



# Produktivitätssteigerung durch M365/Teams Integration mit SAP

# Agenda

- Überblick der Integrationsebenen
- Ebene 1: Integration UI
- Ebene 2: Integration Business Layer
  - Beispiel eines Kundeprojekts:  
Microsoft 365 / Teams Integration mit SAP
- Ebene 3: Integration Backend

# Referenten

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**Eduard Ralph**

Architect Manager

ISD Germany Automotive



**Sebastian Aufleiter**

Solution Architect

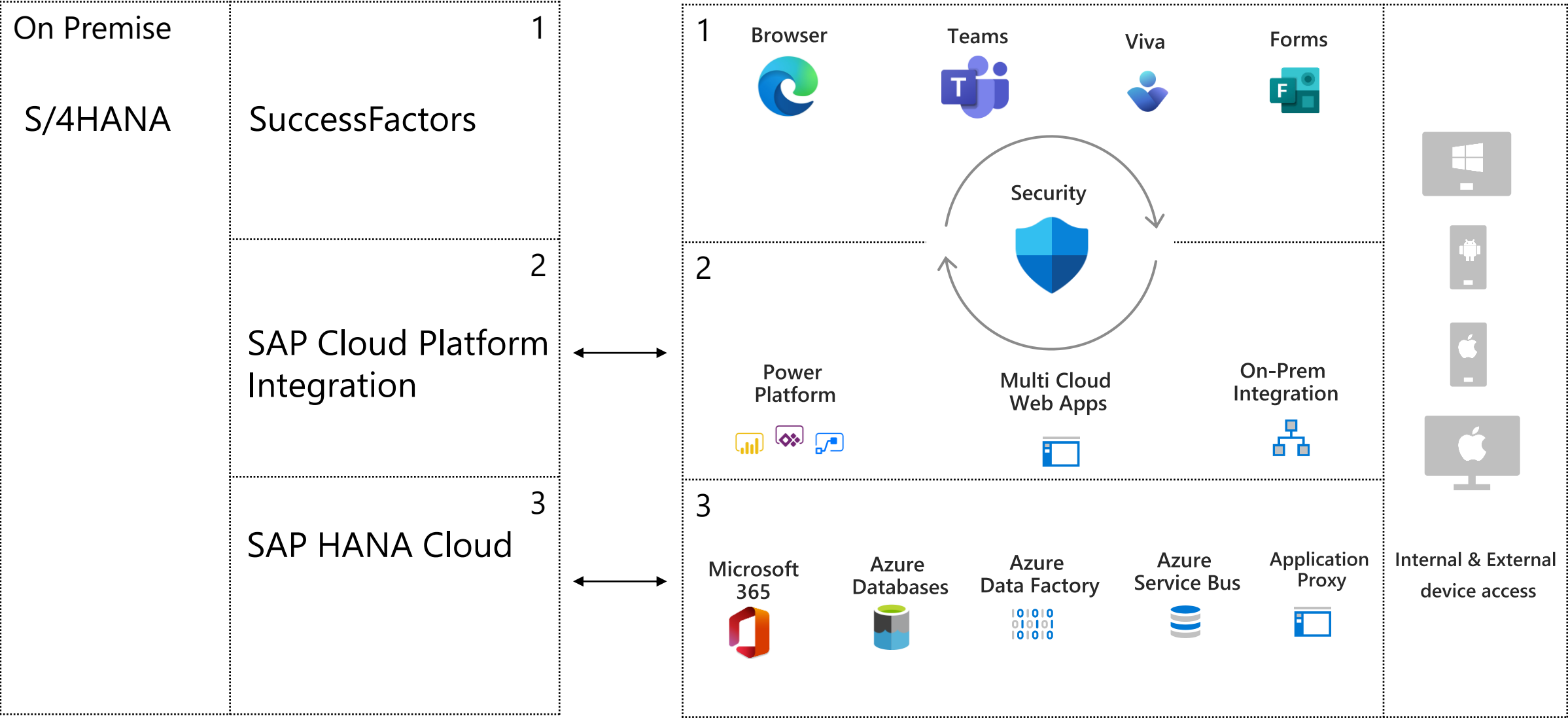
ISD Germany Automotive





# Überblick der Integrationsebenen

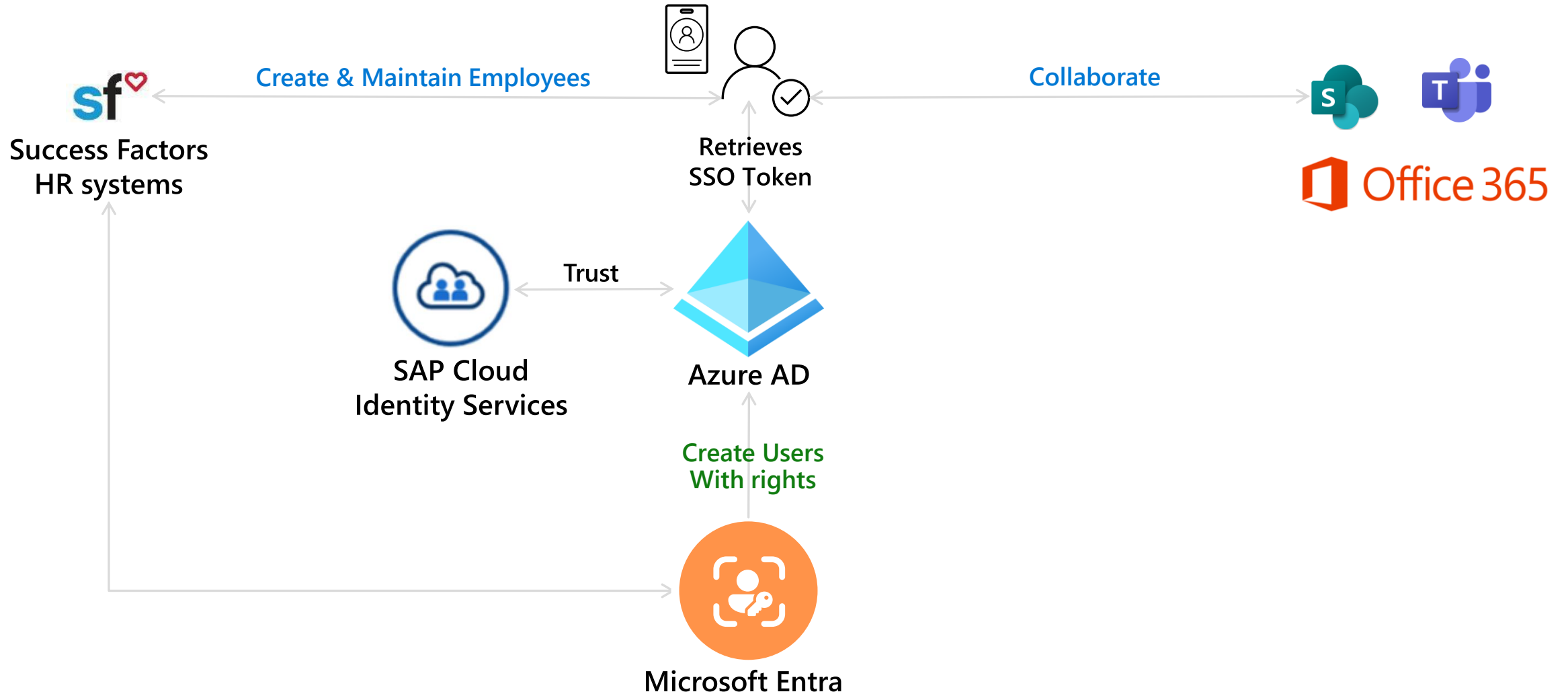
# Drei Ebenen einer Integration





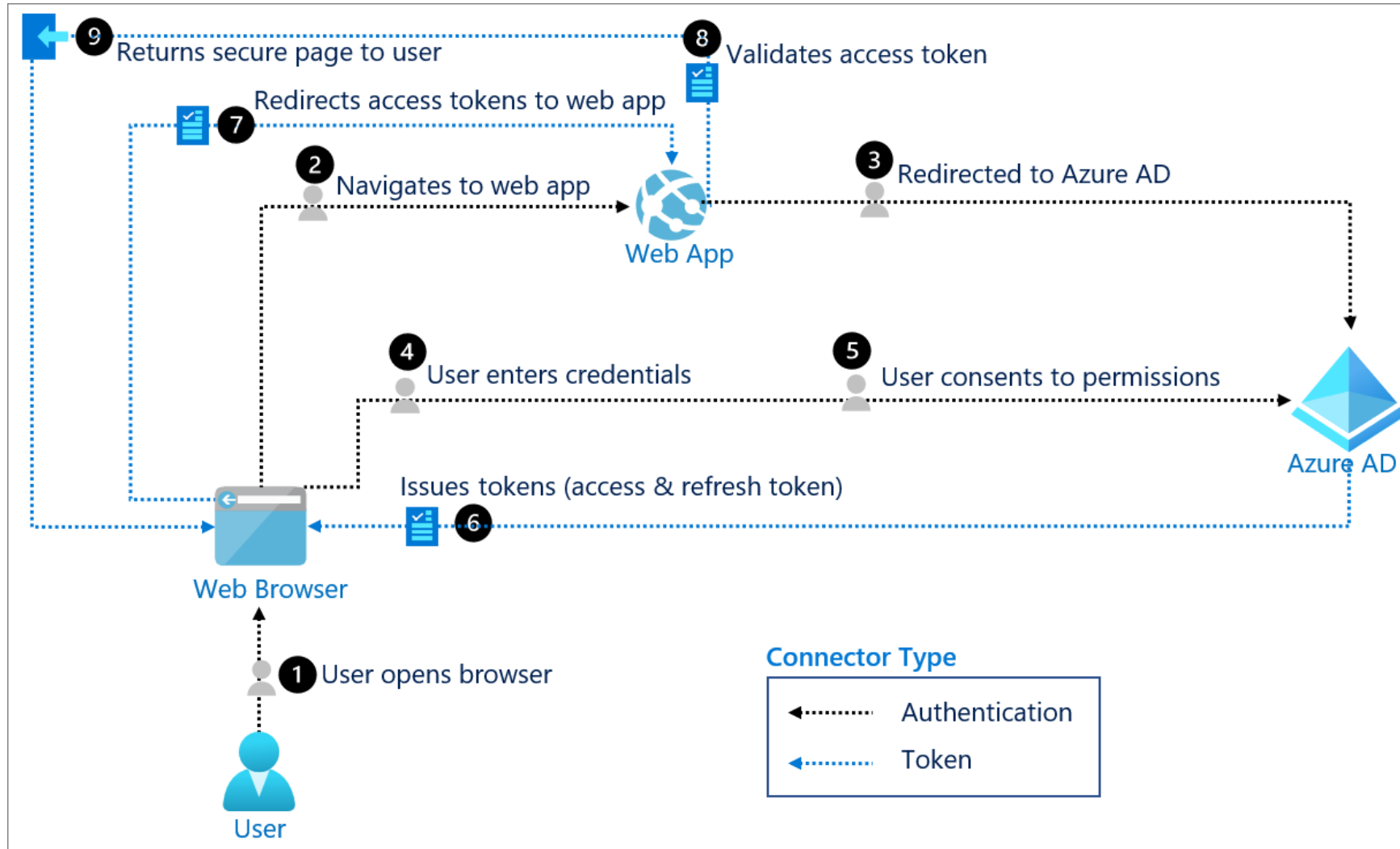
# 1. Integrationsebene: Integration UI

# Integration der Identitäten



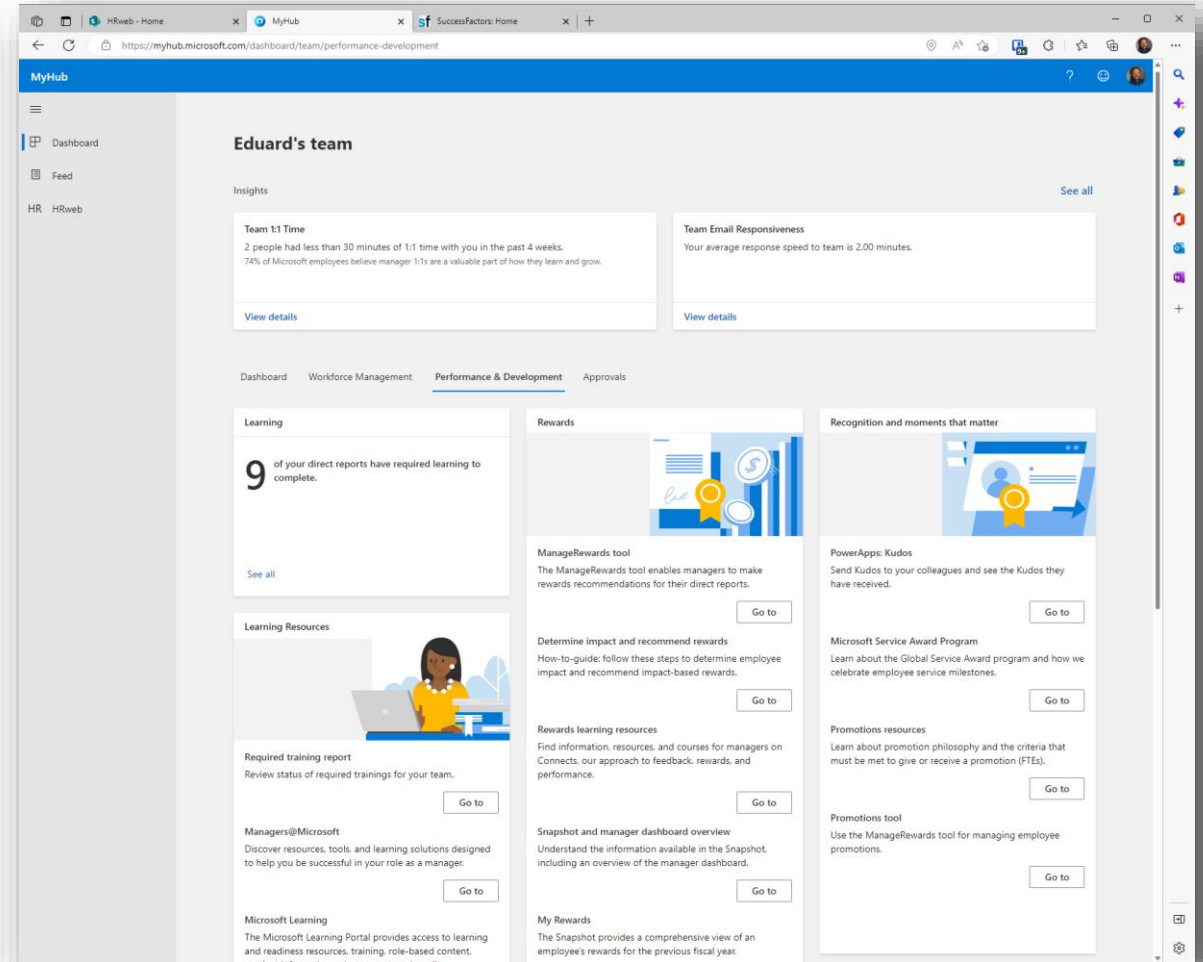
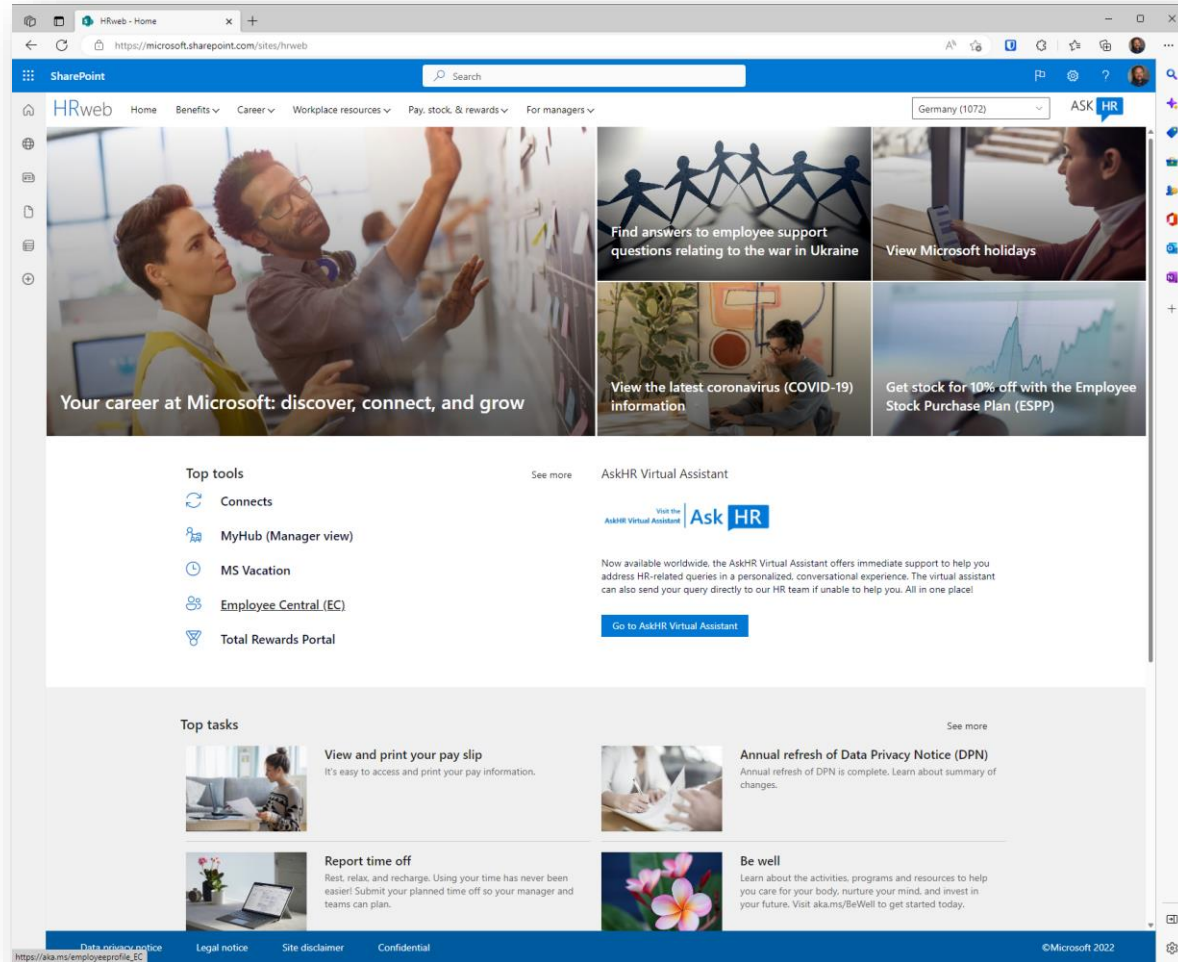


# OpenID Connect authentication with Azure Active Directory





# Ein Beispiel der UI Integration bei Microsoft





## 2. Integrationsebene: Integration Business Layer





# Die Herausforderung



The background image is a long-exposure aerial photograph of a city at night. In the foreground, a large, multi-level highway interchange with several curved ramps is visible, with light trails from cars creating a sense of motion. In the background, a prominent cable-stayed bridge with two tall white pylons spans a body of water. The city skyline with various lit-up buildings is visible in the distance under a dark blue night sky.

Die Zusammenarbeit zwischen Stakeholdern beim Verkauf, der Lieferung und dem Management komplexer industrieller Lösungen verbessern.



# Die IT-Sicht auf die Herausforderung

## Cloud

### SAP C4sales

Lead Mgmt

Opportunity  
Mgmt

### 3<sup>rd</sup> party product

Estimate &  
Quote

Project  
Management

### SAP FSM

Field Service  
Mgmt

## End- punkte



## On premise

### SAP ECC

Logistics

Purchasing

Accounting

Controlling

### SAP PI

Customer Mgmt

### SAP CRM

Service Mgmt

Product Master  
Data

Solution Mgmt

Business Partner

# Die Sicht der Geschäftsbereiche auf die Herausforderung

Fehlen von  
Prozessdefinitionen über alle  
Systeme hinweg

Dokumente sind  
prozessübergreifend nicht  
transparent verfügbar

Zusammenarbeit mit  
Dienstleistern, z.B.  
Rechtsanwälten, Behörden

Fehlender Self-Service oder  
Einblicke in Rechnungen &  
Zahlungspläne



Fehlender Zugang zur  
 Projektdokumentation

Falsche Kategorisierung von  
Dokumenten, Unsicherheit  
in Versionen

Fehlender Zugriff auf  
Partner Dokumente

Keine Einblicke in  
Projektänderungen und  
Notwendigkeit der Anzeige  
mehrerer Systeme



Die Lösung



## ROLE / RESPONSIBILITIES

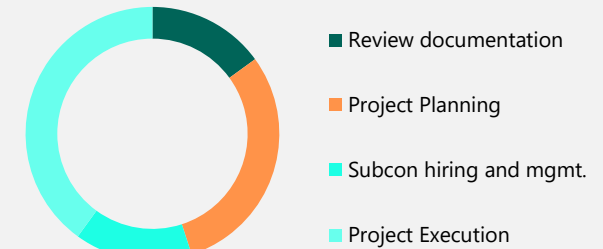
- Review documentation
- Project Planning
- Subcon hiring and management
- Project delivery

## PERSONA

### Project Planning and Delivery



## TYPICAL DAY



## ABOUT

Ensuring an orderly and complete transition from the sales phase to the implementation phase, including all contract and project-related documents. Conduct project and task planning, taking into account agreed deliverables and involvement of subcontractors, partners, and suppliers.



## PAIN POINTS



- Lot of documents are still paper based and need to be digitalized in order to be stored properly
- Document management for each project defined by individual project manager – no consistent file system structure
- Document exchange with external partners mainly via eMail or DVD
- Summary documents are often written to enable third parties to understand the document repository
- No standardized process for how documents are passed on to downstream departments (e.g.: from project delivery to service)
- Correspondence during the realization phase is not handled in a structured manner - different templates, processes, etc.
- It is also not kept track of which communication has taken place with the customer or partner.
- Contractual documents not complete; service/deliverables not complete
- No digital signature available – sometimes a picture of the signature is added to a document
- Archiving is not done; basically documents are just not deleted
- Workflow management self-sufficient; no integration in any of the processes or tools

## GOALS / MOTIVATION



- Establish a future solution to manage the various numbers of documents that are created during a project in an efficient manner.
- Avoid media-breaks and manual re-work to manage document lifecycle

## NEEDS



- Integrated document management systems with E2E visibility of documents throughout the entire value chain
- no need to copy documents across multiple systems or create print-outs

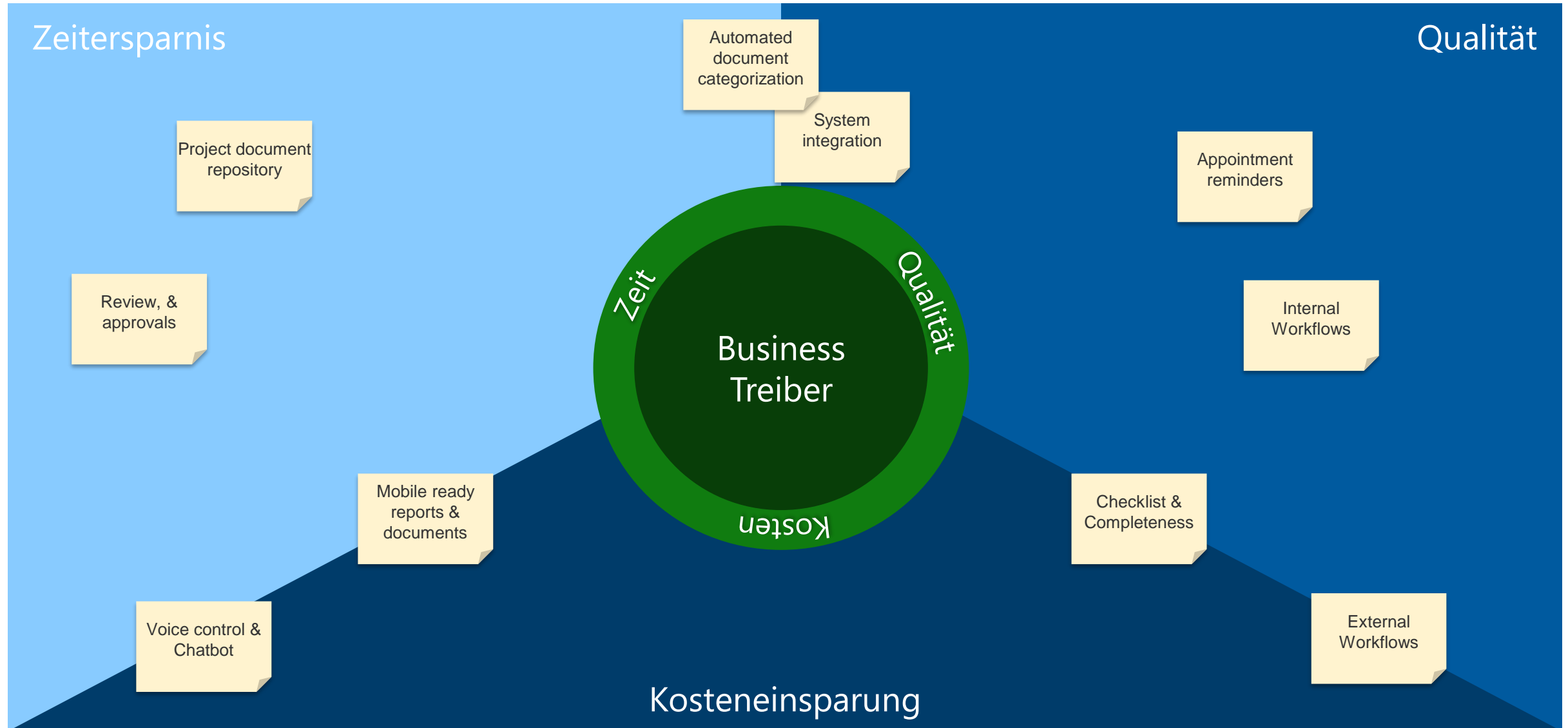
## OPPORTUNITIES



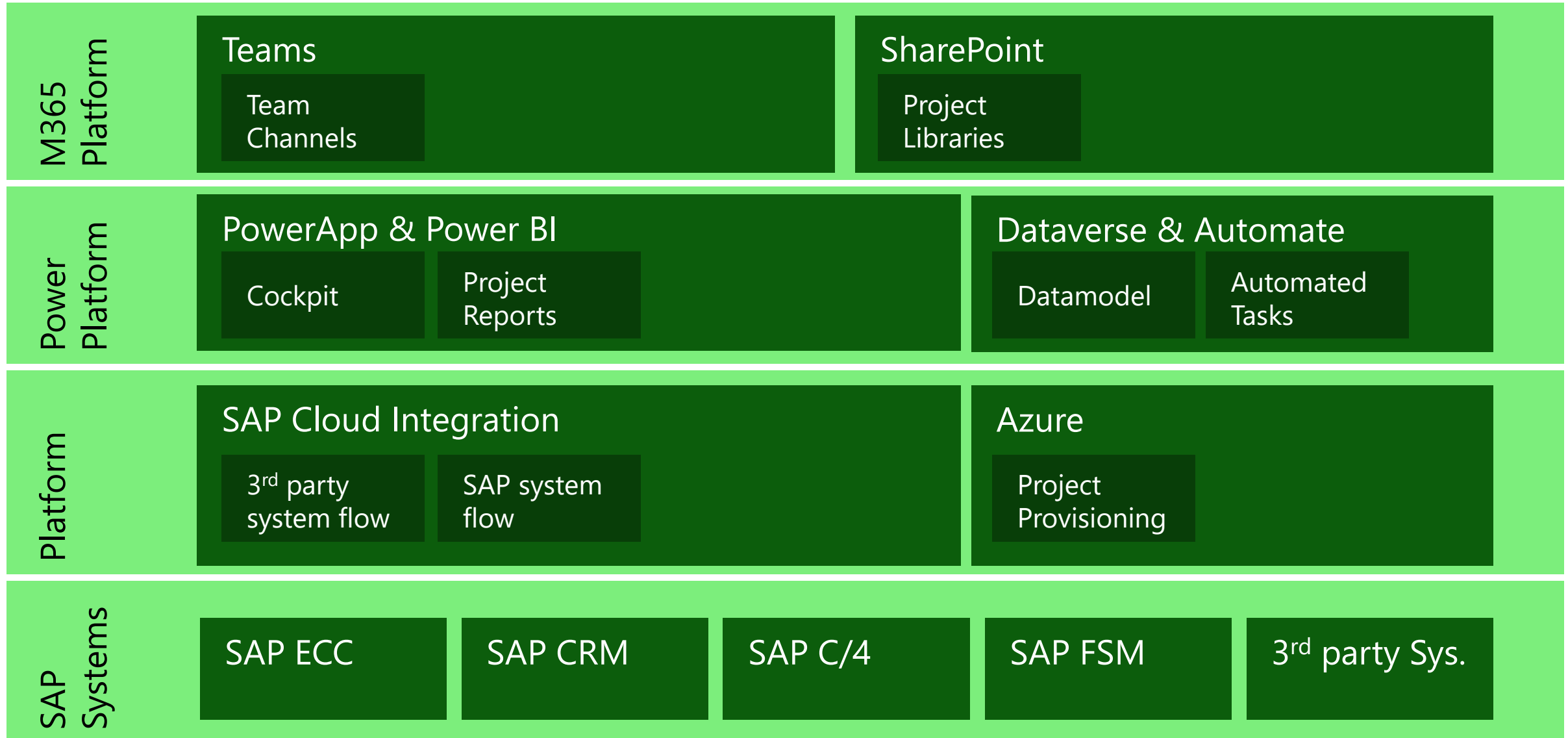
- Leverage AI/ML technology to simplify the registration and categorization of documents
- Simplification of document processing including the control of workflows and the creation of tasks/appointments



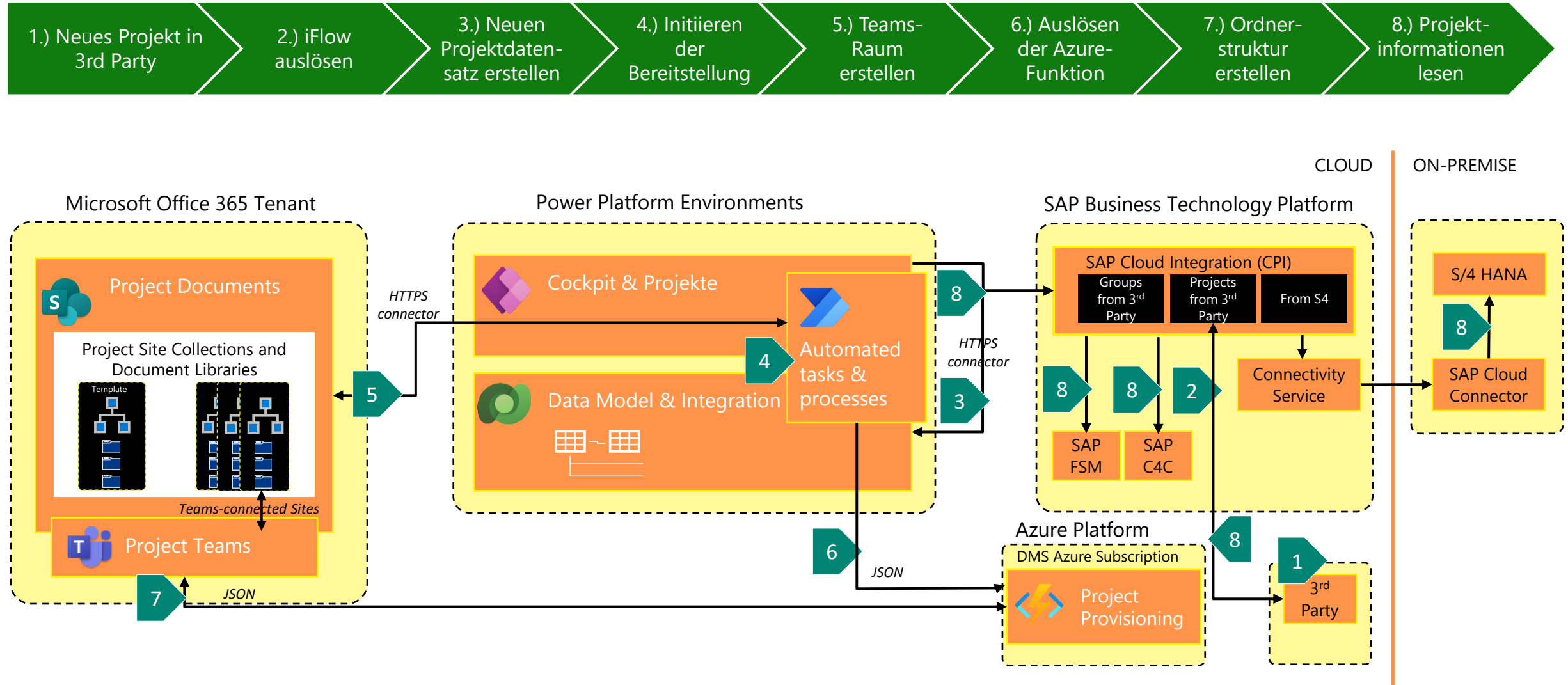
# Brainstorming der Ideen



# Entwicklung der Lösungsarchitektur



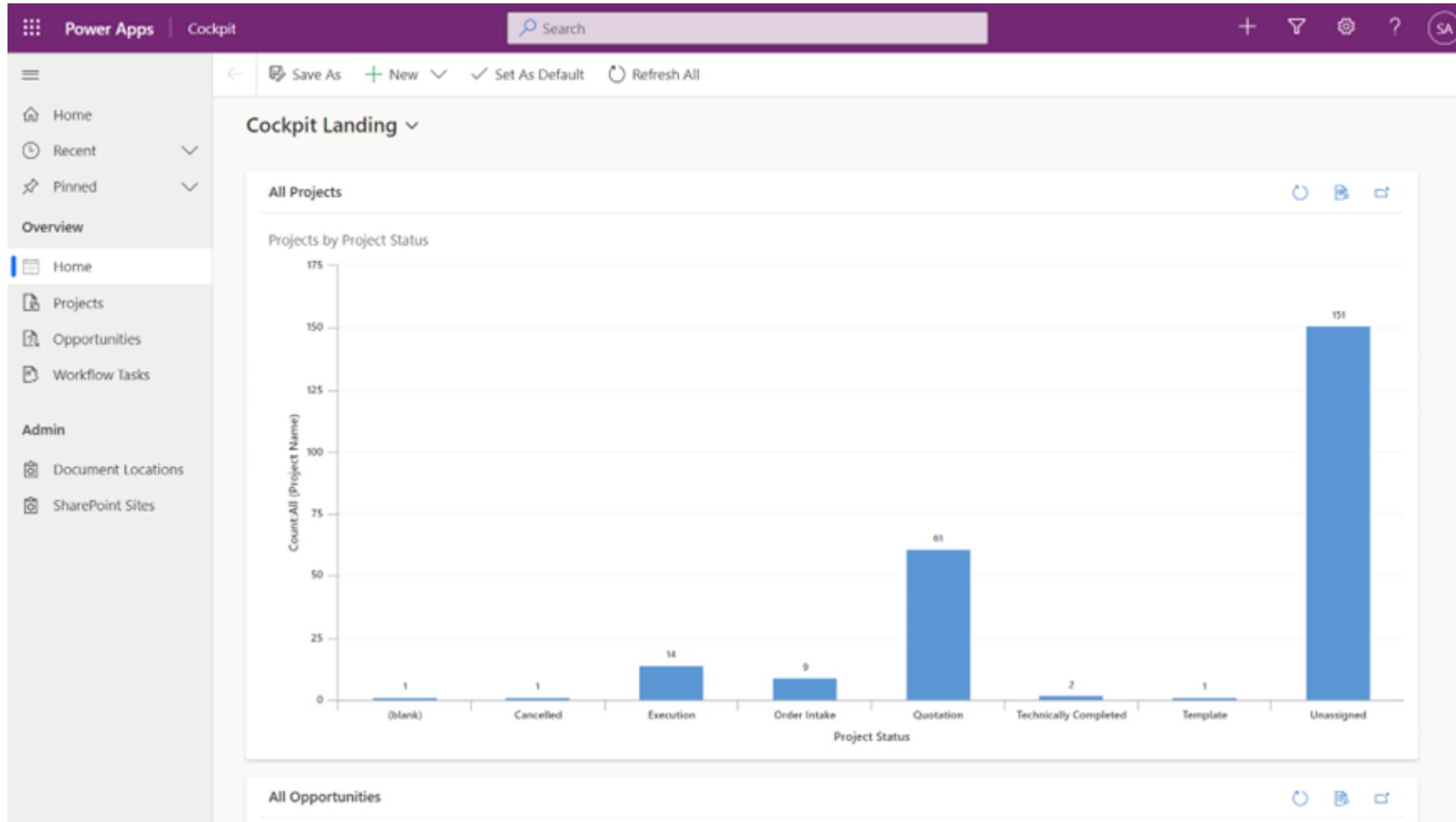
# Darstellung des ersten Hauptanwendungsfalls



# Startseite im Cockpit



Sales & Management





# Details der Projekte aus SAP und SharePoint



Project delivery

Power Apps | Cockpit

Search

Save Save & Close New Deactivate Delete Refresh Check Access Process Email a Link Flow

Test Project with SS - Saved  
Project Item

Project Status Active for 18 days

Unassigned Quotation Order Intake Execution (3 D) Finished

General Opportunity Project Related Tasks Documents Related

Opportunity ID 1,186

Name

Group New building

Processing Type Opportunity

Sales Cycle Phase 7. Closed

Lifecycle Status Won

Probability (%) 0.00

Expected Revenue Amount

Power Apps | Cockpit

Search

Save Save & Close New Deactivate Delete Refresh Check Access Process Email a Link Flow

Test Project with SS - Saved  
Project Item

Project Status Active for 18 days

Unassigned Quotation Order Intake Execution (3 D) Finished

General Opportunity Project Related Tasks Documents Related

Name	Path	Modified	Modified by	Created On SharePoint
test_bp.xlsx	sites/msteams_5924848/P...	3/23/2022 10:07 ...	EXTERNAL	3/23/2022 10:07 AM
Desert.jpg	sites/msteams_5924848/P...	3/23/2022 10:08 ...	EXTERNAL	3/23/2022 10:08 AM

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

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# Opportunities & Projekte aus SAP



Sales, Management  
& Project delivery

Power Apps | Cockpit

Search

← Show Chart + New Delete Refresh Email a Link Flow Run Report Excel Templates

### All Opportunities

Search this view

Opportunity ID	Name	Expected Revenue A...	Lifecycle	Sales Cycl...	Project	Prospect	Group	Project V...
1,354	Ausschreibung	12,500.000000	In Process	4. Quotat...			New buil...	Constr
1,364	Ausschreibung	25,000.000000	In Process	4. Quotat...			New buil...	Constr
1,571	End2End - PoC	1,000.000000	In Process	4. Quotat...	Nachträg...		Extension...	Constr
1,359	Center West	2,500.000000	In Process	4. Quotat...				
1,360	Center West	678.530000	Won	7. Clos				
1,383		1,000.000000	Lost	7. Clos				
1,384		12,016.410000	Won	7. Clos				
1,578		11,801.970000	In Process	4. Quotat...				
3,597		11,801.970000	In Process	3. Rea				
1,385		11,801.970000	Won	7. Clos				
1,386		4,228.470000	Won	7. Clos				
1,387		16,655.570000	Won	7. Clos				
2,014	Erweiterung 100	10,000.000000	In Process	3. Rea				

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Power Apps | Cockpit

Search

← Show Chart + New Delete Refresh Email a Link Flow Run Report Excel Templates

### All Projects

Search this view

Id	Project No	Project Name	Project Status	Clerk Name	Start Date	Opportunity
1,001,348	0200000220	BOQ Copy Option Georg	Unassigned		3/10/2022 1:0...	
1,001,261	0200000155	BoQ Template	Unassigned		2/2/2022 1:00...	
1,001,301	0200000175	IT - Shopping Tour	Unassigned		2/22/2022 1:0...	
1,001,209	0000073435	Calc test	Unassigned		12/1/2021 1:0...	
1,001,096	0200000031	CalcRule-test	Quotation		9/24/2021 2:0...	
1,001,098	0200000032	Calculated Sales Price	Unassigned		10/1/2021 2:0...	
1,001,303	0200000177	Calculation Testing	Unassigned		2/23/2022 1:0...	
1,001,326	0200000199	Cam VOB II	Quotation		3/3/2022 1:00...	
1,001,241	0200000137	CCTEST	Unassigned		1/20/2022 1:0...	
1,001,242	0200000138	cctest2	Unassigned		1/20/2022 1:0...	
1,001,239	0200000135	Change Project CW - All types	Unassigned		1/18/2022 1:0...	
1,001,102	0200000036	Clerk Rights	Quotation		10/1/2021 2:0...	
1,001,104	0200000038	Clerk Rights	Quotation		10/1/2021 2:0...	

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# Aufgaben aus dem 3rd-Party-System



Sales & Project delivery

Power Apps | Cockpit

Search

Show Chart New Delete Refresh Email a Link Flow Run Report Excel Templates

### Active Workflow Tasks

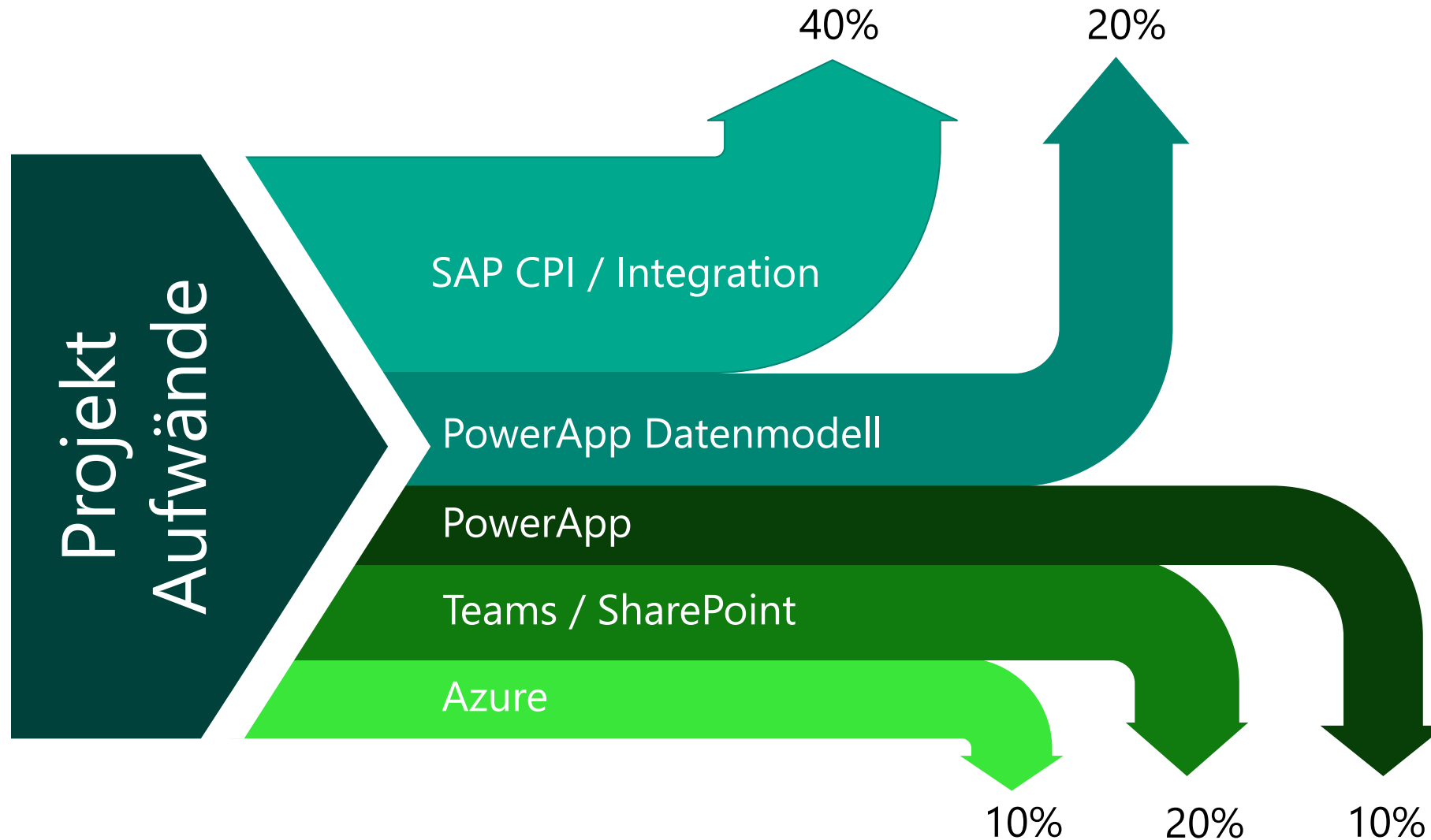
Search this view

	Id	Title	ProjectId	PriorityId	ProjectId ...	Remainin...	Owner	OwnerCo...	OwnerDe...
	1,236,480	Change Calculation needed: Project Nr. [redacted]	1,000,857	2		-624,037	[redacted]	[redacted]	[redacted]
	1,256,626	Change Identified: Project Nr. [redacted]	1,000,585	2		-537,356	[redacted]	[redacted]	[redacted]
	1,256,598	Change Identified: Project Nr. [redacted]	1,000,585	2		-537,357	[redacted]	[redacted]	[redacted]
	1,272,688	[redacted] assignment	1,001,250	2	Test Proje...	-470,086	[redacted]	[redacted]	[redacted]
	1,272,704	[redacted] assignment		2		-470,085	[redacted]	[redacted]	[redacted]
	1,271,964	Create Project from Opportunity		2		-470,536	[redacted]	[redacted]	[redacted]
	1,236,783	Extended User Action	1,001,250	2	Test Proje...	-623,318	[redacted]	[redacted]	[redacted]
	1,236,519	Info		2		-623,795	[redacted]	[redacted]	[redacted]
	1,236,540	Info		2		-623,727	[redacted]	[redacted]	[redacted]
	1,236,443	Please create change [redacted]	1,000,858	2		-624,067	[redacted]	[redacted]	[redacted]

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# Projekt in Zahlen





# Mit der umgesetzten Lösung ...

... wird ein zentraler Einstieg (Cockpit) für alle am Projekt beteiligten Rollen erreicht	 
... wird die Isolation der Datentöpfe aufgebrochen	 
... werden Standard DMS-Funktionalitäten genutzt	
... verbessert sich die Zusammenarbeit im Projekt und mit Partnern	
... bieten sich Möglichkeiten für weitere Automatisierung, wie automatisches Scannen von Dokumenten	Syntex



### 3. Integrationsebene: Integration Backend

# Erweitern der Power Platform mit Azure-Diensten



Cognitive  
Services



Blockchain

Geschäftsabläufe und Lieferketten neu gestalten durch Nutzung von maschinellem Lernen, künstlicher Intelligenz und Blockchain-Funktionen.



IoT Edge



IoT Hub

Anwendungen für das Internet der Dinge erstellen in Kombination mit Telemetrie- und SAP-Daten.



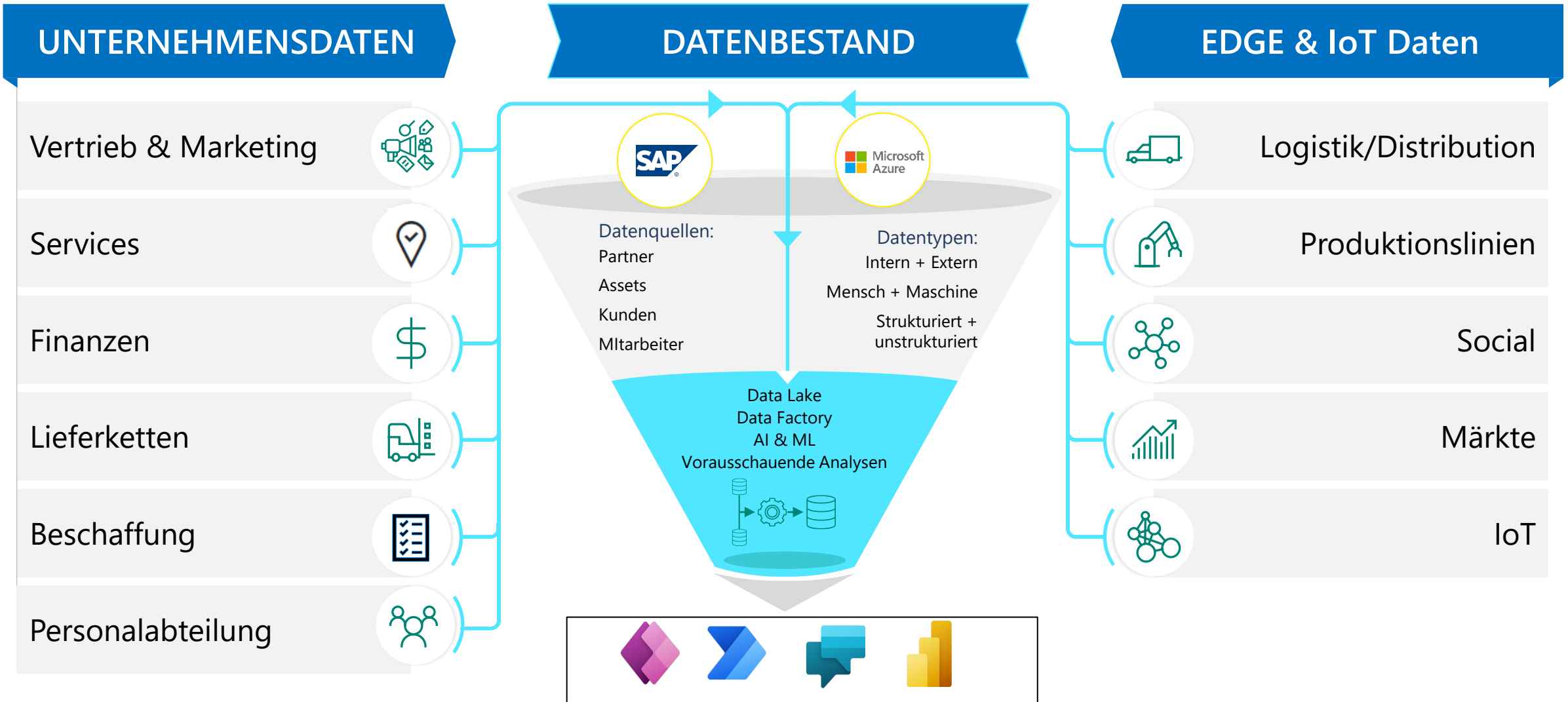
Azure Data  
Factory



Azure Data  
Lake

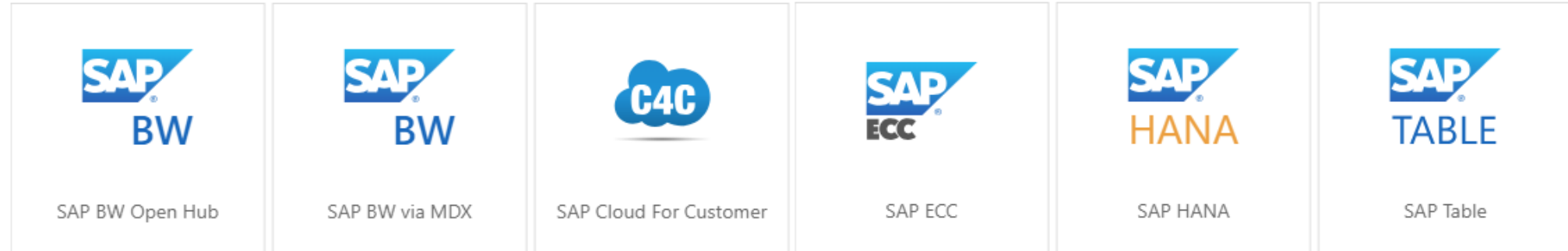
zusammenführen von SAP- und Nicht-SAP-Daten für die Orchestrierung in Azure und die zentralisierte Berichterstellung in Power BI.

# Transformation von Daten





# Zugriff auf alle Daten durch mehr als 80 Konnektoren



Azure (15)		Database & DW (25)		File Storage (6)	NoSQL (3)	Services & Apps (28)		Generic (4)
Blob Storage		Amazon Redshift	Oracle	Amazon S3	Cassandra	Amazon MWS	Oracle Service Cloud	HTTP
Cosmos DB – SQL API		DB2	Phoenix	File System	Couchbase	CDS for Apps	Paypal	OData
Cosmos DB – MongoDB API		Drill	PostgreSQL	FTP	MongoDB	Concur	QuickBooks	ODBC
ADLS Gen1		Google BigQuery	Presto	Google Cloud Storage		Dynamics 365	Salesforce	REST
ADLS Gen2		Greenplum	SAP BW Open Hub	HDFS		Dynamics AX	SF Service Cloud	
Data Explorer		HBase	SAP BW MDX	SFTP		Dynamics CRM	SF Marketing Cloud	
Database for MariaDB		Hive	SAP HANA			Google AdWords	SAP C4C	
Database for MySQL		Impala	SAP Table			HubSpot	SAP ECC	
Database for PostgreSQL		Informix	Spark			Jira	ServiceNow	
File Storage		MariaDB	SQL Server			Magento	Shopify	
SQL Database		Microsoft Access	Sybase			Marketo	Square	
SQL Database MI		MySQL	Teradata			Office 365	Web Table	
SQL Data Warehouse		Netezza	Vertica			Oracle Eloqua	Xero	
Search Index						Oracle Responsys	Zoho	
Table Storage								



Vielen Dank

