP

Duet for Microsoft Office and SAP is the name for a software collaboration between SAP and Microsoft. Duet is the first joint product and facilitates how information workers access MySAP ERP. Using Duet, companies can enjoy time and cost savings, increases in process compliance, improvements in decision-making, and decreases in redundancy and data errors. Company employees can also have improved and more flexible SAP access and greater productivity and efficiency.

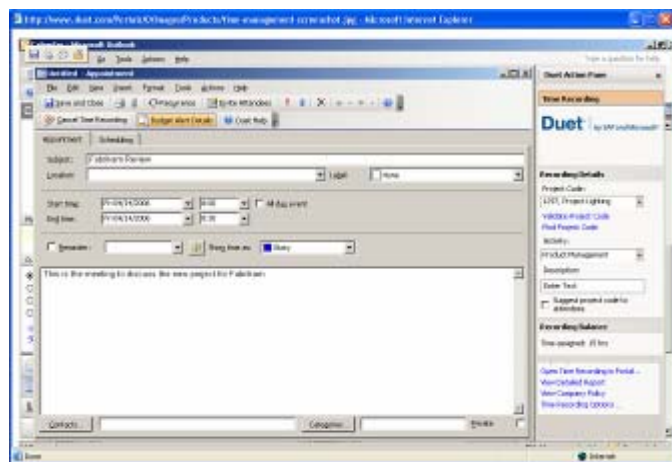
SAP is releasing four scenarios within the first release of Duet: Time Management, Budget Monitoring, Organization Management, and Leave Management but also plan to include two “value packs” by the end of FY06 that includes additional scenarios and functionality. The following describes the first of the Duet scenarios.

Time Management allows users to record, review hours worked, and receive approvals from an Outlook Calendar entry. Information is received from SAP time management and is automatically updated once submitted.

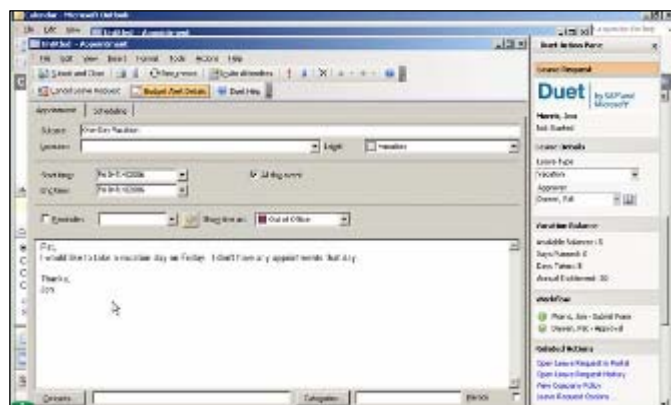
Budget Monitoring gives the user access to any report within Outlook and the ability to view them offline. Budget Monitoring supports managers in fulfilling their cost and budget responsibilities through proactive alerts to time-critical information.

Organization Management provides managers with up-to-date information about employees, open-positions, and organizational structures that are integrated from SAP software into Outlook and Office documents.

Leave Management enables employees to request leave and receive approvals from Outlook calendar entries. Leave Management uses standard meeting request and is based on detailed business rules that are set up in the SAP system.



Improved Time Management in the Information Workplace



Leave requests entered using a familiar interface

Discover for Yourself

Learn more about Microsoft Dynamics Snap:

- Download and install Microsoft Dynamics Snap and the shared source from [Microsoft Dynamics Snap Sandbox](http://codegallery.getdotnet.com/dynamicssnap) (<http://codegallery.getdotnet.com/dynamicssnap>).
- Join the Sandbox community and create your own snap-in.
- Learn more about Microsoft Dynamics and Microsoft Office integrations by reviewing the “Microsoft Dynamics and Microsoft Office System – Delivering the Business Value Through Interoperability” white paper (<http://download.microsoft.com/download/C/E/D/CED47274-B68C-41F9-89B0-B07A22233075/MicrosoftDynamicsOfficeIntegrationWP.doc>).
- Stay current with blogs from Microsoft executives [Satya Nadella](http://blogs.msdn.com/satyanadella) - Microsoft Dynamics R&D and [James Utschneider](http://blogs.technet.com/jamesu) - Microsoft Dynamics strategy. (<http://blogs.msdn.com/satyanadella> and <http://blogs.technet.com/jamesu>).

Learn more about Duet for Microsoft Office and SAP:

- Visit <http://www.duet.com>

Additional Resources

<http://www.microsoft.com/dynamics/product/officesnapin.mspx>

<http://www.microsoft-sap.com/>

At a glance: Microsoft Dynamics Snap and Duet for Microsoft Office and SAP

The following table provides summary information about Microsoft Dynamics Snap and Duet for Microsoft Office and SAP.

	Microsoft Dynamics Snap	Duet for Microsoft Office and SAP
Solutions	<ul style="list-style-type: none"> • Timesheet Management Snap-In – Allows users to use Microsoft Outlook to view or submit time entries for tasks that are performed on a periodic basis. • Vacation Scheduler Snap-In – Allows users to submit vacation requests using Microsoft Outlook. This triggers an e-mail to the approver, who can view details of the request along with the requestor's vacation history, and approve or reject the request. The vacation time entry is then automatically updated into the Microsoft Dynamics AX time and attendance module. • Business Data Lookup Snap-In – (developed for Microsoft Dynamics AX 3.0) – Allows business workers to use the Microsoft Dynamics AX 3.0 task pane to search and browse Microsoft Dynamics AX data using Microsoft Office Word, Excel or Outlook, and to copy selected data into Office 2003 documents or attach the Office documents to Microsoft Dynamics AX records. One of the many useful scenarios for this includes sending order status e-mails to customers. • Business Data Lookup Snap-In – (developed for Microsoft Dynamics CRM 3.0) – Allows business workers to search and browse customer relationship management (CRM) data using the familiar Office 2003 environments of Microsoft Word, Excel and Outlook. Using a CRM task pane, users can copy data into Microsoft Office documents or attach the Microsoft Office documents to CRM records. 	<ul style="list-style-type: none"> • Time management – Use the Microsoft Outlook calendar to report time in SAP software • Leave management – Add leave requests as Microsoft Outlook calendar items that integrate approval guidelines in SAP software and enterprise-defined processes. • Organization management – Access up-to-date information about employees, open positions, organizational structures, and managerial approvals that are integrated from SAP software into the Microsoft Outlook contacts area and Microsoft Office Professional 2003 documents. • Budget monitoring – Receive reports from SAP software in the Microsoft Outlook Inbox and work with them offline

Availability	<p>While solutions within the Microsoft Dynamics line have included Office integrations for many years, the first group of snap-ins was released in February, 2006.</p> <p>Additional snaps-ins will be released based on customer and partner feedback on an ongoing basis.</p>	<p>The first set of Duet software scenarios are expected to ship in June, 2006.</p> <p>Additional scenarios will be shipped on an ongoing basis.</p>
Pricing	No additional charge.	Microsoft and SAP will have different price points, discounting, and pricing structures. Contact your Microsoft or SAP representative for details.
Distribution Method	<p>Microsoft Dynamics Snap applications are distributed as shared source under the Microsoft Permissive License (MS-PL) so that Microsoft Dynamics partners may customize, extend, or use the source to build composite applications.</p> <p>Microsoft Dynamics Snap applications may be downloaded from the Microsoft Dynamics Snap Sandbox.</p> <p>For more information on the Microsoft Permissive License, see http://www.microsoft.com/resources/sharedsource/licensingbasics/permissivelicense.mspx.</p>	<p>Duet is planned to be delivered to Microsoft and SAP (MySAP ERP) customers worldwide in June, 2006.</p> <p>Duet applications are not distributed as shared source.</p>
Client Prerequisites	<p>Depending on the snap-in, Microsoft Dynamics Snap requires:</p> <ul style="list-style-type: none"> • Either Microsoft Dynamics AX 3.0 or Microsoft Dynamics CRM3.0 • Microsoft Office 2003 • Microsoft Windows .NET Framework 2.0 or higher <p>Existing snap-ins will be upgraded within 90 days of Microsoft Dynamics AX 4.0 and Office 2007 releases.</p>	<p>Duet requires:</p> <ul style="list-style-type: none"> • MySAP ERP 2004 • SAP NetWeaver • Office Professional 2003 • Microsoft Windows .NET Framework 2.0 or higher • Microsoft Windows Server 2003 • Microsoft Exchange Server 2003, including Active Directory 2000
Target Market	Information workers who use Microsoft Office 2003 and need to access business information and business processes managed by their Microsoft Dynamics business management solution.	Existing MySAP ERP enterprise customers

Language Support	Microsoft Dynamics Snap community members may localize the snap-ins with help from the “Making Snap-ins for Microsoft Dynamics CRM and Microsoft Dynamics AX World Ready” white paper at http://codegallery.gotdotnet.com/dynamicssnap .	Initially Duet is available in English. Additional language support including French, German, Japanese, Spanish and Portuguese will be made available in a future product release.
Product Support	Microsoft Dynamics Snap community members share feedback and assist others using the Snap Sandbox message boards. Additionally, Microsoft Dynamics partners may provide support to their customers. The Microsoft Dynamics Snap development team will continue to provide maintenance releases, as necessary.	First line support through normal process <ul style="list-style-type: none"> • Microsoft • SAP • Channel Second line support through dedicated Duet support desk <ul style="list-style-type: none"> • One face for Duet customers • Escalate to Microsoft and SAP as necessary
Customization and Extensibility	Microsoft Dynamics Snap applications are distributed as shared source under the Microsoft Permissive License (MS-PL). Microsoft Dynamics partners can easily extend, customize, or use components of them within their own applications and build composite applications that enhance productivity and empower information workers.	Duet v1.0 applications are pre-built scenarios with a light middle tier with limited development tools.

<p>Product Roadmap</p>	<p>The next release of snap-ins, which is targeted for Q4 CY06, include:</p> <ul style="list-style-type: none"> • Vendor Management • Proposal Lifecycle Management • Customer, Case, and Financial Analysis • Customer 360 Degree View • Expense Report Management • Campaign Management • Report Subscription • Smart Search 	<p>Value Pack 1, targeted for Q3 CY06:</p> <ul style="list-style-type: none"> • Additional scenarios: <ul style="list-style-type: none"> • Recruitment Management • Travel Management • Horizontal Analytics (reporting) • Additional functionality: <ul style="list-style-type: none"> • Platform enhancements – mySAP ERP 2005, Microsoft Office InfoPath® 2003 • Additional language supported: French, German, Japanese, Spanish and Portuguese <p>Value Pack 2, targeted for Q4 CY06:</p> <ul style="list-style-type: none"> • Expansion into LOB Scenarios: <ul style="list-style-type: none"> • Sales Activity Management • Purchasing Management • Office 2007 support <p>The above values packs are included at no additional cost with Duet 1.0.</p>
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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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