



Business Portal for Microsoft Dynamics® GP 2010

Implementation Guide

May 3, 2010

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Introduction

Welcome to the Implementation Guide for Business Portal for Microsoft Dynamics® GP. This guide is designed to help Business Portal IT professionals and application implementers, as well as Microsoft® partners, simplify the experience of implementing Business Portal. It is intended to provide information necessary to analyze, design, develop, deploy, and operate Business Portal. It also provides project management tools to aid in effectively deploying Business Portal.

This guide assumes that you are using Business Portal for Microsoft Dynamics GP 2010.

Check for updated instructions

This information was current as of May 3, 2010. The documentation may be updated as new information becomes available. Check the Microsoft Dynamics GP documentation Web site (<http://go.microsoft.com/fwlink/?LinkId=185513>) for the most current documentation.

This introduction is divided into the following sections:

- [*What's in this manual*](#)
- [*Symbols and conventions*](#)
- [*Additional resources*](#)
- [*Technical support*](#)
- [*Documentation feedback*](#)

What's in this manual



This manual will help you install and set up Business Portal for Microsoft Dynamics GP.

This documentation is divided into the following parts:

- [**Part 1, Analysis**](#), contains information about analyzing Business Portal and determining whether it will fit your business needs.
- [**Part 2, Design**](#), contains information about designing your Business Portal implementation.
- [**Part 3, Development**](#), contains tools and information to use when you're developing your Business Portal implementation.
- [**Part 4, Deployment**](#), contains information about deploying Business Portal.
- [**Part 5, Operation**](#), contains information about the operation of Business Portal.

Symbols and conventions

This manual uses the following symbols to make specific types of information stand out.

Symbol	Description
	The light bulb symbol indicates helpful tips, shortcuts, and suggestions.
	The warning symbol indicates situations you should be especially aware of when completing tasks. Typically, this includes cautions about performing steps in their proper order, or important reminders about how other information in Business Portal or the back office might be affected.

This manual uses the following conventions to refer to sections, navigation, and other information.

Convention	Description
<i>Enter a default address ID</i>	Italic type indicates the name of a section or procedure.
File > Print	The (>) symbol indicates a sequence of actions, such as clicking items on a menu or a toolbar or clicking buttons in a window. This example directs you to go to the File menu and click Print .
Bold	Bold type indicates the names of fields, tabs, menus, commands, and buttons, and text you should type.

Additional resources

In addition to this manual, the following documentation is included with this release of Business Portal.

Manuals

The following PDF manuals are included in the Documentation folder on the Business Portal installation media.

Business Portal Installation Guide The Business Portal Installation Guide (BusinessPortalInstallation.pdf) provides step-by-step instructions for installing Business Portal.

Business Portal Administrator's Guide The Business Portal Administrator's Guide (BusinessPortalAdminGuide.pdf) explains how to set up and configure Business Portal.

Business Portal User's Guide The Business Portal User's Guide (BusinessPortalUsersGuide.pdf) helps users complete day-to-day tasks in Business Portal.

Application manuals User and Administrator manuals for each application installed in Business Portal are available in the Documentation folder.

Help

Help is available by clicking the Help icon button, located in the upper-right corner of any page. The help that is displayed depends on whether you open help from a

Business Portal page, a Microsoft Windows® SharePoint® Services page, or a Microsoft Office SharePoint Server 2007 page.

Business Portal help When you click the Help icon button on a Business Portal page, the relevant help topic for that page is displayed. You can use the search field on the help page to search for information. You also can click the Home icon button to browse the contents of the help.

SharePoint help Many of the features included in Business Portal—such as document libraries, lists, announcements, links, and alerts—are provided by Windows SharePoint Services. General information about these features is provided in the Administering Business Portal help. For more detailed information, refer to the Windows SharePoint Services help, which can be accessed by clicking the Help icon button in the upper-right corner of any Windows SharePoint Services page. If you're using Office SharePoint Server 2007, additional help related to SharePoint Server features also will be available.

Technical support

You can contact Microsoft Dynamics technical support online or by telephone. Go to www.microsoft.com/dynamics and click the CustomerSource link or call 888-477-7877 (in the U.S. and Canada) or 701-281-0555.

Documentation feedback

We welcome comments regarding the usefulness of the Microsoft Dynamics GP documentation. If you have specific suggestions or find any errors in this manual, send your comments by e-mail to the following address: bizdoc@microsoft.com.

Note: By offering any suggestions to Microsoft, you give Microsoft full permission to use them freely.

Part 1: Analysis

This part of the guide contains information about analyzing Business Portal and determining whether it will fit your business needs. The information is divided into the following sections:

- [Chapter 1, "Getting started,"](#) contains an overview of Business Portal and provides resources to help you learn more about it.
- [Chapter 2, "System considerations,"](#) contains information on what hardware, software, and technical skills you'll need to implement Business Portal, plus globalization considerations.

Chapter 1: Getting started

The following topics introduce you to Business Portal and direct you to resources to help you learn more about it.

- [What is a portal?](#)
- [Getting started with Business Portal](#)
- [Implementation phases](#)
- [Portal scenarios](#)
- [Available third-party products](#)

What is a portal?

A portal is a web application that provides access to data and services. A business or “enterprise” portal, such as Business Portal, also displays business-related content in a secured and controlled environment via a web browser. This means that for a fraction of the price of implementing other technologies, you can extend the benefits of your entire Microsoft Dynamics GP system to your employees and your customers anywhere.

Intranet portals provide and control access to the information employees need to do their jobs. Employees can use an intranet portal to find and collect relevant information, and collaborate with co-workers. Business Portal with Human Resources Management Self Service Suite combines those opportunities with application functionality that employees can use to interact with the Microsoft Dynamics GP back office.

Partner portals, or extranets, provide focused and targeted information to customers. Order Management extends Business Portal to your customers, allowing them to place orders and view order information through the same browser-based interface that employees and salespeople are using.

Getting started with Business Portal

The following table contains links to documents you can use to learn more about Business Portal.

Document	Description	File format
What's New	Includes information about the new features and enhancements included in Business Portal for Microsoft Dynamics GP 2010.	.pdf or .xpf (on the Web)

Implementation phases

The implementation steps listed here provide general guidelines and principles for planning, installing, and deploying Business Portal. They should be used as a reference and starting point to integrate Business Portal into your Microsoft Dynamics GP system. An implementation strategy can be as complex and detailed as your organization requires.

Analysis

During the analysis stage, you should look at the hardware and software requirements for Business Portal. Then assess your organization’s infrastructure

and whether or not it meets Business Portal and Windows® SharePoint® Services requirements.

Look at the current capacity of your network infrastructure and whether you should consider updating it to accommodate increased network traffic as a result of portal implementation.

Design

Once you've decided that Business Portal is a good fit for your organization, you'll need to design your solution. The planning process is critical to the success of your Business Portal implementation. To deploy Business Portal successfully, it is important to understand your organization's business needs, the types of information you need to put online and manage, and the Business Portal features that you want to use.

Consider your company's security needs and how you plan to go about securing the network, whether you are implementing an intranet or an extranet scenario.

Development

When your preliminary planning is complete, you can install the Business Portal software. The installation phase includes setting up your network infrastructure and prerequisite software.

Deployment

After you've installed Business Portal, you can configure your Business Portal settings. Much of the preliminary work you did during the design phase will be of use here. You'll set up your users and portal applications. You'll also build new Business Portal pages, and link to other intranet web sites or web applications.

Next comes user training, followed by deployment to a production environment. We suggest you first implement Business Portal in a test environment and ensure that the portal is working as expected. Then train your organization's employees. You'll need to set employees' expectations that Business Portal is a tool that will help them complete their work more efficiently.

Operation

As your business changes, post-deployment maintenance will ensure that Business Portal continually meets the needs of your organization. Ongoing maintenance involves monitoring server status and performance, making backups, and planning for recovery and troubleshooting.

Portal scenarios

Whether you're looking to provide key business metrics to the organization's executives, or to provide product catalogs and ordering capabilities to your customers, Business Portal can meet your needs.

The following portal solution scenarios provide a sampling of typical implementations and how Business Portal can meet the needs of all these implementation types.

Team/project collaboration portal

Help team members connect by providing a web workspace where they can communicate, collaborate, and manage project information and key documents.

Such a portal is typically implemented as an intranet, behind a company's firewall. The Windows SharePoint Services foundation of Business Portal provides this capability.

Corporate communications portal

Deliver important organizational information to employees. Communication portals are often deployed as intranets. Business Portal roles allow you to determine what information employees will receive based on their job functions. Because corporate portals typically contain large amounts of content, Business Portal can improve employee efficiency by allowing them to customize their interface and highlight content most relevant to them.

Customer/commerce portal

Transform your business by establishing a business-to-business commerce site. With extranet support built into Business Portal—and with the features of Order Management—your customers can access Business Portal and browse through your inventory, enter orders, track order status, and view their account information. You can establish an online presence that is available to your customers 24 hours a day, seven days a week.

Human Resources portal

Provide Human Resources content and applications to those who need it—those assigned to the Employee, Manager, Payroll Administrator, and Human Resources Administrator roles.

By using the Business Portal and SharePoint features available to you, you can create a Human Resources portal where:

- Employees will go to look up 401(k) information, enter timecards, and change their personal information.
- Managers will go to approve timecards, post job openings, and review performance management information.
- Human Resources team members will go to find employee data, communicate benefits changes and company policies, and discuss team issues.

Sales portal

Provide sales-related content and applications to those who need it—those assigned to the Salesperson and Sales Manager roles.

By using the Business Portal and SharePoint features available to you, you can create a sales portal where:

- Salespeople will go to find product brochures, specifications, service plan information, and price lists.
- Salespeople will go to review a customer's current balance and sales history information.
- Sales managers will go to view up-to-the-minute numbers on sales performance.

Available third-party products

There are many independent software vendors (ISVs) that have solutions which enhance Business Portal by providing an industry-specific solution or need. For more information, see the [Microsoft Dynamics Solution Finder web page](#). If you don't find the solution you are looking for, check again soon; we are adding new solutions frequently.

Questions about ISV solutions can be sent via e-mail to the Microsoft ISV Team at usisv@microsoft.com.

Chapter 2: System considerations

The following sections are included:

- [Hardware and software requirements](#)
- [Technical skills](#)
- [Global considerations](#)

Hardware and software requirements

An inventory of your current hardware and software will help determine what you already have that can be used with your Business Portal implementation, and what must be purchased before implementation can proceed.

To help determine how many servers you will need, and the type of Business Portal configuration that best suits your organization, refer to [Chapter 5, “Plan the deployment.”](#)

To review the hardware and software requirements for each server in the Business Portal configuration, see [System Requirements for Microsoft Dynamics GP 2010 Web Applications](#) (web page).

If you need to purchase additional hardware or software, verify availability and delivery dates. These dates, as well as the time required for installation, are external dependencies that have an impact on the schedule.

Technical skills

Someone in your organization or IT department should be familiar with the following technologies before implementing Business Portal.

Technology	Description
Windows SharePoint Services and Office SharePoint Server	You can install Business Portal on either Windows SharePoint Services or on Office SharePoint Server, which is built on Windows SharePoint Services. For more information about Windows SharePoint Services and Office SharePoint Server, see the following web sites: <ul style="list-style-type: none">• Microsoft Office SharePoint Server 2007 product overview• Windows SharePoint Services Overview
Internet Information Services (IIS)	IIS is the component of Microsoft Windows Server® 2003 and Microsoft Windows Server 2008 that enables Business Portal to share information across an intranet or the Internet. Setting up IIS is a task you'll want to be familiar with before you install Business Portal.
Microsoft Windows Server 2003 or Microsoft Windows Server 2008	This is the platform technology for Business Portal.
Microsoft Windows Server 2003 with Windows Terminal Services, or Microsoft Windows Server 2008 with Remote Desktop Services	Business Portal uses Windows Terminal Services or Remote Desktop Services to enable thin-client access to Microsoft Dynamics GP.
Microsoft SQL Server®	SQL Server is the database used by Business Portal and Microsoft Dynamics GP.

Technology	Description
TCP/IP, firewalls, security, domains, and Active Directory®	Accessing Business Portal via the Internet requires an understanding of domains, firewalls and Active Directory. It is also important to have an understanding of role-based security.

Global considerations

Business Portal is available in U.S. English only. However, international date, time, number, phone and fax number formats are supported for nine predefined locales:

- English (Australia)
- English (Canada)
- English (Hong Kong SAR)
- English (Middle East)
- English (New Zealand)
- English (Singapore)
- English (South Africa)
- English (United Kingdom & Ireland)
- English (United States)

For example, an administrative user in South Africa will select the English (South Africa) region on the Business Portal Regional Settings page. Assuming that the date is February 21, 2017 and the time is 11:20 AM, Business Portal web parts and pages will show:

Short Date: 2017/02/21

Long Date: 21 February 2017

Time: 11:20:13 AM

Number: 123,456,789.00

The same regional settings apply to all users of Business Portal; individual users can't have unique regional settings.

Part 2: Design

This part of the guide contains information about designing your Business Portal implementation. The information is divided into the following sections:

- [Chapter 3, “Identify the project scope.”](#) contains information on establishing goals and approaches for your Business Portal implementation.
- [Chapter 4, “Plan the project.”](#) analyzes issues you should consider as you set up the implementation project and team.
- [Chapter 5, “Plan the deployment.”](#) provides resources to help you determine what type of Business Portal configuration best suits your needs.

Chapter 3: Identify the project scope

You should devise and maintain a workable plan to accomplish your Business Portal implementation. You may have a vision of a portal integrating your employees, customers and trading partners, allowing them to collaborate and improve efficiency throughout the business ecosystem.

While this is an achievable goal, you should break down your project into practical implementation phases that will allow you to achieve your overall objective and at the same time, allow your organization to digest the changes to its communication structure.

This part of the documentation contains the following planning-related topics:

- [*Establish an iterative approach*](#)
- [*Focus on quick success*](#)

Establish an iterative approach

Project planners may have a tendency to want to address too many issues and deliver too much functionality in the initial deployment of a portal. This effort sometimes fails to acknowledge other factors, such as the need for training users, adjusting to new techniques for information management, and the crucial need for fine-tuning the technical infrastructure.

When in doubt, make the initial deployment to your organization smaller in scope. If the initial plan contains too many goals, split it into multiple iterations and then prioritize which objects to attempt first. It's better to plan for simpler, more conservative goals early in the project. An initial positive result will help build morale and employee buy-in for the portal. If the initial deployment is mediocre in quality, the project may see mixed results, despite later efforts to improve the offering.

Focus on quick success

It's not necessary to deploy every Business Portal feature at once, nor is it necessary to locate every document you want to put on the Web before you start. Select the single most important issue facing your employees and focus on delivering that. If you attempt to offer every Business Portal feature in the first deployment, you may weaken your employees' ability to absorb the new technology.

Many organizations first implement the portal to address the needs of a specific department, before expanding the portal software to the business as a whole. Departments whose issues are commonly addressed in an initial deployment are corporate management, sales and marketing, or human resources.

For example, you could focus on your sales department. Your initial goals could include that all salespeople have access to the information they need to close sales: sales tools, product information, and competitive reviews. You could also set a goal to implement portal functionality that rolls up sales results for viewing by territory and sales managers.

Chapter 4: Plan the project

Gearing up for a successful implementation of Business Portal requires careful planning and a close look at your overall business strategy and communication goals. The business benefits of deploying Business Portal can be significant, if you have a good implementation plan.

A good implementation plan represents a road map that clearly identifies where you are going, how long it will take to get there and what routes you might take. The plan should provide a foundation for action among the individuals and groups charged with the implementation project.

This section provides information for a Business Portal implementation through the planning phase. It addresses one of the most fundamental requirements for project success—that the project team have a common vision of what it wants to accomplish and a roadmap for how to get there.

The information is divided into the following sections:

- [*Secure a project sponsor*](#)
- [*Create a project charter*](#)
- [*Identify business needs and goals*](#)
- [*Create a schedule*](#)
- [*Identify project team and roles*](#)
- [*Consider content*](#)
- [*Plan for security*](#)
- [*Develop a plan for training users*](#)

Secure a project sponsor

In small organizations, the project sponsor may be the same as the business owner or manager. In larger organizations, this person provides the link between the project manager and upper management.

This person must understand the details of the installation and configuration, understand the schedule, and work with outside vendors, if necessary. It is essential that the project sponsor support and evangelize the portal vision to upper management and employees alike.

Create a project charter

It may also be beneficial to create a project charter to provide a summary level overview of the project. It allows all parties to document the agreed upon scope and objectives, approach, and deliverables for the project. A project charter can also include information about: how the team plans to communicate with one another, feature control mechanisms, and team member responsibilities.

The project charter should not change throughout the project implementation. It is created at the beginning of the project, approved by the key project team members, and is available for reference.

Identify business needs and goals

When identifying your business needs and goals, consider the difference between information and knowledge. Think of information as anything that can be stored

electronically, such as data in databases or Microsoft Word documents. Think of knowledge, on the other hand, as the ability to take that information and use it to act effectively.

Your Business Portal implementation should serve your users' informational and knowledge needs. But first you have to identify what those needs are.

Identify knowledge needs

Consider the following questions related to knowledge needs:

- Do you have good visibility into business drivers and developments?
- Would your executives be able to respond to business changes more quickly if they could keep an eye on key business indicators?
- Have you ever had a situation where an “early warning system” of important business indicators could have kept you from making a costly mistake?
- Is business performance in sales, finances, profitability, customer satisfaction, and other important areas satisfactory, or would you like the company to do better?
- Would you want to have a higher level of control over the direction of the business?

Identify informational needs

Consider the following questions related to informational needs:

- Do you have a centralized system for storing and sharing electronic documents?
- Are you able to provide employees with information to help them perform their daily tasks better?
- Do sales people have access to the most current product information, including price breaks and discounts?
- Are your accounting, Human Resources, and IT departments constantly fielding one-off requests for information?
- Do people in your organization ever waste time tracking down paper forms that get lost in the workflow?
- Can managers review training, compensation, and performance history with ease?
- Can employees review and update contact, emergency, benefits, and other data by themselves?
- Where do you post job openings and make them available to internal candidates?

Create a schedule

A schedule should list the steps involved in implementing and deploying Business Portal, the time requirements for each step, and who is responsible to make sure that the tasks are completed. It may also identify any risks and dependencies.

The [Business Portal Implementation Checklist](#) (.doc) file is a template that can be tailored to your specific implementation project. You can download this file from the same location where you downloaded this guide.

Identify project team and roles

Assembling a team with appropriate skills is critical to the success of any project, especially when designing a Business Portal deployment that will be used by the entire organization.

The following table describes the team roles and skills that may be required to design and build this system.

Role	Responsibilities	Skills required
Project manager	Create schedule and budget; approve technology choices; create communication plans; report status to project sponsors; manage risk	SharePoint and Business Portal concepts; back office database knowledge
Project sponsors, decision-makers	Provide project guidance and scope; make executive decisions regarding timelines, budget, and features	General intranet and SharePoint concepts
Employees (portal users)	Provide planning feedback; review portal, team, and site design	General intranet and SharePoint concepts
Developer	Develop web parts and customizations; provide technology subject matter expertise	Knowledge of SharePoint; C# or Microsoft Visual Studio® .NET programming skills; ASP.NET
Operations staff, IT implementer	Install and configure application, database, operating system, and monitoring software; manage software and service upgrades; manage backup and restore processes for lost data and disaster recovery; configure additional servers, if necessary	Knowledge of SharePoint; hardware and network management skills, including security

Consider content

Business Portal result viewer web parts and Office SharePoint Server business data web parts are used to display data that originates in Microsoft Dynamics GP. In addition to this data, you may want to display other content that is used by your organization, but that is not stored in the accounting system. For example, you may want to create a web part that displays your company's employee handbook and related Human Resources documents.

To display these other types of content, use SharePoint web parts. For example, you can create document libraries, picture libraries, and announcements lists. The content in libraries and lists can be uploaded for viewing only, or you can allow users to upload documents, check out documents, make modifications and check documents back in.

For more information about SharePoint web parts, see the Windows SharePoint Services Technical Library or the Office SharePoint Server 2007 Technical Library on Microsoft TechNet (technet.microsoft.com).

Plan for security

Business Portal is a role-based system. Each site, page, and web part is designed for a particular role, such as Salesperson, Payroll Administrator, or Manager. Roles will help you determine what content to add to Business Portal and where to add new pages in the site structure.

To help plan security for your Business Portal implementation, review the following guidelines about roles.

Understand each role's unique needs and characteristics. Interview people in various roles to learn what information and content they'd like to see in Business Portal. This will help you determine what pages and web parts you should create.

Use existing roles and groups, if possible. When you create a new page, you'll need to specify which SharePoint groups can access the page. You'll also need to assign users to MBF roles or web services roles for data access. Business Portal has many default roles and groups. If it's appropriate, assign the page to existing, default roles and groups.

You can create new roles and groups if you need to. However, if you add too many roles or groups, it may be difficult to keep track of and manage them.

For more information about the default roles available in Business Portal, see the [Business Portal Administrator's Guide](#) (.pdf or .xpf on the Web).

Use existing center sites, if possible. Business Portal is divided into multiple functional area sites called *center sites*. Each center site is designed for a particular role or roles. For example, the Sales center site is for users assigned to the Salesperson and Sales Manager roles.

You can create new center sites if you need to, but we recommend adding pages to existing center sites whenever possible. For example, if you created a page for salespeople, add it to the default Sales center site.

Develop a plan for training users

One of the keys to a successful implementation is to provide training and support for all users to ensure that everyone can use the system properly. All users will need training on the general use of Business Portal.

Administrators and managers should be trained to manage the system, and users should be trained in common usage. One effective way to provide training is to schedule hands-on training immediately before organization-wide deployment, so users will be able to put what they have learned into practice as soon as possible.

Chapter 5: Plan the deployment

Use the resources in this part of the documentation to determine the Business Portal configuration that best suits your needs. The following topics are included:

- [Capacity planning](#)
- [Single server configuration](#)
- [Separate server configuration](#)
- [Terminal Services or Remote Desktop Services configuration](#)
- [Multiple web servers configuration](#)
- [Multiple server farms configuration](#)
- [Extranet configurations](#)

Capacity planning

When selecting the Business Portal configuration that is best for your business, consider the current and future capacity that is required. Capacity planning is the process of matching usage on a web site to the minimum server hardware required to support the load.

It is often difficult to establish clear, detailed performance and scalability requirements for portal site deployments, since it can be hard to predict the level or type of usage. In addition, the level of use frequently grows and changes over time. Nevertheless, you can often use throughput measured as pages per second as a guideline for measuring performance.

For any successful Business Portal deployment, consider:

- Where the users are located
- What type of bandwidth they have between them
- How much of that bandwidth is available for collaboration
- What are the busy hours of the day
- How many users will be hitting the site
- How many users will this solution serve at peak
- How much throughput is needed from the system (pages per second)

For detailed capacity planning information for Windows SharePoint Services, see the “Plan for performance and capacity” topic in the Windows SharePoint Services Technical Library on Microsoft TechNet (technet.microsoft.com).

For detailed capacity planning information for Office SharePoint Server, see the “Plan for performance and capacity” topic in the Office SharePoint Server Technical Library on Microsoft TechNet.

Single server configuration

In a single server configuration, one computer functions as both the SQL database server and the web server. It stores your Microsoft Dynamics GP information, and hosts your Business Portal web sites.

You can use a single server configuration for demonstration or development, or for a production environment. The requirements differ depending on the intended use.



We don't recommend using this configuration in an extranet environment. For better security, your Microsoft Dynamics GP databases should be on a separate server, inside the firewall.

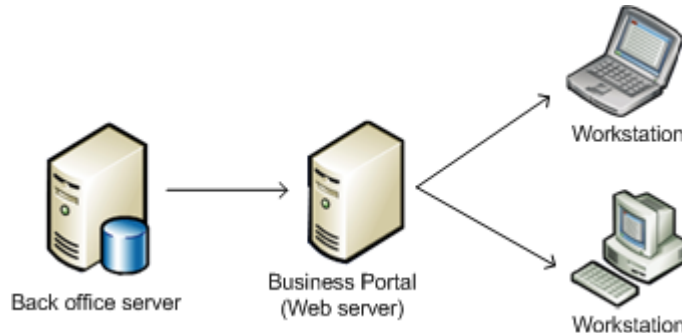
For more information about this configuration, use the following resources.

Document	Description	File format
System Requirements for Microsoft Dynamics GP 2010 Web Applications	Describes system requirements for Business Portal servers in a production environment.	Web page
Business Portal Installation Guide	Contains instructions for setting up a single server for demonstration or development purposes. The configuration described here is not recommended or supported for use in a production environment.	.pdf or .xpf (on the Web)

Separate server configuration

In a separate server configuration, the Microsoft Dynamics GP SQL database and Business Portal are installed on separate servers: your existing Microsoft Dynamics GP server and a web server. You also can add a Terminal Services or Remote Desktop Services server or additional web servers to the configuration.

A configuration with separate servers is shown in the following illustration.



For more information about this configuration, use the following resources.

Document	Description	File format
System Requirements for Microsoft Dynamics GP 2010 Web Applications	Describes system requirements for Business Portal servers in a production environment.	Web page
Business Portal Installation Guide	Contains instructions for installing Business Portal in a separate server configuration.	.pdf or .xpf (on the Web)

Terminal Services or Remote Desktop Services configuration

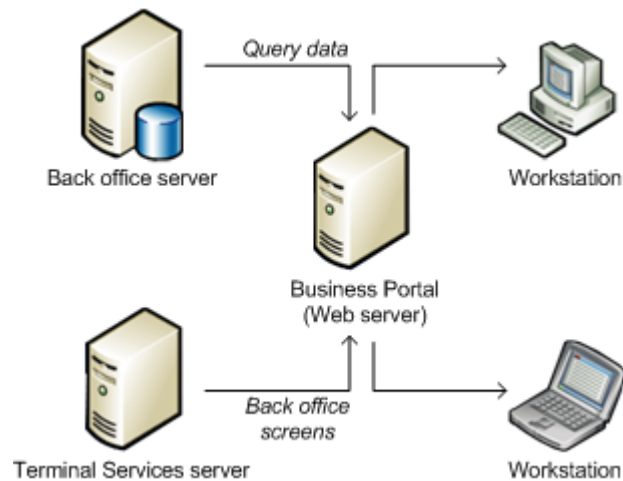
Some links in Business Portal are for tasks performed in Microsoft Dynamics GP. Business Portal can use Terminal Services or Remote Desktop Services, which are components of the Windows operating system, to give users access to Microsoft Dynamics GP over the Web. This is commonly called “thin client” access.

If a user is set up to use thin client access and clicks a task link that opens a back office window, Business Portal connects to the Terminal Services or Remote Desktop Services server, and displays the Microsoft Dynamics GP user interface. All operating system functions—as well as the actual Microsoft Dynamics GP application—run on the Terminal Services or Remote Desktop Services server. Terminal Services or Remote Desktop Services are used only for access to Microsoft Dynamics GP windows; Microsoft Dynamics GP data displayed in Business Portal is not processed through the Terminal Services or Remote Desktop Services server.



We don't recommend using this configuration in an extranet environment. For better security, you should not grant access to the Microsoft Dynamics GP application outside of the firewall without a virtual private network (VPN).

A Terminal Services configuration is shown in the following illustration.



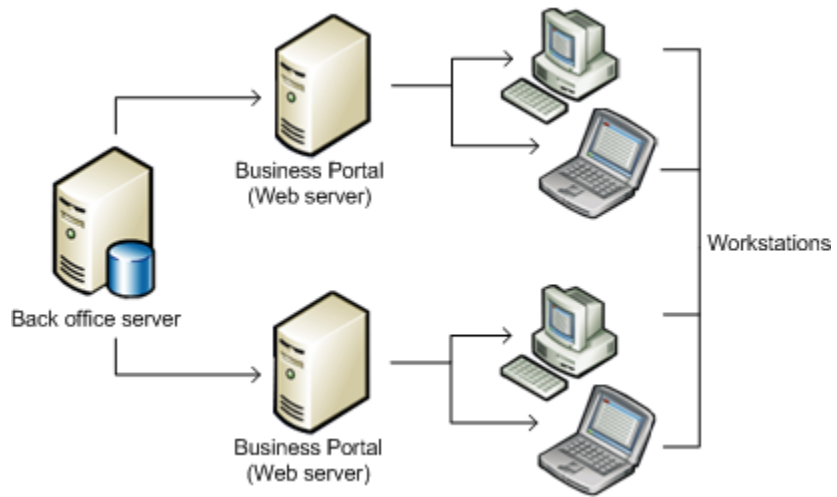
The following documents will help you install Business Portal with Terminal Services or Remote Desktop Services.

Document	Description	File format
Knowledge Base article 872242 on CustomerSource	Explains how to set up Microsoft Dynamics GP in a Terminal Services or Remote Desktop Services environment.	Web page (logon required)
Business Portal Installation Guide	Explains setup procedures you must perform to use Terminal Services or Remote Desktop Services to display Microsoft Dynamics GP windows in Business Portal.	.pdf or .xpf (on the Web)

Multiple web servers configuration

If there will be a lot of traffic on the Business Portal web site, you might want to add web servers to your configuration to improve performance. You might also have separate web servers for Business Portal and Web Services for Microsoft Dynamics GP.

A configuration with multiple web servers is shown in the following illustration.



In an extranet environment, you can deploy multiple Business Portal web servers in your intranet and multiple web servers in your extranet.

If you want to deploy separate internal and external Business Portal sites, use multiple server farms. For more information, see [Multiple server farms configuration](#) on page 25.

For more information about using multiple web servers for Business Portal, use the following resources.

Document	Description	File format
System Requirements for Microsoft Dynamics GP 2010 Web Applications	Describes system requirements for Business Portal servers in a production environment.	Web page
Business Portal Installation Guide	Contains instructions for installing Business Portal on multiple web servers.	.pdf or .xpf (on the Web)
Business Portal Administrator's Guide	Contains information about using multiple web servers for load balancing.	.pdf or .xpf (on the Web)

Multiple server farms configuration

If Business Portal will be deployed in an extranet, and you want to segregate functionality for external users, you can deploy separate server farms for internal and external users. (In SharePoint, a server farm can consist of a single web server.)

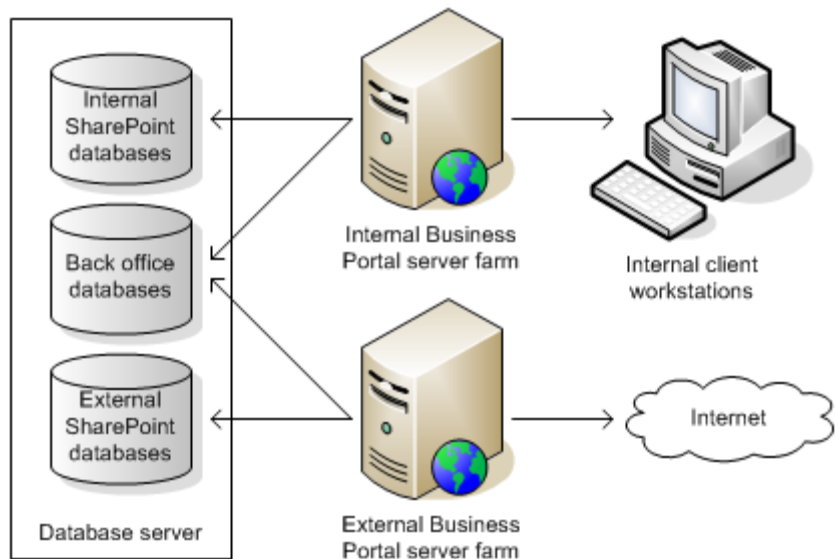
For example, if you use Office SharePoint Server Search functionality for Microsoft Dynamics GP data, and you deploy Business Portal for users outside of your company, you may want to set up separate server farms to help secure Search data. On the external server farm you could install only those applications used by external users, and you could choose not to enable Search for Microsoft Dynamics GP data. On the internal server farm you could install the applications used by your internal users, including Search.



For more information about securing Search data, refer to the [Business Portal Administrator's Guide](#).

Each Office SharePoint Server farm has its own configuration and content databases, which means that SharePoint features such as navigation, security through SharePoint groups, and Search are separate. However, all Business Portal installations must share a single Microsoft Dynamics GP SQL database. This means that data security through Microsoft Business Framework roles and permissions is shared.

The following illustration shows a configuration with multiple server farms.



For more information about this configuration, use the following resources.

Document	Description	File format
System Requirements for Microsoft Dynamics GP 2010 Web Applications	Describes system requirements for Business Portal servers in a production environment.	Web page
Business Portal Installation Guide	Contains instructions for installing Business Portal.	.pdf or .xpf (on the Web)

Extranet configurations

An extranet, or perimeter network, is an extension of your company's intranet that provides limited access to authorized outside users. Deploy Business Portal in an extranet if employees will use home computers to access Business Portal through the Internet, or if external users, such as customers and vendors, will access Business Portal from their own networks.

There are many different ways to design and build an extranet network. However, Business Portal was tested in two specific network topologies: the tri-homed perimeter network and the back-to-back perimeter network. The perimeter networks discussed here use Microsoft Internet Security and Acceleration Server (ISA Server) to create a perimeter network.

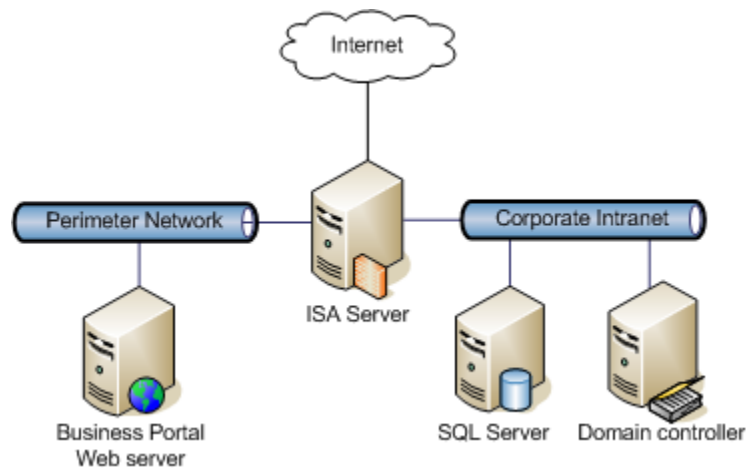


If your company has an existing perimeter network that doesn't use ISA Server, we recommend that you use hardware and software with similar functionality. In addition, you should set up the same communication rules and policies as recommended for ISA Server.

Tri-homed perimeter network

In a tri-homed perimeter network, a single ISA Server computer is used to control communication between your intranet and the Internet. This type of perimeter network takes less time and fewer resources to set up. However, the risk with a single ISA server configuration is that it constitutes a single point of failure.

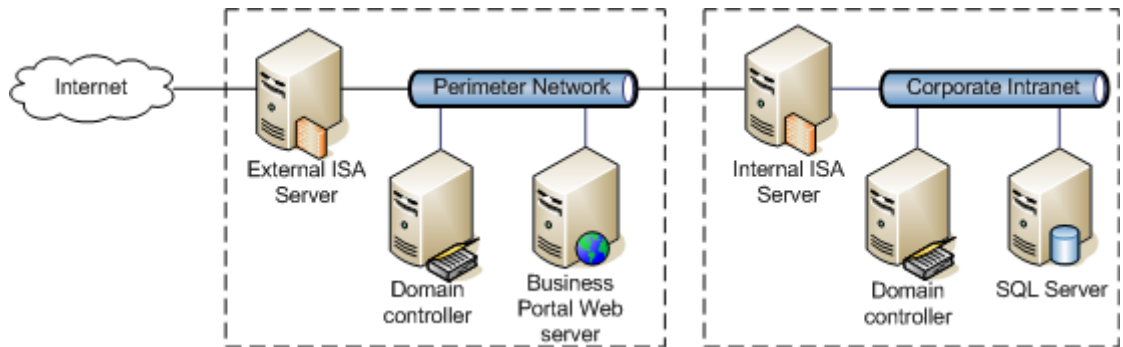
A tri-homed perimeter network is shown in the following illustration.



Back-to-back perimeter network

In a back-to-back perimeter network, multiple ISA Server computers are used to control communication between your intranet and the Internet. This scenario is typically considered more secure than the single ISA server scenario. However, a higher cost is associated with this scenario because additional servers are needed. There is also additional setup complexity.

A back-to-back perimeter network is shown in the following illustration.



For more information

See the following documents for more information about implementing Business Portal in an extranet.

Document	Description	File format
Business Portal Installation Guide	Explains supported extranet configurations and recommended settings.	.pdf or .xpf (on the Web)
ISA Server home page	Contains information about ISA Server.	Web page

Part 3: Development

This part of the guide contains tools and information to use when you're developing your Business Portal implementation. The information is divided into the following sections:

- [Chapter 6, "Security,"](#) describes Business Portal security capabilities and lists security issues you should consider.
- [Chapter 7, "Business Portal installation,"](#) contains resources to help you install Business Portal on a Web server.

Chapter 6: Security

Business Portal extends Microsoft Dynamics GP, providing a browser interface to securely access back office data over an intranet. This distributed computing model brings security challenges. This means that security must be an integral part of every implementation.

The following resources are included:

- [Getting started with Business Portal security](#)
- [Elements of Business Portal security](#)
- [Security synchronization](#)

Getting started with Business Portal security

Use the following documents to learn more about Business Portal security.

Document	Description	File format
Business Portal Installation Guide	Contains information about making secure choices throughout the installation process, as well as information about client workstation settings and extranet security.	.pdf or .xpf (on the Web)

Elements of Business Portal security

There are two types of information to secure in Business Portal: SharePoint content and back office data. Windows SharePoint Services security is used to administer access to pages and other content stored in SharePoint, such as document libraries and announcements. The Microsoft Business Framework (MBF) is used to control access to data from Microsoft Dynamics GP. In some configurations, Web Services for Microsoft Dynamics GP also is used to control access to back office data.

For example, to grant access to the Vendors page on the Purchasing Center site, you could assign a user to the BP Purchasing Manager SharePoint group. To grant access to the data displayed in the web parts on the Vendors page, you would need to add the same user to an MBF role, such as the Purchasing Manager role.

Windows SharePoint Services

Business Portal is built on Windows SharePoint Services, and all page access and navigation is handled through Windows SharePoint Services. Using Windows SharePoint Services, you can give users and groups access to:

- Site collections
- Sites
- Page libraries
- Folders within page libraries
- Pages

Microsoft Business Framework

Most Microsoft Dynamics GP data in Business Portal is retrieved using MBF. To grant access to this data, you must assign users to MBF roles and data permissions. SharePoint groups and MBF roles correspond in many cases, but are not automatically synchronized. You must assign users to MBF roles and SharePoint groups using two separate procedures.

Web Services for Microsoft Dynamics GP

The Business Data Catalog can retrieve back office data through Web Services for Microsoft Dynamics GP. To grant access to this data, you must assign users to web service roles. SharePoint groups, web service roles, and MBF roles are not automatically synchronized; you must assign users to web service roles, MBF roles, and SharePoint groups using three separate procedures.

For more information

Refer to the following documents for more information about securing information in Business Portal.

Document	Description	File format
Business Portal Administrator's Guide	Contains overview information about Business Portal security and detailed information about Microsoft Business Framework security.	.pdf or .xpf (on the Web)
Web Services Installation and Administration Guide	Contains detailed information about security in Web Services for Microsoft Dynamics GP.	.pdf or .xpf (on the Web)
Windows SharePoint Services 3.0 Technical Library	Contains detailed security information for Windows SharePoint Services.	Web page
Office SharePoint Server Technical Library	Contains detailed security information for Office SharePoint Server.	Web page

Security synchronization

Because Business Portal users must be given access to back office data and SharePoint content separately, you may want to use the Microsoft Dynamics Security Synchronization Utility to make setup easier.

The Security Synchronization Utility is a Microsoft Management Console snap-in that enables you to synchronize role membership between applications with different security infrastructures and different administration experiences. The following applications can be synchronized:

- Microsoft Dynamics GP
- Web Services for Microsoft Dynamics GP
- Business Portal (MBF roles)
- Windows SharePoint Services

You can synchronize from any supported application to any other supported application. For example, you can synchronize members of an MBF role with members of a SharePoint group, or vice versa.

You must have administrative permissions to the source and destination applications in order to perform the synchronization. You can run the synchronization manually, or you can set up a Windows scheduled task to run on a regular basis.

The Security Synchronization Utility is available as a download; a CustomerSource logon is required (<https://mbs.microsoft.com/customersource>).

For more information, refer to the documentation provided with the utility.

Chapter 7: Business Portal installation

Use the resources in this part of the documentation to help you install Business Portal on a web server. The following topics are included:

- [Windows SharePoint Services vs. Office SharePoint Server](#)
- [Install Business Portal](#)
- [Install Business Portal applications](#)

Windows SharePoint Services vs. Office SharePoint Server

You can install Business Portal for Microsoft Dynamics GP on Windows SharePoint Services or on Office SharePoint Server, Enterprise Edition.

Office SharePoint Server uses Windows SharePoint Services technology. Any features available in Windows SharePoint Services are also available in Office SharePoint Server. However, Office SharePoint Server offers additional features. For example, Office SharePoint Server uses the same search technology as Windows SharePoint Services but includes the ability to search for data in business applications such as Microsoft Dynamics GP.

If you install on Office SharePoint Server, Enterprise Edition, additional Business Portal and SharePoint features are available. The additional features include:

Search The Search feature integrates Web Services for Microsoft Dynamics GP with the Office SharePoint Server Business Data Catalog, which enables you to search for Microsoft Dynamics GP data along with content from your SharePoint sites.

List pages List pages use the Business Data Catalog integration with the Microsoft Dynamics GP web service to display information from Microsoft Dynamics GP.

Report Center The Office SharePoint Server, Enterprise Edition, version of Business Portal uses the Report Center site for publishing Microsoft Dynamics GP reports. The Report Center site provides the flexibility to publish other types of reports, such as Management Reporter for Microsoft Dynamics ERP reports or reports from applications like Microsoft Excel. Using SharePoint features, users can receive alerts when new reports are added to the Report Center, create document workspaces to collaborate on reports, set up workflows to review reports, and even access reports offline.

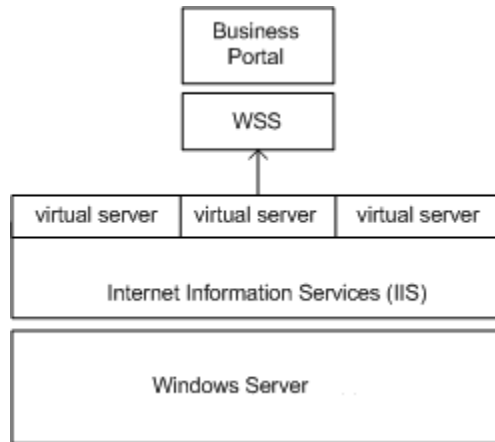
Field Service Suite The Field Service Suite application is available only if you're using Business Portal with Office SharePoint Server. Use this application to allow your customers to enter, view, and update service requests and return requests.

Install Business Portal

Business Portal is built on a stack of other applications, beginning with Windows Server 2003 or Windows Server 2008. Internet Information Services (IIS), a component of Windows Server 2003 or Windows Server 2008, hosts virtual servers, each of which can contain a separate web-based application.

Business Portal is installed on a Windows SharePoint Services web application and site collection. The main Business Portal site will be created as a subsite of the top-level site in the site collection.

The following illustration shows the software configuration on the Business Portal web server.



The following resources will help you prepare your web server and install Business Portal.

Document	Description	File format
Business Portal Readme	Contains important information about Business Portal for Microsoft Dynamics GP 2010, such as known issues.	.rtf (on the Business Portal installation media)
Business Portal Installation Guide	Provides step-by-step instructions for installing Business Portal. The guide also contains instructions for initial Business Portal setup.	.pdf or .xpf (on the Web)

Install Business Portal applications

You can install Business Portal applications, such as Key Performance Indicators or Requisition Management, at the same time as you install the main Business Portal application. You also can install Business Portal applications at a later time.

For more information, refer to the following documents. Because each application may have unique installation considerations, you should consult each application’s manual.

Document	Description	File format
Business Portal Installation Guide	Contains general information about installing Business Portal applications.	.pdf or .xpf (on the Web)
HRM Self Service Suite Administrator’s Guide	Explains how to install HRM Self Service Suite.	.pdf or .xpf (on the Web)
Field Service Suite Guide	Explains how to install Field Service Suite.	.pdf or .xpf (on the Web)
Key Performance Indicators Guide	Explains how to install Key Performance Indicators, and how to set up a scheduled task for calculating KPIs.	.pdf or .xpf (on the Web)

Document	Description	File format
<u>Order Management Administrator's Guide</u>	Explains how to install Order Management and Catalog Maintenance.	.pdf or .xpf (on the Web)
<u>Project Time and Expense Administrator's Guide</u>	Explains how to install Project Time and Expense.	.pdf or .xpf (on the Web)
<u>Requisition Management Administrator's Guide</u>	Explains how to install Requisition Management.	.pdf or .xpf (on the Web)

Part 4: Deployment

This part of the guide contains information about deploying Business Portal. The information is divided into the following sections:

- [Chapter 8, “System setup,”](#) contains information and resources to help you set up Business Portal.
- [Chapter 9, “Application setup,”](#) contains information and resources to help you set up Business Portal applications.
- [Chapter 10, “Prepare to use Business Portal,”](#) explains how to test your deployment, set up client workstations, and train new users on Business Portal.

Chapter 8: System setup

The following topics direct you to resources and information that can help you set up Business Portal.

- [Setup checklist](#)
- [Template for setting up users and assigning them to roles and groups](#)
- [Template for organizing content](#)
- [Configure Business Portal for publishing reports](#)
- [Set up the Business Data Catalog](#)
- [Set up Search](#)

Setup checklist

To set up Business Portal, complete the following tasks in the order shown. Each of these tasks is described in detail in the [Business Portal Administrator's Guide](#) (.pdf or .xpf on the Web).

✓	Task	Description
	Specify general Business Portal settings.	This step includes entering your SMTP server name and Business Portal e-mail address.
	Add users and assign them to roles and groups.	Assign users to MBF roles, SharePoint groups, and web service roles (optional), depending on the information they need access to. Before setting up users, you should make a list of the names and domain aliases of the users you want to add, along with the information they need. For more information about how you should gather user information, see Template for setting up users and assigning them to roles and groups on page 42.
	Create shared queries.	Queries are used to display Microsoft Dynamics GP data in Business Portal. You can create queries and share them with other users.
	Create pages.	Use Windows SharePoint Services functionality to create new Business Portal center subsites or to create new pages on existing sites.
	Create document libraries, lists, and other content.	Business Portal result viewer web parts and Office SharePoint Server business data web parts display data that originates in Microsoft Dynamics GP. To display other types of content, use Windows SharePoint Services web parts. For more information about how to use Windows SharePoint Services features, see the Windows SharePoint Services help and how-to web page . For more information about how to organize your content, see Template for organizing content on page 43.

✓	Task	Description
	Set up Reports Catalog or the Report Center and publish reports.	<p>Reports Catalog is a Business Portal application used to make Microsoft Dynamics GP reports available to users. You must map report sets to Business Portal center sites and then create and publish reports using the Microsoft Dynamics GP Report Scheduler.</p> <p>The Report Center is a site in Office SharePoint Server, Enterprise Edition, that serves as a central location to manage information sources such as reports, spreadsheets, and SQL Server Reporting Services data connections. You can publish Microsoft Dynamics GP reports to the Report Center site using the Report Scheduler or using standard SharePoint functionality.</p> <p>For more information about making reports available in Business Portal, see Configure Business Portal for publishing reports on page 44.</p>
	Set up the Business Data Catalog, if you're using Office SharePoint Server, Enterprise Edition.	<p>The Business Data Catalog is a service in Office SharePoint Server that is used for registering properties of applications such as Microsoft Dynamics GP.</p> <p>For more information about the Business Data Catalog, see Set up the Business Data Catalog on page 45.</p>
	Set up Search, if you're using Office SharePoint Server, Enterprise Edition.	<p>The Search feature uses the Business Data Catalog, SharePoint Search Engine, and the Microsoft Dynamics GP web service to allow users to locate Microsoft Dynamics GP data in addition to content stored on SharePoint sites.</p> <p>For more information about Search, see Set up Search on page 47.</p>

Template for setting up users and assigning them to roles and groups

The [Users and Roles template](#) (.xls) file will help you set up users and assign them to SharePoint groups, MBF roles, and web service roles. You can download this file from the same location where you downloaded this guide. Complete the template before adding users to Business Portal.



For complete descriptions of Business Portal SharePoint groups and MBF roles, see the [Business Portal Administrator's Guide](#) (.pdf or .xpf on the Web).

How to use the template

The Users and Roles template is a Microsoft Office Excel® file. It consists of multiple worksheets.

Business Portal User Information worksheet The Business Portal User Information worksheet helps you identify who your Business Portal users are. You'll need to enter each user's domain and Windows alias.

Role worksheets There is a worksheet for each functional role in Business Portal. Each functional role worksheet contains the SharePoint groups, MBF roles, and web service roles a user must be assigned to in order to properly access pages and data in Business Portal.

In most cases, to indicate that a user will be assigned to a role or group, enter an “X” in the column. For some MBF and web service roles, the user also must be assigned to a Microsoft Dynamics GP ID. For example, when you assign users to the Employee role, you must assign each user to a Microsoft Dynamics GP employee ID. In those cases, enter the user’s ID in the column.

Multiple companies

If your organization consists of multiple companies, we recommend you make a copy of the template for each company. You’ll need to rename the Excel file to include the company name. For example:

- UsersAndRoles_Fabrikam.xls
- UsersAndRoles_CohoVineyard.xls

Template for organizing content

Business Portal web parts are used to display data that originates in Microsoft Dynamics GP. In addition to this data, you may want to display other content that is used by your organization, but that is not stored in the accounting system. To display these other types of content, use SharePoint web parts.

Before you begin creating your SharePoint web parts, we recommend you conduct a *content inventory*. A content inventory will help you identify documents, spreadsheets, pictures, and other types of content that you already have, that you want Business Portal users to have access to. Some documents to consider putting online in Business Portal include:

- Project documents, plans, proposals, presentations, and bids
- Holiday schedules, individual work and vacation schedules, and project schedules
- Contact information for team members, partners, customers, suppliers, and vendors
- Tasks or assignments
- Frequently used links to other web sites
- Important team announcements or news
- Human resources policies and procedures

To begin conducting your content inventory, create a list of the content you already have. Your initial content planning should include identifying:

- Where documents are located
- What format documents were created in
- Who is responsible for maintaining the documents
- Where the information will be stored within the portal

For an example of a content inventory, see the [Content Inventory template \(.xls\)](#) file. You can download this file from the same location where you downloaded this guide.

Configure Business Portal for publishing reports

You can publish your Microsoft Dynamics GP reports to Business Portal using the Reports Catalog or the Report Center, depending on whether you're using Windows SharePoint Services or Office SharePoint Server.

Reports Catalog

If Business Portal is installed on Windows SharePoint Services only, the Reports Catalog is available. The Reports Catalog is a folder on a server that contains back office reports that can be viewed through Business Portal. A "Top 5 Reports" web part appears on each center site home page, and contains links to back office reports that are stored in the folder. Users can also access Reports pages from each center site in Business Portal.

Reports in the Reports Catalog are static—the data they show is current as of the date they were published. The Report Scheduler is used to specify how often each report is published.

To configure Business Portal for publishing reports, you must complete the following tasks on the Business Portal web server:

- Create a shared folder for the reports.
- Set up the Report Scheduler by specifying the location of the shared folder.
- Change the account used to display reports.

You can complete the following tasks from a Business Portal client computer:

- Decide which reports will appear in Business Portal centers, such as the Finance, Sales, and Inventory centers.
- Add reports to the Reports Catalog.

For more information about these tasks, see the "Reports Catalog" chapter in the [Business Portal Administrator's Guide](#) (.pdf or .xpf on the Web).

Report Center

If Business Portal is installed on Office SharePoint Server, Enterprise Edition, the Report Center site is available. The Report Center site is a central location where you can manage business-critical information sources, such as reports, spreadsheets, and SQL Server Reporting Services data connections.

When you install Business Portal, report libraries for Microsoft Dynamics GP reports are created on the Report Center site. Reports contained in Report Center document libraries are static—data is displayed as of the date they were published.

You determine how often each report is published using either the Microsoft Dynamics GP Report Scheduler or standard SharePoint document library functionality. Microsoft Dynamics GP reports can be published to the Report Center site in many different file formats. You can also publish other types of reports, such as reports from applications like Microsoft Excel.

Using SharePoint functionality, users can receive alerts when new reports are added to the Report Center site, create document workspaces to collaborate on reports, set up workflows to review reports, and even access reports offline through the Microsoft Office Outlook® integration.

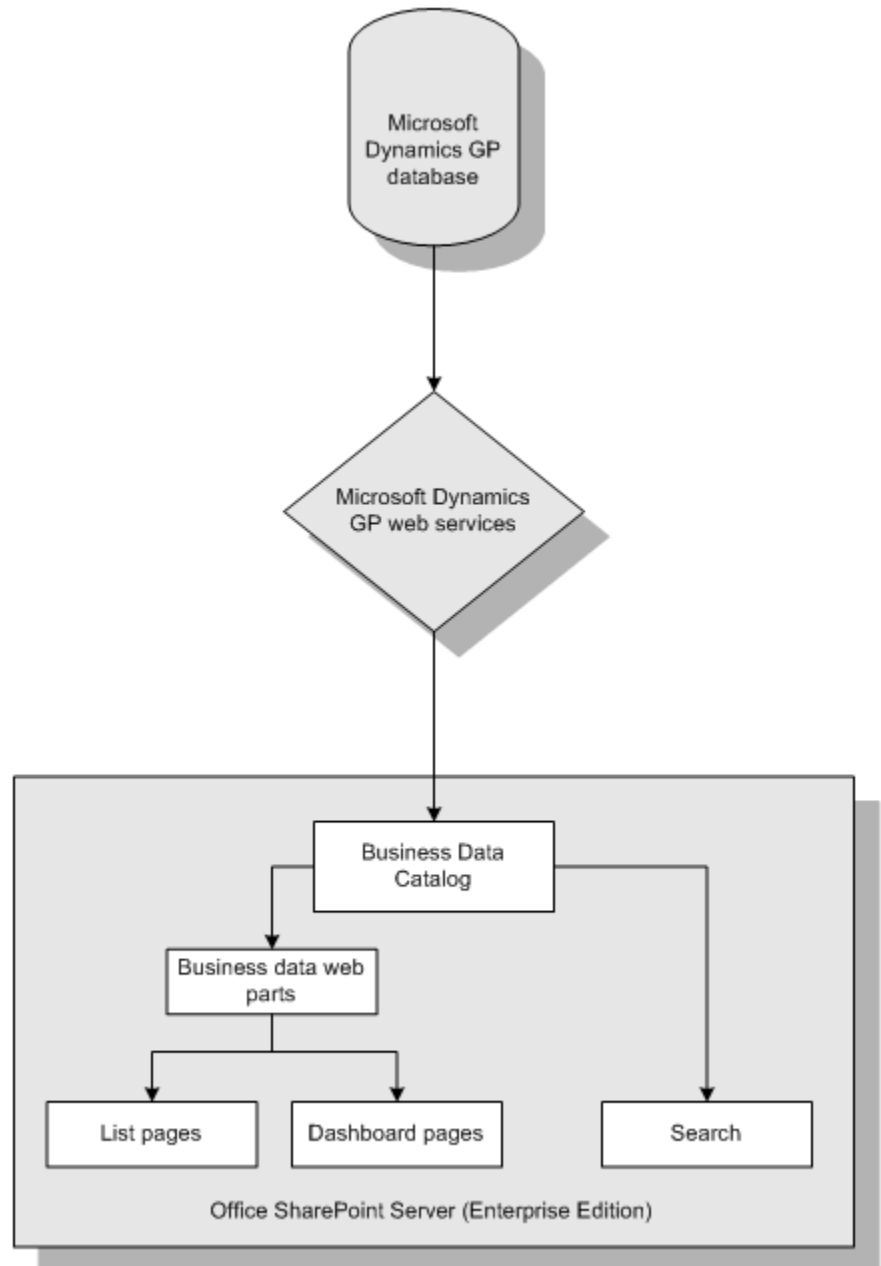
For more information about the Report Center, see the “Report Center” chapter in the [Business Portal Administrator’s Guide](#) (.pdf or .xpf on the Web).

Set up the Business Data Catalog

The Business Data Catalog is a service in Office SharePoint Server that is used for registering business data types and properties of applications such as Microsoft Dynamics GP. The Business Data Catalog makes Microsoft Dynamics GP data accessible in business data web parts, dashboard pages, and list pages on sites in the Business Portal site collection.

When you install Business Portal on Office SharePoint Server, Enterprise Edition, the Microsoft Dynamics GP web service is registered with the Business Data Catalog. The web service for Microsoft Dynamics GP provides access to the primary documents in the accounting system. Because the Microsoft Dynamics GP web service is used to retrieve data for the Business Data Catalog, web service security is used to secure the data.

The following illustration shows how Microsoft Dynamics GP data is returned for display in Office SharePoint Server.



In order to display data from the Business Data Catalog on Business Portal pages, the account used as the identity for the Business Portal application pool must be a member of the BDC Administrator role in web services.

For more information about the Business Data Catalog and how it works with Business Portal, see the “Business Data Catalog concepts” chapter in the [Business Portal Administrator’s Guide](#) (.pdf or .xpf on the Web).

Set up Search

The Search Center in Office SharePoint Server, Enterprise Edition, provides a single location for employees to find content, processes, people, and business data relevant to their needs.

When the Microsoft Dynamics GP web service is registered with the Business Data Catalog and Search is activated for your companies, the Search Center can be used to locate Microsoft Dynamics GP data along with data stored in Windows SharePoint Services.

You must perform the following tasks to set up Search:

- To properly crawl your data, you must assign the account used for crawling to the BDC Administrator role in web services, and to the DYNGRP role in SQL Server for all Microsoft Dynamics GP databases.
- We recommend that you adjust the level of logging in order to prevent interruptions in the crawl process.

Using default settings, Office SharePoint Server log files can become very large when you perform a full crawl of your Microsoft Dynamics GP data. If the log files become too large, crawling will stop until space becomes available.

- You must run the Microsoft Dynamics GP Search Setup wizard to register Microsoft Dynamics GP companies with the Business Data Catalog.

Using the wizard, you'll specify which companies to activate Search for and you'll select which entities and fields to include in searches. You'll also select a default crawl schedule.

For more information about using the Office SharePoint Server Search feature to find Microsoft Dynamics GP data, see the "Search concepts" and "Search setup and maintenance" chapters in the [Business Portal Administrator's Guide](#) (.pdf or .xpf on the Web).

Chapter 9: Application setup

The following topics direct you to resources and information that can help you set up Business Portal applications.

- [Human Resources Management Self Service Suite](#)
- [Key Performance Indicators](#)
- [Order Management](#)
- [Project Time and Expense](#)
- [Requisition Management](#)

Human Resources Management Self Service Suite

The HRM Self Service Suite is a collection of applications that are accessible from within Business Portal. Using these applications, employees can update their personal information, enter timecards, submit vacation requests, and complete other related tasks. Managers can approve timecards, modify their employees' pay rates, and review their employees' performance history.

To learn more about the HRM Self Service Suite, see the following manuals.

Document	Description	File format
HRM Self Service Suite Administrator's Guide	Explains how to install and set up the HRM Self Service Suite.	.pdf or .xpf (on the Web)
HRM Self Service Suite Canadian Release	Most HRM Self Service Suite features look and function the same way in the Canadian release as they do in the U.S. release. However, there are some differences, which are described in the Canadian Release document.	.pdf or .xpf (on the Web)

Key Performance Indicators

Key Performance Indicators is an application you can use to calculate measurements of the health of your business, such as your company's total sales, gross profit margin, and current ratio. These business metrics, referred to as KPIs, help you monitor your company's progress toward specific performance goals.

To learn more about Key Performance Indicators, refer to the following manuals.

Document	Description	File format
Key Performance Indicators	This manual is intended for users who will be installing Key Performance Indicators, creating and administering KPIs, and adding KPIs to pages so other Business Portal users can view them.	.pdf or .xpf (on the Web)
Common KPIs Guide	Each chapter in this manual explains how to create a specific KPI.	.pdf or .xpf (on the Web)

Order Management

Order Management is a Business Portal application that provides trusted customers and company salespeople with the ability to enter sales orders using their web browsers. Once an order is placed, it is automatically transferred to Microsoft Dynamics GP for processing.

Using Order Management, your customers and salespeople can:

- Enter sales orders at any time of the day, any day of the week (as long as the Business Portal web server is running).
- Track the status of orders they've entered.

For information about how to install and set up Order Management, see the [Order Management Administrator's Guide](#) (.pdf or .xpf on the Web).

Project Time and Expense

Project Time and Expense is a Business Portal application that employees can use to create, modify, and submit project timesheets and expense reports using a web browser. Approvers use the same web browser interface to review and approve timesheets and expense reports, which are then automatically transferred to a batch in Microsoft Dynamics GP Project Accounting for posting.

Project Time and Expense is closely integrated with Microsoft Dynamics GP Project Accounting and Personal Data Keeper (PDK). The project information set up in Project Accounting (including employee assignments and cost categories) determines the projects, tasks, and items that will appear when your employees work in Project Time and Expense. The user records in PDK define the relationships between employees, managers, and supervisors. This, along with role assignments in Business Portal, controls the project information users see in Project Time and Expense, and the workflow for project document approval.

For information about how to install and set up Project Time and Expense, see the [Project Time and Expense Administrator's Guide](#) (.pdf or .xpf on the Web).

Requisition Management

Requisition Management is an application that employees, managers, supervisors, and purchasers can use to enter and approve requisitions, also known as purchase requests, in Business Portal. Requisitions, which are requests for goods or services, are routed to the appropriate users for review and approval, and then line items are transferred to new or existing purchase orders in the Microsoft Dynamics GP back office.

Requisition Management eliminates the need for a paper-based system and gives employees an easy way to enter requisitions. It automates the routing of requisition information from creators to approvers, and ultimately to purchase orders in Microsoft Dynamics GP.

Users can use Requisition Management to:

- Enter, approve, or reject requisitions in Business Portal.
- Route requisitions to a supervisor for review.
- View the status of a requisition and its history information.
- Transfer line items to new or existing back office purchase orders.
- Consolidate line items from multiple requisitions into a single purchase order for each vendor.

For information about how to install and set up Requisition Management, see the [Requisition Management Administrator's Guide](#) (.pdf or .xpf on the Web).

Chapter 10: Prepare to use Business Portal

The following topics direct you to resources and information that help you test the deployment, set up client workstations, and train your users on Business Portal.

- [*Test the deployment*](#)
- [*Configure client computers*](#)
- [*Train your users*](#)
- [*Encourage your users to use Business Portal*](#)

Test the deployment

After you've set up Business Portal and its applications, you should test the system. The following tasks will help you test Business Portal.

- Have users assigned to different roles log on to Business Portal. Business Portal should display a coherent set of menu items and pages to each user. There should be no empty web parts or inoperative links. If there are, you should adjust how the roles are applied to resolve the issues.
- Test each application. For example, if you're using Requisition Management, have users submit test requisitions and have managers approve them. Verify that the requisitions are transferred to the back office. (You can later void or delete your test transactions.)

Configure client computers

Before your users start accessing Business Portal, you must configure their client workstations. Specifically, you'll need to:

Configure browser settings Be sure that the Internet Explorer® options for employee workstations are set so content is refreshed. Also, Internet Explorer security should be set up so that ActiveX controls are allowed to run on the Business Portal web site. If ActiveX controls are not allowed to run, users won't be able to use result viewer web parts.

Install ActiveX controls When users launch Business Portal for the first time on client workstations, they may be prompted to install ActiveX components that are needed to use certain Business Portal web parts.

To install ActiveX components, the user logged on to the workstation must have write access to the Downloaded Program Files folder (typically located in the Windows or the Winnt folder) and to the registry. On Windows XP computers, members of the Administrators and the Power Users groups typically have these rights. Once a member of the Power Users group or the Administrators group has downloaded the components, those components will be available to members of the Users group.

To install ActiveX controls for those in the Users group, or for those who do not have installation rights on their computers, a Windows Installer package file is available on the Business Portal installation media. If your users don't have installation rights on their computers, you can install the controls using a software distribution tool such as Systems Management Server.

Configure pop-up blockers Pop-up blocker software on client computers may interfere with some Business Portal pages. We recommend configuring pop-up blockers to allow pop-ups within the Business Portal URL.

Install Office XP Web Components In order to export information to Excel from a Business Portal client computer, Microsoft Office XP Web Components must be installed, regardless of the version of Office you're using.

The Office XP Web Components (owc10.exe) can be downloaded from the Microsoft Download Center (www.microsoft.com/downloads).

For more information about these tasks, see the "Client configuration" chapter in the [Business Portal Installation Guide](#) (.pdf or .xpf on the Web).

Train your users

The following manuals will help your users understand how to use Business Portal and its applications.

Document	Description	File format
Business Portal User's Guide	Explains the basic concepts used in Business Portal. For example, it explains the different types of pages, how to create queries, and how to set user preferences.	.pdf or .xpf (on the Web)
Human Resources Management Self Service Suite User's Guide	Explains how to complete tasks in the HRM Self Service Suite. The manual is divided into two parts: one part contains procedures for employees, and the other part contains procedures for managers.	.pdf or .xpf (on the Web)
Project Time and Expense User's Guide	Describes how to enter and approve time and expense reports. Also includes information about processing timesheets and expense reports in Personal Data Keeper.	.pdf or .xpf (on the Web)
Requisition Management User's Guide	Explains how to use Requisition Management to create and approve purchase requests using Business Portal. Also describes how to convert purchase requests to purchase orders.	.pdf or .xpf (on the Web)

Encourage your users to use Business Portal

To encourage your users to use Business Portal, consider the following:

Provide training Some users may be hesitant to use Business Portal because it is new and unfamiliar to them. To encourage their use of Business Portal, provide them with training. Show them how they can use Business Portal to access business information and complete their day-to-day tasks. For more information about training, see [Train your users](#) on page 52.

Make Business Portal part of your new employee orientation Include information about Business Portal in your new employee orientation training. It's important for new employees to become familiar with Business Portal as soon as possible.

Keep the content updated Your users will access Business Portal if they know the content is continually updated. Add fresh content on a regular basis and remove outdated content.

Make the content easy to find Users will access Business Portal if the content they need is easy to find. Keep your content well organized so users can find the information they need on their own, with just a few clicks.

Provide content for each role and department Users want content that is relevant to them and their jobs. Provide content for the various roles and departments in your organization on Business Portal center pages.

Add interest You may want to display team pictures, a humorous cartoon, a news feed, or other features that your users will find interesting or enjoyable.

Require users to go online Make it necessary for users to use Business Portal. For example, if you're using the Employee Pay application of the HRM Self Service Suite, don't mail out employee pay stubs. Your employees can view their pay stub information in Business Portal.

Enable your users to participate Provide areas where users can add content and contribute information. For example, create a SharePoint discussion board where users can post comments and suggestions. Or, create a SharePoint links web part, where users can add links to useful web sites and articles.

Publicize Business Portal Refer users to Business Portal often to remind them that it's available and has important resources. For example, instead of e-mailing your monthly company newsletter, post your company news and event information in Business Portal. Then e-mail your users the link to the Business Portal page containing that information.

Part 5: Operation

This part of the guide contains information about the operation of Business Portal. The information is divided into the following sections:

- [Chapter 11, “Backups and recovery,”](#) contains information on creating backups of Business Portal.
- [Chapter 12, “Business Portal configuration changes,”](#) explains potential changes to your Business Portal configuration, such as moving from a basic installation to a server farm installation or turning SSL on or off.
- [Chapter 13, “Optimization,”](#) provides information on optimizing performance and monitoring usage statistics.
- [Chapter 14, “Upgrade,”](#) contains resources for learning about new features and enhancements, up-to-date information on upgrades, plus step-by-step instructions for upgrading.

Chapter 11: Backups and recovery

This part of the documentation contains information about backing up Business Portal. It's important to make regular backups of the Business Portal databases and the Business Portal web site. The following topics are included:

- [Implement a backup strategy](#)
- [Back up Business Portal data and sites](#)

Implement a backup strategy

The purpose of creating backups is to enable you to recover damaged data. However, backing up and restoring must be tailored to your environment and must work with your available resources. Using backup and restore for recovery therefore requires a strategy. A well-designed backup and restore strategy maximizes data availability and minimizes data loss.

The backup portion of the strategy defines the type and frequency of backups, the hardware required for them, how backups are to be tested, and where and how backup media is to be stored (including security considerations). The restore portion of the strategy defines who is responsible for performing restores, and how restores should be performed in order to maximize availability and minimize loss.

Designing an effective backup and restore strategy requires careful planning, implementation, and testing. You need to consider a variety of factors, including:

- The production goals of your organization for the databases—especially the requirements for availability and protection of data from loss.
- The nature of each of your databases—its size, its usage patterns, its content, the requirements for its data, and so on.
- Constraints on resources such as hardware, personnel, space for storing backup media, the physical security of the stored media, and so on.

We recommend that you document your backup and restore procedures.

Back up Business Portal data and sites

You should back up the SharePoint databases and web applications for Business Portal at the same time as you back up your Microsoft Dynamics GP databases. For more information, see the following documents.

Document	Description	File format
Business Portal Administrator's Guide	Contains information about backing up Business Portal.	.pdf or .xpf (on the Web)
SQL Server Books Online	Contains general information about backing up and restoring databases on Microsoft SQL Server.	Online help delivered with SQL Server
Microsoft Knowledge Base article 325003	Explains how to back up and restore MSDE databases.	Web page
Windows SharePoint Services 3.0 Technical Library	Contains information about backing up and restoring if you're using Windows SharePoint Services.	Web page

Document	Description	File format
Office SharePoint Server Technical Library	Contains information about backing up and restoring if you're using Office SharePoint Server.	Web page

Chapter 12: Business Portal configuration changes

The following topics are included:

- [Turning SSL on or off](#)
- [Move from a basic installation to a server farm installation](#)
- [Move Business Portal from Windows SharePoint Services to Office SharePoint Server](#)

Turning SSL on or off

If you decide to use Secure Sockets Layer (SSL) for the web site after you've installed Business Portal, or if you decide to stop using SSL, you must complete some additional procedures. The procedures you must complete depend on which Business Portal features you have installed.

For more information, refer to the [Business Portal Administrator's Guide](#) (.pdf or .xpf on the Web).

Move from a basic installation to a server farm installation

If you installed Business Portal using a basic SharePoint installation (using MSDE), you can move to a server farm environment (using Microsoft SQL Server) to handle heavier traffic. You can use the same procedure to move Business Portal from one SQL server to another.

For more information, refer to the following documents.

Document	Description	File format
Windows SharePoint Services 3.0 Technical Library	Contains information about moving Windows SharePoint Services sites.	Web page
Office SharePoint Server Technical Library	Contains information about moving Office SharePoint Server sites.	Web page

Move Business Portal from Windows SharePoint Services to Office SharePoint Server

If you have been running Business Portal on Windows SharePoint Services 3.0 and have decided that you need the functionality of Office SharePoint Server, you can upgrade from Windows SharePoint Services 3.0 to Office SharePoint Server 2007. After you've upgraded Windows SharePoint Services, you can move Business Portal. You must manually change navigation settings after you've migrated Business Portal.

Upgrade to Office SharePoint Server 2007

To upgrade, install Office SharePoint Server 2007 over Windows SharePoint Services 3.0, and then perform the additional configuration needed for Office SharePoint Server. Installing Office SharePoint Server always upgrades an existing installation of Windows SharePoint Services 3.0.

For more information about upgrading from Windows SharePoint Services 3.0 to Office SharePoint Server 2007, refer to the Office SharePoint Server Technical Library on Microsoft TechNet (technet.microsoft.com). For more information about

Office SharePoint Server configuration for Business Portal, see the [Business Portal Installation Guide](#) (.pdf or .xpf on the Web).

Modify the web.config file

After you upgrade to Office SharePoint Server, the web.config file contains an extra entry. To prevent errors when running the Business Portal migration, you must remove the extra entry before migrating.

1. Open the web.config file using a text editor, such as Notepad. The web.config file is located at C:\inetpub\wwwroot\wss\VirtualDirectories*<port number>*, where *<port number>* is the port number of the IIS web site where Business Portal is installed.
2. Locate the section of the file that has two **appSettings** tags next to one another.

```

    </appSettings>
</appSettings>
<system.net>

```

3. Delete one of the **appSettings** tags, so that the file looks like the following.

```

</appSettings>
<system.net>

```

4. Save and close the web.config file.

Install Web Services for Microsoft Dynamics GP

If Web Services for Microsoft Dynamics GP has not been installed, you must install it before migrating Business Portal. For more information about installing web services, see the [Web Services Installation and Administration Guide](#) (.pdf or .xpf on the Web).

Migrate Business Portal

Use the **Migrate to Office SharePoint Server** option to move Business Portal from Windows SharePoint Services to Office SharePoint Server. For more information about installing Business Portal, refer to the [Business Portal Installation Guide](#) (.pdf or .xpf on the Web).

1. Open the Add or Remove Programs control panel, and select **Business Portal for Microsoft Dynamics**. Click **Change** to open the Modify Business Portal Installation window.
2. Click **Migrate to Office SharePoint Server**.
3. The Connection Information window appears. Enter the location of your Microsoft Dynamics GP SQL database.

You also must select the type of authentication that should be used when creating the SQL tables and objects that are used by Business Portal. These credentials are used *only during the migration process*.

- If you select **Windows Trusted Authentication**, you don't need to enter any other information. Click **Next**.
 - If you select **SQL Authentication**, enter a SQL Server administrator ID and password. Click **Next**.
4. The Web Services URL window appears. Enter the URL to the Microsoft Dynamics GP web service. Be sure to include the .asmx file in the path (DynamicsGPService.asmx).
 5. The Business Portal User window appears if services required for Office SharePoint Server must be started. Enter a user account that can be used to run these services, which may include the Shared Service Provider.
 6. The Ready to Install window appears. Click **Install**. The installation process will take some time to complete.
 7. The Finish window appears. Click **Finish**.

Modify navigation settings

After you've migrated Business Portal to Office SharePoint Server, change navigation settings.

1. Go to the home page for the top-level site in the site collection where Business Portal is installed.
2. Click **Site Actions > Site Settings > Modify Navigation**. The Site Navigation Settings page is displayed.
3. Under **Subsites and Pages**, select **Show subsites**.
4. In the **Navigation Editing and Sorting** section, delete the **Business Portal** heading item and click **OK**.



Do not remove the Business Portal subsite item.

5. Go to the Business Portal home page.
6. Click **Site Actions > Site Settings**. Under **Look and Feel**, click **Navigation**. The Site Navigation Settings page is displayed.
7. Under **Subsites and Pages**, select **Show subsites**.
8. In the **Global Navigation** section, select **Display the same navigation as the parent site**.

- In the **Navigation Editing and Sorting** section, remove the Business Portal heading items.



Do not remove the Business Portal subsite items.

Business Portal heading items to remove

Business Portal subsite items (do not remove)

- Employee Center
- Manager Center
- Executive Center
- Company Center
- Financial Center
- Sales Center
- Purchasing Center
- Inventory Center
- Human Resources Center
- Payroll Center
- Manufacturing Center
- Project Center
- Company Center
- Employee Center
- Executive Center
- Financial Center
- Human Resources Center
- Inventory Center
- Manager Center
- Manufacturing Center
- Orders
- Payroll Center
- Project Center
- Purchasing Center
- Sales Center

- Click **OK** to save your changes.

Chapter 13: Optimization

The following topics are included:

- [Optimize performance](#)
- [Monitor usage statistics](#)

Optimize performance

If you're using the recommended Business Portal configuration and the performance of your system does not meet expected performance levels, there are several ways you can improve the performance of your servers.

The following resources will help you optimize Business Portal performance.

Document	Description	File format
Business Portal Administrator's Guide	Contains information about adjustments you can make to improve Business Portal performance.	.pdf or .xpf (on the Web)
Windows SharePoint Services 3.0 Technical Library	Contains information about optimizing Windows SharePoint Services performance.	Web page
Office SharePoint Server Technical Library	Contains information about optimizing Office SharePoint Server performance.	Web page

Monitor usage statistics

If you want to know what kind of impact your web site has, you need to track how many users visit your site, the type and number of hits your site receives, and other site-usage information. Windows SharePoint Services includes features that analyze the usage of your site.

For more information, see the following resources.

Document	Description	File format
Windows SharePoint Services 3.0 Technical Library	Contains information about monitoring usage in Windows SharePoint Services.	Web page
Office SharePoint Server Technical Library	Contains information about monitoring usage in Office SharePoint Server.	Web page

Chapter 14: Upgrade

The following topics are included:

- [What's new](#)
- [Upgrade software and hardware](#)

What's new

For information about the new features and enhancements included in Business Portal, refer to [What's New in Business Portal for Microsoft Dynamics GP 2010](#) (.pdf or .xpf on the Web).

Upgrade software and hardware

Use the following resources to help you upgrade Business Portal.

Document	Description	File format
Business Portal Upgrade Guide	Provides step-by-step instructions for upgrading Business Portal.	.pdf or .xpf (on the Web—CustomerSource logon required)

