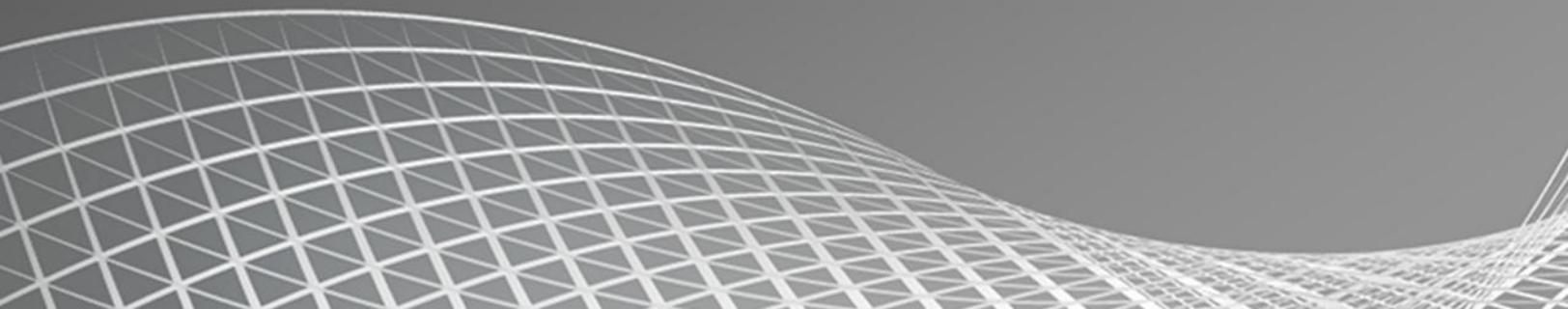




# Business Productivity at Its Best

Microsoft Office and Microsoft SharePoint

White Paper  
October 2009



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## Abstract

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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 users 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.

This paper describes how the 2010, 2007, and 2003 versions of Office work together with the 2010, 2007, and 2003 versions of SharePoint technologies. Although we provide an overview of Office and SharePoint features working together in past versions, this paper focuses on the integration features of the Microsoft Office 2010 experience with Microsoft SharePoint 2010.

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 desktop users. The scenarios cover the following value areas:

- Collaboration Without Compromise
- Bring Ideas to Life
- Anywhere Access
- The Practical IT Platform

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

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## Introduction

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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.

Many analysts support the notion of an integrated productivity environment for information workers. Gartner Group's "Smart Enterprise,"<sup>1</sup> Forrester's "Information Workplace,"<sup>2</sup> and Yankee Group's "Extended Enterprise"<sup>3</sup> 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 integration, could deliver the functionality that would have previously required 6–10 "best-in-class" products for a full BPI platform. The 2010 release of these products takes this integration 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.

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

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

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

Combined Value	Description
<b>Fair</b>	<b>Microsoft Office 2000 or Office XP:</b> Microsoft Office 2000 introduced the first interactions with Windows® SharePoint Services, which provides simple file operations that allow people 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 integration 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.
<b>Good</b>	<b>Microsoft Office 2003</b> provides a good level of integration with Windows SharePoint Services, and SharePoint Portal Server 2003 which allows users to 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 integration 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.
<b>Better</b>	<b>Microsoft Office 2007</b> provides contextual integration with Windows SharePoint Services and Microsoft Office SharePoint Server, which allows people to interact with SharePoint sites without leaving their Microsoft Office programs, and provides two-way synchronization with collaborative information, documents, and business data stored on SharePoint sites.
<b>Best</b>	<b>Microsoft Office 2010 with SharePoint 2010</b> gives people the ability to view and edit with PCs, browsers, and mobile devices. This combination also includes greater capabilities for people to use Microsoft Office applications to edit documents and work with information from line-of-business (LOB) applications while offline, and then resynchronize when they're reconnected to the network. The ability to co-author the same document or share a Microsoft Office OneNote® notebook reduces review cycles and enhances teamwork. Microsoft Office Backstage view puts many more SharePoint 2010 capabilities in the context of Office applications, including greater automation of metadata capture and streamlined access to document libraries and SharePoint workspaces.

Therefore, to achieve the best user experience with Microsoft Office and SharePoint integration, we recommend the following:

- Upgrade client software to Microsoft Office Professional Plus 2010
- Upgrade server software to SharePoint 2010

## Collaboration Without Compromise

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People and businesses expect the tools they use in the office to support the highly collaborative, mobile, and virtualized work styles that are the norm in today's workplace. Successful tools allow people to work simultaneously with the same documents, data, and information to share ideas with partners and suppliers, and to deliver products 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

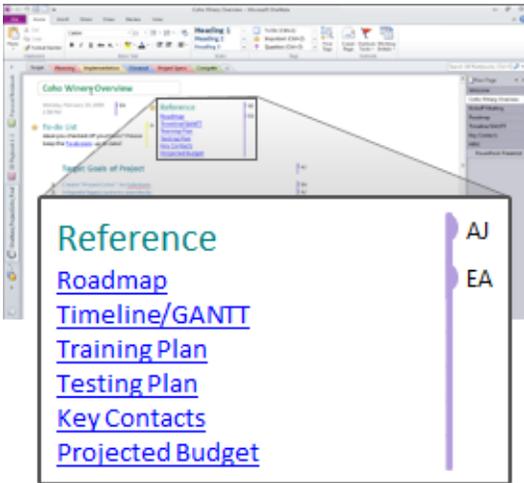
**Craft request for proposal (RFP) documents with greater speed, effectiveness, and quality to remain competitive.**

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 quickly put together an accurate and up-to-date RFP document.

**FEATURES**  
**Coauthoring Documents and Presentations**  
**Author Highlights in a Shared Notebook**

**Microsoft Office 2010 with SharePoint 2010**

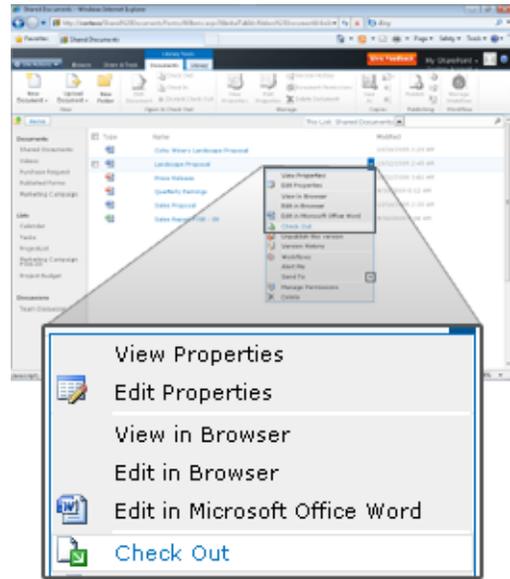
- The team has been contributing ideas on how to best respond to the RFP by using a OneNote 2010 shared notebook hosted on SharePoint 2010. As changes are made, OneNote tracks each person's notes and edits.
- When Jonathan, the Director of Sales, views the notebook, the easy-to-follow version history in OneNote lets him quickly see what the team has done since he last opened the notebook.



- After making some final notes in the shared notebook, Jonathan quickly drops the information into the company's RFP template in Microsoft Office Word.
- By 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 it to finance, engineering, and legal contributors so they can fill in their respective RFP sections.

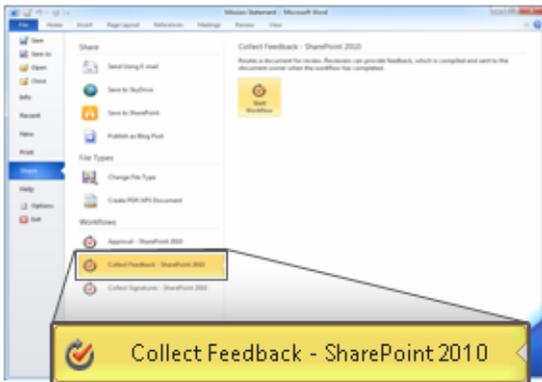
**Microsoft Office 2007 with SharePoint 2010**

- Multiple people work in the same OneNote 2007 shared notebook hosted in SharePoint 2010. Individuals contribute notes in their own sections. Jonathan reads through the notes and copies and pastes sections into an RFP template in Microsoft Office Word.
- 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.
- Jonathan checks out the document from the SharePoint library to update his RFP sections.

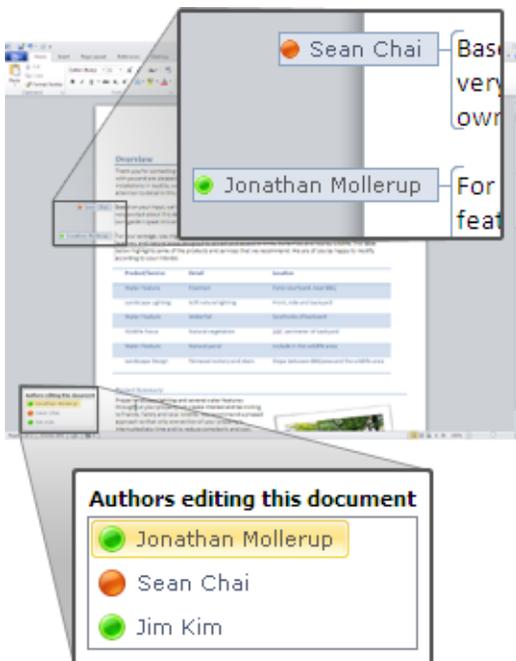


- After Jonathan finishes making his updates and checks the notebook in, Jim checks out the notebook and makes his updates.

Microsoft Office 2010 with SharePoint 2010

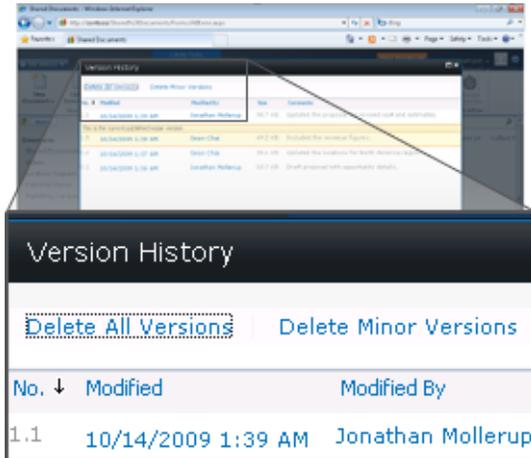


- By using Microsoft Office 2010 and SharePoint 2010 together, Jonathan, Sean, Head of Legal, and Jim, the Finance Manager, work on the same version of the RFP document, each editing their own sections without worrying about conflicting changes.

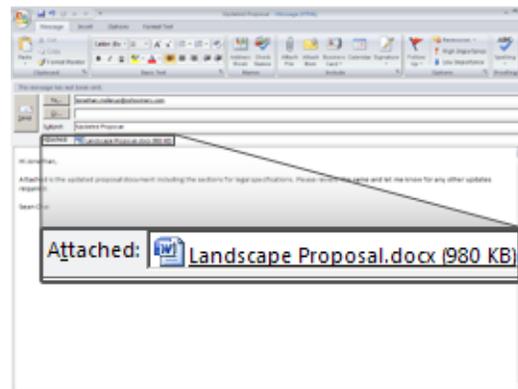


- As they work, each person can see the others' edits highlighted as changes are made. It's clear that this document is coming together quickly as the RFP deadline looms.
- Jonathan does a final review of the entire RFP, reviewing Sean's and Jim's contributions. He doesn't have to worry about reconciling 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.

Microsoft Office 2007 with SharePoint 2010



- Sean needed to work on the document at the same time, but because it was checked out to Jonathan, he must 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 pull together 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 submits the final version of the RFP.

<b>Microsoft Office 2010 with SharePoint 2010</b>	<b>Microsoft Office 2007 with SharePoint 2010</b>
<ul style="list-style-type: none"><li>• Because the document was collaboratively edited and managed within the RFP workflow with Office 2010 and SharePoint 2010 working together, a final approval pass was not needed.</li><li>• Jonathan sends the RFP to the client and beats the RFP submission deadline.</li></ul>	

## Bring Ideas to Life

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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.

## FEATURES

### Project "Gemini" for Microsoft Office Excel 2010 Publishing and Sharing Through Excel Services

#### Microsoft Office 2010 with SharePoint 2010

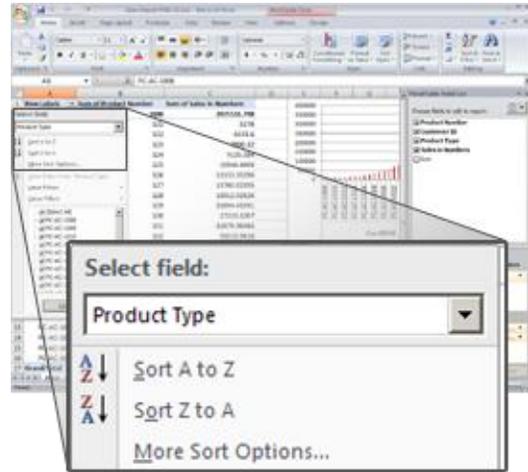
- Mike, the Director of Sales, opens a report that has all of his company's sales data for the year in a Microsoft PivotTable® dynamic view, to analyze which products are performing best.
- Because Mike is using "Gemini" for Excel, he can work with hundreds of millions of rows, and can pivot the different fields quickly.
- Mike inserts Excel Data Slicers beside the PivotTable report to make it easy for others who are not comfortable with PivotTables to view different combinations of data.



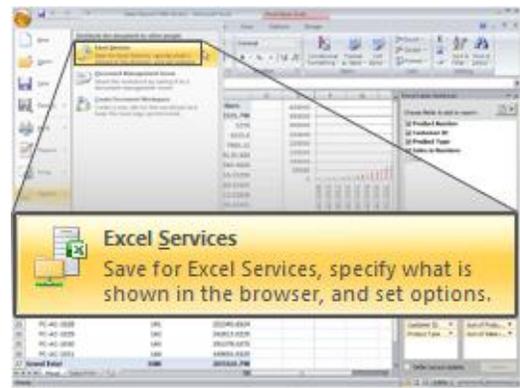
- Mike selects a category and can easily see the sales figures.
- To share the sales analysis with other team members, Mike publishes the sales analysis charts in SharePoint 2010 by using Excel Services from the Office Backstage view in Excel 2010. Security in SharePoint 2010 ensures that only his sales team and marketing can view or edit the analysis.
- 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.

#### Microsoft Office 2007 with SharePoint 2010

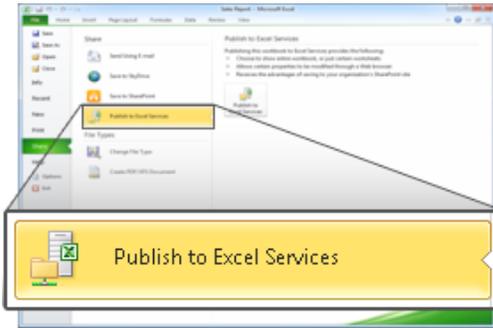
- Mike asks the IT department to use Microsoft Office Excel 2007 to create a custom sales report that is consolidated from millions of rows of data from multiple external sources.
- Mike receives the Excel spreadsheet from IT a few hours later. Data is split across multiple worksheets, so he combines the worksheets by copying and pasting and builds a PivotTable to provide the analysis he needs.
- By using a custom spreadsheet he copied from the corporate line-of-business system, Mike sifts through the large data tables using PivotTable views and finishes the analysis.



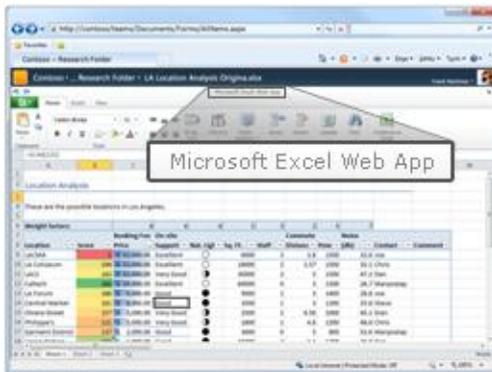
- To share his analysis with the team, Mike manually navigates to the SharePoint 2010 site to publish the sales report.



**Microsoft Office 2010 with SharePoint 2010**

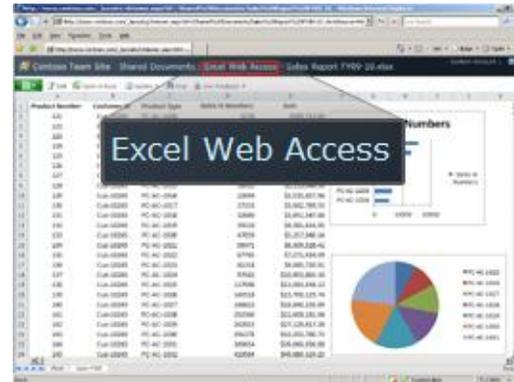


- The team can enjoy the same data analysis capabilities with the Data Slicers when they work with the report online through Excel Services reports.



**Microsoft Office 2007 with 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.



## Anywhere Access

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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, they need the ability to access information from more places and on more devices. Taking action on the go can be difficult, especially if workers 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 full fidelity across all devices.

### Scenario

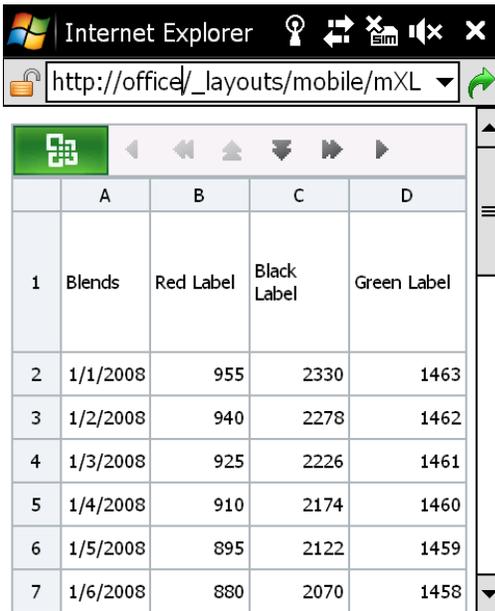
**Enable people who travel without a PC to comment on a press release.**

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.

**FEATURES**  
**Mobile Access Enhancements**  
**Viewing and Editing Documents, Spreadsheets, Presentations, and Notebooks in a Browser**

**Microsoft Office 2010 with SharePoint 2010**

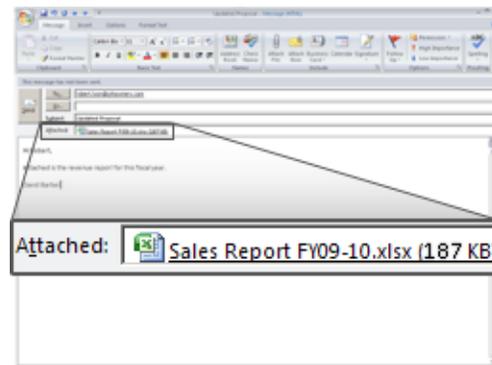
- Before Finance Director Robert revises the press release document to announce fourth-quarter earnings, he needs to update the regional revenue in the quarterly earnings report in Excel.
- Robert uses the browser on his mobile device to navigate to the SharePoint 2010 library and opens the revenue report in Excel 2010 for the Web (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.



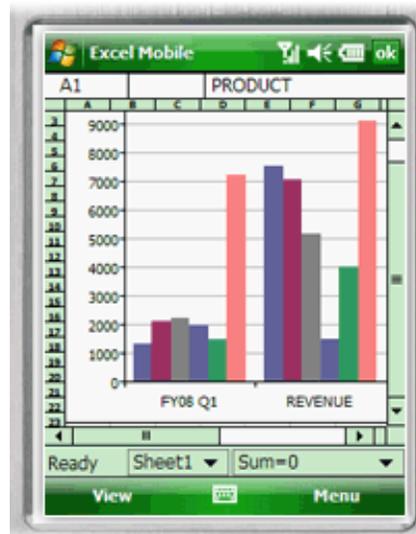
- Robert updates the revenue figures with the confidence that the changes are saved as he intends and the whole team will stay up-to-date.
- The team takes Robert's figures and rebuilds the quarterly earnings section of the press release.
- Meanwhile, Robert needs to add executive commentary to support 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.
- The PC does not have Microsoft Office installed, but Robert can use Web applications to view the documents—just as he is used to seeing them on his PC—and make the necessary edits.

**Microsoft Office 2007 with SharePoint 2010**

- 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 sends e-mail to his colleague, David Bradley, to forward the revenue report in Excel 2007, as it is hosted in SharePoint 2010.
- The next day, Robert sends the document to David as an e-mail attachment.

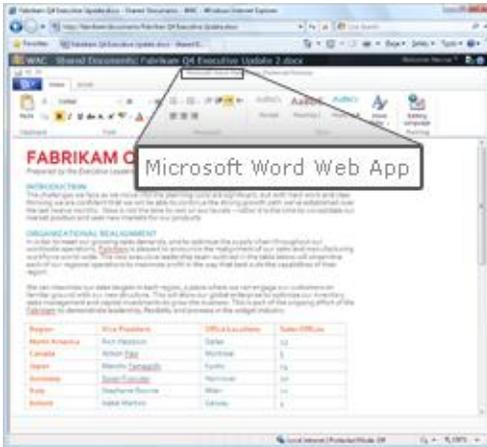


- Robert receives the revenue report as an e-mail attachment and updates the revenue figures in the Excel 2007 report by using Microsoft Office Mobile.

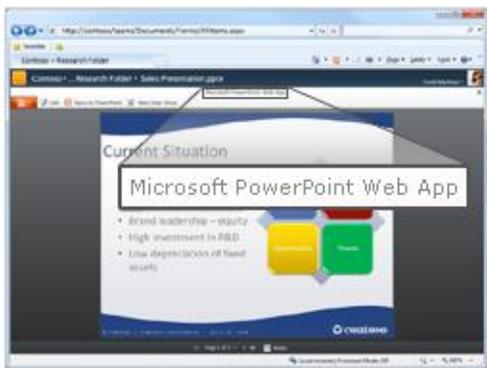


**Microsoft Office 2010 with SharePoint 2010**

- Using the PC's browser, Robert navigates to the SharePoint 2010 library and opens the draft press release in the Word 2010 Web application.
- From within the browser, Robert views and edits the press release document in full fidelity, just as he would see it on his PC.



- He saves his changes to the document, and now has to update the Microsoft Office PowerPoint® presentation that will accompany the earnings report.
- By using the PowerPoint 2010 Web application, Robert opens the slide deck, 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.

**Microsoft Office 2007 with SharePoint 2010**

- Robert sends the 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 get access to the file.
- Robert finds a local Internet café and 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 downloads the document and presentation to the PC, makes some last minute edits to it, and sends it back to the team.

Microsoft Office 2010 with SharePoint 2010	Microsoft Office 2007 with SharePoint 2010
<ul style="list-style-type: none"> <li>• Even though Robert used a Web browser to edit the presentation, he knows that Office Web Access 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.</li> </ul>	

## Office 2010 with SharePoint 2010

**Help people stay productive anywhere—online or offline—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. This integration enables people to 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

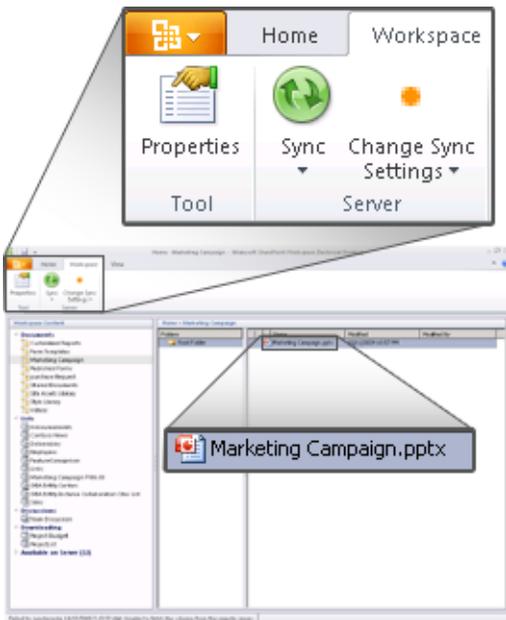
**Enable people to stay productive anywhere—online or offline—and update team information at the office, at a customer site, on the road, and from home.**

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**

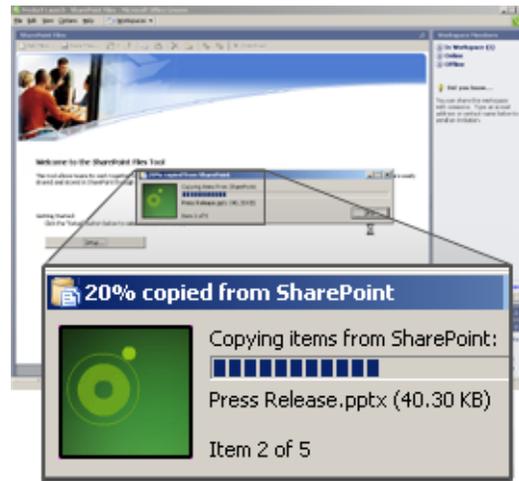
- Jeff, the Marketing Director, was in a hurry to catch his flight when he left the office, and he did not download the presentation to his laptop.
- Fortunately, he had the presentation stored on a SharePoint site that he has synced to his desktop through SharePoint Workspace 2010. At the airport, he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



- Jeff also updates product information by using offline SharePoint list forms in Microsoft Office InfoPath® 2010 from within SharePoint Workspace 2010. Information entered in the forms will be automatically synchronized to SharePoint list when he reconnects.

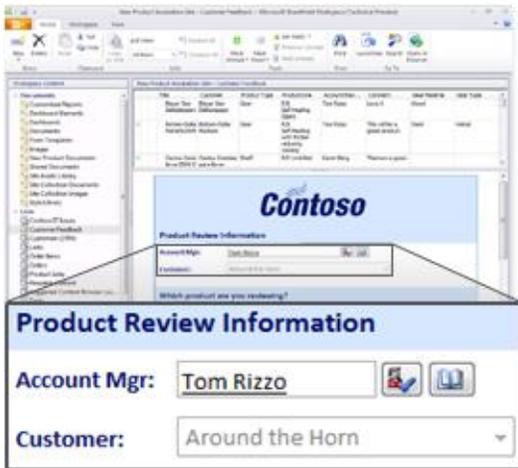
**Microsoft Office 2007 with SharePoint 2010**

- 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 PowerPoint 2007 presentation, updates it, and saves it back to the Groove 2007 workspace just before he boards his flight.
- Jeff also needs to make changes to product information in his company's database, which is published in SharePoint 2010.
- To work offline with data in SharePoint 2010, Jeff created a link between Microsoft Office Access 2007 and SharePoint 2010. While he is in flight and disconnected, Jeff makes changes to an Access 2007 database.
- When Jeff is back at the hotel, he connects through a virtual private network (VPN) to update his team with the changes he made to the Access database.

Microsoft Office 2010 with SharePoint 2010



- Once onboard his flight, Jeff decides to make some changes to company's product information database in Microsoft Office Access 2010, which is published in SharePoint 2010. Last time Jeff updated the database, Access 2010 cached the data from SharePoint 2010 in local database tables by default, by using Access Services.
- While in flight and disconnected, Jeff makes changes to Access 2010 forms, reports, queries, and macros offline, knowing that Access 2010 will take care of updating the company's database when he reconnects.

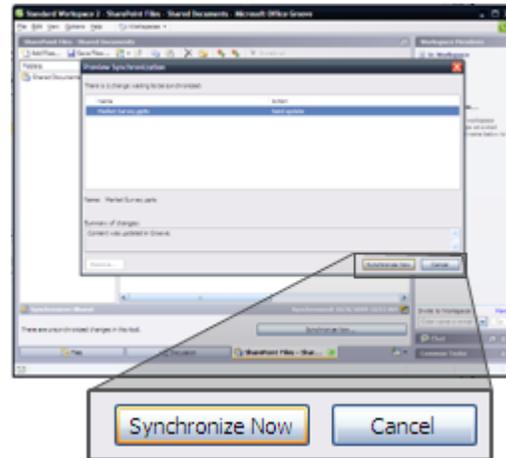


- He also sends a note to his team to make a few changes to his presentation.

Microsoft Office 2007 with SharePoint 2010



- Jeff also synchronizes the updated presentation in Groove 2007 with the SharePoint 2010 library.



<b>Microsoft Office 2010 with SharePoint 2010</b>	<b>Microsoft Office 2007 with SharePoint 2010</b>
<ul style="list-style-type: none"><li>• When Jeff arrives, he reconnects to get the updated presentation and he finds that his hotel has a slow connection. Thankfully, his team didn't have to send the whole presentation via e-mail; SharePoint Workspace 2010 just sends the changes, 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.</li></ul>	

## The Practical IT Platform

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Today's business world demands that information technology (IT) support the business to overcome increasingly complex challenges while operating within a reduced budget. At the same time, organizations are being forced to 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 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

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

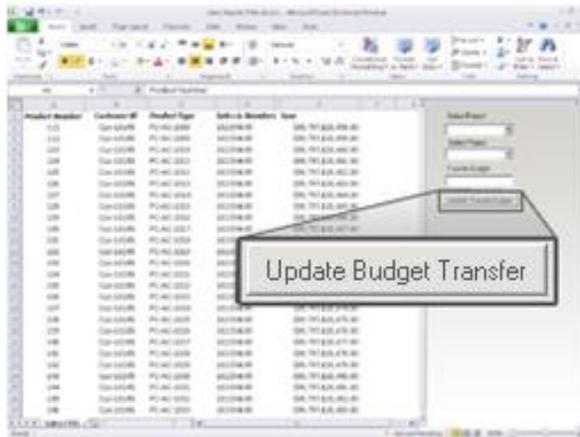
Let's consider an example in which the Line-of-Business Manager, Chris Barry, has to update the budget information for an internal project and get it approved by the Finance Director, Sara Davis.

## FEATURES

### Business Connectivity Services Offline and Online LOB Data Integration

#### Microsoft Office 2010 with SharePoint 2010

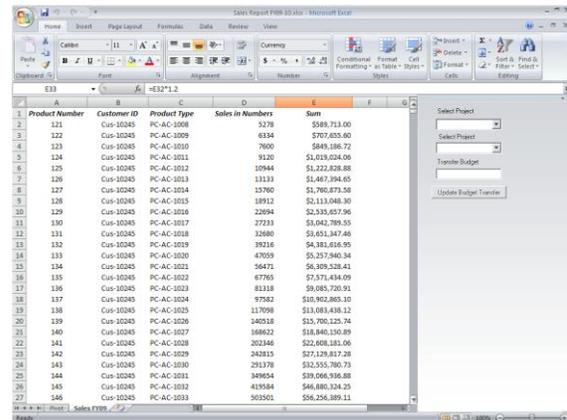
- The company that Chris, the Line-of-Business Manager, works for has taken advantage of SharePoint 2010 Business Connectivity Services (BCS) to connect to and read and write line-of-business information from the company's ERP system using Excel 2010.
- Chris opens the budget monitoring report in Excel 2010 to look into the budget information for an internal project, Payroll System Upgrade. He needs information such as actual budget, planned budget, variance, and more.



- He transfers 10 percent of the budget from another 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-to-understand charts.
- Chris clicks the Update Budget Transfer button in the Excel report, and then saves changes back to SharePoint 2010, which synchronizes data with the SAP 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.

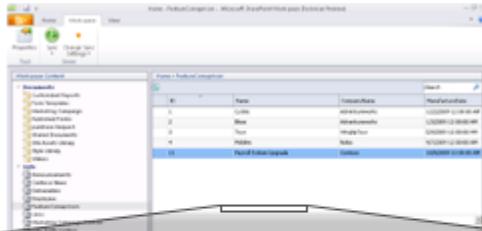
#### Microsoft Office 2007 with SharePoint 2010

- Chris's company has taken advantage of SharePoint 2010 Business Connectivity Services (BCS) to connect and surface line-of-business information from the company's ERP system and use it in Excel 2007.
- Chris opens the custom budget monitoring report in Excel 2007 to look into the budget information for an internal project, Payroll System Upgrade. He needs information such as actual budget, planned budget, variance, and more.



- Chris sees that he needs to transfer 10 percent of the budget from another 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-to-understand charts.
- Chris goes into the ERP system to transfer the budget. The next time the report runs, the change will appear.

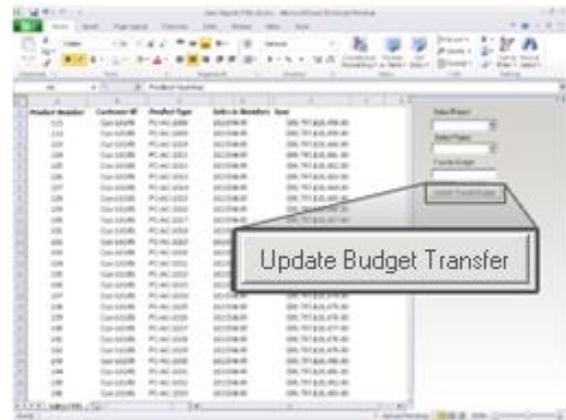
Microsoft Office 2010 with SharePoint 2010



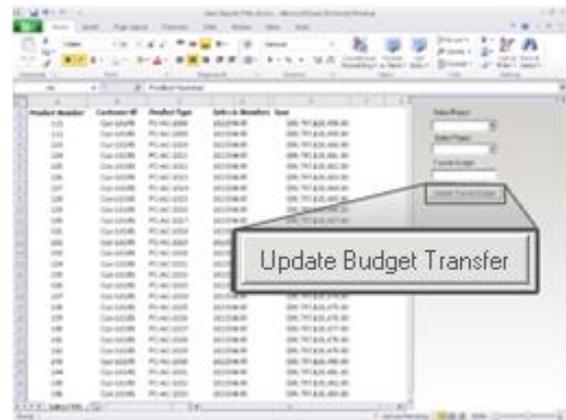
ID	11
Name	Payroll System Upgrade
CompanyName	Contoso

- After she reconnects to the network at home that evening, Sara's updates are reflected back to SharePoint and the SAP database.

Microsoft Office 2007 with SharePoint 2010



- 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 generated with Office Business Applications.
- 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, Sara again clicks the Update Budget Transfer button in the Excel report.



- Sara's changes are reflected back to SharePoint 2010. She puts the new figures in the ERP system and they are accessible by Chris and the rest of the finance team.

## Office 2010 with SharePoint 2010

**Streamline content creation and publishing, and automate business processes to empower users to quickly respond to competitive market pressure.**

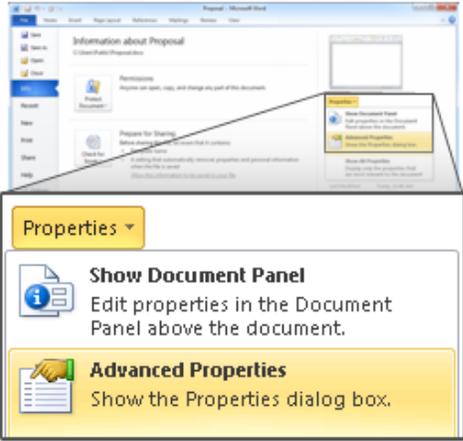
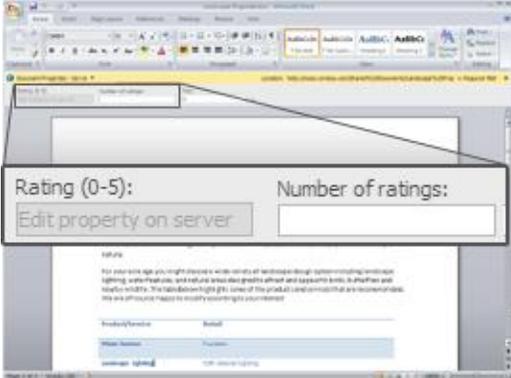
With Microsoft Office 2010 and SharePoint 2010 capabilities, people can bring innovative, new products and services to market with the speed and agility that sets them apart from their competitors. They can quickly create and manage portals and external-facing sites to more effectively engage, retain, and provide self-service features for employees, partners, and customers.

### Scenario

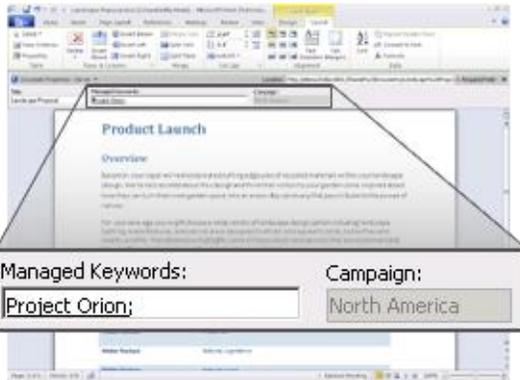
**Provide people with automated processes for quickly creating, publishing, and delivering content over the Internet, intranet, and extranet.**

Let's consider an example in which the Marketing Manager, Ryan Gregg, needs to work on new product launch documentation and introduce an external-facing site to respond to competition.

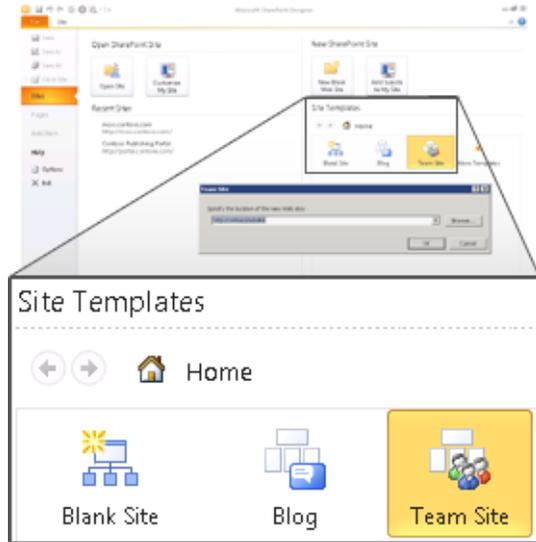
**FEATURES**  
**Branding**  
**Document Sets**  
**Automatic Metadata**

Microsoft Office 2010 with SharePoint 2010	Microsoft Office 2007 with SharePoint 2010
<ul style="list-style-type: none"> <li>Marketing Manager Ryan opens the PowerPoint 2010 presentation for a proposal and updates the product details in it.</li> <li>Because a Word 2010 template is also part of the document set, Ryan can easily identify the template. He needs to update the template to include the new product details.</li> <li>Throughout the development of product launch documents, Word 2010 and SharePoint 2010 provide better metadata capture with Office Backstage by automatically adding document information and using AutoComplete to ease metadata entry. This automation encourages people to use the documents, while also helping to ensure that the product documents are properly managed and easier to find.</li> </ul>  <ul style="list-style-type: none"> <li>Ryan fills in the custom metadata fields to ensure that all necessary information relating to the product launch is captured.</li> </ul>	<ul style="list-style-type: none"> <li>Ryan opens the PowerPoint 2007 presentation for a proposal and updates the product details in it.</li> <li>Because a Word 2007 template is also part of the document set, Ryan can easily identify the template. He needs to update the template to include the new product details.</li> <li>Word 2007 and SharePoint 2010 provide a customizable document information panel to capture metadata.</li> </ul>  <ul style="list-style-type: none"> <li>Ryan fills in the custom metadata fields to ensure that all necessary information relating to the product launch is captured.</li> <li>When the product launch document is ready, he starts a custom workflow that assigns task to the site designer, Molly Clark, to update and publish the site content.</li> <li>Molly receives the alert, and she quickly creates the SharePoint site by using default site templates that are available in SharePoint 2010.</li> </ul>

**Microsoft Office 2010 with SharePoint 2010**

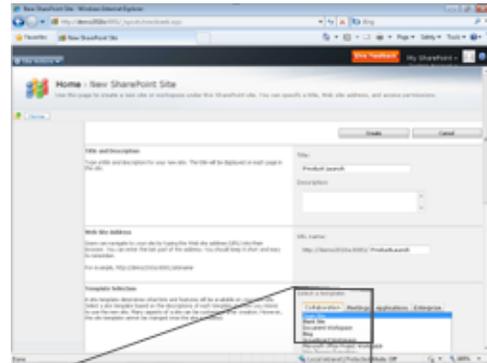


- When the product launch document is ready, he starts a custom workflow that assigns a task to the site designer, Molly Clark, to update and publish site content.
- Molly receives the alert, and she quickly creates the SharePoint site directly in SharePoint Designer 2010 by using Site Templates.

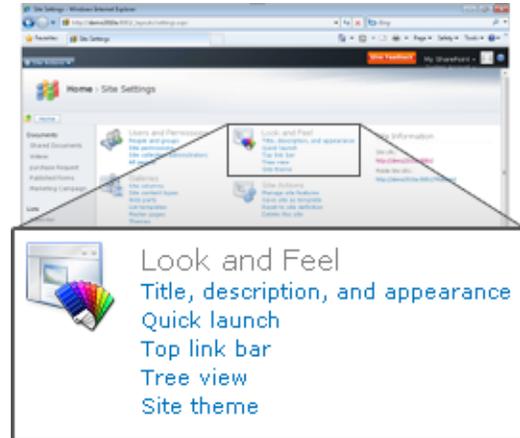


- Molly then updates the site content according to the product launch document and applies branding to the new product launch SharePoint site, all in an IT-managed environment that has greater flexibility and a fail-safe mechanism.

**Microsoft Office 2007 with SharePoint 2010**



- She then updates the site content according to the product launch document and applies branding by using default SharePoint 2010 themes and master pages.



## Conclusion

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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 maximum integration, with the expressed purpose of delivering a wealth of server and services capabilities to information workers and enabling the most powerful user experience possible. While Office 2010 and SharePoint 2010 provide much new and improved functionality compared to their previous versions, *the combined deployment of the latest client programs and server technologies is necessary to achieve the best integration of Microsoft Office and SharePoint features.*

## Appendixes

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

#### Collaboration without Compromise

	Microsoft Office 2010	Microsoft Office 2007	Microsoft Office 2003
<p><b>Coauthor Documents and Presentations</b> Share ideas with other people simultaneously and see what areas of a document have changed.</p>	<p>●</p> <p>With coauthoring, work together in Microsoft Office Word 2010 and Microsoft Office PowerPoint 2010 and see others' changes tracked as you work with documents hosted in SharePoint 2010.</p>	<p>○</p>	<p>○</p>
<p><b>Simultaneously Edit Spreadsheets and Notebooks</b> Work together on content using a Web browser.</p>	<p>●</p> <p>Work together in Microsoft Office Excel 2010 and Microsoft Office OneNote 2010 Web applications simultaneously and see others' changes in real time.</p>	<p>○</p>	<p>○</p>
<p><b>Share a Team Notebook</b> Enable multiple people to add to and change the same shared notebook, and author names appear in near real time as authors make changes.</p>	<p>●</p> <p>Shared OneNote 2010 notebooks provide a clear trail of what other authors have changed since the user last opened the notebook.</p>	<p>◐</p> <p>Share OneNote 2007 notebooks with other people, but without a complete audit trail.</p>	<p>○</p>
<p><b>Broadcast Slide Shows in PowerPoint</b> Share a PowerPoint presentation over the Web for remote or networked viewers.</p>	<p>●</p> <p>Audiences do not need to have PowerPoint 2010 installed; they can view the presentation in high fidelity in a Web browser.</p>	<p>○</p>	<p>○</p>

	Microsoft Office 2010	Microsoft Office 2007	Microsoft Office 2003
<p><b>Save Documents and Presentations Directly to SharePoint from Office</b> Automatically discover the SharePoint document library to make saving the content easy and intuitive.</p>	<p> People can save Office 2010 documents directly to the SharePoint 2010 document library from Office Backstage view.</p>	<p></p>	<p></p>

**Bring Ideas to Life**

	Microsoft Office 2010	Microsoft Office 2007	Microsoft Office 2003
<p><b>Project code-named "Gemini"</b> "Gemini" for Excel 2010 provides streamlined integration and 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.</p>	<p> Publish and share analysis with less effort and enable others to enjoy the same Data Slicers and fast-query capabilities, even when they work in Excel Services reports.</p>	<p></p>	<p></p>
<p><b>Publish and Share Through Excel Services</b> Share analysis and results across the organization by publishing Excel spreadsheets to the Web or other SharePoint site (intranet or extranet).</p>	<p> Use Office Backstage view in Excel 2010 to selectively publish parts of a worksheet, hide formulas, and stage data to SharePoint 2010.</p>	<p> Manually navigate to SharePoint sites and specify which components of the workbook will be visible when published to the Excel Services site.</p>	<p></p>
<p><b>Microsoft Office Access Design for the Web</b> Microsoft Office 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.</p>	<p> 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.</p>	<p></p>	<p></p>

	Microsoft Office 2010	Microsoft Office 2007	Microsoft Office 2003
<p><b>Automate Metadata Capture</b>                      Make information more findable, perceptible, discoverable, navigable, manageable, and re-usable.</p>	 <p>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.</p>	 <p>Use the document information panel to manually capture metadata from within Microsoft Office 2007.</p>	
<p><b>Use Office Backstage View</b>                      Seamlessly connect Microsoft Office applications with SharePoint 2010 to provide workflow integration, the ability to enter metadata, and social context.</p>	 <p>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.</p>		
<p><b>Access SharePoint Templates</b>                      Access document templates stored on SharePoint 2010 more quickly and easily.</p>	 <p>People can access document templates stored in SharePoint 2010 via the <b>New Document</b> wizard in Microsoft Office applications.</p>		
<p><b>Apply PowerPoint Themes to SharePoint Sites</b>                      Make customization of SharePoint 2010 sites more flexible by using themes as used in presentation decks.</p>	 <p>People can theme SharePoint 2010 sites by using the same themes as in PowerPoint 2010.</p>		
<p><b>Use Reusable Workflows</b>                      Support workflows that can be used multiple times, and provide workflow templates for later use in SharePoint 2010.</p>	 <p>SharePoint Designer 2010 supports reusable workflows and workflows attached to content types.</p>		

	Microsoft Office 2010	Microsoft Office 2007	Microsoft Office 2003
<p><b>Visualize Workflow</b> Allow a workflow designer to see the steps in a SharePoint 2010 workflow in a visual format.</p>	<p><input checked="" type="radio"/></p> <p>Workflows developed as drawings and exported from Microsoft Office Visio® 2010 can be imported into SharePoint Designer 2010 for modification and deployment.</p>	<p><input type="radio"/></p>	<p><input type="radio"/></p>
<p><b>Use Forms-Based Applications</b> Forms-based applications connect with back-end data and include workflow, reporting, custom Web pages, and other components.</p>	<p><input checked="" type="radio"/></p> <p>Integrate InfoPath 2010 forms with back-end data by using external lists in SharePoint 2010, and include custom sandboxed solution code.</p>	<p><input type="radio"/></p>	<p><input type="radio"/></p>

**Anywhere Access**

	Microsoft Office 2010	Microsoft Office 2007	Microsoft Office 2003
<p><b>View and Edit Documents, Spreadsheets, Presentations, and Notebooks in the Browser</b> Allow editing, even if applications are not loaded on a PC.</p>	<p><input checked="" type="radio"/></p> <p>View and make light edits to documents through Office Web applications in a browser. Document formatting and content are maintained when changes are made in the browser, because Web applications can be hosted on the premises, running in SharePoint.</p>	<p><input type="radio"/></p>	<p><input type="radio"/></p>
<p><b>Mobile Access Enhancements</b> View and edit documents from a mobile device, even when on the go.</p>	<p><input checked="" type="radio"/></p> <p>View Office 2010 documents from virtually anywhere with Web applications without losing fidelity, and make changes with limited editing capabilities.</p>	<p><input type="radio"/></p>	<p><input type="radio"/></p>

	Microsoft Office 2010	Microsoft Office 2007	Microsoft Office 2003
<b>Work Offline with an Improved Experience in Microsoft Office Access</b> Edit Office 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.	
<b>Collaborate Offline and Online</b> Work offline with SharePoint 2010 contents and when reconnected to the network, changes are synchronized.	 Work offline with SharePoint 2010 document libraries and lists through SharePoint Workspace 2010.	 Work offline in SharePoint 2010 document libraries only through Microsoft Office Groove®.	
<b>Fill In Forms Offline</b> 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.		
<b>Extend the Reach of Forms</b> Fill in InfoPath forms from a Web browser, while online or offline, and from a mobile device.	 The InfoPath 2010 forms solution offers embedded solutions using InfoPath controls that can be hosted.	 Limited InfoPath 2007 controls work on Web-enabled and mobile forms.	
<b>Publish Access Databases to the Web</b> Securely publish database applications to the Web so IT managers can meet requirements for data compliance, backup, and audits.	 While publishing data, Access 2010 checks for incompatible objects and builds a report of any runtime differences between the client and server.	 While publishing data from Access 2007, people must manually check whether objects created in Access can be supported in the server or not.	

**The Practical IT Platform**

	Microsoft Office 2010	Microsoft Office 2007	Microsoft Office 2003
<p><b>Integrate LOB Data Offline and Online</b> Take LOB data offline, and then synchronize changes automatically when back online.</p>	 Synchronize LOB data in both directions between SharePoint Workspace 2010 and enterprise line-of-business systems by bringing LOB data into SharePoint 2010 Sites, and then taking that data offline via SharePoint Workspace 2010.		
<p><b>Use Business Data Applications</b> Design forms for SharePoint 2010 that create, read, update, and delete business data from a back-end system.</p>	 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.		
<p><b>Enhance Information Security and Integrity with Digital Signatures</b> 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.</p>	 InfoPath 2010 and SharePoint 2010 support cryptography next-generation (CNG) digitally signed content.		
<p><b>Publish Forms in a Single Click</b> Avoid clicking through the Publishing Wizard every time you update forms published in SharePoint 2010.</p>	 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.	

	Microsoft Office 2010	Microsoft Office 2007	Microsoft Office 2003
<p><b>Manage Forms More Easily</b> More easily manage form versions, updates, and upgrades in SharePoint 2010 to ensure that team members are working on the correct version of a form.</p>	 <p>Automate template version management with SharePoint 2010 and InfoPath 2010 to provide an improved process for checking for template updates.</p>		
<p><b>Use Line of Business Data in Applications</b> Provide a SharePoint-based framework for creating Office Business Applications.</p>	 <p>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).</p>	 <p>Use the Business Connectivity Services within SharePoint to provide read access and surface line-of-business information in Office client applications</p>	
<p><b>Package and More Easily Move InfoPath Applications</b> More easily move InfoPath applications from site to site and server to server.</p>	 <p>InfoPath 2010 applications can be packaged more quickly and easily by using the Windows SharePoint Services solutions (.wsp) and SharePoint site template (.stp) file formats.</p>		

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

### Collaboration without Compromise

	SharePoint 2010	SharePoint 2007	SharePoint 2003
<p><b>Coauthor Documents and Presentations</b> Share ideas with other people simultaneously and see what areas of a document have changed.</p>	<p>●</p> <p>With coauthoring, work together in Microsoft Office Word 2010 and Microsoft Office PowerPoint 2010, and see others' changes tracked in documents hosted in SharePoint 2010.</p>	○	○
<p><b>Simultaneously Edit Spreadsheets and Notebooks</b> Work together on content using a Web browser.</p>	<p>●</p> <p>Work together in Microsoft Office Excel 2010 and Microsoft Office OneNote 2010 Web applications simultaneously and see others' changes in real time.</p>	○	○
<p><b>Highlight Changes in Shared Notebooks</b> Enable multiple people to add to and change the same shared notebook. Author names appear in near real time as changes are made.</p>	<p>●</p> <p>Shared OneNote 2010 notebooks provide a clear trail of what other authors have changed since the last user opened the notebook.</p>	○	○
<p><b>Broadcast Slide Shows in PowerPoint</b> Share a PowerPoint presentation over the Web for remote or networked viewers.</p>	<p>●</p> <p>Audiences do not need to have PowerPoint 2010 installed; they can see the presentation in high fidelity in a Web browser.</p>	○	○
<p><b>Save Documents and Presentations Directly to SharePoint</b> Automatically discover SharePoint document libraries to make saving content easier and more intuitive.</p>	<p>●</p> <p>People can save Office 2010 documents directly to the SharePoint 2010 document library from Office Backstage view.</p>	○	○

**Bring Ideas to Life**

	SharePoint 2010	SharePoint 2007	SharePoint 2003
<p><b>Project code-named "Gemini"</b> "Gemini" for Excel 2010 provides streamlined integration and Web-based analysis in SharePoint. Use data from multiple sources and manipulate large data sets that have up to hundreds of millions of rows.</p>	 <p>Publish and share analysis with less effort and enable others to enjoy the same Data Slicers and fast-query capabilities, even when working in Excel Services reports.</p>		
<p><b>Publish and Share Information Through Excel Services</b> Share analysis and results across the organization by publishing Excel 2010 spreadsheets to the Web or other SharePoint sites (intranet, extranet).</p>	 <p>Use Backstage view in Excel 2010 to selectively publish selective parts of a worksheet, hide formulas, and stage data to SharePoint 2010.</p>	 <p>Use Backstage view in Excel 2010 to selectively publish parts of a worksheet to SharePoint 2007.</p>	
<p><b>Microsoft Office Access Design for the Web</b> Microsoft Office Access 2010 applications developed in Design for Web mode can be designed and edited for publishing to SharePoint, so people can share, collect, and report on data.</p>	 <p>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.</p>		
<p><b>Automate Metadata Capture</b> Provide better, automated metadata capture in SharePoint to make information more findable, perceptible, discoverable, navigable, manageable, and re-usable.</p>	 <p>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.</p>	 <p>Word 2010 provides automated metadata capture from Backstage view, including document information added automatically.</p>	

	SharePoint 2010	SharePoint 2007	SharePoint 2003
<p><b>Use Office Backstage View</b> Seamlessly connect Office 2010 applications with SharePoint to provide workflow integration, the ability to enter metadata, and social context.</p>	<p> By 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.</p>	<p> By using Office Backstage view in Office 2010 applications, people can enter metadata and interact with workflows.</p>	<p></p>
<p><b>Access SharePoint Templates</b> Access Office 2010 document templates stored in SharePoint more quickly and easily.</p>	<p> People can access document templates stored in SharePoint 2010 via the <b>New Document</b> wizard in Office 2010 applications.</p>	<p></p>	<p></p>
<p><b>Apply PowerPoint Themes to SharePoint</b> Make customization of SharePoint sites more flexible by using themes used in PowerPoint 2010 presentations.</p>	<p> People can apply themes to SharePoint 2010 sites by using the same themes as in PowerPoint 2010.</p>	<p></p>	<p></p>
<p><b>Use Reusable Workflows</b> Support workflows to be used multiple times and provide workflow templates for later use in SharePoint.</p>	<p> SharePoint Designer 2010 supports reusable workflows and workflows attached to content types.</p>	<p></p>	<p></p>
<p><b>Visualize Workflow</b> Allow a workflow designer to see the steps in a SharePoint workflow in a visual format.</p>	<p> Workflows developed as drawings and exported from Office Visio 2010 can be imported into SharePoint Designer 2010 for modification and deployment.</p>	<p></p>	<p></p>

	SharePoint 2010	SharePoint 2007	SharePoint 2003
<p><b>Use Forms-Based Applications</b> Forms-based applications connect with back-end data and include workflow, reporting, custom Web pages, and other components.</p>	<p><input checked="" type="radio"/></p> <p>Integrate InfoPath 2010 forms with back-end data by using external lists in SharePoint 2010, and include custom sandboxed solution code.</p>	<p><input type="radio"/></p>	<p><input type="radio"/></p>
<p><b>Provide the Office Ribbon for InfoPath Forms Web Services</b> Provide the Fluent Office Ribbon interface for Web-enabled forms so people can easily find, access, and use the features they want when designing Web-enabled forms.</p>	<p><input checked="" type="radio"/></p> <p>When used with SharePoint 2010, InfoPath Forms Services provides Web-enabled forms with their commands in a Ribbon interface.</p>	<p><input type="radio"/></p>	<p><input type="radio"/></p>

**Anywhere Access**

	SharePoint 2010	SharePoint 2007	SharePoint 2003
<p><b>View and Edit Documents, Spreadsheets, Presentations, and Notebooks in the Browser</b> Allow editing, even if applications are not loaded on a PC.</p>	<p><input checked="" type="radio"/></p> <p>View and make light edits to documents through Office Web applications in a browser. Document formatting and content are maintained when changes are made in the browser and Web applications can be hosted on the premises running in SharePoint.</p>	<p><input type="radio"/></p>	<p><input type="radio"/></p>
<p><b>Mobile Access Enhancements</b> View and edit documents from a mobile device even when on the go.</p>	<p><input checked="" type="radio"/></p> <p>View Office 2010 documents from virtually anywhere by using Web applications, without losing fidelity, and make changes with limited editing capabilities.</p>	<p><input type="radio"/></p>	<p><input type="radio"/></p>

	SharePoint 2010	SharePoint 2007	SharePoint 2003
<p><b>Work Offline with an Improved Experience in Microsoft Office Access</b>                      Edit Office Access 2010 forms, reports, queries, and macros offline and synchronize changes in SharePoint when reconnected to the network.</p>	 Data in SharePoint 2010 list is cached in the Access 2010 by default.		
<p><b>Collaborate Offline and Online</b>                      Work offline with SharePoint contents and when reconnected to the network, changes are synchronized.</p>	 Work offline in SharePoint 2010 document libraries and lists through SharePoint Workspace 2010.		
<p><b>Fill In Forms Offline</b>                      SharePoint list forms are synchronized so people can work offline.</p>	 SharePoint 2010 list items open in an InfoPath 2010 form that is hosted in SharePoint for edit in display mode.		
<p><b>Extend the Reach of Forms</b>                      Fill in InfoPath 2010 forms in a Web browser, while online or offline, and from a mobile device.</p>	 The InfoPath 2010 forms solution offers embedded solutions that use InfoPath controls that can be hosted.		
<p><b>Publish Access Databases to the Web</b>                      Securely publish database applications to the Web so IT managers can meet data compliance, backup, and audit requirements.</p>	 While publishing data, Access 2010 checks for incompatible objects and builds a report of any runtime differences between the client and server.		

**The Practical IT Platform**

	SharePoint 2010	SharePoint 2007	SharePoint 2003
<p><b>Use Business Data Applications</b> Design forms for SharePoint that create, read, update, and delete business data from a back-end system.</p>	<p>● 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.</p>	○	○
<p><b>Offline and Online LOB Integration</b> Take LOB data offline and synchronize changes automatically when back online.</p>	<p>● Synchronize LOB data in both directions between SharePoint Workspace 2010 and enterprise line-of-business systems by bringing LOB data into SharePoint 2010 Sites and then taking it offline via SharePoint Workspace 2010.</p>	○	○
<p><b>Enhance Information Security and Integrity with Digital Signatures</b> 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.</p>	<p>● InfoPath 2010 and SharePoint 2010 support CNG digitally signed content.</p>	○	○
<p><b>Manage Forms More Easily</b> More easily manage form versions, updates, and upgrades in SharePoint to ensure that team members are working in the correct version of a form.</p>	<p>● Automate template version management with SharePoint 2010 and InfoPath 2010 to provide an improved process for checking for template updates.</p>	○	○

	SharePoint 2010	SharePoint 2007	SharePoint 2003
<p><b>Use Line of Business data in applications</b> Provide a SharePoint-based framework for creating Office Business Applications.</p>	<p> 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).</p>	<p> Use Business Data Catalog within SharePoint to provide read access and surface line of business information in Office client applications</p>	<p></p>
<p><b>Business Connectivity Services: Use Data as Document Properties</b> Insert LOB data as document properties to make critical information more findable, perceptible, and re-usable in SharePoint.</p>	<p> Expose BCS data as Word 2010 document properties and insert it into documents.</p>	<p></p>	<p></p>
<p><b>Package and More Easily Move SharePoint Applications</b> Move InfoPath applications more easily from site to site and server to server.</p>	<p> Package InfoPath 2010 applications more quickly and easily packaged by using Windows SharePoint Services solutions (.wsp) and SharePoint site template (.stp) file formats.</p>	<p></p>	<p></p>