

# INTEGRATION

Microsoft Dynamics NAV<sup>TM</sup>

## How Integration with Other Microsoft Products and Technologies Adds Value

White Paper

Integrated Innovation

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## *Introduction*

This white paper is intended for Microsoft partners. It reviews how integration between Microsoft Dynamics™ NAV 5.0 and other Microsoft products help small and medium-sized companies do more – faster than ever – without increasing costs. The integration adds value to the solution because it:

### **Helps people work faster in familiar programs**

Integration takes the hassle out of administrative tasks because it works better than ever with Microsoft Office and has the same familiar interface.

### **Fits with existing systems**

It doesn't disrupt business because it connects smoothly with existing systems and helps customers get the most out of their existing technology investment.

### **Enables confident decision-making**

It supports a wide range of business insight tools that help people make the right decisions at the right time.

### **Fuels business productivity**

It makes it possible to bring together the right data from multiple systems and share and exchange the information cost efficiently.

After reading this paper you will know about the history of Microsoft Dynamics NAV integration with Microsoft products, which Microsoft products and technologies integrate with Microsoft Dynamics NAV, and how this integration benefits customers and partners.

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## *Background: What Is Microsoft Dynamics NAV?*

Microsoft Dynamics NAV is an integrated business management solution designed specifically for the unique needs of growing, small to medium-sized companies. It is ideal for businesses looking for one solution that is fast to implement, easy to customize and simple to use and maintain. Microsoft Dynamics NAV delivers integrated functionality to support solutions for Financial Management, Supply Chain Management, Customer Relationship Management and e-Commerce.

Microsoft Dynamics NAV was originally envisioned around three fundamental design principles – simplicity, flexibility and adaptability. The development team’s unwavering commitment to these principles and the expertise of the partners has made it the success it is today. To date, Microsoft has over 2700 Microsoft Dynamics NAV partners in at least 150 countries serving more than 57,000 small to medium-sized companies with over 40 localized versions. These companies rely on Microsoft Dynamics NAV every day to help them run their operations.

## **Better Together: A Successful History of Integrated Innovation**

Microsoft Dynamics NAV has a long history of using Microsoft technologies and products to benefit partners and their customers. As early as 1993, the development team behind Microsoft Dynamics NAV recognized the potential of the Microsoft® for Windows® NT 32-bit graphical user interface (GUI)-based software. At that time, a major development effort was initiated to create a new generation of Microsoft Dynamics NAV solutions with a highly adaptable and easy-to-customize user interface. This resulted in the successful launch of Microsoft Navision Financials Windows 95 and Windows NT versions in 1995 – making it one of the first accounting solutions for small and medium-sized businesses based on Microsoft Windows.

Since then, innovative enhancements have been made to Microsoft Dynamics NAV making it even easier and more cost-efficient to sell, implement, upgrade, use and maintain. And, Microsoft products and technologies have been, and continue to be, an integral part of these enhancements.

For example, in 2000, Commerce Gateway for Microsoft Dynamics NAV was one of the world’s first solutions based on Microsoft BizTalk Server. Today, Microsoft Dynamics NAV represents a significant number of the total sales of Microsoft Biz Talk Server. And, again in 2000, User Portal for Microsoft Dynamics NAV was one of the world’s first solutions based on Microsoft’s Digital Dashboard. Today, Microsoft Dynamics NAV is leveraging the benefits of Microsoft SharePoint technologies with an Employee Portal based on Microsoft Windows SharePoint Services and Office XML with a new and enhanced Microsoft Word and Microsoft Excel integration





The development of Microsoft Dynamics NAV continues to prioritize integration with other leading technologies. What’s more, this principle will continue to be the foundation for the future development of a business solution aimed at helping partners and their customers do more – faster than ever – without increasing costs.

## Integrated Innovation in Microsoft Dynamics NAV Today

Microsoft Dynamics NAV integrates with a number of Microsoft products and technologies to help your customers do more, faster than ever, without increasing costs. Tight integration with other technology like Microsoft .net and Microsoft BizTalk Server makes it's easier for you to deploy, customize and maintain your solution. Integration with Microsoft Office helps your customers work faster because they don't have to jump from one application to another. The integration also promotes productivity and better decision-making. For example, integration to Microsoft SQL Server and Microsoft SharePoint make it's easier to share and exchange information stored on Microsoft SharePoint. The next sections of this white paper will go into more detail and offer examples of how the integration between Microsoft Dynamics NAV and other Microsoft applications and technologies adds value to the solution because it:

- Helps people work faster in familiar programs
- Fits with existing systems to get the most out of existing technology investments
- Fuels business productivity by helping customers share and exchange information cost-efficiently
- Enables confident decision-making with a range of business insight tools

## Microsoft Dynamics NAV Integration Overview

	Excel	X
	Word	X
	Outlook	X
	PowerPoint	(X)
	SharePoint Server	X
	Windows Server™ 2003	X
	Biz Talk® Server	X
	Commerce Server	(X)
	Exchange Server	X
	Project Server	
	SQL Server™	X
	Small Business Server	X
	Internet Information Services (IIS)	X
	Active Directory®	X
	.NET Framework	X
	Visual Basic for Applications (VBA)	
	Visual C#®	(X)
	Visual ++®	(X)
	Windows Vista	X
	Windows XP	X
	Windows 2000	X

### *Familiar Programs Help People Work Faster*

Customer research shows that employees waste valuable time re-keying information and data into disparate systems, switching back and forth between different applications and getting reacquainted with applications that look and feel different. Not only will the task-based design of Microsoft Dynamics NAV be familiar to Microsoft Windows users, the tight integration with Microsoft Office enables employees to draw on the functionality of familiar programs.

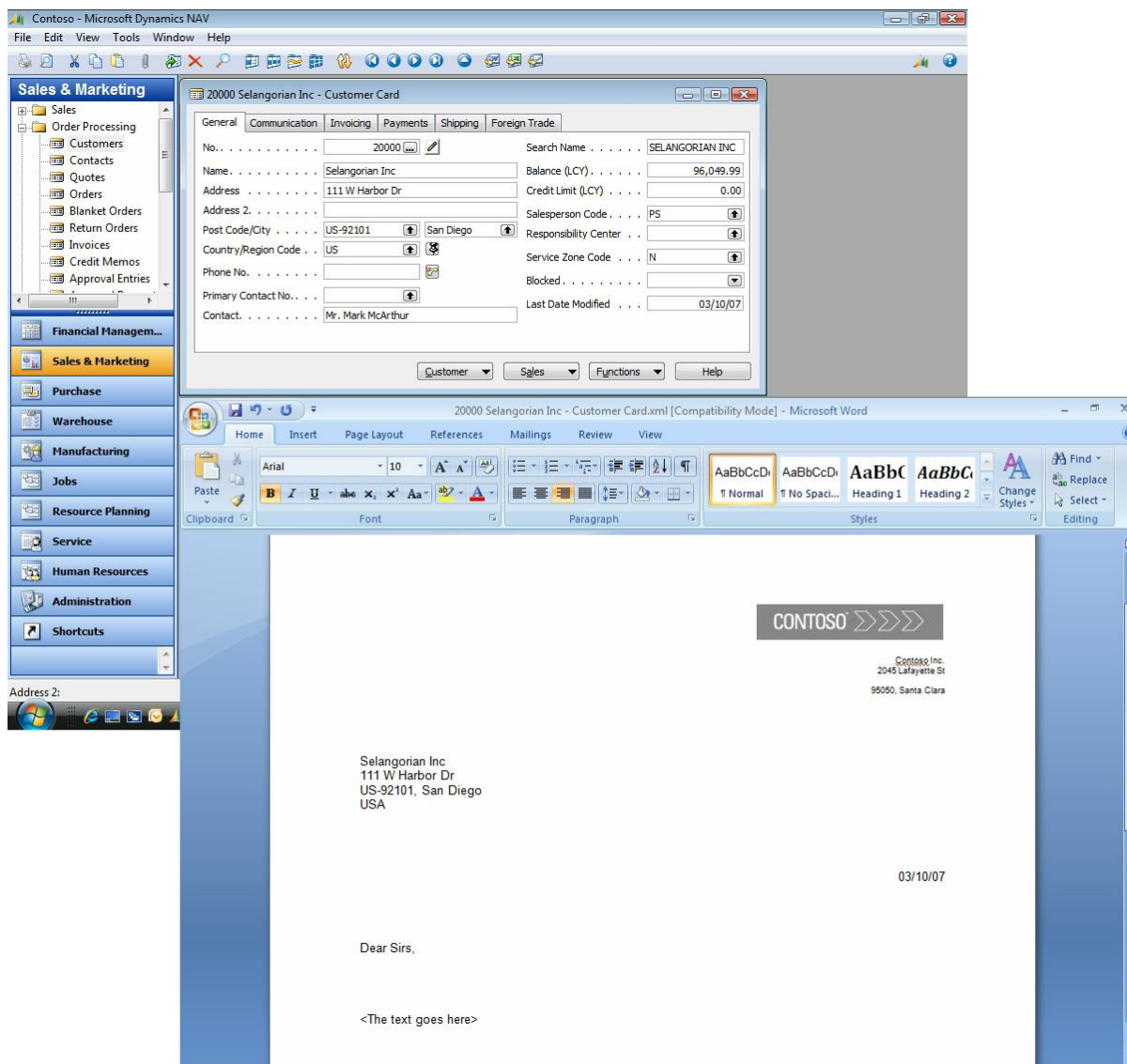
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## Integration with Word, Outlook and Excel Helps Employees Work Faster

The data from Microsoft Dynamics NAV can be synchronized with Microsoft Outlook so users only have to manage common tasks in one program. And users can modify data from Microsoft Dynamics NAV in familiar programs like Microsoft Word and Microsoft Excel. The Export to Word and Excel feature works out-of-the-box allowing users to export XML data in a simple manner Using Office XML and XML style sheets.

Users simply click on an export icon in the menu bar from any form in Microsoft Dynamics NAV, and data is exported directly into the relevant program. So, for example, a user can click on the Export to Word icon with a customer card in Microsoft Dynamics NAV and that customer's data will be automatically exported to a Word customer letter stylesheet. The user can then apply headings, fonts and all the familiar formatting functionality in Microsoft Word.

Or, to give another example, you can use sales data from Microsoft Dynamics NAV in a Microsoft Excel spreadsheet to produce reports or create a pivot table for analysis. You also have the opportunity to create new XML stylesheets for your customers that allow them to export specific data in a specific format from Microsoft Dynamics NAV to templates in other Microsoft products and to third-party applications.



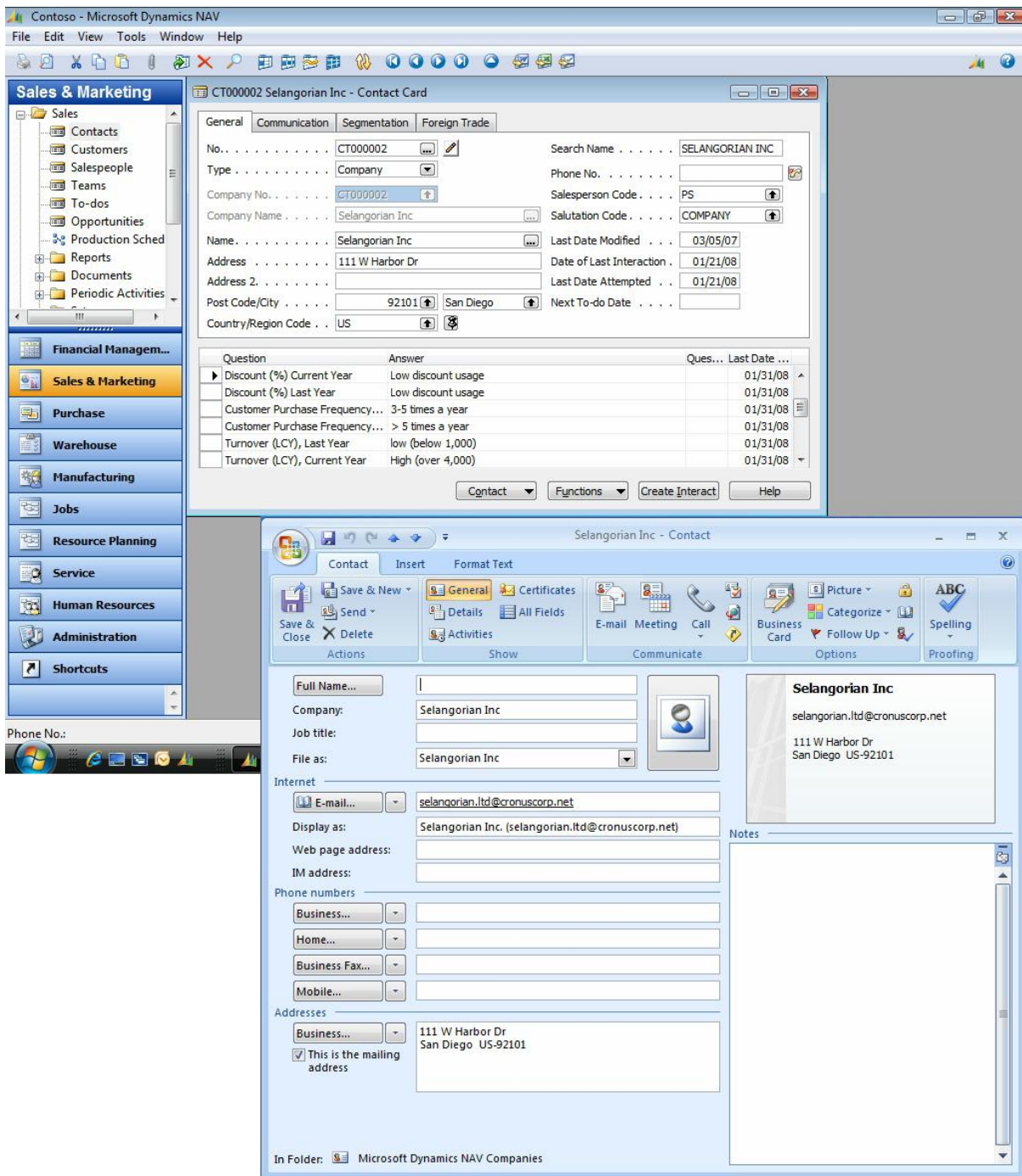
**Figure 1** Tight integration with Microsoft Office enables users to create letters using Microsoft Word from within the Microsoft Dynamics NAV application. Here, the user is about to create a letter from the Customer Card in Microsoft Dynamics NAV.

## Synchronize Any Field in Any Table with Microsoft Outlook

There is also tight integration to Microsoft Outlook. Users can synchronize the data from any field in any table in Microsoft Dynamics NAV with any type of common Microsoft Outlook function, within the limits determined by the administrator. This makes it easier to manage tasks and saves time because users only have to enter the information once. Employees can book meetings, manage contacts and tasks and send email in Microsoft Dynamics NAV and synchronize automatically with Microsoft Outlook. Users can also access up-to-date contacts, tasks and calendar information from Microsoft Outlook directly in Microsoft Dynamics NAV.

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Users can also keep records of e-mail correspondence, business contacts, meetings, tasks, appointments, and so on, in both Microsoft Outlook and Microsoft Dynamics NAV and share selected records with colleagues. For example: when an e-mail from Microsoft Dynamics NAV is created, the e-mail is also registered in Microsoft Outlook, and when a task is assigned in Microsoft Outlook, the task is also registered in Microsoft Dynamics NAV. Integrated innovation enables better communication with customers and colleagues. E-Mail Logging gives a greater overview of e-mails. Employees can integrate e-mails between Microsoft Outlook and Microsoft Dynamics NAV. Companies are able to maintain current e-mail records in both systems and employees can share and publish knowledge about external contacts.



**Figure 2** Information can be synchronized between Microsoft Dynamics NAV and Outlook. Here you can see information from the Contact Card in Microsoft Dynamics NAV synced with the Outlook Contact Card.

In addition, Microsoft Dynamics NAV industry-specific solution templates make use of Microsoft Excel and Microsoft Project for set-up and project planning. This helps partners increase productivity and reduces customer total-cost-of-ownership.

Another innovative integration feature makes it easy for users to get a map and driving directions from the office to a customer or business partner's location directly from Microsoft Dynamics NAV. In fact, you can view, print out maps and get driving directions between any two addresses stored in the system. Integration to Windows Live Local Search means you just click a button next to the relevant address in Microsoft Dynamics NAV and then follow the simple directions on the screen.

### *Fits with Existing Systems*

To remain competitive today, small and medium-sized businesses must be able to connect and share data and information cost-efficiently among employees, customers and business partners, and across different systems. Microsoft Dynamics NAV helps you get the most out of your technology investment because it fits well with existing systems.

### **Microsoft BizTalk Server Helps Customers Gain More from Technology Investment**

Microsoft Dynamics NAV integrates with Microsoft BizTalk Server to facilitate the electronic exchange of business documents between business partners. Commerce Gateway helps customers bring systems, employees, and trading partners together efficiently by automating their interactions in a flexible way. Information sent or received by Microsoft Dynamics NAV Commerce Gateway is automatically updated in Microsoft Dynamics NAV. This eliminates the need for manual data entry and significantly increases data accuracy.

This tight integration enables companies to become more competitive. They can reach out to new trading partners cost-efficiently – regardless of the system they use or the standards they require. Companies can work faster. The time it takes to respond to requests for information and documents decreases, so companies can do more. And, Microsoft BizTalk Server works with the Microsoft Dynamics NAV Application Server to automate and speed up transactions like sales orders, for example. This improves service and makes companies more attractive to new trading partners.

Microsoft customer, CRT Group was the first organization in the Asia Pacific region to implement Microsoft Dynamics NAV Commerce Gateway. CRT Group is a leading transport company in Australia and they needed an integrated financial and transport logistics management system with an e-business interface. According to CRT, their customer service staff saved up to 50% in order entry time in just one month following implementation of Commerce Gateway. Tony McAvaney, Logistics Project Manager at Qenos, one of CRT Group's most important trading partners, reported that Commerce Gateway eliminated the double entry issues. Data errors, as a result, dropped 75% thereby eliminating the costs of those errors – a benefit for both organizations.

## Leading Database Technology

Since the release of Microsoft–Navision 2.5, Microsoft has been providing the Microsoft SQL Server Option for to customers as an alternative to Microsoft Dynamics NAV Database Server. This option gives customers the opportunity to run their business on Microsoft’s industry-leading database technology and gives partners greater flexibility in recommending and designing a solution that meets the needs of customers.

The Microsoft SQL Server option offers a number of benefits to those customers whose businesses require data integration across many systems and applications. It also provides benefits to customers where down time means loss of revenue or business interruption, and who need faster access and work with more data and information from their system.

## *Enables Confident Decision-Making*

Companies today are buried under an enormous amount of data and information – so much so that companies end up analyzing too much of the wrong information and missing out on profitable opportunities. For example, information in their system is not up-to-date so employees only identifies problems or opportunities when it is already too late to make a difference. Microsoft Dynamics NAV brings together structured and unstructured information, and it supports a wide range of business insight tools that help people make the right decisions at the right time.

## Record Links Integrate Unstructured Information

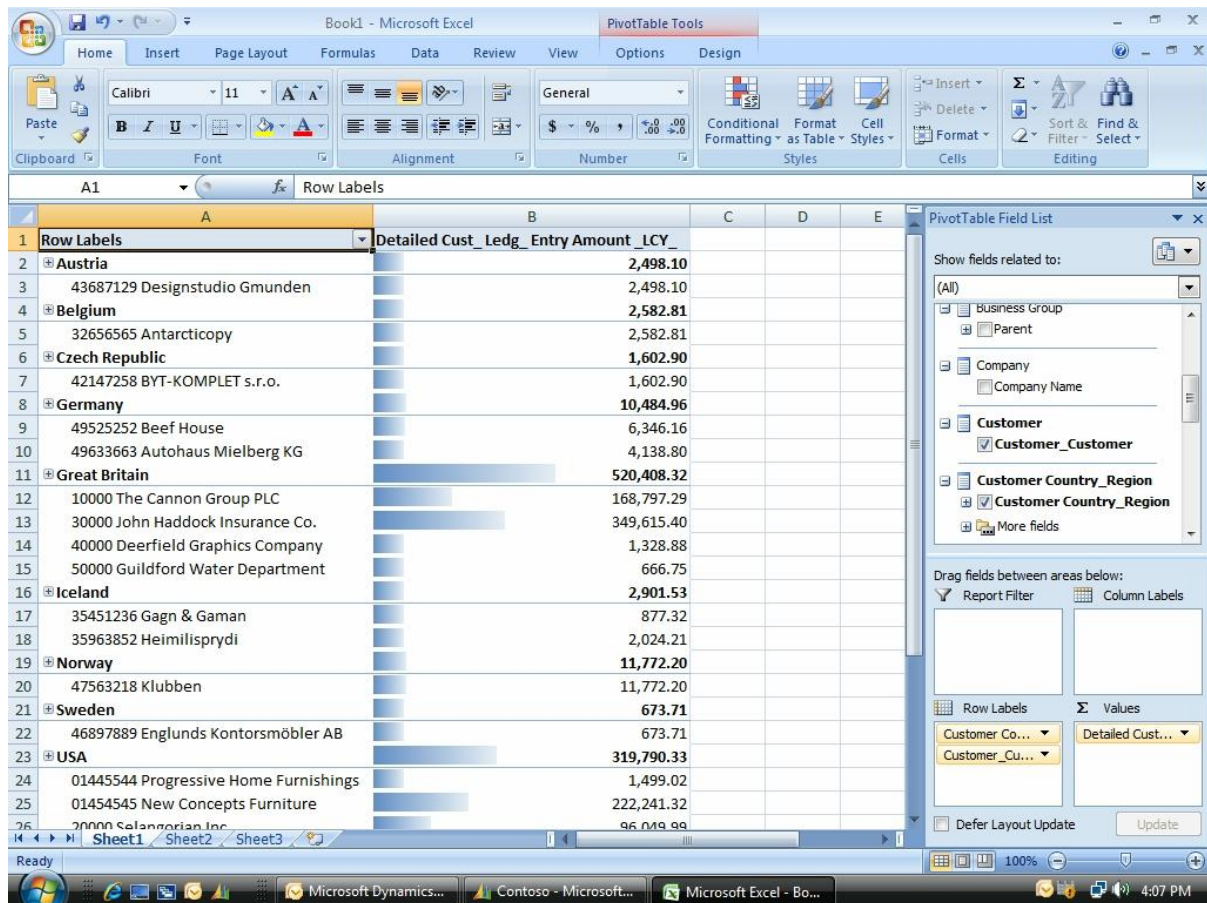
Companies also often have a lot of relevant information in unstructured documents like Microsoft Office document and web sites. The ability to create record links helps make sure employees have all the information necessary to make good business decisions. In Microsoft Dynamics NAV, you can add links to any web site or file stored on a document management system such as Microsoft SharePoint.

For example, you could create links in an item in Microsoft Dynamics NAV to a product web site, a video demo of the product, images of the product, or to other documents created in Microsoft Office. Links can be created from any form in Microsoft Dynamics NAV. Record links can also be moving links. This means that when the same information is automatically moved from one area in an application to another, the link will follow. For example, links created in quotes are automatically copied to the relevant order when it is created, and to the invoice when it is posted.

## A Wide Range of Business Insight Tools

Microsoft Dynamics NAV draws on the benefits of Microsoft SQL Server and Microsoft Windows SharePoint Services to unlock the value of business data and share relevant information among employees across the organization in a secure way. Microsoft Dynamics NAV helps your customers get hold of the right information quickly and transform it into insight and knowledge. Built-in Business Analytics takes advantage of the capabilities of Microsoft SQL Server Analysis services so they can present meaningful information in an attractive way.

With tools such as online analytical processing (OLAP) enabled by Microsoft SQL Server, you can draw upon table relations within Microsoft Dynamics NAV for a multi-dimensional view of data (for example, how a particular product is performing in a certain region in a given time period). You can access the cubes in a reporting application tool, such as Microsoft Excel or the Business Analytics Advanced Viewer.



**Figure 3** Microsoft Excel with access to Microsoft Dynamics NAV data stored in a Microsoft SQL Server Analysis Services cube created by Business Analytics Basic.

### *Fuels Business Productivity*

Often, when an employee needs data from other departments, the employee must have someone send them the data since it is stored in departmental data sources that are not shared. What's more, moving data from one source to another and reformatting it for analysis can cause errors. The challenge lies in being able to access the right information and transform it into insight and knowledge. Microsoft Dynamics NAV offers a cost-efficient way to share information that fuels business productivity.

## **A Cost-Efficient Way to Deploy a Web-Based Interface and Share Information**

Integration with Microsoft SharePoint allows companies to give their employees access to relevant information that helps them bring together the right data from multiple systems and share and exchange the information cost efficiently. For example, if a manager wants to make weekly sales reports available to the salespeople in the field, the manager can maintain the list in just one place. The relevant salespeople (who have been given access rights) can then view the sales report via Employee Portal. With Employee Portal, they would get a simplified view of the sales reports as well other important business data on their own personalized intranet home pages.

The Microsoft Dynamics NAV Employee Portal is a very convenient and powerful Microsoft .net-based product for distributed information needs. It's an intranet solution that utilizes Microsoft SharePoint Services and integrates with Microsoft SharePoint Portal. This integration makes it possible to work with real-time business information such as invoices, customer data and reports directly – and in a secure environment – from Microsoft Dynamics NAV.

Employees can access and share Microsoft Office documents, receive information or updates quickly, or update relevant business information in Microsoft Dynamics NAV. Like all Microsoft Dynamics NAV solutions, the employee portal has been developed with the user in mind so that it's both intuitive and simple to use. Customers save on training costs, and employees can start working immediately.

## ***How Integrated Innovation Helps Microsoft Dynamics NAV Partners Improve TCO for Customers***

Integrated innovation in Microsoft Dynamics NAV enables partners to realize business success, too, by increasing productivity and making it easier for partners to focus on their key competencies. Instead of partners using valuable resources on integrating their customers' solutions with other systems, they can focus on differentiating themselves and developing unique solutions with a lower total cost of ownership.

The Microsoft Dynamics NAV Rapid Implementation Methodology (formerly known as Industry Specific Solutions tools) decrease the Total-Cost-of-Ownership for customers. It uses Microsoft Excel and Microsoft Project templates that help partners boost productivity by being able to implement standard industry solutions rapidly.

## *Conclusion*

Microsoft Dynamics NAV was created with the spirit of integrated innovation. One of the very early adopters of Microsoft products and technologies, Microsoft Dynamics NAV continues to use Microsoft products and technologies to help customers do more faster and cost-efficiently. Integration to familiar programs and technologies fuels business productivity. It fits well with their existing systems. It helps customers work faster, and it enables confident decision-making.

Microsoft Dynamics NAV and Microsoft products and technologies boost partner productivity and profitability, too. Instead of wasting valuable resources on integration, partners can focus on adding more customers and developing unique solutions that help small and medium-sized businesses around the world achieve business success.

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