

**SAP Solution in Detail  
Duet for Microsoft Office and SAP**



**Duet™** | for Microsoft® Office  
and SAP®

# **DUET™ SOFTWARE FOR MICROSOFT® OFFICE AND SAP® APPLICATIONS**

**A New Approach to Office Productivity**

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# BRINGING TOGETHER THE WORLDS OF DESKTOP PRODUCTIVITY AND ENTERPRISE APPLICATIONS

From their desktops, today's information workers have access to a greater depth and quality of information than ever before. Thanks to technology advances in everything from desktop applications to networking and the Web, information workers have a world of relevant detail at their fingertips.

But these employees are typically denied easy access to their own organization's most valuable business processes and data. Instead, they need to take time-consuming extra steps to produce their time sheets and are often unable to obtain the reports that would help them better manage their time. Managers are hard-pressed to get timely reports of their departments' budget status. And employees and managers need to route even simple employment-related requests through the HR department.

The result is time wasted, both for individuals and for the enterprise. Moreover, it means that information workers are out of sync with enterprise best practices and policies – thereby lowering their productivity potential.

All of that now changes with Duet™ software for Microsoft® Office and SAP® solutions. The product of joint development between Microsoft Corporation and SAP AG, Duet now brings information workers a window into the heart of SAP enterprise applications. Duet is designed to be both scalable and secure, and to make the most of an organization's investments in its two most important software architectures – Microsoft Office for desktop productivity and SAP enterprise applications.

## Duet Overview

The current version of Duet enables out-of-the-box business scenarios and supports an underlying architecture that ties SAP software enterprise functions to Microsoft Office applications.

Duet grew out of a long-term joint development relationship between Microsoft and SAP. In operation, Duet leverages the SAP NetWeaver® platform, Microsoft .NET framework, and enterprise services architecture (ESA) to make business processes and information from the mySAP™ ERP application available to users of Microsoft Office Professional 2003.

The current version delivers the following functionality:

- **Time management** – Lets employees schedule, record, and review project and billable hours using their Microsoft Office Outlook® calendar, which automatically interfaces with and updates the SAP enterprise software.
- **Budget monitoring** – Gives managers seamless access to the financial data they need to make better decisions as well as to fulfill their cost and budget responsibilities, including budget monitoring, variance alerts, posting alerts, budget transfers, and correction of postings.
- **Organization management** – Allows employees and managers to access and initiate updates to useful and time-saving HR-related employee information while remaining in the familiar Office Outlook environment.
- **Leave management** – Lets employees request personal leave and receive management approvals via e-mail with records of the approvals, process compliance, and time scheduled entered automatically into back-end SAP applications.

## Time Management Scenario

Filling out time sheets can be quite laborious for information workers. Typically, they keep records manually and enter their time into enterprise systems daily, weekly, or monthly – or at least, that’s what management asks them to do. Always pressed for time, they are likely to reconstruct billable hours long after the fact. Accuracy suffers because of normal memory lapses and mistakes.

This inefficient approach can have a significant effect on employee productivity, especially when detailed activity records are required. It can even delay customer billing, seriously affecting the organization’s cash flow. Enterprise managers may not get an accurate picture of how employees, or entire divisions, are spending their time. Keeping time records when working remotely or traveling can be problematic since the central system may not allow access from client sites – a real impediment

for professional service firms. Employees may have low visibility into how their time is actually spent or whether they have achieved certain time quotas.

Duet time management functionality links employees’ Outlook calendar appointments with the cross-application time sheet in mySAP ERP. Users can enter and assign project codes to Outlook appointments – to record time spent on actual meetings as well as on other activities. If the user schedules an appointment for later in the day, for instance, Duet will automatically ask if the activity is billable and to which project code. Since Duet connects Outlook directly to mySAP ERP, users see the list of project codes exactly as the SAP application displays them.

The user then gets immediate confirmation that the time has been recorded, as well as contextual information such as statistics or analyses on how much time has been recorded by

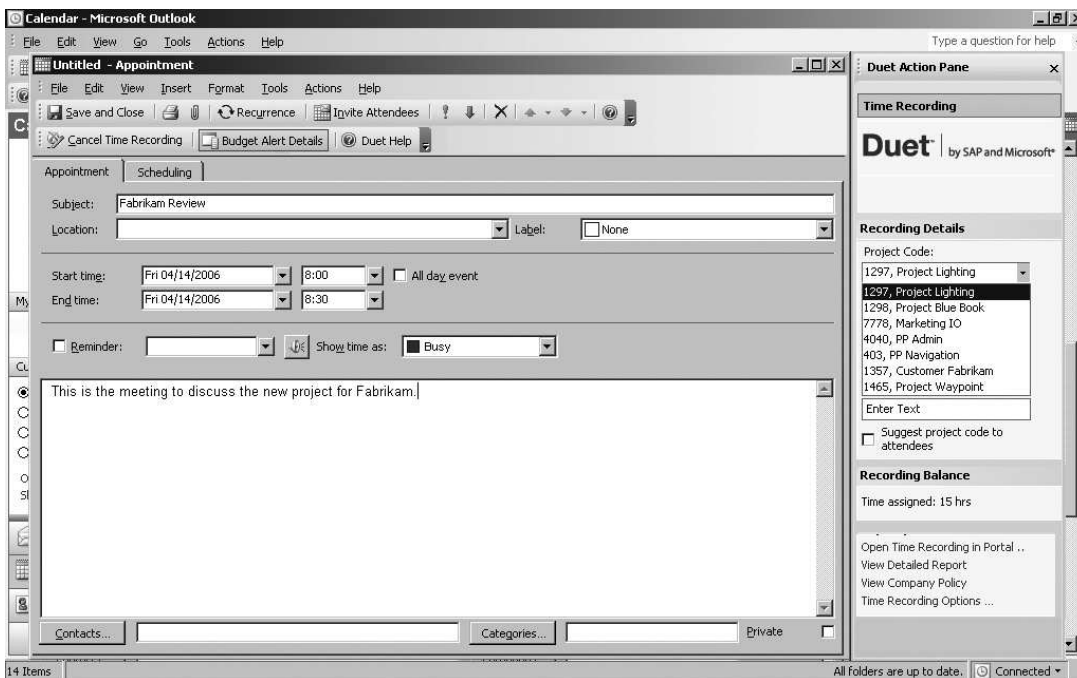


Figure 1: Time Recording in the SAP® Application Using Microsoft® Office Outlook®

project, by month, and so on. The user can also request a list of all appointments in Outlook views and then can filter those appointments by a number of parameters such as projects, currently-not-assigned, and more.

This single-entry approach can save substantial time and effort for employees, thereby improving individual and group productivity and dramatically boosting accuracy. And with more precise and timely views of activities by employee, work group, and department, managers are much better prepared for project planning.

### Budget Monitoring Scenario

Many managers find it difficult to gain insight into their budget information. They frequently track budgets via separate spreadsheets and, lacking training on the central systems, must work through the financial controller or via power users to request

or modify reports from the enterprise resource planning (ERP) system. In some organizations, this can add days or weeks to the process.

This can impact the organization in several ways. Without timely reports on accurate budget status, managers operate on out-dated information. Because they cannot make timely budget allocations, important projects may suffer because of inaccurate information on funds available.

In addition, budget overruns may not be corrected until the end of the month or late into the fiscal year. This can create significant overhead for managers who are trying to determine budget status or make budget corrections via the accounting department.

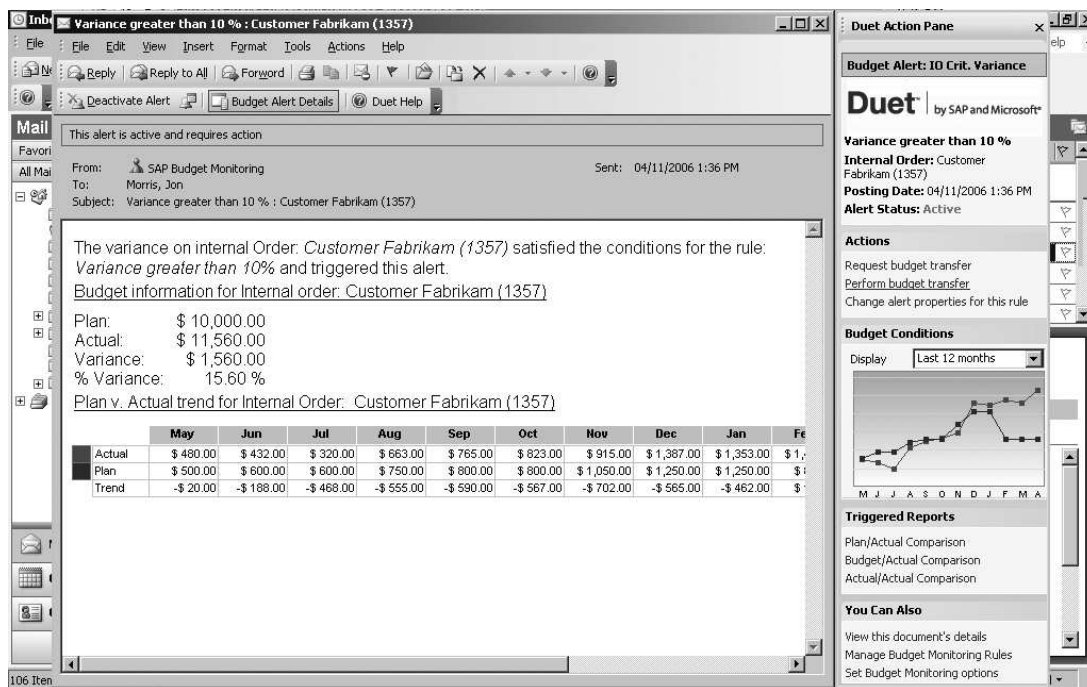


Figure 2: Duet™ Software Budget Variance Alert Delivered to the Microsoft® Office Outlook® In-Box

Duet budget monitoring functionality gives managers a wealth of tools and information for tracking, analyzing, and acting on individual and group budgeting data. Managers can schedule regular reports and set report delivery based on budget parameters. For example, the manager can request a planned-versus-actual budget report when “actual” reaches 80% of “planned.” Or the manager can schedule the planned-versus-actual report to be delivered into his or her Outlook in-box every Monday at 9:00 a.m., for example.

All reports are available for offline use, yet they still allow the manager to drill into the analytic and source data behind the numbers and distribute reports to individuals or other managers. In the case of offline use, Duet uses the information contained in its local cache storage for drill-down detail.

Budget monitoring refers directly to setting alerts and notifications. Alerts can be set by managers or central administrators, and conditions can be defined by variance (as discussed above) or by posting. For example, a posting alert might be triggered by any payment request over a certain amount. In addition to setting alerts, the manager can request or perform budget transfers or a posting adjustment – in case an employee had entered expenses for a trip that turned out to be canceled, for instance.

In short, budget monitoring functionality helps managers to save substantial time and effort and to make decisions that are accurate and timely. Executives including the CFO can track performance closely to a level of detail never before possible.

### **Organization Management Scenario**

Personnel records, HR policies, and other organizational information are often “locked up” in multiple systems, difficult for managers or employees to access. As a result, employees may be uninformed about important company policies and managers are likely to make employee-related decisions without the benefit of key information.

At the same time, managers typically maintain information about their teams in desktop applications, often with outdated contact information since neither the manager nor the employee remembers to keep it current. Because getting access to personnel files on the central ERP application can be a cumbersome process, managers may not refer to these files when they should.

The impact of such organizational disconnectedness can be severe, especially for large companies. Employees and managers may not adhere to company policy on personnel matters, and this can lead to potentially troublesome situations – even those that might leave the organization vulnerable to lawsuits.

The organization management functionality gives employees and managers access to information on everything from compensation and organizational structure to open positions and training opportunities – all through the Outlook contacts interface, within their SAP standard security and authentication privileges. Managers can see department-wide personnel information and initiate personnel change requests.

For instance, employees can access their own records from the SAP application for HR and, with proper authorization controlled by the SAP software, view certain details about their coworkers. This can be helpful in looking up organizational reporting questions, for instance. Employees also get access to contextual information through the action pane. For example, Duet might display several actions available for changing the user’s direct-deposit or other banking information.

Managers can view their team members' information in greater detail, such as their compensation, letters of recommendation, resumes, and so on – thanks to SAP software user authorization security. Managers also get analytics capabilities and contextual information, allowing them to drill into areas such as average enterprise-wide compensation by job title.

This time-saving scenario also benefits HR staff who would otherwise be responding to the employees' requests. Managers can more easily consolidate personnel-related communications – a memo praising an employee's performance on a specific project, for instance – within the same standard personnel file. Perhaps more importantly, it can help employees and managers understand and follow HR policies.

#### **Leave Management Scenario**

Employee leave requests often require employees and managers to link multiple calendars. The reviewing manager may have to dig into HR files to determine the context for the request. Is the employee entitled? Does the request comply with company policy?

Overall, the simple tasks associated with leave management can be overly complex, both for employees and for managers. This can waste a lot of time, particularly in large companies with multiple layers of management. And it can adversely affect employee morale and contribute to lower productivity over time.

Duet gives the enterprise an array of leave types to choose from, each reflecting the same definitions that exist in the SAP application. All leave parameters, such as vacation allowances or sick days, can be configured to adhere to company policy.

An employee requests a leave by selecting the desired time in the Outlook calendar. The leave management functionality then triggers an SAP software workflow that automates the

approval process. By default, the workflow routes the request to the employee's corresponding manager, according to the company's organization chart.

The workflow sends an alert to the reviewing manager, along with links to contextual information both on the employee and on relevant company policy, giving the manager all information necessary to make the decision. Once the request is approved, Duet automatically updates any other related calendars and submits the data to the central SAP application for HR.

This scenario reduces administrative overhead and improves the transparency and timeliness of the leave approval process.

#### **Duet Features and Benefits**

Throughout these scenarios, Duet delivers substantial ease-of-use features, including the following:

- **Contextual data integrations** – This Microsoft Office functionality ensures that the user sees information that's relevant to any given query. For a query about vacation time, for instance, the system will also display links to HR policies in the action pane. This gives Duet an anticipatory quality that builds user confidence – and saves time.
- **Report distribution** – Duet preformats and customizes analytics and transactional reports from mySAP ERP data for reading as spreadsheets in Microsoft Excel®. Information workers can personalize the spreadsheet templates and subscribe to new reports right from their desktops.
- **Reliable security for data transfer** – The standard authentication and encryption techniques of SAP software ensure secure data transfer. Users enjoy the simplicity of single sign-on with the full strength of SAP user authentication security. As a result, data transactions leverage the same safety provisions as do all SAP enterprise applications.



Overall, Duet delivers the following benefits:

**Sustained financial benefits** – Financial benefits range from day-to-day increases in employee productivity to improved operating margins through decreased cost of governance. Services firms can benefit from improved cash flow through reduced accounts-receivable cycles, or “days sales outstanding” (DSOs). Also, Duet optimizes resource allocation, maximizes returns on capital investments, and puts in place a services-oriented architecture that will continue to lower total cost of ownership for enterprise applications.

**Real-time productivity gains** – Because processes supported by mySAP ERP are embedded into Microsoft Office applications, the complexity of advanced tasks is reduced and the transparency of simple tasks is increased. In addition, costs associated with training are minimized because Duet runs within the Microsoft Office environment that employees use on a daily basis.

**Increased data accuracy and reduced redundancy** – Duet eliminates the redundant and inaccurate timekeeping and other tasks that have been prevalent in enterprise IT systems. The results: higher data accuracy since data is only entered one time; greater compliance with internal policies and systems; and improved efficiency since professionals and managers don’t have to take the extra steps or the extra time necessary to keep multiple systems up-to-date.

**Greater IT efficiency through service-oriented processes** – Duet brings the benefits of a services-oriented architecture, such as component reusability and faster time to value, directly to the enterprise, without risking the ROI in existing resources.

**Improved support for decision making** – Information workers get up-to-date information and the ability to drill down into information sources in critical business applications so they can access the most recent, consistent views of information within the context of a business task. For instance, when a manager drills down into employee compensation details in Outlook, relevant personnel budget information is simultaneously retrieved from the back-end application and displayed. This enables managers to make better business decisions more efficiently.

**Audit traceability and transparency** – Duet facilitates consistent and proper use of corporate processes, thereby reducing personal, ad hoc workflows and mitigating the risk on noncompliance with corporate workflow and policies.

**Leveraging SAP applications** – As transparent as it may be to users, Duet works beneath the surface to make the most of the power and quality of SAP enterprise software. For instance, Duet leverages a number of components of the SAP NetWeaver open application and integration platform. These include the business intelligence infrastructure and its robust analytics components, as well as the SAP NetWeaver Portal component, which works in conjunction with Duet to give all levels of enterprise users access to SAP enterprise applications.

**A road map to the future** – Because Duet fits within and implements enterprise services architecture, it is designed for full compatibility with the new world of services-based applications that make up the strategic vision of IT managers around the world.

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