

## Microsoft Dynamics® and Microsoft Office 2010 are Better Together

### The Guiding Light

A major guiding principle of Microsoft Dynamics is the understanding that different roles have different information needs to get their jobs done. Sales people spend a lot of their time in Outlook, while Finance people live in Excel. That's why the tools Microsoft makes available are designed to adapt to the way that people work.

Microsoft Dynamics CRM is available inside Outlook, giving sales people instant access to their customer information. Microsoft Excel can easily access Microsoft Dynamics data, and refresh that data every time Excel is opened, supporting the work of the financial users within your organization.

Microsoft Dynamics decision to standardize on SharePoint Server a few years ago has proven to be a wise choice for the basis of their portal and collaboration platform, today SharePoint is used extensively to deliver dashboards. SharePoint also supports securing and validating information edited within it so that the information can be sent back into Microsoft Dynamics applications by its users.



Now that you have a sense of what Microsoft Dynamics is and why it is important for it to work hand-in-hand with Microsoft office, let's turn to the idea of empowering people.

People who run Microsoft Dynamics with Microsoft Office 2010 and SharePoint Server 2010 empower their employees by providing them with the best productivity experience across the PC, phone and browser. Such empowerment is delivered in a number of ways, the two most relevant are:

### Bringing Ideas to Life and Accessing Business Information from Anywhere

- **Bringing ideas to life** is important because people are working in an increasingly complex environment with ever-growing volumes of information, often leading to "information overload." Being able to visualize information in the form of graphs, charts, and dashboards enables people to draw insights from complex data sets and express their ideas in more compelling ways.

- Accessing business information from anywhere** is important because having the capability to work mobile is no longer just about the sales force. A significant percentage of employees now need to be able to access their business information while away from the office. This is influenced by increased telecommuting, as well as the expectation that people are “always on, always connected.” Whether you are a financial controller, a purchasing agent, or someone in HR, you need to not only check your email while out of the office, but also review the latest financial forecasts, approve a purchase order, or sign an offer letter. According to the Yankee Group, 50% of employees categorize themselves as mobile workers and they spend on average 20% of their time away from their primary workspace.

Microsoft Excel 2010 is a cornerstone of Microsoft’s Business Intelligent (BI) strategy. Excel is the most widely-used BI today and is how Microsoft delivers BI to the masses. Excel 2010 comes with many new features that improve the planning, analyzing, and decision-making processes. These processes are made even more powerful when Excel 2010 is connected directly to Microsoft Dynamics, as Dynamics is the system of record for many business transactions, such as sales orders, actual and budget expenditures, inventories, etc.

Some of the new Excel features include:

- Slicers**, which are a new addition to Pivot tables. Slicers make it much easier to group and filter data within a Pivot Table, so with a single click you can select a particular year, month, or region.

**CalendarYear**

2002	2003	2004
2005	2006	2007
2008	2009	2001

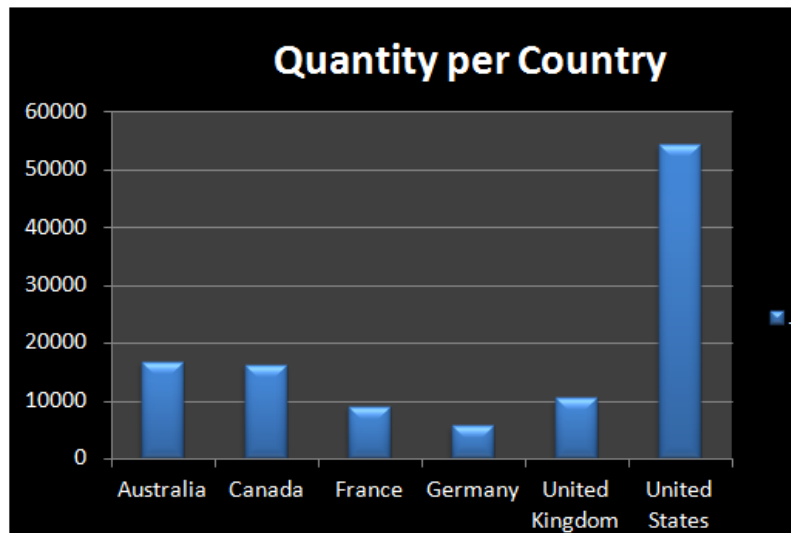
April	August	December	February
January	July	June	March
May	November	October	September

**SalesChannelName**

Individual	Store
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**SalesTerritoryGroup**

Europe
NA
North America
Pacific



- **Sparklines**, which are small charts in a worksheet cell that provide a clear and compact visual representation of Microsoft Dynamics data. They can show trends in a series of values, such as seasonal increases in revenue, or highlight maximum and minimum values. By positioning a Sparkline near its corresponding data, trends and patterns emerge that may otherwise remain hidden.

Product Sales by Year					
	2006	2007	2008	2009	Trend
Mountain Bikes	▼ \$ 128,365	▲ \$ 156,429	▲ \$ 199,840	▲ \$ 195,661	
Road Bikes	▼ \$ 113,614	▼ \$ 105,442	▲ \$ 188,303	▲ \$ 209,183	
Touring Bikes	▼ \$ 114,677	▲ \$ 159,051	▲ \$ 154,832	▼ \$ 137,267	
<b>Grand Total</b>	▼ \$ 356,656	▲ \$ 420,922	▲ \$ 542,975	▲ \$ 542,111	

### Getting the Data into Excel Pivot Tables

A new feature that works with Excel 2010 and Microsoft Dynamics data stored in a SQL database is PowerPivot. PowerPivot provides business users with the ability to manipulate very large data sets - hundreds of millions of rows - almost instantly from within the familiar Excel desktop. Connecting PowerPivot to the underlying data sources has been made considerably easier with a table import wizard. The wizard provides a code-free experience for establishing the data connection, and then identifying and linking the tables that are required for the data analysis. In the past, this would have required a developer, or at least someone who was fairly technical, to do the setup.

### Going Mobile

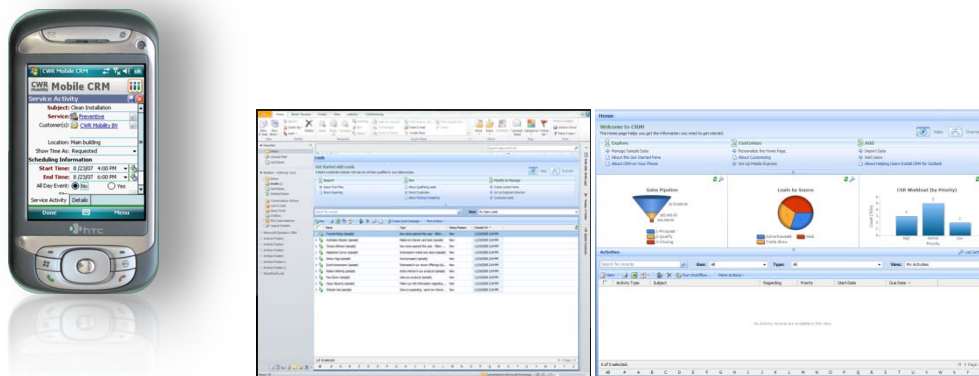
Office 2010 delivers the productivity experience across the PC, browser and phone. Combining Microsoft Dynamics with Office 2010 makes it easier to access Microsoft Dynamics information across all three devices.

We've already discussed how Dynamics data can be fed into Excel on the PC. But it is also possible to save that same spreadsheet to a SharePoint site, where it can be opened as an Excel Web App from any browser, anywhere in the world. And with Office Mobile, that same Excel Web App can be viewed on a mobile device. This means that a spreadsheet with up-to-date sales forecasts, or the latest budgets, can be created in Excel using a PC, shared via Excel Web Apps, and then viewed for important updates on a mobile device.



Microsoft Dynamics also supports the Microsoft vision of providing a great productivity experience across the PC, browser and phone. In this case, we can see that Microsoft Dynamics CRM can be used within the rich Outlook 2010 client.

Microsoft Dynamics CRM also has a completely web-native browser experience, so it can be accessed from any web browser or from any mobile device.



We've shown some of the ways in which Microsoft Office 2010 works with Microsoft Dynamics and why Microsoft Dynamics and Microsoft Office 2010 are "better together."



Let us help your organization become "Better Together." Give us a call today so we can get started. Contact Bob Milanowski, Director of EHTC Technology Solutions at [616-575-3482](tel:616-575-3482) or [bobm@ehtc.com](mailto:bobm@ehtc.com).