





Business Productivity at Its Best Microsoft Office 2010 and Microsoft SharePoint 2010

White Paper May 2010

DISCLAIMER

The information contained in this document represents the current plans of Microsoft Corporation on the issues presented at the date of publication. Because Microsoft must respond to changing market conditions, it should not be interpreted to be a commitment on the part of Microsoft, and Microsoft cannot guarantee the accuracy of any information presented after the date of publication. Schedules and features contained in this document are subject to change.

Unless otherwise noted, the companies, organizations, products, domain names, e-mail addresses, logos, people, places, and events depicted in examples herein are fictitious. No association with any real company, organization, product, domain name, e-mail address, logo, person, place, or event is intended or should be inferred.

Complying with all applicable copyright laws is the responsibility of the user. Without limiting the rights under copyright, no part of this document may be reproduced, stored in or introduced into a retrieval system, or transmitted in any form or by any means (electronic, mechanical, photocopying, recording, or otherwise), or for any purpose, without the expressed written permission of Microsoft Corporation.

Microsoft may have patents, patent applications, trademarks, copyrights, or other intellectual property rights covering subject matter in this document. Except as expressly provided in any written license agreement from Microsoft, the furnishing of this document does not give any license or rights to these patents, trademarks, copyrights, or other intellectual property.

© 2010 Microsoft Corporation. All rights reserved.

Microsoft, the Microsoft logo, Backstage, Excel, Excel Services, FrontPage, Groove, InfoPath, OneNote, Outlook, PivotTable, PowerPivot, PowerPoint, SharePoint, Visio, and Windows are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries.

All other trademarks are property of their respective owners.





MAMAN

This paper shows how two products, Microsoft[®] Office and Microsoft SharePoint[®], contribute to the powerful architectural design of the Microsoft Business Productivity Infrastructure (BPI). The *BPI stack* approach suggests that only by thinking at a capability level (for example, *"What do information workers want to do?"*), and then adding the right aspects of capability in each place (client, server, and services), can we create desktop applications that also deliver rich server and services capabilities to information workers.

Although we provide an overview of Office and SharePoint features working together in past versions, this paper focuses on the Microsoft Office 2010 experience with Microsoft SharePoint 2010. As of May 2010, both Office 2010 and SharePoint 2010 are now available.

The scenarios outlined in this paper show examples of how the power of SharePoint 2010 and related servers can be combined with capabilities of one or more Microsoft Office 2010 applications to deliver rich, intuitive, and easy-to-use capabilities directly into the hands of information workers. The scenarios cover the following value areas:

- Work Better Together
- Bring Ideas to Life
- Use Office Anywhere
- The Practical Productivity Platform

The paper concludes that to realize the best features and user experience with Office and SharePoint, organizations should upgrade client programs to Office Professional Plus 2010 and server technologies to SharePoint 2010.





Contents

 \sim

T

Abstract	3
Introduction	5
Work Better Together	7
Bring Ideas to Life	11
Use Office Anywhere	14
The Practical Productivity Platform	
Conclusion	
Appendixes: Capability Comparison Tables	



Microsoft[®] SharePoint[®] 2010



VERFEE

Microsoft Office has always been about automating tasks and providing people with choices for how they get things done at work, at school, and at home. When Microsoft Office products were first introduced, they helped people move beyond manual processes and tools to automated processes on computers. Over time, Microsoft Office has evolved and is now the primary vehicle by which people experience Business Productivity Infrastructure capabilities, such as collaboration and content management. Microsoft Office helps enhance business productivity by offering rich server capabilities that are tightly integrated into its user experience. Office 2010 and SharePoint 2010 are designed to provide people with a set of capabilities that span across Client and Server, often without the users even realizing that both are involved.

Many analysts support the notion of an integrated productivity environment for information workers. Gartner Group's "Smart Enterprise,"¹ Forrester's "Information Workplace,"² and Yankee Group's "Extended Enterprise"³ frameworks all combine these capabilities to create the next-generation workplace for information workers. The introduction of Microsoft Office 2007 was the first time a solution of client, server, and service products, with tight design interoperability, could deliver the functionality that would have previously required anywhere from six to ten "best-in-class" products for a full BPI platform. The 2010 release of these products takes this interoperability to the next level by providing more flexibility in delivery and new capabilities to help save the business time and money.

The focus of this paper is to provide an overview of the specific capabilities enabled through Microsoft Office and SharePoint working together as key components of the BPI stack in the 2010 release.

The following table provides an overview of the features designed to work together between a specific version of the Microsoft Office programs and the specific version of SharePoint products and technologies. Levels of the combined value of these two products can be summarized as fair, good, better, and best, and are further explained below.

¹ Gartner Group: The Smart Enterprise Suite is Coming: Do We Need It?, May, 2002

² Forrester Big Idea: The Information Workplace Will Redefine the World of Work – At Last!, June, 2005

³ Yankee Group: The Impact of Microsoft's Unified Communications Launch, Enterprise Computing & Networking, Zeus Kerravala, August 2006





Combined Value	Description
Fair	Microsoft Office 2000 or Office XP: Microsoft Office 2000 introduced the first interactions with Windows [®] SharePoint Services, which provides simple file operations that people can use to open and save documents on SharePoint sites from their Microsoft Office 2000 applications and receive alerts in Microsoft Office Outlook [®] 2000. Microsoft Office XP builds on this level of data interoperability to provide interactive access to data stored on SharePoint sites, which allows people to export list data to Microsoft Office Excel [®] XP and view properties and metadata for files stored on SharePoint sites.
Good	Microsoft Office 2003 works well with Windows SharePoint Services and Microsoft SharePoint Portal Server 2003, so information workers can create documents, organize team meetings and activities, access and analyze data from SharePoint sites, and use Microsoft FrontPage 2003 to customize lists or Web Parts on SharePoint sites. People can also use data interoperability between the Office 2003 and Windows SharePoint Services to move data to and from SharePoint sites and create databases linked to data stored on SharePoint sites.
Better	Microsoft Office 2007 provides contextual interoperability with Microsoft Office SharePoint [®] Server 2007 , which allows people to interact with SharePoint sites without leaving their Microsoft Office programs, and provides online/offline access with two-way synchronization for select information through Outlook and Microsoft Office Groove [®] . The Business Data Catalog (BDC) was introduced, enabling line-of-business (LOB) data to be surfaced through SharePoint and Office.
Best	Microsoft Office 2010 with Microsoft SharePoint 2010 gives people the ability to seamlessly view and edit information from a PC, browser, and smartphone ⁴ . Microsoft SharePoint Workspace 2010 (formerly Groove) makes it easier for people to take information offline, then resynchronize when they reconnect to the network. Business Connectivity Services (BCS) makes it easier to enable information workers to work with line-of-business (LOB) information from within familiar Office applications. People can co-author the same document, presentation, worksheet or share a Microsoft Office Backstage [™] view helps to surface SharePoint 2010 capabilities in the context of Office applications, including greater automation of metadata capture and streamlined access to document libraries and SharePoint sites. And Office 2010 extends the ribbon toolbar throughout all applications, including SharePoint 2010, helping people discover commands that make it easier to produce stand-out work and save time.

XX

X

72

⁴ Some mobile functionality requires Office Mobile 2010 which is not included in Office 2010 applications, suites, or Web Apps



Work Better Together

11

VA.

MARA

 $\Lambda V V$ Witte

People and businesses expect the tools they use in the office to support the highly collaborative, mobile, and virtualized work styles that are becoming the norm in today's workplace. With effective tools, people can work simultaneously with the same documents, data, and information to share ideas with colleagues, partners and suppliers, and to deliver results regardless of where they are, or if they are connected or on the go.

Office 2010 with SharePoint 2010

Enable people to respond faster so they're better equipped to meet deadlines by offering document collaboration with IT control.

With Microsoft Office 2010 and SharePoint 2010 capabilities, people can accurately and quickly respond with information that is pulled together from various experts across the organization. People in various roles and departments need to combine information in a variety of ways every day-from creating formal documents such as a press release, annual report, or legal contract, to gathering information about a potential client, detailing product specs, or creating on-boarding materials for new employees.

Scenario

Craft request for proposal (RFP) documents with greater speed, effectiveness, and quality to remain competitive.

Let's consider an example below where the Director of Sales, Jonathan Mollerup, must work with the Head of Legal, Sean Chai, and the Finance Manager, Jim Kim, to put together an accurate and up-to-date RFP document quickly.



FEATURES

Co-authoring Documents and Presentations Author Highlights in a Shared Notebook

Microsoft Office 2010 with SharePoint 2010 Microsoft Office 2007 with SharePoint 2010 The team has been contributing ideas on how to best The team has been contributing ideas on how to best respond to the RFP by using a Microsoft OneNote 2010 respond to the RFP by using a Microsoft Office OneNote shared notebook hosted on SharePoint 2010. As 2007 shared notebook hosted on SharePoint 2010. changes are made, OneNote tracks each person's notes Jonathan recalls that Dan, Manager of Sales Support, and edits. recently sent him a customer brochure that will help When Jonathan, the Director of Sales, views the shared complete the proposal, so searches through his notebook, he uses the easy-to-follow version history in Microsoft Office Outlook 2007 inbox to find the OneNote to see what the team has done since he last attachment. • Individuals contribute notes in their own sections in the opened the notebook. shared notebook. Jonathan reads through the notes and copies and pastes sections into an RFP template in Microsoft Office Word 2007. Jonathan sends an e-mail message to Sean and Jim to ask them to contribute to their respective RFP sections. He includes a link to the RFP document hosted in SharePoint. AJ Jonathan checks out the document from the SharePoint Reference library to update his RFP sections. Roadmap EΑ Timeline/GANTT **Training Plan Testing Plan** Key Contacts Projected Budget Jonathan recalls that Dan, Manager of Sales Support,

- Jonathan recails that Dan, Manager of Sales Support, recently sent him a customer brochure that will help complete the proposal, so he brings up a recent e-mail from him. With the Outlook Social Connector, he can view all the communication he has had with Dan, including e-mail attachments. This makes it easy for Jonathan to find the message where Dan sent the latest version of the brochure.
- After Jonathan finishes making his updates and checks in the notebook, Jim checks out the notebook and makes his updates.

Edit in Microsoft Office Word

View Properties

Edit Properties

Check Out

View in Browser Edit in Browser

• Sean needs to work on the document at the same time, but because it is checked out to Jonathan, he must

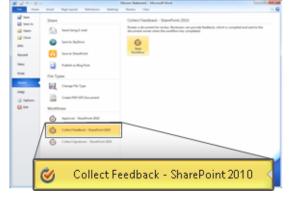




MMMM MMMM WINNER BE

NAVATE ANAR

- After copying content from the brochure and making some final notes in the shared notebook, Jonathan quickly drops the information into the company's RFP template in Microsoft Word 2010.
- Using built-in workflow services in SharePoint 2010, Jonathan can submit the document into the company's RFP workflow directly from the Office Backstage view in Word 2010, which routes the document link and a request to finance, engineering, and legal contributors to fill in their respective RFP sections.

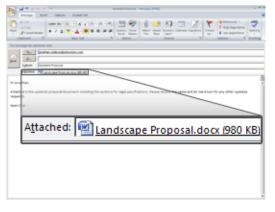


By using Microsoft Office 2010 and SharePoint 2010 together, Jonathan; Sean, Head of Legal; and Jim, the Finance Manager, work on the same version of the RFP document, each editing their own sections without worrying about conflicting changes.

Microsoft Office 2007 with SharePoint 2010

SharePoint 2010

create a new version. Sean saves the RFP document to his desktop, makes his changes, and then mails the separate version to Jonathan as an attachment.



- Jonathan, who is assembling the final version of the RFP document, needs to assemble all the edits from the team. He sees tracked changes and inline comments from Jim's document in SharePoint, and he sees Sean's edits in the separate copy.
- Jonathan reconciles the changes, and sends another e-• mail message to Sean and Jim to ask them to review for final approval.
- After all iterations are received, Jonathan spends several hours consolidating the final edits from the different versions created by the team.
- Jonathan submits the final version of the RFP to the customer right before the deadline.





Microsoft Office 2010 with SharePoint 2010	Microsoft Office 2007 with SharePoint 2010
Sean Chai Base Very owr Owr owr Owr	
Authors editing this document	
• After each time they save, each person can see the others' edits highlighted as they make changes, so they can see this document is coming together quickly as the	
 RFP deadline looms. Jonathan does a final review of the entire RFP, including Sean's and Jim's contributions. He doesn't have to worry about reconciling their changes—they were all working on the same document at the same time, so each person was aware of changes as they were made. 	
 Because they edited and managed the document collaboratively within the RFP workflow with Office 2010 and SharePoint 2010 working together, they did not need a final approval review. Jonathan sends the RFP to the client long before the 	
submission deadline, making a good impression by delivering before the competitive bids.	

Benefit: Empower All Your People for Critical Interactions

• Reduce sales proposal response time

 \checkmark /

AVMAAL WWEE

VVVVV

 $\Lambda \Lambda$

Made

NV

Reduce re-work and time spent reconciling document changes





NAMAM

People work in a far more complex environment than ever before, and can fall victim to information overload. They are looking for ways to draw insights from complex or disparate data sets and express ideas in more compelling ways, such as with the use of multimedia. They also need to capture, search, and reuse different types of content more easily. Further, staff and budget cuts mean that everyone needs to be more productive and make the most of resources to produce results that keep them ahead of the competition.

Office 2010 with SharePoint 2010

Provide self-service access to information to help people make more informed business decisions and to reduce the burden of report requests.

With Microsoft Office 2010 and SharePoint 2010 capabilities, people can create and share powerful analysis right from their desktops or a browser. With improved analysis capabilities, people can make better, smarter decisions and share sensitive business information more broadly with co-workers, customers, and business partners in a security-enhanced environment.

Scenario

Provide people with self-service access to sales information to analyze massive data sets.

Let's consider an example in which Director of Sales, Mike Miller, wants to see how his company's sales are going so far this year.





	ស្រីភ្លើល SharePoint [®] 2010
FEATU Formatting and Analysis v PowerPivot fo Publishing and Sharing Through Offic	with Data Slicers in Excel or Excel 2010
Microsoft Office 2010 with SharePoint 2010	Microsoft Office 2007 with SharePoint 2010
Mike, the Director of Sales, opens a report in Microsoft Excel 2010 that has all of his company's sales data for the year in a Microsoft PivotTable® dynamic view, to analyze which products are performing best. Because Mike is using PowerPivot for Excel 2010, a free add-in, he can work with hundreds of millions of rows and can pivot the different fields quickly, all without requiring help from IT. Mike inserts Slicers beside the PivotTable report to make it easy for others who are not comfortable with PivotTables to filter and view different combinations of data. Fourthie Video Fourthie Vid	<text><list-item></list-item></text>

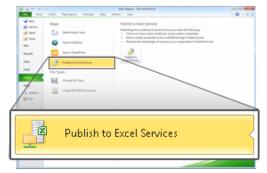
 $\wedge \vee \vee \vee \vee \vee$



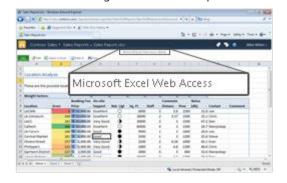
Microsoft Office 2010 with SharePoint 2010

MALE

 Because the Backstage view is extensible, Mike uses a button he has customized to publish the view to his team site so he doesn't have to remember the URL.



• The team can enjoy the same data analysis capabilities using Slicers when they work with the report in SharePoint through Excel Services reports.



Microsoft Office 2007 with SharePoint 2010

SharePoint[®] 2010

- He publishes the Excel 2007 sales report in SharePoint 2010 and specifies which components of the workbook will be visible when they're published to the Excel Services site.
- When the team uses Excel 2007 content that is published in SharePoint 2010, they have a read-only view of the PivotTable.



Benefit: Make Better Decisions and React Quickly to Change

- Decrease IT cost of generating reports
- Avoid cost of 3rd party BI solutions



Use Office Anywhere

WARA

Mobile work is no longer just about the sales force. More than ever, employees in a variety of roles are expected to be "always on, and always connected," even when they are away from the office. To enable the fast response they want to provide, these information workers need the ability to access information from more places and on more devices. Taking action on the go can be difficult, especially if employees can't connect to the business network or access the right information for their jobs. And while telecommuting and working on the go can reduce costs and increase productivity, it potentially opens up access and security concerns.

Office 2010 with SharePoint 2010

Enable people to access and respond to information securely from virtually anywhere with confidence that content changes and fidelity are maintained across locations and devices.

With Microsoft Office 2010 and SharePoint 2010 capabilities, information access is securely extended to enable people to work from more places and on more devices with a browser, and to keep everyone more productive even when they're on the go. With new mobile access enhancements, co-workers in different locations can share, edit, and comment on documents or presentations from their mobile devices with a familiar experience that is tailored to mobile devices. Whether they view or edit documents, spreadsheets, or presentations on a PC, a browser, or a mobile device, they can experience high-fidelity across all devices.

Scenario

Enable people who travel without a PC to comment on a press release.

Let's consider an example in which the Finance Director, Robert Lyon, is heading out for a long weekend in the country. He leaves his PC behind but brings his mobile device. While he is away, some late-breaking company news requires him to review and edit a press release.



ы		U	R	ES
	 	<u> </u>		

Mobile Access Enhancements

Viewing and Editing Documents, Spreadsheets, Presentations, and Notebooks in a Browser

Microsoft Office 2010 with SharePoint 2010	Microsoft Office 2007 with SharePoint 2010
 Before Finance Director Robert revises the press release document to announce fourth-quarter earnings, he needs to update the regional revenue in the quarterly earnings report in Excel. 	 Before Robert revises the press release document to announce fourth-quarter earnings, he needs to update the regional revenue in the quarterly earnings report in Excel.

Robert uses the browser on his mobile device⁵ to navigate to the SharePoint 2010 library and opens the revenue report in the Excel 2010 Web App (running in the browser), confident that changes he makes on his mobile device will not change the quality or format of the spreadsheet's appearance.

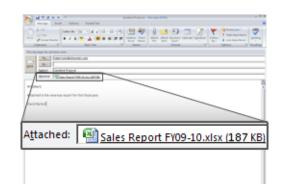
 $\mathcal{N}\mathcal{N}$ $\mathcal{N}\mathcal{N}\mathcal{N}$ MM

NAFEE

시 Internet Explorer 🛛 💡 🗱 🏎 🗙						
🔓 http://office/_layouts/mobile/mXL 👻 🌈						
Ę						
	A	В	с	D		
1	Blends	Red Label	Black Label	Green Label		
2	1/1/2008	955	2330	1463		
3	1/2/2008	940	2278	1462		
4	1/3/2008	925	2226	1461		
5	1/4/2008	910	2174	1460		
6	1/5/2008	895	2122	1459		
7	1/6/2008	880	2070	1458	-	

- Robert updates the revenue figures with the confidence that the changes are saved as he intends and the whole team will stay up-to-date.
- The team takes Robert's figures and rebuilds the guarterly earnings section of the press release.
- Meanwhile, Robert needs to add executive commentary to support the new data. When he arrives at his vacation destination, he finds that the hotel has a small business center with a PC and Internet access.

- ease document to he needs to quarterly earnings
- Because the Excel 2007 spreadsheet is hosted in SharePoint 2010, Robert must send an e-mail to his colleague, David Bradley, requesting him to forward the revenue report.
- The next day, David sends the document to Robert as • an e-mail attachment.



Robert opens the revenue report from the e-mail attachment and updates the revenue figures in the Excel 2007 report using Microsoft Office Mobile.

⁵ Given mobile connectivity to corporate resources, most Smartphones using the microbrowser standard (iPhone, RIM, Symbian and Windows Mobile) can access documents stored on a server via their Smartphone browser.



Microsoft Office 2010 with SharePoint 2010

NVVVV

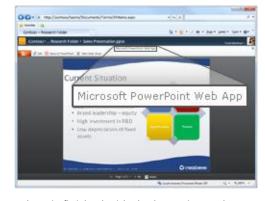
VI

NVVVV

- The PC does not have Microsoft Office installed, but with the browser, Robert can use Web Apps to view the documents—just as he is used to seeing them on his PC—and make the necessary edits.
- Using the PC's browser, Robert navigates to the SharePoint 2010 library and opens the draft press release in the Word 2010 Web App.
- From within the browser, Robert views and edits the press release document in high-fidelity, just as he would see it on his PC.



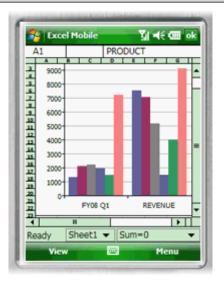
- He saves his changes to the document, and then must update the Microsoft PowerPoint[®] presentation that will accompany the earnings report.
- Even though the presentation is large in size, he is able to quickly open the presentation in a browser using the PowerPoint 2010 Web App.
- Robert edits the slide deck in the browser, revises some of the figures and slide notes, and saves his changes.



Robert is finished with the last-minute changes. The rest of his team collects Robert's changes from SharePoint 2010 and submits the press release.

SharePoint 2010

Microsoft Office 2007 with SharePoint 2010



- Robert replies to David's e-mail with the updated Excel report attached, and the team takes Robert's figures and rebuilds the quarterly earnings section of the press release.
- Meanwhile, Robert also needs to add executive commentary to support the new data. When he arrives at his vacation destination, he finds that the hotel has a small business center with a PC and Internet access.
- The PC does not have Microsoft Office installed, so he can't access the file.
- Robert finds a local Internet café with a PC with Microsoft Office 2007 installed. He signs in to his e-mail through Outlook Web Access, where he can get the press release document and presentation from an e-mail attachment.
- Robert waits for the document and presentation to download to the PC, then makes some last minute edits to it, and sends it back to the team.
- Robert remembers to delete the document and presentation from the Internet café PC.





Microsoft Office 2010 with SharePoint 2010	Microsoft Office 2007 with SharePoint 2010
Even though Robert used a Web browser to edit the presentation, he knows that the Office Web App will maintain the presentation of the content and formatting changes. He also knows that the confidential information in the presentation is secure because it resides securely on his company's SharePoint server.	

Benefit: Productivity for all Workstyles and Mobile Situations

- Save time and resolve issues faster
- Support telecommuting which can save on overhead costs of real estate and facilities

Office 2010 with SharePoint 2010

Help people stay productive anywhere whether they're working at the office, at a customer site, on the road, or from home, with the tools that seamlessly synchronize online and offline changes.

With Microsoft Office 2010 and SharePoint 2010 capabilities, people can enjoy a seamless online and offline experience and stay productive, even when they're away from the office. With this solution, people can work from more locations, stay up-to-date, and respond effectively to information—regardless of whether they are at home, at work, or on the move.

Scenario

Enable people to stay productive anywhere—online or offline—and update team information at the office, at a customer site, on the road, and from home.

Let's consider an example in which the Marketing Director, Jeff Phillips, is traveling from the U.S. to the Far East for several customer visits. He wants to update a presentation for a product launch while he is on the plane or in the hotel.





FEATURES Offline and Online Collaboration Working Offline with Improved Access

•

Microsoft Office 2010 with SharePoint 2010

XXX

Microsoft Office 2007 with SharePoint 2010

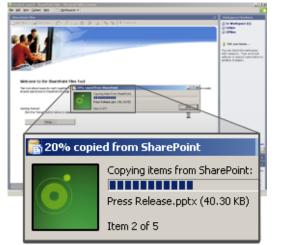
- Jeff, the Marketing Director, was in a hurry to catch his flight when he left the office, and he did not download the presentation to his laptop. Fortunately, he had the presentation stored on a SharePoint site that he has synced to his desktop through Microsoft SharePoint Workspace 2010.
- At the airport, he opens his laptop and starts working on the offline version of the presentation. He saves his updates back to SharePoint Workspace 2010.



 Jeff also updates product information using offline SharePoint list forms in Microsoft InfoPath[®] 2010 from within SharePoint Workspace 2010. Information he enters in the forms is automatically synchronized to SharePoint list when he reconnects.



Although Jeff is in a hurry to catch his flight, he has to manually synchronize the SharePoint 2010 library with Microsoft Office Groove[®] 2007 on his laptop before he leaves the office.



- At the airport, Jeff opens the Microsoft Office PowerPoint 2007 presentation, updates it, and saves it back to the Groove 2007 workspace just before he boards his flight.
- Once on board his flight, Jeff also needs to change product information in his company's database, which is published in SharePoint 2010.
- To work offline with data in SharePoint 2010, IT previously created a link between Microsoft Office Access 2007 and SharePoint 2010.
- While he is in flight and disconnected, Jeff changes product information in the Access 2007 database.
- When Jeff returns to the hotel, he connects to the network to update his team with the changes he made to the Access database.



Microsoft Office 2010 with SharePoint 2010

VVV

VY

NVVVV

company's product information database in Microsoft Access 2010, which is published to Access Services in SharePoint 2010. Last time Jeff updated the database, Access 2010 cached the data from SharePoint 2010 in local database tables by default, using Access Services.

While in flight and disconnected, Jeff changes Access 2010 forms, reports, queries, and macros offline, knowing that Access 2010 will update the company's database when he reconnects.



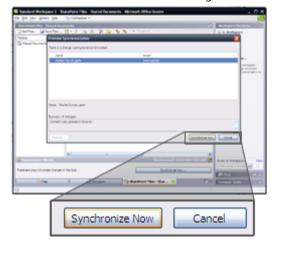
- He also sends a note to his team to make a few changes to his presentation.
- When Jeff arrives, he reconnects to get the updated presentation and finds that his hotel has a slow connection. Despite the low bandwidth connection, all changes are automatically synchronized between SharePoint Workspace and SharePoint quickly since only the changes are sent and received, saving him time and frustration. He also knows his work is secure because it is all encrypted. He opens his presentation in the workspace and sees that his team has polished it for him.

Microsoft Office 2007 with SharePoint 2010

SharePoint 2010



Jeff also synchronizes the updated presentation in Groove 2007 with the SharePoint 2010 library. Since there are many graphics in the presentation, it is a large file and the synchronization across the low network bandwidth is time consuming.



Benefit: Empower All Your People for Critical Interactions

- Save time working away from the office
- Resolve customer or other issues faster



The Practical Productivity Platform

Today's business world demands that information technology (IT) department support the business to overcome increasingly complex challenges while operating within a reduced budget. At the same time, organizations must support a broader array of devices securely and meet compliance requirements with fewer resources, better response times, and lower costs.

Office 2010 with SharePoint 2010

Unlock more value from LOB systems while helping people across the organization increase productivity.

With Microsoft Office 2010 and SharePoint 2010 capabilities, people are empowered with read and write access to line-of-business (LOB) applications and external data sources (such as SQL, Oracle, SAP, CRM, Siebel, Web services, and custom applications), whether they are online or offline. They can now access the back-end data and business processes through their familiar Microsoft Office applications with no additional training, and extend the reach of LOB data across the organization.

Scenario

XXX

Provide people with read and write access to external data sources, as well as the capability to take data offline.

Let's consider an example in which the Line-of-Business Manager, Chris Barry, has to update the budget information for an internal project and get it approved by the Finance Director, Sara Davis.





FEATURES **Business Connectivity Services Offline and Online Access to LOB Data**

Microsoft Office 2010 with SharePoint 2010			Microsoft Office 2007 with SharePoint 2010		
any that Chris, in as taken adva on nectivity Ser ad and write ad ny's ERP system is the budget nor by into the bu	the Line-of-Business ntage of SharePoint 2 rvices (BCS) to connect ccess to LOB informat m using Microsoft Ex- nonitoring report in E dget information for a ystem Upgrade. He n al budget, planned bu	Manager, 2010 ct to and tion from ccel 2010. Excel an needs udget,			
	\$89, 757,120, 481.00 \$89, 757,120, 482.00 \$89, 757,120, 482.00		26 145 Cuis-10045 PC-AC-1012 4155544 564,880,124,25 27 146 Cuis-10045 PC-AC-1033 501501 \$56,256,389,11 14 H1 H1 H1 H1 H1		
	As taken adva onnectivity Ser ad and write ad ny's ERP syste s the budget r bk into the buc oject, Payroll S n such as actua nd more.	As taken advantage of SharePoint 2 onnectivity Services (BCS) to connect ad and write access to LOB informat ny's ERP system using Microsoft Ex s the budget monitoring report in E bok into the budget information for a oject, Payroll System Upgrade. He n n such as actual budget, planned bu nd more.	Numerica State from the first of the first		

internal project, Office Equipment Tracking System, to this internal project in the Excel report. At the same time, he previews the budget variances with easy-tounderstand charts.

 \mathcal{N} $\Lambda V V$ VI

- Chris clicks the Update Budget Transfer button in the Excel report, and then saves changes back to SharePoint 2010, which synchronizes data with the ERP database.
- The submission of an Excel report triggers an alert for Sara to validate the budget transfer. Sara is about to disconnect from the company's intranet and leave the office, so she takes the budget data offline in SharePoint Workspace 2010.
- While she is on the bus, Sara opens SharePoint Workspace 2010 to review the budget transfer and make some updates. She then saves the changes.

- the Equipment Tracking System, to this internal project in the Excel report. At the same time, he previews the budget variances with easy-to-understand charts.
- Chris opens the ERP system to transfer the budget. The next time the Excel report runs, the change will appear.
- Sara is about to disconnect from the company's intranet and leave the office. Before she does so, she requests that Chris send her a copy of the Excel 2007 report.
- While on the bus, Sara reviews the budget transfer, makes some updates in her copy, and saves the changes.
- After she reconnects to the network at home that evening, she puts these same new figures in the ERP system manually, and they are accessible by Chris and the rest of the finance team.





	Microsoft Office	2010 with SharePoint 2010	Microsoft Office 2007 with SharePoint 2010
Image: Second			
	Statustics function Filter Statustics (surgery building statustics) Statustics (surgery building statustics) Statustics (surgery building statustics) Statustics function Building statustics Building statustics Buildi		
ID 11		11	
	Name	Payroll System Upgrade	
	CompanyName	Contoso	
•	 After she reconnects to the network at home that evening, Sara's updates are synchronized back to SharePoint and the ERP database using BCS. 		

Benefit: Rapidly Deliver Customized Business Productivity Solutions

• Shorten time-to-market

N

XXXX

AREA

- Improve adoption of solutions
- Reduce development costs





APIER

Microsoft Office 2010, when used with Microsoft SharePoint 2010, maximizes existing investments by extending server and services capabilities to people's desktops, mobile devices, and browsers through familiar and intuitive applications. The latest versions of these platforms were developed together for maximizing productivity, with the expressed purpose of delivering a wealth of server and services capabilities to information workers and enabling the most powerful user experience possible. *The combined deployment of Office 2010 and SharePoint 2010* provide new and improved capabilities compared to their previous versions. The latest client programs and server technologies *is necessary to experience the best capabilities and performance, while achieving more valuable benefits for your business.*



Appendixes: Capability Comparison Tables

The tables in this section contain a detailed comparison of the capabilities of different versions of Microsoft Office with SharePoint 2010; and then Microsoft Office 2010 with different versions of SharePoint.

Below is an explanation of the symbols you will see throughout the comparison tables:

		Capability is fully supported
		Capability is partially supported
C		Capability is not supported

Appendix A: Microsoft SharePoint 2010 with Different Versions of Microsoft Office

Work Better Together

	Microsoft Office 2010	Microsoft Office 2007	Microsoft Office 2003
Co-author Documents and Presentations Share ideas with other people simultaneously and see what areas of a document have changed.	With co-authoring, work together in Word 2010 and PowerPoint 2010 and see others' changes tracked as you work with documents hosted in SharePoint 2010.		\bigcirc
Simultaneously Edit Spreadsheets and Notebooks Work together on content using a Web browser.	Use Excel 2010 Web App to edit the same workbook at the same time or simultaneously edit the same shared notebook with others through the OneNote Web App.		
Share a Team Notebook Enable multiple people to add to and change the same shared notebook, and author names appear in near real time as authors make changes.	Shared notebooks in OneNote 2010 provide a clear trail of what other authors have changed since the user last opened the notebook.	Work with others in a shared notebook in Office OneNote 2007 , but without a complete audit trail.	





	Microsoft Office 2010	Microsoft Office 2007	Microsoft Office 2003
Broadcast Slide Shows in PowerPoint Share a presentation over the Web for remote or networked viewers.	Instantly broadcast your slides to a remote audience who can view them online, even if they don't have PowerPoint installed.		\bigcirc
Save Documents and Presentations Directly to SharePoint from Office Automatically discover the SharePoint document library to make saving content easy and intuitive.	People can save Office 2010 documents directly to the SharePoint 2010 document library from the new Office Backstage view.	Save documents to SharePoint, but without the simplicity of the Backstage view	

Bring Ideas to Life

 \sim IA

 $\mathcal{N}\mathcal{N}\mathcal{M}$

FRAME

/

	Microsoft Office 2010	Microsoft Office 2007	Microsoft Office 2003
PowerPivot for Excel 2010 PowerPivot for Excel 2010, a free add-in, provides Web-based analysis in SharePoint 2010. Use data from multiple sources and manipulate large data sets that have up to hundreds of millions of rows.	Publish Excel 2010 workbooks to SharePoint that were created with PowerPivot for Excel 2010, a free Web download that can quickly calculate data sets of hundreds of millions of rows from multiple sources. PowerPivot for SharePoint 2010 enables Web-based analysis through Excel Services or the Excel Web App.		
Publish and Share Through Excel Services Share analysis and results across the organization by publishing Excel spreadsheets to the Web or other SharePoint site (intranet or extranet).	Use the new Office Backstage view in Excel 2010 to selectively publish parts of a worksheet, hide formulas, and stage data to SharePoint 2010. Publish and share analysis with less effort and enable others to enjoy the same Slicers and fast-query capabilities, even when they work in Excel Services reports.	Manually navigate to SharePoint sites and specify which components of the workbook will be visible when published to the Excel Services site.	
Microsoft Access Design		\bigcirc	\bigcirc





			Microsoft [*]
		Sharef	Point [*] 2010
	Microsoft Office 2010	Microsoft Office 2007	Microsoft Office 2003
for the Web Microsoft Access applications developed in 'Design for Web' mode can be designed and edited for publishing to SharePoint 2010, so people can share, collect, and report on data.	Use Access 2010 to publish data, forms, logic/macros, and reports with nearly the same look and feel in the browser as Access 2010 on a PC.		
Automate Metadata Capture Make information more accessible, perceptible, discoverable, navigable, manageable, and re- usable.	Use Word 2010 to provide better and more automated metadata capture from Backstage view, including document information either added automatically or typed quickly in AutoComplete fields.	Use the document information panel to manually capture metadata from within Office 2007.	
Use Office Backstage [™] View Seamlessly connect Microsoft Office applications with SharePoint 2010 to provide access to workflow, the ability to enter metadata, and social context.	By using the Backstage view in Office 2010 applications, people can enter metadata, interact with workflows, access authors' profiles, and more. Because Backstage view is extensible, people can add custom actions to suit custom needs.		
Access SharePoint Templates Access document templates stored on SharePoint 2010 more quickly and easily.	People can access document templates stored in SharePoint 2010 via the New Document Wizard in Microsoft Office applications.		
Apply PowerPoint Themes to SharePoint Sites Make customization of SharePoint 2010 sites more flexible by using themes that are also used in presentation decks.	People can theme SharePoint 2010 sites by using the same themes as in PowerPoint 2010.		\bigcirc



1 AND	Microsoft [®]
AT .	SharePoint [®] 2010

			Contraction of the second seco
		Share F	Point 2010
	Microsoft Office 2010	Microsoft Office 2007	Microsoft Office 2003
Use Reusable Workflows Support workflows that can be used multiple times, and provide workflow templates for later use in SharePoint 2010.	SharePoint Designer 2010 supports reusable workflows and workflows attached to content types.	\bigcirc	\bigcirc
Visualize Workflow Allow a workflow designer to see the steps in a SharePoint 2010 workflow in a visual format.	Workflows developed as drawings and exported from Microsoft Visio [®] 2010 can be imported into SharePoint Designer 2010 for modification and deployment.		
Use Forms-Based Applications Forms-based applications connect with back-end data and include workflow, reporting, custom Web pages, and other components.	Connect InfoPath 2010 forms with back-end data by using external lists in SharePoint 2010, and include custom sandboxed solution code.		

Use Office Anywhere

Carlos I.

	Microsoft Office 2010	Microsoft Office 2007	Microsoft Office 2003
View and Edit Documents, Spreadsheets, Presentations, and Notebooks in the Browser Allow editing, even if applications are not loaded on a PC.	View and make light edits to documents through Office Web Apps in a supported Web browser. Document formatting and content are maintained in high fidelity when changes are made in the browser. Web applications can be hosted on the premises, running in SharePoint.		
Mobile Access Enhancements View and edit documents from a mobile device, even when on the go.	Office Mobile 2010 delivers an improved authoring and editing experience for Word, Excel, and PowerPoint, which is		\bigcirc





			Microsoft*
		Sharef	Point 2010
	Microsoft Office 2010	Microsoft Office 2007	Microsoft Office 2003
	available from Windows and Nokia e-series phones. It also offers improved touch-friendly navigation and introduces SharePoint Workspace Mobile for browsing SharePoint sites and opening and synching documents to a phone.		
Work Offline with an Improved Experience in Microsoft Access Edit Access forms, reports, queries, and macros offline and synchronize changes in SharePoint when reconnected to the network.	Data in Microsoft SharePoint 2010 lists is cached in Access 2010 by default.	Before working offline with data from SharePoint sites, people must manually create links between Access 2007 tables and SharePoint 2010 lists.	
Collaborate Offline and Online Work offline with SharePoint 2010 contents. When you reconnect to the network, changes are synchronized.	Take SharePoint 2010 document libraries and lists and work offline with SharePoint Workspace 2010.	Work offline in SharePoint 2010 document libraries only through Office Groove [®] 2007.	\bigcirc
Fill in Forms Offline SharePoint list forms are synchronized with the workspace so people can work offline.	SharePoint 2010 list items open in an InfoPath 2010 form that is hosted in SharePoint for edit in display mode.		\bigcirc
Extend the Reach of Forms Fill in InfoPath forms from a Web browser or mobile device, while online or offline.	The InfoPath 2010 forms solution offers embedded solutions using local or hosted InfoPath controls.	Limited InfoPath 2007 controls work on Web- enabled and mobile forms.	\bigcirc
Publish Access Databases to the Web Securely publish database applications to the Web so IT managers can meet requirements for data compliance, backup, and audits.	When you publish data, Access 2010 checks for incompatible objects and builds a report of any runtime differences between the client and server. Access Services is a	While publishing data from Access 2007, people must manually check whether objects created in Access can be supported in the server or not.	





		⊡ ⊡.Offic
	Sharel	Point 2010
 Microsoft Office 2010	Microsoft Office 2007	Microsoft Office 2003
new SharePoint 2010 feature that gives you the ability to create Web databases in Access, host them on a SharePoint site, and make them fully accessible through a Web browser. As a result, organizations can save time and reduce development and maintenance costs.		

The Practical Productivity Platform

 $\mathcal{N}\mathcal{N}\mathcal{M}\mathcal{M}\mathcal{M}$ $\wedge \wedge \vee \vee \vee \vee \vee$

	Microsoft Office 2010	Microsoft Office 2007	Microsoft Office 2003
Access LOB Data Offline and Online Take LOB data offline, and then synchronize changes automatically when you are back online.	Synchronize LOB data in both directions between SharePoint Workspace 2010 and enterprise LOB systems by bringing LOB data into SharePoint 2010 Sites, and then taking that data offline via SharePoint Workspace 2010.	Groove 2007 can provide offline access to some SharePoint information	
Use Business Data Applications Design forms for SharePoint 2010 that create, read, update, and delete business data from a back-end system.	Business data applications start with an external list in SharePoint 2010 and use InfoPath Designer 2010 to create custom forms on top of the list.		
Enhance Information Security and Integrity with Digital Signatures Help ensure the integrity of information contained in forms with the controls necessary to enable single, co-sign, and counter-sign scenarios for the full form or portions of the form.	InfoPath 2010 and SharePoint 2010 support cryptography next- generation (CNG) digitally signed content.		
Publish Forms in a Single			\bigcirc





			Controsoft*
		Sharef	Point 2010
	Microsoft Office 2010	Microsoft Office 2007	Microsoft Office 2003
Click Avoid clicking through the Publishing Wizard every time you update forms published in SharePoint 2010.	Use "quick" publish functionality in InfoPath 2010 to publish forms to SharePoint 2010 in a single click.	Publish data from forms through a publishing wizard.	
Manage Forms More Easily More easily manage form versions, updates, and upgrades in SharePoint 2010 to ensure that team members are working on correct versions.	Automate template version management with SharePoint 2010 and InfoPath 2010 to provide an improved process for checking for template updates.		
Use LOB Data in Applications Provide a SharePoint- based framework for creating Office Business Applications (OBA).	Business Connectivity Services (BCS) provides the read/write capability to connect SharePoint 2010 and Microsoft Office client applications to external data sources (such as SQL, Oracle, SAP, CRM, Siebel, Web services, and custom applications).	Use the BCS within SharePoint to provide read access and surface LOB information in Office client applications	
Package and More Easily Move InfoPath Applications More easily move InfoPath applications from site to site and server to server.	Package InfoPath 2010 applications more quickly and easily using the Windows SharePoint Services solutions (.wsp) and SharePoint site template (.stp) file formats.		\bigcirc



Appendix B: Microsoft Office 2010 with Different Versions of Microsoft SharePoint

Work Better Together

/

Mitte

MATER

	SharePoint 2010	SharePoint 2007	SharePoint 2003
Co-author Documents and Presentations Share ideas with other people simultaneously and see what areas of a document have changed.	With co-authoring, work together in Word 2010 and PowerPoint 2010, and see others' changes tracked in documents hosted in SharePoint 2010.		
Simultaneously Edit Spreadsheets and Notebooks Work together on content using a Web browser.	Use Excel 2010 Web App to edit the same workbook at the same time or simultaneously edit the same shared notebook with others through the OneNote Web App.		
Highlight Changes in Shared Notebooks Enable multiple people to edit the same shared notebook. Author names appear in near real time as changes are made.	Shared notebooks in OneNote 2010 provide a clear trail of what other authors have changed since the user last opened the notebook.		
Broadcast Slide Shows in PowerPoint Share a presentation over the Web for remote or networked viewers.	Instantly broadcast your slides to a remote audience who can view them online, even if they don't have PowerPoint installed.		
Save Documents and Presentations Directly to SharePoint Automatically discover SharePoint document libraries to make saving content easier and more intuitive.	People can save Office 2010 documents directly to the SharePoint 2010 document library from Office Backstage view.	\bigcirc	



Bring Ideas to Life

 $\wedge \vee \vee \vee$

	SharePoint 2010	SharePoint 2007	SharePoint 2003
PowerPivot for Excel 2010 PowerPivot for Excel 2010, a free add-in, provides Web- based analysis in SharePoint. Analyze data from multiple sources and manipulate large data sets that have up to hundreds of millions of rows.	Publish Excel 2010 workbooks to SharePoint that were created with PowerPivot for Excel 2010, a free Web download that can quickly calculate data sets of hundreds of millions of rows from multiple sources. PowerPivot for SharePoint 2010 enables Web-based analysis through Excel Services or the Excel Web App.		
Publish and Share Information Through Excel Services Share analysis and results across the organization by publishing Excel 2010 spreadsheets to the Web or other SharePoint sites (intranet, extranet).	Use the new Office Backstage view in Excel 2010 to selectively publish parts of a worksheet, hide formulas, and stage data to SharePoint 2010. Publish and share analysis with less effort and enable others to enjoy the same Slicers and fast-query capabilities, even when they work in Excel Services reports.	Use Backstage view in Excel 2010 to selectively publish parts of a worksheet to SharePoint 2007.	
Microsoft Office Access Design for the Web Design and edit Microsoft Access 2010 applications in Design for Web mode and then publish them to SharePoint, so people can share, collect, and report on data.	Use Access 2010 to publish data, forms, logic/macros, and reports with nearly the same look and feel in the browser as in Access 2010 on a PC.		
Automate Metadata Capture Provide better, automated metadata capture in SharePoint to make information more accessible, perceptible, discoverable, navigable, manageable, and re-usable.	Use Word 2010 to provide better and more automated metadata capture from Backstage view, including document	Word 2010 provides automated metadata capture from Backstage view, including document information added	





		ShareF	Point 2010
	SharePoint 2010	SharePoint 2007	SharePoint 2003
	information either added automatically or typed quickly in AutoComplete fields.	automatically.	
Use Office Backstage View Seamlessly connect Office 2010 applications with SharePoint to provide workflow, the ability to enter metadata, and social context.	Using Office Backstage view in Office 2010 applications, people can enter metadata, interact with workflows, access authors' profiles, view recent content the author has created in SharePoint 2010, and more.	By using Office Backstage view in Office 2010 applications, people can enter metadata and interact with workflows.	
Access SharePoint Templates Access Office 2010 document templates stored in SharePoint more quickly and easily.	People can access document templates stored in SharePoint 2010 via the New Document wizard in Office 2010 applications.		
Apply PowerPoint Themes to SharePoint Customize SharePoint sites using PowerPoint 2010 presentation themes.	People can apply PowerPoint 2010 themes to SharePoint 2010 sites.		\bigcirc
Use Reusable Workflows Support workflows people can use multiple times and provide workflow templates in SharePoint.	SharePoint Designer 2010 supports reusable workflows and workflows attached to content types.		
Visualize Workflow Workflow designers can see the steps in a SharePoint workflow in a visual format.	Import workflows developed as drawings and exported from Visio 2010 into SharePoint Designer 2010 for modification and deployment.		
Use Forms-Based Applications Forms-based applications connect with back-end data and include workflow, reporting, custom Web pages, and other	Connect InfoPath 2010 forms with back-end data by using external lists in	\bigcirc	





			Co.Offic
		ShareF	Point 2010
	SharePoint 2010	SharePoint 2007	SharePoint 2003
components.	SharePoint 2010, and include custom sandboxed solution code.		
Provide the Office Ribbon for InfoPath Forms Web Services Take advantage of the Office Ribbon Fluent user interface for Web-enabled forms so people can easily find, access, and use the features they want when designing Web-enabled forms.	When used with SharePoint 2010, InfoPath Forms Services provides Web-enabled forms with their commands in a Ribbon interface.		

Use Office Anywhere

 $\overline{\mathcal{M}}$

	SharePoint 2010	SharePoint 2007	SharePoint 2003
View and Edit Documents, Spreadsheets, Presentations, and Notebooks in the Browser Allow editing, even if applications are not loaded on a PC.	View and make light edits to documents through Office Web Apps in a browser. Document formatting and content are maintained when changes are made in the browser. Web Apps can be hosted on the premises, running in SharePoint.		
Mobile Access Enhancements View and edit documents from a mobile device even when on the go.	Office Mobile 2010 delivers an improved authoring and editing experience for Word, Excel, and PowerPoint, which is available from Windows and Nokia e- series phones. It also offers improved touch- friendly navigation and introduces SharePoint Workspace Mobile for browsing SharePoint sites and opening and synching documents to a phone.		
Work Offline with an Improved Experience in Microsoft Access	Data in SharePoint 2010	\bigcirc	\bigcirc





			Microsoft CD.Offic
		Sharel	Point 2010
	SharePoint 2010	SharePoint 2007	SharePoint 2003
Edit Access 2010 forms, reports, queries, and macros offline and synchronize changes in SharePoint when reconnected to the network.	list is cached in the Access 2010 by default.		
Collaborate Offline and Online Work offline with SharePoint contents and when reconnected to the network, changes are synchronized.	Work offline in SharePoint 2010 document libraries and lists through SharePoint Workspace 2010.	\bigcirc	\bigcirc
Fill in Forms Offline SharePoint list forms are synchronized so people can work offline.	SharePoint 2010 list items open in an InfoPath 2010 form that is hosted in SharePoint for edit in display mode.	\bigcirc	\bigcirc
Extend the Reach of Forms Fill in InfoPath 2010 forms in a Web browser, while online or offline, and from a mobile device.	The InfoPath 2010 forms offers embedded solutions that use InfoPath controls that can be hosted.		
Publish Access Databases to the Web Securely publish database applications to the Web so IT managers can meet data compliance, backup, and audit requirements.	While you publish data, Access 2010 checks for incompatible objects and builds a report of any runtime differences between the client and server. Access Services is a new SharePoint 2010 feature that gives you the ability to create Web databases in Access, host them on a SharePoint site, and make them fully accessible through a Web browser. As a result, organizations can save time and reduce development and maintenance costs.		





The Practical Productivity Platform

 $\mathcal{N}\mathcal{N}\mathcal{V}\mathcal{V}\mathcal{V}\mathcal{V}$

	SharePoint 2010	SharePoint 2007	SharePoint 2003
Use Business Data Applications Design forms for SharePoint that create, read, update, and delete business data from a back-end system.	Business data applications start with an external list in SharePoint 2010 and use InfoPath Designer 2010 to create custom forms on top of the list.		
Access LOB Data Offline and Online Take LOB data offline and synchronize changes automatically when back online.	Synchronize LOB data in both directions between SharePoint Workspace 2010 and enterprise LOB systems by bringing LOB data into SharePoint 2010 Sites and then taking it offline via SharePoint Workspace 2010.		
Enhance Information Security and Integrity with Digital Signatures Help ensure the integrity of information contained in forms with the controls necessary to enable single, co-sign, and counter-sign scenarios for the full form or portions of the form.	InfoPath 2010 and SharePoint 2010 support cryptography next- generation (CNG) digitally signed content.		
Manage Forms More Easily More easily manage form versions, updates, and upgrades in SharePoint to ensure that team members are working in the correct version of a form.	Automate template version management with SharePoint 2010 and InfoPath 2010 to provide an improved process for checking for template updates.		
Use LOB data in applications Provide a SharePoint-based framework for creating Office Business Applications (OBA).	Business Connectivity Services (BCS) provides the read/write capability to connect SharePoint 2010 and Microsoft Office	Use Business Data Catalog within SharePoint to provide read access and surface LOB information in Office client applications	





			Microsoft*
		Microsoft* ShareF	Point 2010
	SharePoint 2010	SharePoint 2007	SharePoint 2003
	client applications to external data sources (such as SQL, Oracle, SAP, CRM, Siebel, Web services, and custom applications).		
Business Connectivity Services: Use Data as Document Properties Insert LOB data as document properties to make critical information more findable, perceptible, and re-usable in SharePoint.	Expose BCS data as Word 2010 document properties and insert it into documents.	\bigcirc	
Package and More Easily Move SharePoint Applications Move InfoPath applications more easily from site to site and server to server.	Package InfoPath 2010 applications more quickly and easily packaged by using Windows SharePoint Services solutions (.wsp) and SharePoint site template (.stp) file formats.		