Microsoft Dynamics™ GP with Microsoft® Office SharePoint® Server 2007

Frequently Asked Questions
March 2007

Introduction

With the release of Microsoft Dynamics GP 10.0, the integration with Microsoft SharePoint technologies becomes significantly more visible. Several new functionalities within Microsoft Dynamics GP 10.0, including workflow, search, and some server side Business Intelligence capabilities, require Microsoft Office SharePoint Server (MOSS) to be installed and configured to collaborate with Microsoft Dynamics GP.

While MOSS components are already available for purchase via Microsoft Volume Licensing sources, three new purchase options for MOSS will be added to the Microsoft Dynamics GP 10.0 price lists:

1) **Microsoft Dynamics™ Client for Microsoft® Office and Windows® SharePoint® Services**
2) **Microsoft Dynamics™ Client for Microsoft® Office and Office SharePoint® Server**
3) **Microsoft Dynamics™ GP with Microsoft® Office SharePoint® Server 2007**

A pricing guide is included later in this document. For the purposes of this document, we will abbreviate the names above to these names (respectively):

1) **Microsoft Dynamics Client for WSS**
2) **Microsoft Dynamics Client for MOSS**
3) **Microsoft Dynamics GP with MOSS**

The first two SharePoint portal licenses will be offered across all Microsoft Dynamics product lines and will be available to Advanced Management customers only. The third SharePoint portal license above is exclusive to the Microsoft Dynamics GP price list and will be available to existing Microsoft Dynamics GP Professional customers only.

This document will focus on how these products impact the Microsoft Dynamics GP solutions – a separate FAQ for the Microsoft Dynamics Client options and covering all Microsoft Dynamics product lines can be found on PartnerSource.

General

Q: What is Microsoft Office SharePoint Server 2007?
A: Microsoft Office SharePoint Server 2007 (MOSS 2007) is a new server application that is part of the 2007 Microsoft Office system. Your organization can use it to facilitate collaboration, provide content management features, implement business processes, and provide access to information that is essential to organizational goals and processes. MOSS 2007 includes functionality previously contained in Microsoft Office SharePoint Portal Server 2003, and also incorporates the web content management functionality that was previously available in Content Management Server 2002.

Q: Is Microsoft Office SharePoint Server 2007 required for Microsoft Dynamics GP 10.0?
A: No, it is not required. However, there are several key "light up" features in Microsoft Dynamics GP 10.0 that become available when MOSS 2007 is installed. These include workflow, search, some eService functionality, and additional business intelligence capabilities, along with all of the collaboration and document sharing capabilities that are available with MOSS 2007.

Q: Can I utilize the workflow or search capabilities in Microsoft Dynamics GP 10.0 without installing Microsoft Office SharePoint Server 2007?
A: You may not use the six workflows and search capabilities that come preconfigured with Microsoft Dynamics GP 10.0 - these and a few other Microsoft Dynamics GP 10.0 features leverage the technologies of MOSS 2007 and are only available within Microsoft Dynamics GP when MOSS 2007 is installed.

Q: What is Microsoft Windows SharePoint Services? How is it related to Microsoft Office SharePoint Server 2007?
A: Windows SharePoint Services (WSS) is a collection of services for Microsoft Windows Server™ 2003 that you can use to share information, collaborate with other users on documents, and create lists and Web Part pages. It is built on Microsoft Windows Server 2003 and provides a single workspace for teams to coordinate schedules, organize documents, and participate in discussions—within the organization and over the extranet. WSS also provides a foundation platform for building Web-based business applications that can flex and scale easily – for example, Business Portal for Microsoft Dynamics GP.

WSS is required for Business Portal and also for MOSS 2007. See TechNet for additional FAQs on WSS.

MOSS 2007 is a security enhanced, scalable, enterprise portal server built upon WSS that you can use to aggregate SharePoint sites, information, and applications in your organization into a single, easy-to-use portal. Because MOSS 2007 requires WSS, all features of WSS are available in MOSS 2007.

Q: What suites of the Microsoft Office system work with Office SharePoint Server 2007?
A: MOSS 2007 has no restrictions in terms of support for previous releases of Microsoft Office. When choosing a Microsoft Office system suite, we recommend the 2007 Office release for the richest user experience, although it is not required. Consider the following when choosing a Microsoft Office suite:
- Office Outlook 2007 provides bidirectional offline synchronization with SharePoint document libraries, discussion groups, contacts, calendars, and tasks.
- Microsoft Office Groove 2007, included as part of Microsoft Office Enterprise 2007, will enable bidirectional offline synchronization with SharePoint document libraries.
- Features such as the document information panel and the ability to publish to Excel Services will only be enabled when using Microsoft Office Professional Plus 2007 or Office Enterprise 2007.
- Excel Services will only work with documents saved in the new Office Excel 2007 file format (XLSX).
- What are the software requirements for Office SharePoint Server 2007?
- Read the Office SharePoint Server 2007 system requirements.

Licensing

Q: How do I obtain Microsoft Office SharePoint Server 2007?
A: There are two ways to obtain MOSS 2007 for use with Microsoft Dynamics GP. MOSS 2007 is available via Microsoft Volume Licensing. It will also be made available for purchase on the Microsoft Dynamics ERP price lists in several ways. Look to the MOSS 2007 pricing guide within this document for further details. Microsoft Dynamics GP Professional or Advanced Management customers purchasing MOSS 2007 from the Microsoft Dynamics GP price list will receive a MOSS 2007 DVD for installation.

Q: How do I obtain Windows SharePoint Services?
A: Windows SharePoint Services is a component of Windows Server 2003 and conforms to the Windows Server 2003 licensing model. Organizations simply need to own Windows Server 2003 licenses to have the rights to also use Windows SharePoint Services. Learn more about licensing Windows Server 2003 and Windows SharePoint Services on the SharePoint licensing page. Windows SharePoint Services 3.0 is available for download, as well.

Microsoft Dynamics GP with Microsoft Office SharePoint Server 2007 FAQ

Q: Do I need SQL Server CALs and/or Windows CALs in order to access Microsoft Dynamics GP information via Microsoft Office SharePoint Server 2007?
A: Yes, both of these are required to access Microsoft Dynamics GP data via MOSS 2007. Please contact your Volume Licensing specialist for additional information and guidance.

Q. Why is Microsoft offering these special SKUs for Microsoft Dynamics GP?
A: With these license options (Microsoft Dynamics Client for WSS, Microsoft Dynamics Client for MOSS, and Microsoft Dynamics GP with MOSS), we want to help companies extend the power, insights and process control of their ERP to all their employees at a compelling price, and via a user experience that is familiar and easy to use. This is one way in which we are enabling our customers to become a "People Ready Business".

Q. Are there any restrictions on my Microsoft Office SharePoint Server 2007 license? Can I use it to connect to partners and customers?
A: The MOSS 2007 license that is provided with either Microsoft Dynamics Client for MOSS or Dynamics GP with MOSS encompasses both the Standard and Enterprise additive client access licenses (CAL's). These licenses are for use by employees working within the company, and all of the capabilities of the Standard and Enterprise additive CALs are available to the company. This includes the creation of departmental intranet sites, personal "My sites", Roles-based sites, enterprise search, data integration with other applications, server-based spreadsheet publishing and calculation, a centralized Report Center, and more. In addition, customers will receive one MOSS 2007 server license.

The MOSS 2007 license does not provide access to the Internet, and so cannot be used by customers or partners who are outside the firewall. Customers wishing to implement an Internet-facing website can purchase Microsoft Office SharePoint Server 2007 for Internet sites through Microsoft's Volume Licensing programs.

Q: Do I still need to purchase an Office client license if I've purchased a SharePoint CAL?
A: Your SharePoint CAL only covers the use of MOSS 2007, not the 2007 release of the Microsoft Office system. When choosing a release of Microsoft Office, we recommend you use the 2007 release for the richest user experience. Please see the previous question on the 2007 Microsoft Office system for additional reasons why. If you purchased the Microsoft Enterprise CAL Suite, you will receive an equivalent number of Office SharePoint Server Enterprise CALs.

For more information on Microsoft Office suites, please see the 2007 Microsoft Office system packaging page or contact your Volume Licensing specialist.

Q: Is Microsoft Office SharePoint Server 2007 required for Business Portal for Microsoft Dynamics GP 10.0?
A: No, users can use either WSS 3.0 or MOSS 2007 with Business Portal for Microsoft Dynamics GP 10.0. Some of the features within the Field Service eService and eReturns modules available in Business Portal do require MOSS 2007.

Q: Is Windows SharePoint Services required for Business Portal?
A: Yes. Windows SharePoint Services 3.0 is a required prerequisite for Business Portal for Microsoft Dynamics GP 10.0. If you are installing MOSS 2007, it will install WSS 3.0 during the installation process if it is not already installed.

Q: Is Business Portal required to be installed in order to activate the MOSS 2007 features in Microsoft Dynamics GP 10.0?
A: Many of the MOSS 2007 components (e.g. – Search) specific to Microsoft Dynamics GP are installed during the Business Portal installation – others, such as Workflow, do not require Business Portal. Please consult the Microsoft Dynamics GP 10.0 Installation Guide for specific details.

Q. What unique Business Portal features are provided when it is deployed with MOSS 2007?
A. The Report Center, Excel Services, connections to external data sources, and dashboards (including two Sales dashboards preconfigured for Microsoft Dynamics GP) are some of the Business Intelligence features that come available when MOSS 2007 is installed.

Q: Is MOSS 2007 available for all Microsoft Dynamics GP 10.0 customers (e.g. – Standard, Professional, Business Essentials, and Advanced Management)?
A: The Microsoft Dynamics GP with MOSS licenses are available to existing Microsoft Dynamics GP Professional customers.

The Microsoft Dynamics Client for WSS and Microsoft Dynamics Client for MOSS licenses are available for Advancement Management customers only.

See the pricing information guide for additional details.

Q: How does the Microsoft Dynamics GP with MOSS SKU compare or contrast to the Microsoft Dynamics Client SKUs recently announced?
A: The Microsoft Dynamics GP with MOSS SKU and the Microsoft Dynamics Client for MOSS SKU are comparable in that each includes MOSS 2007 server and client licenses. As you can see in the pricing information guide, these SKUs differ in terms of pricing, components, and product line availability.

Q: Can I purchase a mix of the Microsoft Dynamics GP with MOSS SKUs and Microsoft Dynamics Client SKUs?
A: No. Customers will need to license either the Microsoft Dynamics GP with MOSS SKU or the Microsoft Dynamics Client SKUs.

Q: What about Microsoft Dynamics GP Standard customers that have purchased Business Portal?
A: Microsoft Dynamics GP Standard customers will be able to continue to use Business Portal with WSS 3.0 on Microsoft Dynamics GP 10.0. In order to purchase, install, and utilize the MOSS 2007 features within V10.0, Microsoft Dynamics GP Standard customers will need to migrate to Microsoft Dynamics GP Professional or Advanced Management.

Q. Why are you not extending this to Business Essentials edition under Business Ready Licensing?
A: We believe that this new licensing package will be of most interest to our Professional and Advanced Management customers who are looking for an adaptable solution with an extensive set of advanced functionality.

Q: Can I purchase the Microsoft Dynamics GP with MOSS SKUs or Microsoft Dynamics Client SKUs via Volume Licensing?
A: No. These SKUs are available only on the Microsoft Dynamics price lists.

Q: Can I purchase MOSS 2007 licenses via Microsoft Volume Licensing?
A: Yes – MOSS 2007 is available for purchase via Microsoft Volume Licensing (however, the Microsoft Dynamics SKUs listed in the pricing guide will only be available on Microsoft Dynamics price lists). You may wish to compare Volume Licensing pricing to the Microsoft Dynamics pricing, as well as consider the services available with and pricing of related Software Assurance.

Q: What if I need MOSS 2007 external licenses for access to an extranet?
A: External licenses for MOSS 2007 are currently only available for purchase via Microsoft Volume Licensing.

Q. How many servers can I install MOSS 2007 on?
A: One. The license that is included with the Microsoft Dynamics Client for MOSS package or Microsoft Dynamics GP with MOSS package includes one MOSS server license (i.e. - for one server). If you need to install MOSS 2007 on more than one server, you will need to purchase additional server licenses via Microsoft's Volume Licensing programs.

Pricing

Q: What is the pricing for the MOSS 2007 licenses that will be on the Microsoft Dynamics GP Price Lists?
A:

SKU	Components	Product Availability	Price	Expected Timeline
Microsoft Dynamics Client for WSS	• Business Portal named user • FRx DrillDown Viewer • FRx WebPort • HRM Self-Service Suite	Advanced Management	$195/license	New customers May, 2007 – Existing customers H1 FY08.
Microsoft Dynamics Client for MOSS	• Business Portal named user • FRx DrillDown Viewer • FRx WebPort • HRM Self-Service Suite • MOSS Server, Std & Enterprise CAL's	Advanced Management	$395/license	New customers May, 2007 – Existing customers H1 FY08.
Microsoft Dynamics GP with MOSS	• Business Portal named user • MOSS Server, Std & Enterprise CAL's	Professional	$240/license	May, 2007
Business Portal for Microsoft Dynamics GP	• Business Portal named user	Standard, Professional, and Advanced Management	$40/license	Currently available

Microsoft Dynamics GP Professional customers may purchase Microsoft Dynamics GP with MOSS for $240 per user license.

Microsoft Dynamics GP Advanced Management customers may purchase the Microsoft Dynamics Client for WSS licenses for $195 per user license (total $195 per user license if desire to license WSS 3.0 only), and the Microsoft Dynamics Client for MOSS for an additional $200 per user license (total $395 per user license if desire the MOSS 2007 licenses).

Q: Will the Microsoft Dynamics GP components listed in the [pricing information](#) table also be available for purchase separately from the Microsoft Dynamics Client SKUs (e.g. – can I still purchase Business Portal or the HRM Self-Service Suite separately)?
A: Yes, the Microsoft Dynamics GP components that are included in the Microsoft Dynamics Client and Microsoft Dynamics GP with MOSS SKUs will remain on the Microsoft Dynamics GP price list for individual purchase.

Q: The pricing information indicates that each SKU listed includes Business Portal – what if I've already purchased Business Portal users?
A: Microsoft Dynamics GP Professional customers will receive full investment credit for all purchased Business Portal users toward the purchase of the Microsoft Dynamics GP with MOSS licenses. For example, if 10 Business Portal employee users were purchased at $40 each, the customer would receive $400 toward the purchase of an equal number of MOSS 2007 users. Business Portal users obtained at no additional charge (e.g. – one Business Portal user included with each Microsoft Dynamics GP System Manager/Foundation user) will not receive investment credit. Investment credit for the Microsoft Dynamics Client SKUs will be announced with the pricing for existing customers that will be made available in H1 of FY08.

Q: When will MOSS 2007 be available on the Microsoft Dynamics GP price list?
A: MOSS 2007 will be available on the Microsoft Dynamics GP price list around the General Availability release of Microsoft Dynamics GP 10.0. MOSS 2007 can be purchased from Volume Licensing today, as well. Microsoft Partners may wish to check both pricing models when evaluating purchases for customers – the Microsoft Dynamics GP price list compared to Volume Licensing pricing, keeping Software Assurance needs in mind, as well, to determine the best pricing options.

The Microsoft Dynamics Client SKUs will be available for **new** Advanced Management customers around the General Availability of Microsoft Dynamics GP 10.0. The Microsoft Dynamics Client SKUs are expected to be available for **existing** Advanced Management customers in H1 FY08.

Q: What is the pricing for MOSS 2007 with Volume Licensing?
A: The cost of MOSS is dependent on the edition chosen, the number of servers and CALs, and any applicable volume discount. For additional information about pricing, read the Office SharePoint Server 2007 and Related Technologies pricing page or contact your Volume Licensing specialist.

Q: Is Independent Software Vendor (ISV) pricing available for MOSS 2007?
A: Yes. Microsoft provides an ISV Royalty Licensing program designed for ISVs that incorporate Microsoft technology into their value-added software business solutions for commercial distribution to their customers. For information on ISV pricing, please visit the Microsoft ISV Royalty Licensing Program.

Q: How do customers license an upgrade from Microsoft SharePoint Portal Server 2003?
A: Customers who purchased SharePoint Portal Server 2003 with Software Assurance will be granted a server license to upgrade to MOSS 2007. A MOSS

2007 Standard CAL will be granted per each existing standalone SharePoint Portal Server 2003 CAL or Core CAL covered with Software Assurance. Please contact your Volume Licensing specialist for additional details.

Q. Where can I go to get information on pricing and packaging for Microsoft Dynamics GP?
A: Details will be available on the price lists for each product on the PartnerSource website here:
https://mbs.microsoft.com/partnersource/resources/pricing/pricing/

Support

Q: How will Microsoft Business Solutions provide support for MOSS 2007 as part of a customer support plan?
A: Support for MOSS 2007 and WSS 3.0 will continue to be available via Microsoft Volume Licensing service plans. We are evaluating the feasibility of future support capabilities for inclusion in Microsoft Business Solutions customer and Partner service plans.

Microsoft Dynamics GP customers who purchase the new Microsoft Dynamics Client for WSS, Microsoft Dynamics Client for MOSS, or Microsoft Dynamics GP with MOSS will be required to enroll in the Microsoft Dynamics GP Enhancement Plan. When current on this plan, customers will receive product upgrades for MOSS 2007.

Q: What are the hardware and software recommendations for MOSS?
A: Please check PartnerSource (Products > Business Portal > Documentation > System Requirements) or CustomerSource for current system requirements. On PartnerSource, the current system requirements are listed here -
https://mbs.microsoft.com/customersource/support/documentation/systemrequirements/system_requirements_gp10_webapps.htm?printpage=false.

Partner Topics

Q. What are the partner benefits of this new license? How can they get this?
A: Partners can benefit from the new license in a number of ways. First, it provides them with a great revenue opportunity, as it provides a compelling new package of functionality that is applicable to all employees, and at a price point that is very competitive with offerings from other vendors. Second, it helps partners to position Microsoft Dynamics GP as a leading player in the new category of office business applications, and to have a strong response to competitors. Third, it provides a platform on which partners can develop their

own industry or customer-specific office business applications, and gives them the ability to license these more broadly throughout the company, without requiring either the Microsoft Dynamics GP full access user license to be installed or having to purchase separate business connectors.

Q. Will Microsoft Dynamics GP Partners receive credit for the sale of MOSS 2007 off the Microsoft Dynamics GP price list?
A: Yes. For Microsoft Dynamics GP Partners, sales of the new packages will be included in the Partner's 12 month revenue roll which establishes SPA discount levels.

Q: As a Microsoft Partner, what does this announcement mean for my discount structure?
A: Discount structures will be consistent with current Microsoft Dynamics GP product discounts.

Q: Are new certifications required to sell MOSS 2007?
A: No. All Microsoft Dynamics GP Partners are eligible to sell MOSS 2007 from the Microsoft Dynamics GP price list. However, we strongly recommend that Microsoft Partners consider utilizing the sales and technical learning and readiness resources that are available through the Microsoft Partner Program. Specifically, the Information Worker competency – Portals and Collaboration specialty – is recommended. Continue to look to PartnerSource for additional and more specific guidance and learning opportunities.

Q: Will MOSS 2007 be included with the Microsoft Dynamics GP 10.0 Partner Not For Resale kit?
A: MBS partners should be registered partners of MSPP (Microsoft Partner Program) and may obtain MOSS 2007 through their MSPP benefits. One benefit of that program is the Microsoft Action Pack subscription which includes MOSS Enterprise 2007. The software included with the subscription can be used for internal business use, testing, evaluation, demonstration, training, and education only.

SharePoint Product Information

Q: How do I learn more about Microsoft Office SharePoint Server 2007?
A: For product information, look to the Microsoft.com website - http://office.microsoft.com/en-us/sharepointserver/FX100492001033.aspx. For information on Microsoft Information Worker competencies around Microsoft Office SharePoint Server 2007 and Windows SharePoint Services, start by looking to this Microsoft.com website - https://partner.microsoft.com/US/program/competencies/iwsolutions.

Additional Microsoft Office SharePoint Server 2007 FAQ's can be found at this Microsoft web page - http://office.microsoft.com/en-us/sharepointserver/HA101655351033.aspx.

The Microsoft Office SharePoint Server 2007 website on Office Online contains extensive product information, as well as a free trial download of Microsoft Office SharePoint Server 2007. From a training perspective, the training you need will depend on the depth of expertise you wish to gain on Microsoft Office SharePoint Server 2007, as well as on whether you are more focused on administering the site, developing using Microsoft Office SharePoint Server 2007, or creating your own simple web pages using pre-configured wizards and templates.

A number of free eLearning courses are available on the Microsoft.com website, such as Clinic 5046. These are suitable for gaining an overview of Microsoft Office SharePoint Server 2007. More advanced courses, including instructor-led classroom courses, can be found through the Microsoft.com training site.

Q: Can I purchase only part of the Enterprise CAL features, such as Excel Services?
A: Portions of MOSS 2007, such as Excel Services, cannot be licensed independently. Search services are available as part of MOSS 2007 for Search and InfoPath Forms Services are available as part of Office Forms Server 2007. For all other capabilities you must license MOSS 2007 in its entirety.

Q. How does the Microsoft Dynamics GP licensing for MOSS 2007 fit with Microsoft's Office Business Applications (OBA) initiative?
A: Office Business Applications (OBAs) are an emerging class of business applications that connect existing systems such as ERP and SCM to Microsoft Office. The new licenses provide an excellent way for Microsoft Dynamics GP customers to start benefitting from OBAs, as the major components, such as MOSS 2007, access to the Microsoft Dynamics GP system, and integration with Office client products, are all included in the premium package.

Microsoft Office SharePoint Server 2007 Templates

Q: What are Role-Based Templates for SharePoint My Sites?
A: Role-Based Templates for SharePoint My Sites are custom templates designed for MOSS 2007 and tailored to address the unique needs and requirements of specific roles. They are extensions to the standard My Site functionality of Office SharePoint Server, providing a personal portal and dashboard data relevant to your role.

The role-based templates are pre-configured to display, in a common environment, role-relevant data from sources such as line-of-business systems,

desktop tools, and portals. The templates make use of Office SharePoint Server capabilities, such as audience targeting, KPIs, workflows, Excel services, Business Data Catalog, and others.

Q: Can customers, developers, ISVs, solution providers, and others modify the Role-Based My Site Templates?
A: Yes. This is one of the main goals of the Role-Based My Site Templates, as a demonstration of the application building power in MOSS 2007 and as a potential starting point for larger applications.

Q: How do I customize these Role-Based My Site Templates and deploy them in more specific scenarios and organizations?
A: Microsoft also offers a set of customization and development tools that help tailor the Role-Based My Site Templates to meet your specific business needs.

- Microsoft Office SharePoint Designer 2007 can be used to customize and extend instances of the templates. Using Office SharePoint Designer 2007, you can add or modify views on data in the site, as well as integrate external data from databases, Web services, and RSS. Or, when partnered with Microsoft Office SharePoint Server 2007 with Business Data Catalog enabled, integrate line-of-business data into your site.
- Productivity tools, such as Microsoft Office Access 2007 and Microsoft Office InfoPath 2007, also help increase the value of the templates. With Office Access 2007, you can create and integrate form and report views, coordinate structured data collection via e-mail, and access SharePoint site lists offline. With Office InfoPath 2007, you can design form solutions to gather data which can integrate with business processes leveraging the workflow capabilities of MOSS 2007. Office InfoPath 2007-designed forms can also be filled out in the most common browsers, further broadening the reach of such form solutions.
- Microsoft Visual Studio 2005 can be used to modify templates or add new code to the server. Common tasks might include adding custom Web part assemblies, new server controls, or new workflow activities. After deploying these assemblies to the server, custom Web parts and workflow activities can be exposed and used in Office SharePoint Designer 2007.

Beyond these Microsoft tools, there are a number of Microsoft Partners delivering services and solutions to implement, tailor, and customize the templates to fit specific customer scenarios. Many Partner solutions go beyond template-related solutions, reaching to sophisticated applications built on the Microsoft SharePoint Products and Technologies platform.

Q: Are the Role-Based My Site Templates supported by Microsoft?
A: The templates are not supported by Microsoft. They are intended to provide an example of what can be done with My Sites in MOSS 2007. Please refer to the setup guides for installation instructions.

Q. Can I integrate these Role-based templates into my Business Portal?
A. Yes, the content of the Role-based templates may be used to create similar pages within Business Portal, which must then be integrated with your Microsoft Dynamics GP data.

Q. Will role-based templates work with or interface to my Microsoft Dynamics GP data?
A. Yes, the Role-based templates may be integrated with your Microsoft Dynamics GP data using the integration tools included with MOSS 2007, including the Business Data Catalog and Web Services for Microsoft Dynamics GP.