Microsoft Dynamics®

Business Portal for Microsoft Dynamics® GP 2010

Administrator's Guide

Release 5.1

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Introduction

Welcome to Business Portal for Microsoft Dynamics® GP, a web-based business application that you can use for your company intranet or as an extension to your company intranet. It provides users with secure and easy access to Microsoft Dynamics GP information, and to additional, browser-based applications that operate in Business Portal.

This guide is intended for administrators who:

- Set up Business Portal
- Provide company employees with access to Business Portal
- Manage daily use of Business Portal
- Create Microsoft Dynamics GP queries
- Generate reports

Depending on your organization, this may be one person or several.

The guide occasionally refers to the Business Portal Installation Guide, which is located in the Documentation folder on the Business Portal media. An understanding of that information is recommended. Also, it is important that you have a good understanding of concepts and administrative procedures for Internet Information Services (IIS) and Microsoft® SharePoint® Foundation 2010 or Microsoft SharePoint Server 2010.

Check for updated instructions

This information was current as of April 14, 2011. The documentation may be updated as new information becomes available. Check the Microsoft Dynamics GP online web sit e (http://go.microsoft.com/fwlink/?LinkId=185513) for the most current documentation.

This introduction includes the following sections:

- *What's in this manual*
- *Symbols and conventions*
- *Additional resources*
- *Technical support*
- *Send us your documentation comments*

What's in this manual

This documentation is divided into the following parts:

- Part 1, **Getting started**, provides an overview of Business Portal and its pages, and helps you understand your role as the administrator. This part also explains how to change global settings and manage Business Portal notification messages.

- Part 2, **Security**, provides procedures for setting up and maintaining Business Portal security through users, roles, and data permissions.

- Part 3, **Portal elements**, explains the types of queries and web parts that are available in Business Portal, and how you can maintain them for users.

- Part 4, **Reports administration**, contains information about storing and managing Microsoft Dynamics GP reports using either the Reports Catalog or the GP Report Center site.
- Part 5, **Business Connectivity Services**, explains how the Business Connectivity Services allows Microsoft Dynamics GP data to be displayed in SharePoint.
- Part 6, **Customizations**, explains how to customize Business Portal. Information about creating a customer portal is included.
- Part 7, **Tuning, troubleshooting, and maintenance**, contains procedures you can use to improve Business Portal performance and to maintain and troubleshoot the installation.
- Part 8, **Role and group reference**, lists default roles, groups and security permissions for 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 Microsoft Dynamics GP may be affected.

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

Convention	Description
Modifying user information	Italicized type indicates the name of a section or procedure.
File > **Print**	The (>) symbol indicates a sequence of actions, such as choosing items from a menu or toolbar or clicking buttons in a window. This example directs you to go to the **File** menu and click **Print**.
Bold	Bold type indicates navigation, tab names, menus, commands, buttons, field names, keywords, and functions.
TAB or ENTER	Small capital letters indicate a key or a key sequence.
Reports pages are available only if you're using Business Portal with SharePoint Foundation.	Margin notes indicate when a topic applies only if you're using a specific product or technology.

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.

After you've installed Business Portal, you can find links to these manuals and other printable Business Portal documentation in the Documentation Resources web part on the Administration Home page.

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

Business Portal User's Guide The 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, or a SharePoint Foundation page, or SharePoint Server 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 SharePoint. General information about these features is provided in the Administering Business Portal help. For more detailed information, refer to the SharePoint help, which can be accessed by clicking the Help icon button in the upper-right corner of any SharePoint page.

Technical support

You can contact Microsoft Dynamics GP 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.

Send us your documentation comments

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: Getting started

This part of the documentation explains fundamental concepts you need to know to use Business Portal. Information about general Business Portal settings also is included.

- Chapter 1, "Business Portal overview," contains general information about Business Portal.
- Chapter 2, "Before you begin," contains a checklist for setting up Business Portal, and includes information that will help you understand your role as administrator.
- Chapter 3, "General settings," contains information about global Business Portal settings. You can specify the e-mail server and set up Terminal Services access or Remote Desktop Services access to Microsoft Dynamics GP.
- Chapter 4, "Managing e-mail notifications," explains how to define the content of e-mail messages that are automatically generated and sent to customers or employees. (The notification system is used with and Requisition Management only.)

Chapter 1: Business Portal overview

Overview information about Business Portal is provided in the following sections:

- *Business Portal features*
- *Business Portal site structure*
- *Business Portal navigation*
- *Business Portal pages*
- *Content management*

Business Portal features

Business Portal gives employees in your organization access to business information and allows them to participate in business processes using a web-based portal. Business Portal can be used as the basis for your company's intranet. Business Portal provides the following features:

Microsoft SharePoint Foundation Business Portal is a collection of Microsoft SharePoint Foundation sites. All the functionality of SharePoint Foundation web parts and web part pages are available, with additional features that are unique to Business Portal. SharePoint document libraries, lists, sites, and workspaces that are used for content management.

Business Portal can be installed with SharePoint Foundation only, or with Microsoft SharePoint Server, which is based on SharePoint Foundation. To learn more about SharePoint Foundation or SharePoint Server features, refer to your SharePoint documentation.

Role-based desktop Information and applications are organized by role, which means that users see only information that is relevant to their jobs.

Ad-hoc query capabilities Query pages provide the ability to search for and organize back office data through Business Portal. Links in the query results enable you to find related information quickly.

For more information about queries, refer to Chapter 12, "Creating queries."

Browser navigation to Microsoft Dynamics GP windows With Business Portal, you can give users access to Microsoft Dynamics GP through Internet Explorer® (using Windows® Terminal Services technology or Remote Desktop Services technology). Users can browse directly to a Microsoft Dynamics GP window without leaving Business Portal.

You may want to set up Terminal Services or Remote Desktop Services for remote users or users who need access to Microsoft Dynamics GP only occasionally. For more information, see *Set up Microsoft Dynamics GP Terminal Services or Remote Desktop Server access* on page 19.

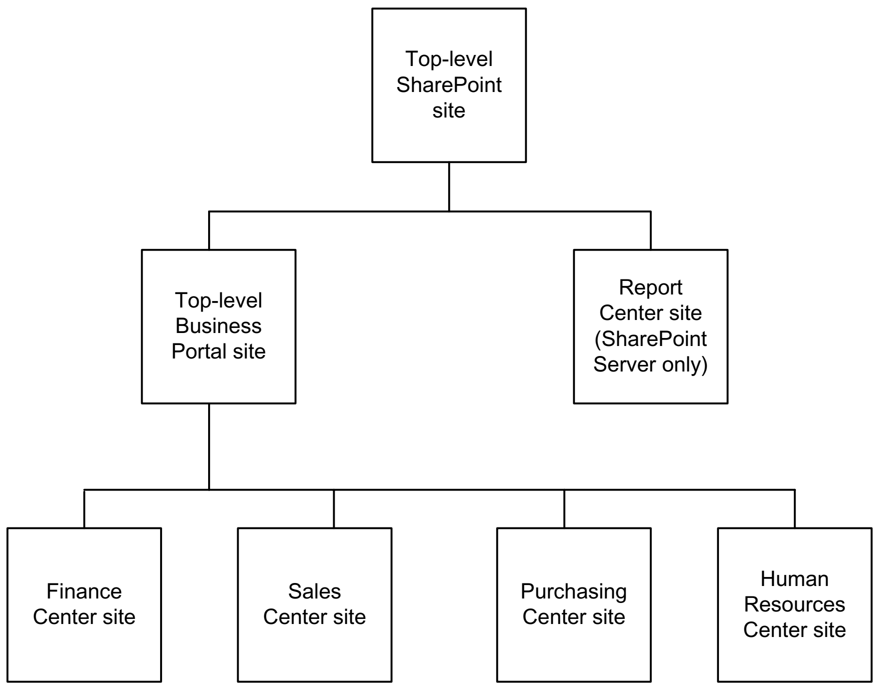
Integrated web-based applications Business Portal applications expand the business tasks users can perform without having access to a full Microsoft Dynamics GP client installation. In Business Portal, web-based applications share data, a common logon, a common look and feel, and uniform navigation.

There are various integrating applications for Business Portal, which can be purchased and installed separately. For example, Key Performance Indicators (KPI) is an application that helps you calculate business metrics such as your company's total sales and gross profit margin.

Business Portal site structure

Business Portal is composed of multiple web sites. The top-level site contains the main home page and the administration pages for Business Portal and its applications. Each Business Portal center is a subsite that contains pages related to a particular department or role.

The following illustration shows the Business Portal site structure. (You may have additional center subsites in your implementation.)



Each site in the Business Portal site collection has its own Site Settings page, accessed by clicking **Site Actions** > **Site Settings**.

To administer Business Portal or its applications, such as Key Performance Indicators, you must use the Site Settings page on the top-level Business Portal site. (The Business Portal Home page is on the top-level Business Portal site; from the Home page, you can access the top-level Site Settings page.)

Because SharePoint groups exist across the entire site collection, you can administer users and groups from any site in the collection. For more information about SharePoint settings, refer to the SharePoint documentation.

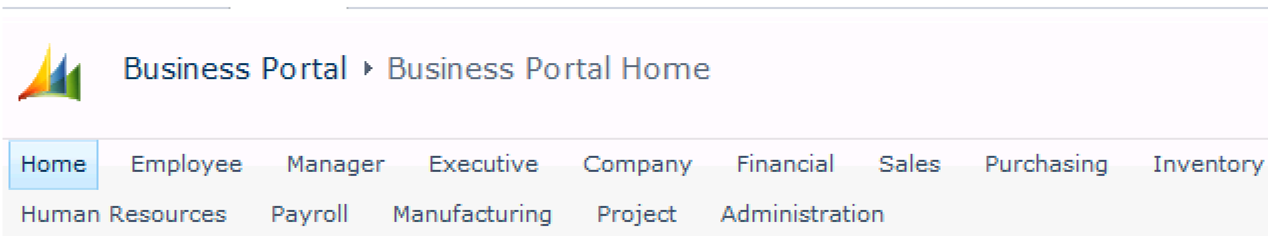
Business Portal navigation

To locate a page in Business Portal, use the horizontal menu at the top of the page and the Quick Launch on the left side of the page.

The top link bar

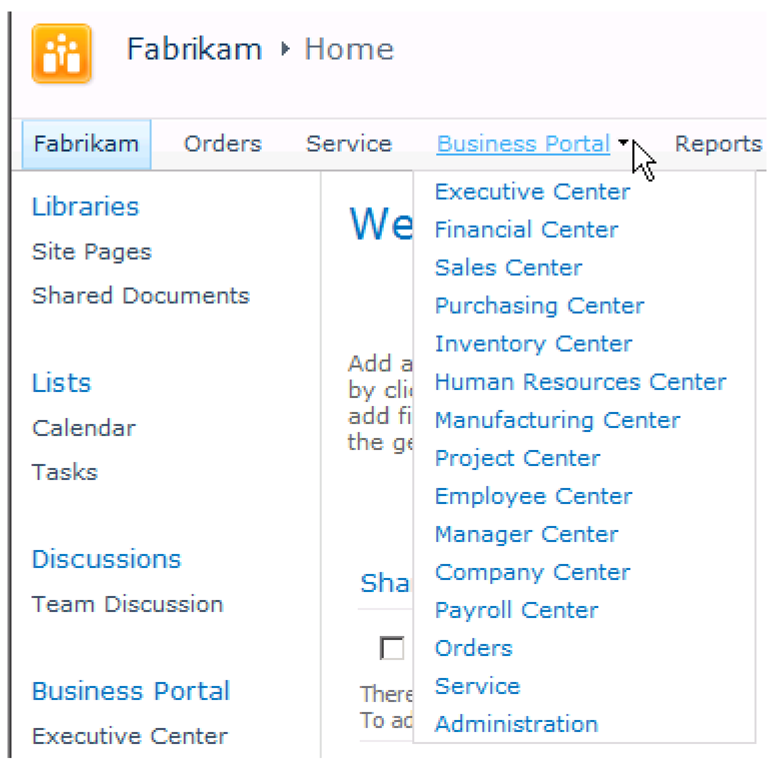
The top link bar contains links to Business Portal center sites. The top link bar works in one of the following ways:

- If you're using Business Portal with SharePoint Foundation only, the top level menu contains links to all Business Portal center sites. Click a center site link to go to that site's home page.



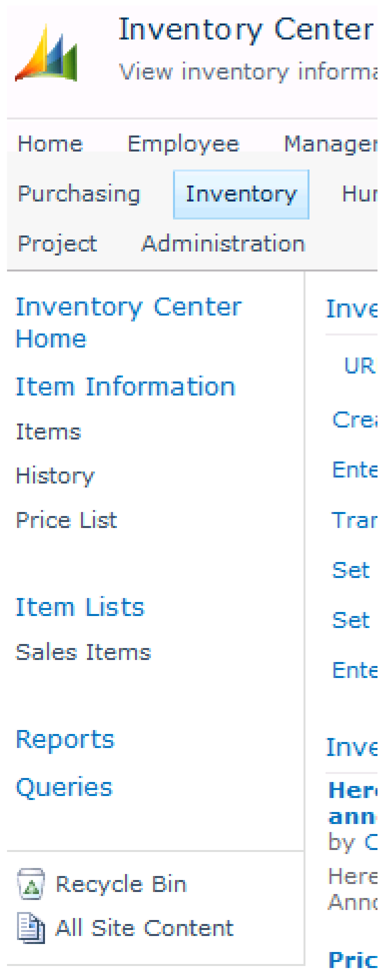
- If you're using Business Portal with SharePoint Server, a Business Portal item appears in the top level of the menu. When you hold the mouse pointer over the Business Portal heading, links to center sites are displayed.

  If you click the Business Portal heading, the Business Portal Home page is displayed. Links to Center sites appear in the Quick Launch on the Home page. Click a center site link, either in the menu or in the Quick Launch, to go to that site's home page.



The Quick Launch

A Quick Launch is displayed on most pages in Business Portal. The Quick Launch provides navigation to the pages on a center site.



Business Portal pages

Business Portal comes with many pages set up and ready to use in your business. These predefined pages include the Business Portal Home page, center site home pages, information pages, external list pages, dashboard pages, reports pages, and query pages.

Business Portal Home page

The Home page is the first page users see. It provides an overview of what is available to users in Business Portal, such as company information. You control which web parts appear on the Home page.

Center site home pages

A center site home page displays a summary of Microsoft Dynamics GP information related to the roles and groups that can view the center. Users see links to only the center sites associated with their specific SharePoint groups. For example, a user who is a member of the Salesperson SharePoint group will see the **Sales** site link.

Center site home pages provide a starting point for similar types of users to access information and tasks. Each center site home page includes web parts containing tasks, announcements, and center-related information. Center site home pages for functional areas such as Purchasing and Inventory may also include a **Top 5 Reports** web part and links to query and reports pages.

Information pages

Information pages combine a number of web parts—mainly result viewer web parts—to present current data from Microsoft Dynamics GP.

Typically, information pages display a list of related master records in a result viewer web part on the left, along with several related result viewer web parts to the right that display detail information related to the records in the list. For example, the Customer Summary information page contains result viewer web parts that show the following information:

- A list of customers
- Name, address, and contact information
- Balance information
- Sales history

When a customer is selected in the web part on the left side of the Customer Summary page, the other web parts on the page display contact information and current balances for the selected customer.

External list pages

External list pages use external content types in Business Connectivity Services in SharePoint to present current data from the back office. For example, the Customer List page displays a current list of customers. External list pages appear on Business Portal center sites for sales, purchasing, and inventory, and can be identified by the word “list” in their names.

If you have access to the data, you can click an item in an external list to show detailed information about the selected object. For example, on the Sales Order List page, you can click on an order in the Sales Order List to view detailed information for that order.

External lists can be connected to each other to display additional information. For example, on the Sales Order List page, you can select the Connection icon next to an order in the Sales Order List to view the line items for that order in the Sales Order Line List. For more information about external list pages, see *External list pages and dashboard pages* on page 111.

Some external lists allow you to add and modify data from the back office. When working with external lists, not all the fields that are available for a record in Microsoft Dynamics GP are available in an external list in Business Portal. To complete a record, you might have to enter information using Microsoft Dynamics GP. See the Business Portal User’s Guide for more information about entering data for external lists.

Dashboard pages

Dashshboards bring together related information to help people perform their jobs effectively. Each dashboard may consist of a number of pages. For more information about dashboard pages, see *External list pages and dashboard pages* on page 111.

The Executive Center site has dashboard pages for key performance indicators and metrics created using Microsoft SQL Server® Reporting Services 2008. Pages are organized for executives to show information in the following areas: Company Overview, Financial, Sales, Inventory, Manufacturing, Project, and Human Resources.

The Customer Balance page is a sales dashboard that is available from the Sales Center site. The My Sales Dashboard is available for salespeople and sales managers. The dashboard page uses external lists to display data.

Reports pages

Reports pages are available only if you're using Business Portal with SharePoint Foundation.

Reports pages display Microsoft Dynamics GP reports. These reports include .pdf, .txt, .htm, doc, or .docx files that are updated and published regularly on a shared network location; they don't provide real-time data. Reports pages are available on functional area center sites, such as Sales, Purchasing, Inventory, and Finance.

Users with access to Microsoft Dynamics GP choose which reports to publish and how often. The date and time a report was last updated appears in the **Top 5 Reports** web part on the corresponding center site home page.

Query pages

You can use query pages to create customized ad-hoc queries that provide easy access to information stored in Microsoft Dynamics GP. Each Business Portal functional area center site has a related query page with a series of default data categories, called entities, to make searching easy. For example, the **Sales** center site's query page includes entities such as Order and Customer. You can use queries on query pages or in result viewer web parts.

For more information about creating queries, refer to Chapter 12, "Creating queries." For information about organizing queries for use in Business Portal, see Chapter 13, "Organizing queries."

Content management

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. 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 Foundation content management features. The following SharePoint Foundation content types can be used in Business Portal. You can add these content types to your pages as web parts.

For more information about any of the SharePoint content types listed here, refer to the SharePoint documentation.

- Libraries—A library is a folder where a collection of files is stored. The files often use the same template.

To help make your server more secure, we recommend not allowing libraries to contain .htm files. For details about blocking files with certain extensions from libraries, refer to the SharePoint documentation.

- Lists—A list is a collection of information that you share with team members. For example, you can create a sign-up sheet for an event, or you can create a list of ideas. A site can include a variety of lists—from contacts and calendars to announcements and issues.

- Discussion boards—Discussion boards provide a forum for conversing about topics that interest your team. Team members can post comments and reply to each others' comments, reducing the need for widely distributed e-mail threads.

- Surveys—Surveys provide a way of polling team members. All you need to do is specify the questions and define how team members will enter their answers.

Users can set up SharePoint alerts, to be notified by e-mail of any changes made to applicable site content. Alerts are managed using the My Alerts on this Site page under **[Your Name]** > **My Settings** > **My Alerts**.

To manage document libraries, lists, and other SharePoint content, you'll use SharePoint administration pages, available from the **Site Actions** menu.

Chapter 2: Before you begin

As the Business Portal administrator, you'll be setting up and organizing many elements: users, roles, permissions, pages, web parts, and customizable Business Portal settings. Administrative information and tasks associated with each of these elements are located on the Site Settings page of the top-level Business Portal site.

It is important to understand SharePoint site management, content management, and web part functionality as you set up and implement Business Portal. Because Business Portal is a collection of SharePoint Foundation sites, some Business Portal administration must be done through SharePoint.

Review this documentation before proceeding with Business Portal setup. This information will help you understand your role as the administrator, and will help you get started with Business Portal.

The information is divided into the following sections:

- *Administrator considerations*
- *Plan content*
- *Business Portal setup checklist*
- *Start Business Portal*

Administrator considerations

The Business Portal administrator manages the entire Business Portal, including page and data access for all users. Following are considerations to keep in mind about the Business Portal administrator:

- In order to administer Business Portal, users must belong to both the Administrator MBF role and the BP Administrator SharePoint group.

- The user who installs Business Portal automatically is assigned to all Business Portal SharePoint groups.

  Users who are assigned to the BP Administrator SharePoint group have the Full Control permission level for all pages in Business Portal.

- The user who installs Business Portal automatically is assigned to the Administrator MBF role for All Companies.

  Users who are assigned to the Administrator MBF role for All Companies can run all queries and access all pages and data in Business Portal. If a user is assigned to the Administrator role for only one company, that user will not be able to run queries for other companies.

- The Administrator MBF role cannot be copied or removed.

Plan content

The first step in planning content for Business Portal is to do a content inventory. Create a list of the information, web applications, and web sites you already have that you want to make available. Identify the content, where it's currently located, what format it's in, and who maintains it.

The next step is to identify the portal elements you'll need to create and set up. You should identify:

- New pages that you need to create
- The location of each page in the site structure
- Web parts that will be on each page
- Who will create each page

You should also determine which users will need access to each page, and which users should be allowed to edit the content.

Business Portal setup checklist

After installing Business Portal, complete the following setup procedures, in the following order. Some items are optional, depending on your implementation.

Refer to the Business Portal Installation Guide for information about installing Business Portal and required software.

Task	For more information, see
1. Specify global Business Portal settings.	Chapter 3, "General settings"
2. Add users and assign them to roles and groups.	*Add users to SharePoint groups* on page 38 *Add users to MBF roles* on page 41 *Add users to web service roles* on page 61
3. Create shared queries.	Chapter 12, "Creating queries" *Share a query among users* on page 76
4. Create pages.	SharePoint Foundation or SharePoint Server documentation
5. Create document libraries, lists, and other content.	*Content management* on page 12 SharePoint Foundation or SharePoint Server documentation
6. Set up Reports Catalog or GP Report Center and publish reports.	Chapter 15, "Reports Catalog" Chapter 16, "GP Reports Center"
7. Set up the Business Connectivity Services.	*Assign the application pool identity to the BDC Administrator role* on page 112
8. Set up Business Portal applications.	The .pdf files in the Documentation folder on the Business Portal installation media. You can view online help after you've installed the applications.
9. Prepare client workstations to run Business Portal, if you didn't do so during the installation process.	Business Portal Installation Guide (available in the Documentation folder on the Business Portal media)

Start Business Portal

Start Business Portal by typing the Business Portal URL in the address field of Internet Explorer. Type http://<*ServerName*>/BP, where <*ServerName*> is the name of the web server where you've installed Business Portal. If you've configured Business Portal to use Secure Sockets Layer (SSL), the URL is https://*ServerName*/BP. Depending on your Internet Explorer security settings, you may be required to log on.

When you launch Business Portal for the first time, you will be prompted to install ActiveX® components that are needed to use certain Business Portal web parts.

On each client computer, the user who launches Business Portal for the first time must have access privileges to view and use cabinet (.cab) files. This user also must have access rights to the Downloaded Program Files folder. (The folder is typically in the Windows or the Winnt folder.) Typically, members of the Administrators and the Power Users groups have these rights.

For information about installing ActiveX components on workstations for members of the Users group, refer to the Business Portal Installation Guide.

Chapter 3: General settings

This documentation describes how to set up Microsoft Dynamics GP access through Microsoft Windows Terminal Services or Remote Desktop Services. It also explains how to set up the e-mail address that Business Portal will send notifications from. Information about these settings is divided into the following sections:

- *Specify the SMTP server and Business Portal e-mail address*
- *Set up Microsoft Dynamics GP Terminal Services or Remote Desktop Server access*
- *Change Business Portal regional settings*

Specify the SMTP server and Business Portal e-mail address

If you are going to use e-mail notifications for Business Portal, use the E-Mail and Terminal Services page or E-Mail and Remote Desktop Services page to specify the Simple Mail Transfer Protocol (SMTP) server that will manage these messages. You also must enter the address that Business Portal messages will be sent from. For more information, see Chapter 4, “Managing e-mail notifications.”

1. Go to the Site Settings page (**Site Actions** > **Site Settings**) for the top-level Business Portal web site.

2. Under **Business Portal Administration**, click **E-mail and Terminal Services or E-mail and Remote Desktop Services**. The E-mail and Terminal Services page or E-mail and Remote Desktop Services page appears.

3. Under the **E-Mail** heading, type the path to the SMTP server that will manage e-mail notifications for Business Portal.

4. Enter the originating e-mail address that Business Portal will use when sending e-mail notifications (the address in the **From** line of notification e-mails).

5. Click **Save**.

Set up Microsoft Dynamics GP Terminal Services or Remote Desktop Server access

Business Portal users can access Microsoft Dynamics GP windows through Business Portal using Windows Terminal Services (WTS) or Remote Desktop Services, even if the Microsoft Dynamics GP client software isn’t installed directly on the computer. This is useful for remote users or users who need access to Microsoft Dynamics GP windows only occasionally.

Most center site home pages include a Back Office Tasks web part that displays links to windows in Microsoft Dynamics GP. Clicking a task link opens a new Terminal Services session or a Remote Desktop Services session. For more information about these web parts, see *Back Office Tasks web parts* on page 88.

Use the E-mail and Terminal Services page or the E-mail and Remote Desktop Services page to select options for Microsoft Dynamics GP access. When you use this page to set up Terminal Server access or Remote Desktop Server access, Microsoft Dynamics GP opens by default only for those users who access the SQL server through Business Portal. We don’t recommend specifying the initial program and working directory through Terminal Services or Remote Desktop Services; this opens Microsoft Dynamics GP by default for every user who logs on to the SQL server.

Use the following steps to set up Terminal Services or Remote Desktop Services access to Microsoft Dynamics GP.

1. Go to the Site Settings page (**Site Actions** > **Site Settings**) for the top-level Business Portal web site.

2. Under **Business Portal Administration**, click **E-mail and Terminal Services** or **E-mail and Remote Desktop Services**. The E-mail and Terminal Services page or the E-mail and Remote Desktop Services page appears.

3. Specify Windows Terminal Server or the Remote Desktop Services Server to use for Internet Explorer access to Microsoft Dynamics GP.

4. Type the path and filename of the initial program to start when a user logs on to WTS or Remote Desktop Services, using the following format:

   “C:\PathName\dynamics.exe” “C:\PathName\dynamics.set”

   where *PathName* is the path to the Microsoft Dynamics GP application. (Be sure to include the quotation marks.)

5. Type the path to the working directory where the initial application should run, using the following format:

   C:*PathName*

   where *PathName* is the path to the Microsoft Dynamics GP application.

6. Click **Save**.

Change Business Portal regional settings

Use the Regional Settings page to select a geographic region for Business Portal. The region you select determines how numbers, dates, times, and phone numbers are displayed. For example, if you select **English (Australia)**, the information will displayed as shown in the following table.

Number	123,456,789.00
Time	10:55:06 AM
Short Date	30/06/05
Long Date	Thursday, 30 June 2005

The region you select does not affect how currency amounts are displayed in Business Portal. Currency amounts use the currency format (symbol, separators, and decimal places) defined in Microsoft Dynamics GP for each company. The region you select also does not affect the language in which text is displayed; text is always displayed in U.S. English.

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

We don't recommend changing anything on the SharePoint Foundation Regional Settings page. Changes made on the Business Portal Regional Settings page affect the way information is displayed in SharePoint lists and document libraries, as well as in Business Portal result viewers. Changes made on the SharePoint Regional Settings page will affect only SharePoint lists and document libraries.

1. Go to the Site Settings page (**Site Actions** > **Site Settings**) for the top-level Business Portal web site.

2. Under **Business Portal Administration**, click **Regional Settings**. The Regional Settings page appears.

3. Select a region.

   Business Portal provides regional settings for only the countries displayed in the **Region** list.

4. Click **Save**.

   When you change your region selection in Business Portal, the setting also is changed in SharePoint for the Business Portal web site. If you're using multiple web servers, you need to select the region on only one server; the other servers will be updated automatically.

Chapter 4: Managing e-mail notifications

If you've installed Requisition Management, the Notifications page is available to you. Use this page to set up and manage message templates that contain the information that will appear in e-mail messages that are automatically generated and sent to customers or employees.

Before you can send notifications, you must specify a mail server and the address that will appear in the **From** line on notification messages. For more information, refer to *Specify the SMTP server and Business Portal e-mail address* on page 19.

Information about notifications is divided into the following sections:

- *Notifications*
- *Automatic substitutions*
- *Add or modify an e-mail notification*

Notifications

Notifications are message templates; they contain the information that will appear in e-mail messages that are automatically generated and sent to customers or employees. The types of notifications that you can send depend on whether you have Requisition Management installed.

If you've installed Requisition Management, you can use the Notifications page to define the content of e-mail messages sent to employees who have submitted purchase requests.

For more information about the types of notifications available with each application, see the Requisition Management documentation.

Automatic substitutions

Use automatic substitutions to create e-mail messages that are automatically personalized for each recipient.

Automatic substitutions are variables you can use in your notifications. When messages are generated, the variables are replaced with the appropriate data for the recipient. For example, the variable "Customer Name" would be replaced with the specific customer name.

The type of notification you're creating determines which automatic substitutions are available for the subject line and message body. For more information about each notification type, refer to the Requisition Management documentation.

For more information about setting up notifications, refer to *Add or modify an e-mail notification* on page 23.

Add or modify an e-mail notification

Notifications are message templates; they contain the information that is used to automatically generate e-mail messages you send to customers or employees. For each notification, you can specify a From address, subject line, and message body.

1. Go to the Administration Home page on the Business Portal web site.

2. Under **Requisition Management**, click **Notifications**. The Notifications page appears.

3. To create a new notification, click **Add**. The Add E-mail Notification page is displayed.

   To make changes to an existing notification, select the notification in the list and click **Modify**. The Modify E-mail Notification page is displayed.

4. Enter or change the name for the notification.

5. For a new notification, select the notification type.

   For specific information about each notification type, see the Requisition Management documentation.

6. Enter or change the description for the notification.

7. Enter or change the e-mail address that will appear in the **From Address** line for messages that use this notification.

8. Enter or change the subject line for messages that use this notification.

   You can insert variables from the **Automatic Substitutions** list. Click in the subject line where you want the variable to appear, then select the variable and click **Insert in Subject**.

   Variables are substituted with the appropriate data when each e-mail message is generated. The notification type you selected determines which substitutions are available. For more information, refer to *Automatic substitutions* on page 23.

9. Compose the message body for messages that use this notification.

   You can insert variables from the **Automatic Substitutions** list. Click in the message body where you want the variable to appear, then select the variable and click **Insert in Message**.

10. Click **Save**.

Part 2: Security

This part of the documentation explains how Business Portal security is set up and maintained through MBF roles, SharePoint groups, and web service roles. Because Business Portal uses SharePoint functionality, you'll be referred to information about managing SharePoint site users, groups, and permission levels.

The following information is included:

- Chapter 5, "Security overview," describes the elements of Business Portal security.
- Chapter 6, "Managing page security," explains how page security works in Business Portal.
- Chapter 7, "Managing SharePoint groups and permissions," gives an overview of SharePoint permissions and how they're used in Business Portal.
- Chapter 8, "Managing Microsoft Business Framework users," describes setting up domain users as MBF users and mapping them to back office IDs.
- Chapter 9, "Managing Microsoft Business Framework roles," explains how MBF roles are used to control access to Business Portal data.
- Chapter 10, "Managing data permissions," describes how to create and modify the data permissions used with MBF roles.
- Chapter 11, "Managing web service users," provides instructions for setting up web service users and mapping them to back office IDs.

Chapter 5: Security overview

This information is divided into the following sections:

Elements of Business Portal security

There are two types of information to secure in Business Portal: SharePoint content and back office data. SharePoint Foundation 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.

SharePoint

Business Portal is built on SharePoint, and all page access and navigation is handled through SharePoint. Using SharePoint, 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 the Microsoft Business Framework (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

Business Connectivity Services 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.

SharePoint Foundation security overview

SharePoint Foundation uses groups and permission levels to grant access to pages and content.

For more information about SharePoint groups and permission levels, and how they're used in Business Portal, see Chapter 7, "Managing SharePoint groups and permissions," and Chapter 24, "Default SharePoint groups and security permissions."

SharePoint groups for Business Portal

SharePoint groups are used to grant access to Business Portal sites and pages. A number of predefined SharePoint groups are created when you install Business Portal. For example, the BP Salesperson and BP Sales Manager groups are installed by default and grant access to pages on the Sales Center site.

SharePoint permission levels for Business Portal

SharePoint permission levels define the level of control users have over securable items. Default SharePoint permission levels include Full Control, Design, Contribute, Read, and Limited Access.

Most Business Portal groups need only Read access to pages and other content. However, if a particular group must have the ability to add content, such as announcements, that group would require the Contribute permission level for the page or content.

SharePoint permission levels do not affect data entry on Business Portal pages. For example, users with Read access to the page where requisitions are entered can still enter requisitions. The ability to enter requisitions is controlled by the user's MBF role assignments. The Read permission level applies only to modifying the page itself and any SharePoint content on the page.

Microsoft Business Framework security overview

In order to access the data and functionality on certain Business Portal pages, users must be assigned to MBF roles, which are sets of data permissions. Users in the Business Portal Administrator MBF role can add users to roles using the administration pages provided with Business Portal.

Data permissions

MBF uses business entities to retrieve data from the Microsoft Dynamics GP database. A business entity is a representation of a record from the Microsoft Dynamics GP back office. Customer, purchase order, and item are examples of entities.

Entities contain properties, or attributes, that refer to specific data. For example, customer ID, customer name, and customer contact are attributes of the customer entity. Data permissions allow users to see only certain properties or attributes of an entity.

For more information about data permissions, see Chapter 10, "Managing data permissions."

Roles

Use MBF roles to control access to data by assigning data permissions to them. When a data permission is assigned to a role, users in that role can access business entity data through that data permission. You can assign a user to a role in a specific company, multiple companies, or all companies.

There are two types of MBF roles: portal roles and advanced roles. A portal role is used to grant users who share job functions access to the same data. An advanced role identifies a specific user with an ID from Microsoft Dynamics GP, such as an employee, salesperson, customer, or vendor.

For more information about MBF roles, see Chapter 9, "Managing Microsoft Business Framework roles."

Microsoft Dynamics GP IDs

Users in advanced roles are mapped to Microsoft Dynamics GP IDs, which provides access to specific information. For example, you can map Business Portal users to their employee IDs so they can access their own information, such as paystubs and available time off. Similarly, you can map a salesperson, customer, or vendor to a salesperson ID, customer ID, or vendor ID.

For more information, see *Advanced roles* on page 48.

Web service security overview

Business Portal includes additional pages that retrieve data using Web Services for Microsoft Dynamics GP. You must set up users in web service roles, which are sets of web service operations and tasks, in addition to assigning them to MBF roles and SharePoint groups.

Security for the Microsoft Dynamics GP web service is controlled through the Microsoft Dynamics Security console, which is a snap-in for Microsoft Management Console (MMC). You must be designated as a Security Administrator for the security service in order to access the Dynamics Security Console and configure security settings.

For more information about web services or about using the Dynamics Security Console, see the Microsoft Dynamics GP Web Services Installation and Administration Guide.

A brief overview of web service security is provided below.

Tasks and operations

Operations are the individual actions that can be performed by the Dynamics GP web service. Tasks provide a way to group related operations together.

The Dynamics GP Web Services application has multiple predefined tasks. For example, the View Commissions task contains the Query Salesperson Commissions and View Salesperson Commissions operations.

Roles

A web service role contains a set of operations, tasks, or other roles. Roles are used to group together the actions that can be performed by users who will be assigned to the role. You can assign a user to a web service role in a specific company, multiple companies, or all companies.

The Dynamics GP Web Services application has multiple predefined roles. For example, the Sales Representative role contains tasks that would be performed by sales representatives, such as Manage All Sales Transactions and Manage Customers.

Microsoft Dynamics GP IDs

You can assign web service users to entity IDs to identify a specific user with an ID from Microsoft Dynamics GP, such as a salesperson or a customer. You must be designated as a Business Object User Assignment Administrator for the security service in order to assign users to entity IDs.

User setup checklist

Perform the following steps to give domain users access to Business Portal. Business Portal uses Windows authentication, so domain users will log on using domain user names and passwords.

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 access to. This will help you determine which roles and groups to assign to each user.

Task	For more information, see
1. Set up users in SharePoint Foundation.	*Add users to SharePoint groups* on page 38
2. Set up users in MBF.	*Add users to MBF roles* on page 41
3. Set up users in web services, if necessary.	*Add users to web service roles* on page 61

Suggested role and group mapping

SharePoint groups provide access to pages; MBF and web service roles provide access to data. In Business Portal, SharePoint groups, web service roles, and MBF roles are not automatically synchronized. You must assign users to SharePoint groups, web service roles, and MBF roles separately or use the Security Synchronization Utility. For more information, see *The Microsoft Dynamics Security Synchronization Utility* on page 31.

The following table shows default SharePoint groups and the corresponding MBF roles and web service roles that users should be assigned to in order to effectively access default Business Portal pages.

SharePoint group	MBF role	Web service roles
BP Accounting Specialist	Accounting Specialist	AP Coordinator AR Coordinator
BP Administrator	Administrator	Superuser
BP Employee	Employee	N/A
BP Executive	Executive	N/A
BP HR Administrator	HR Administrator	N/A
BP Internal User	User	N/A
BP Inventory Manager	Inventory Manager	WMS
BP Manager	Manager	N/A
BP Operations Manager	Operations Manager	WMS Purchasing Manager
BP Order Entry Clerk	Order Entry Clerk	Sales Representative
BP Payroll Administrator	Payroll Administrator	N/A
BP Production Manager	Production Manager	N/A
BP Purchasing Manager	Purchasing Manager	Purchasing Manager
BP Reports Catalog Administrator	Reports Catalog Administrator	N/A

SharePoint group	MBF role	Web service roles
BP Sales Manager	Sales Manager	Sales Manager - Self
BP Salesperson	Salesperson	Salesperson - Self

For more detailed information about page access for each SharePoint group, refer to Chapter 24, “Default SharePoint groups and security permissions.”

For more detailed information about data access for each MBF role, refer to Chapter 25, “Default portal roles and security permissions,” and Chapter 26, “Default advanced roles and security permissions.”

For more detailed information about data access for web service roles, refer to the web service documentation.

The Microsoft Dynamics Security Synchronization Utility

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)
- SharePoint Foundation

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 on CustomerSource (https://mbs.microsoft.com/customersource). For more information, refer to the documentation provided with the utility.

Chapter 6: Managing page security

This information is divided into the following sections.

The Business Portal subsite

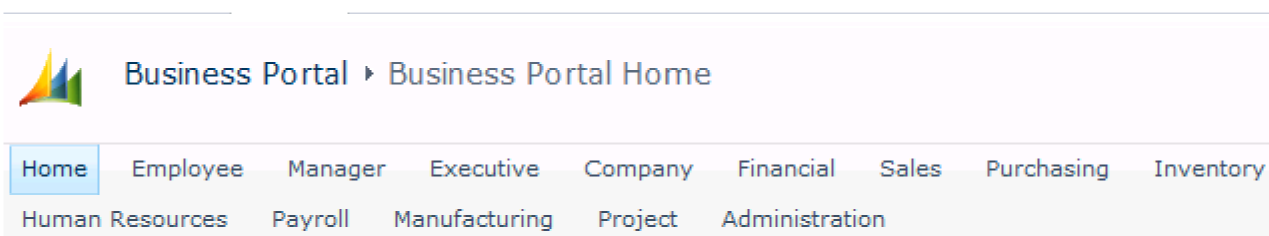
The Business Portal sites belong to a *site collection*—a hierarchical set of sites that can be managed together. Sites within a site collection have common features, such as shared permissions, galleries for templates, content types, and web parts, and they often share a common navigation. All sites in a site collection are stored together in the same Microsoft SQL Server database. For more information about site collections, see the SharePoint Foundation documentation.

The top-level Business Portal site is a subsite of the top-level site in the collection. The Business Portal center sites are subsites of the top-level Business Portal site. For an illustration of the Business Portal site structure, see *Business Portal site structure* on page 8.

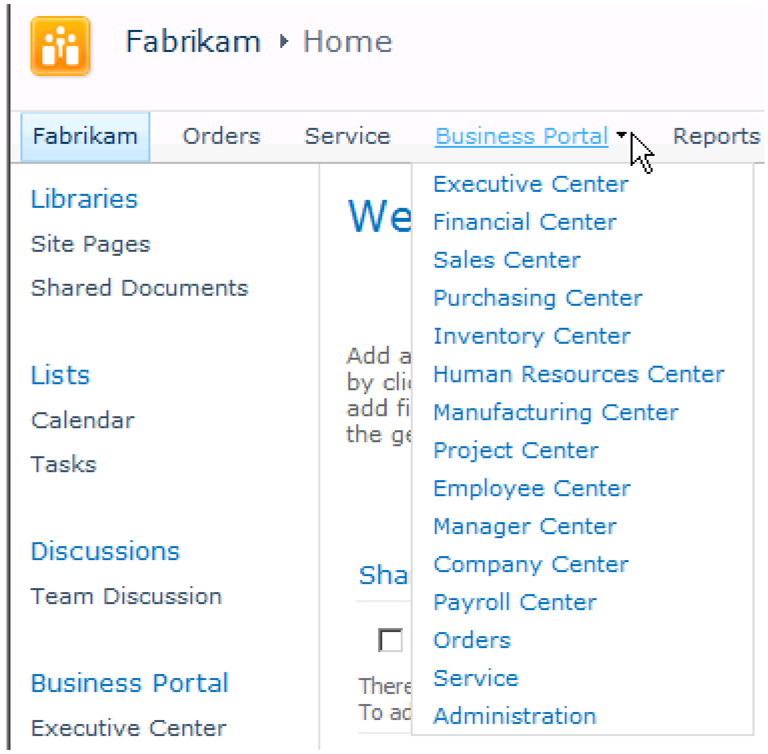
The Business Portal sites interact with the site collection in the following ways.

Navigation Navigation inheritance depends on how Business Portal was implemented.

- If you're using Business Portal with SharePoint Foundation only, the Business Portal sites have their own navigation that is not inherited from the site collection, as in the following illustration.



- If you're using Business Portal with SharePoint Server, the Business Portal sites inherit navigation from the top-level site in the site collection, as in the following illustration.



For more information about Business Portal navigation, see *Business Portal navigation* on page 9.

Permissions The Business Portal sites do not inherit permissions from the top-level site in the site collection. For more information about Business Portal permissions, see *Security inheritance for pages and page libraries* on page 34.

Galleries Template galleries, content type galleries, and web part galleries are shared between Business Portal sites and other sites in the collection.

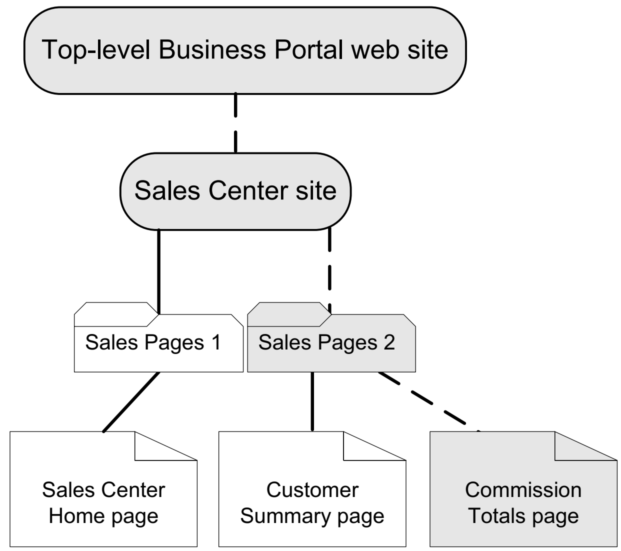
Security inheritance for pages and page libraries

By default, permissions for securable objects in SharePoint (such as document libraries and lists) are inherited from the parent site, list, or library. In Business Portal, this means that users and groups automatically get access to page libraries when they get access to the site those page libraries belong to. In turn, users and groups automatically get access to pages when they get access to the page libraries those pages belong to.

To help make Business Portal more secure, in some cases it is necessary to set different permissions at the library or page level rather than inherit from the parent site or library. When you set permissions at the page library or page level, permission inheritance from the parent site or library is broken. The parent permissions are duplicated, and from that point forward, changes made to the parent do not roll down.

For example, assume the Business Portal Sales Center site has two page libraries: Sales Pages 1 and Sales Pages 2. All groups that access the Sales Center site need access to the pages in the Sales Pages 1 library, which means that permissions can be inherited from the Sales Center site. However, the Sales Pages 2 library contains a mix of pages for salespeople and sales managers. For the Sales Pages 2 library, page-level permissions should be set on pages that must be restricted.

In the illustration below, shaded items show where permission inheritance has been broken.



When you set page-level permissions on a particular page in a library, all of the other pages in the library can continue to inherit permissions.

You can’t break inheritance for a single user or group for a page. When you break inheritance for a page, no users or groups will automatically get access to the item; you must set permissions manually.

You can return to inheriting permissions from the parent site or library at any time. If you return to inheriting permissions, any customized permissions you set at the library or page level will be discarded.

Guidelines for assigning page permissions

Use the following guidelines when setting up new pages and page libraries in Business Portal.

- We recommend assigning permissions to specific pages only when necessary, in order to maximize performance and minimize setup.

- For common pages that should be accessible by everyone in a site, store the pages in a library named Common with no permissions directly assigned.

  For example, the home page of a site would reside in the Common page library because every user needs access to that page. Be sure that everything in the common page library is truly common and shared by all roles that will access the site.

- We don't recommend creating multiple page libraries just to provide different security rights. Having multiple page libraries for security reasons would likely result in having multiple copies of pages.

Page security and navigation

When a user logs on to Business Portal, items in the Quick Launch and the top link bar appear based on the SharePoint groups that user belongs to. (For more information about the top link bar and the Quick Launch in Business Portal, see *Business Portal navigation* on page 9.)

For example, if a user is in the BP Employee and BP Salesperson SharePoint groups, that user will see the Company Center, Employee Center, Inventory Center, and Sales Center in the top link bar. In the Quick Launch on the Sales Center site, that user would see links to only those pages assigned to the BP Salesperson group.

Be sure to assign users to the correct roles for data access in addition to assigning them to SharePoint groups. If a user isn't assigned to both the correct SharePoint group and the correct MBF or web service role for a page, the user will get an error when navigating to the page.

Chapter 7: Managing SharePoint groups and permissions

SharePoint groups and permissions help you maintain access to sites, pages and other SharePoint elements in Business Portal. When a user logs on to Business Portal, Quick Launch and menu options appear based on the SharePoint groups assigned to that user. Permission levels determine the level of access users have to a securable object, such as Read or Contribute.

Information about managing SharePoint groups and permission levels for Business Portal is divided into the following sections:

- *SharePoint groups for Business Portal*
- *SharePoint permission levels for Business Portal*
- *Add users to SharePoint groups*
- *View or modify a SharePoint group*

SharePoint groups for Business Portal

SharePoint groups are used to maintain role-based access to SharePoint content in Business Portal, including sites, pages, and document libraries. Use SharePoint groups to logically group Business Portal users based on job responsibilities.

A number of SharePoint groups are installed with Business Portal. Most groups grant access to pages and page libraries within role-based sites. For example, the BP Salesperson group grants access to pages on the Sales Center site. The BP Administrator group provides access to all sites and pages in Business Portal. The BP Internal User group provides access to pages that are accessible to all internal Business Portal users, such as the top-level home page. All internal Business Portal users must belong to the BP Internal User group. (External users, such as customers, should not belong to this group.)

SharePoint groups *cannot* be used to control access to data from Microsoft Dynamics GP. You must maintain data access separately, using MBF or web services. SharePoint groups and MBF or web service roles correspond in many cases, but are not automatically synchronized.

In most cases, the default Business Portal SharePoint groups are not limited to a particular company in the back office. This means that if a group has access to a page, users in that group will be able to view the page no matter which company has been selected in Business Portal. However, because back office data access is company-specific, users will see data only for companies they have access to.

Business Portal SharePoint groups for the GP Report Center in SharePoint are company-specific. For more information, refer to Security for Microsoft Dynamics GP report libraries on page 105.

Because it is not efficient to directly maintain large numbers of user accounts, we don't recommend assigning permissions at the individual level for Business Portal. We recommend assigning users to SharePoint groups as much as possible to avoid having to track individual user accounts.

For more information about managing groups, refer to SharePoint Foundation documentation.

SharePoint permission levels for Business Portal

SharePoint Foundation permission levels set the level of access for SharePoint users and groups. The default SharePoint permission levels, in order from least to most access, are:

- Limited Access
- Read
- Contribute
- Design
- Full Control

Because most Business Portal users don't need to modify SharePoint content, such as document libraries or lists, most default Business Portal SharePoint groups are assigned the Read permission level for the sites and pages they have access to. Some groups, such as the BP Human Resources Administrator group, are assigned to the Contribute permission level for certain pages and page libraries by default, which gives them the ability to add content, such as announcements, to those pages. The BP Administrator group is assigned to the Full Control permission level for all Business Portal sites.

The *BP Administration* permission level is a custom permission level created for Business Portal. This permission level gives Business Portal application administrators, such as the Requisition Administrator, access to the Site Settings page on the top-level Business Portal web site, where application administration pages are available.

To make your server more secure, we recommend that you assign users and groups to the BP Administration, Full Control, Design, and Contribute permission levels only when necessary.

SharePoint permission levels do not affect data entry on Business Portal pages. For example, users with Read access to the page where requisitions are entered can still enter requisitions. The ability to enter requisitions is controlled by the user's MBF role assignments. The Read permission level applies only to modifying the page itself and any SharePoint content on the page.

For more information about managing permission levels, refer to SharePoint Foundation documentation.

Add users to SharePoint groups

SharePoint groups are used to grant access to Business Portal sites, document libraries, and pages. When a user logs on to Business Portal, menu options and Quick Launch items appear based on the SharePoint groups that user belongs to.

Adding users to SharePoint groups is only one step in giving them access to Business Portal. Users also must be added to MBF or web service roles for data access.

For more information about managing groups, see the SharePoint Foundation documentation.

1. Go to the Site Settings page for any Business Portal site.

2. Under **Users and Permissions**, click **People and groups**. Click **Groups** in the Quick Launch to display all groups.

3. Click the name of the group to add users to. Click **New** > **Add Users**.

4. Follow the instructions on the page to enter user names and select permissions.

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

View or modify a SharePoint group

Use the People and Groups page in SharePoint Foundation to view or change the properties of a SharePoint group. For more information about managing groups, see the SharePoint Foundation documentation.

1. Go to the Site Settings page for the top-level Business Portal web site.

2. Under **Users and Permissions**, click **People and Groups**. The People and Groups page appears.

3. Click **Groups** in the Quick Launch to display all groups. Click the name of the group to modify.

   - To remove users, click **Actions** > **Remove Users From Group**.

   - To change group settings, such as the name, description, owner, or permission level, click **Settings** > **Group Settings**.

   - To view the items a group has permission to, click **Settings** > **View Group Permissions**.

Chapter 8: Managing Microsoft Business Framework users

Use the Users page to view and modify user properties, and to remove Microsoft Business Framework (MBF) users.

Information about managing MBF users is divided into the following sections:

- *Add users to MBF roles*
- *How matching works in the Add Users wizard*
- *Modify MBF user information*
- *Change a user's MBF role assignments*
- *Modify a user's permissions*
- *Remove MBF users*

Add users to MBF roles

In order to access the Microsoft Dynamics GP data on certain Business Portal pages, users must be assigned to MBF roles, which are sets of MBF data permissions.

The Add Users wizard guides you through the process of adding users to MBF and assigning them to portal roles. You can also assign users to advanced roles and back office IDs using the wizard. For some roles, the wizard can match users to back office IDs automatically.

You can add domain users or local users (users on the Business Portal server) to MBF.

Adding users to MBF roles is only one step in giving them access to Business Portal. Users also must be added to SharePoint groups for site and page access.

1. Go to the Site Settings page for the top-level Business Portal web site.

2. Under **Business Portal Administration**, click **Users**. The Users page appears.

3. Select **Add new users** from the task area of the **User List** web part.

4. On the Welcome page, click **Next**.

5. Select a domain.

   Click **Add Manually** to add users from a domain that is not listed. To manually add users, you must know their domain names and user IDs.

6. Choose whether to display all users within the selected domain or a group of domain users, such as users in a particular geographic location.

7. Select domain users to add to MBF, then click **Next**.

8. Select the advanced roles that you want to assign users to. For more information about advanced roles, see *Advanced roles* on page 48.

   *Selecting an advanced role here does not automatically assign it to any users. After you click **Next**, you will be able to assign individual users to the selected advanced roles.*

   Click **Next**.

9. Assign users to advanced roles and back office IDs.

   Back office IDs containing an ampersand (&) can't be assigned to Business Portal users using MBF advanced roles.

   For each advanced role you selected, a separate wizard page will be displayed. On each role page you must:

   - Select a company.
   - Select the users you want to assign to the selected advanced role in the selected company.
   - Assign back office IDs to users.

     Selecting a back office ID provides the user with access to specific Microsoft Dynamics GP information. For example, a user in the Employee role and associated with an employee ID has access to personal employee information, such as paystubs and time off, but does not have access to any other employee's information.

     For some roles, you can use the **Match <Role> IDs** button to match users to back office IDs automatically. For more information, see *How matching works in the Add Users wizard* on page 43.

     You can also select a user and choose the **Look Up ID** button to assign an individual ID. In some cases, only the lookup button is available.

   - If you used the automatic matching process, verify that the correct IDs are assigned to users, and fix any errors using the **Look Up ID** button.
   - If necessary, select another company and repeat the process.

   Click **Next**. Repeat this step for each advanced role.

10. Assign users to portal roles. Select a role and company, then select the users you want to assign to that role and company.

    All users added to MBF are assigned automatically to the User role. For more information about portal roles, see *Portal roles* on page 48.

    Repeat this step for each role and company that you want to add users to. Click **Next**.

11. Review the selections you've made in the Add Users wizard. To save the list of users and role assignments as a Microsoft Office Excel® file, click **Copy to Excel**. A file called *New Users.xls* is created on your desktop.

12. Click **Finish**. The new users are added to MBF roles.

How matching works in the Add Users wizard

When you use the Add Users wizard to assign users to advanced roles, you can click the **Match <Role> IDs** button to automatically search for the appropriate back office IDs.

The system will attempt to find a matching record for a domain user by comparing the user's attributes in Microsoft Active Directory® with attributes in Microsoft Dynamics GP. Attributes are compared in the following order. The matching process is not case sensitive.

- First, middle, and last name (match)
- First and last name (match)
- Last name (last name match)

If the last name and full name attributes for the selected users are blank in Active Directory, or if you're adding local users, the **Match <Role> IDs** button will not be available.

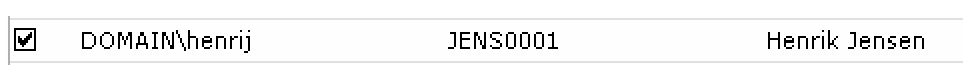
The following table shows an example of the matching process.

Name in Active Directory	Name in Microsoft Dynamics GP	Comparison	Match?
Matthew Berg	Matt Berg	First, middle, and last name	No
		First and last name	No
		Last name	Last Name Match

Customer IDs and Vendor IDs must be assigned individually, rather than using the matching process. First, middle, and last name information is not stored in Microsoft Dynamics GP for those IDs.

After you run the matching process, one of the following will happen.

A match is found If a match is found, the back office ID is displayed next to the user name, and the check box for that user is selected. If the automatically selected ID is incorrect, you can change it using the **Look Up ID** button.



A last name match is found If a last name match is found, “Last Name Match Found” is displayed in the ID field, and the check box for that user is not selected.

☐	DOMAIN\bobkelly	Last Name Match Found

Use the **Look Up ID** button to view the match that was found. If the match is correct, select it and click **OK**. If the match is incorrect, select **Show All** from the **Display Options** list to display all IDs. Select the correct ID and click **OK**.

More than one match is found If more than one match is found for a single user, “Multiple Matches Found” is displayed in the ID field. The check box for the user is not selected.

☐	DOMAIN\mattberg	Multiple Matches Found

To select the correct ID for the user, click the **Look Up ID** button. The possible matches for that user are displayed in the lookup window. Select the appropriate ID and click **OK**.

An ID matches more than one user If the same ID matches multiple users, the ID is displayed for those users, but the check boxes are not selected. Click the **Look Up ID** button to select the correct ID for each user.

☐	DOMAIN\henrij	JENS0001	Henrik Jensen
☐	DOMAIN\hjense	JENS0001	Henrik Jensen

No matches are found “No Matches Found” is displayed in the ID field, and the check box for the user is not selected. Use the **Look Up ID** button to find the appropriate ID for the user.

☐	DOMAIN\kberg	No Matches Found

Modify MBF user information

Use the following procedure to modify an MBF user’s name or default company.

The default company determines the information that is presented when the user first opens Business Portal. Companies are assigned to users when they are added to MBF or web services.

1. Go to the Site Settings page for the top-level Business Portal web site.
2. Under **Business Portal Administration**, click **Users**. The Users page appears.
3. Select a user name and click the **Description** tab. User information associated with the selected name appears in the **User Properties** web part.

4. Click **Modify** to change the user's name or default company.

5. The Modify User Information page appears. Type the modified information and click **OK**.

Change a user's MBF role assignments

You can add or remove a user's role assignments in a specific company or all companies.

Assigning a user to a portal role grants access to data. Assigning a user to an advanced role and ID provides the user with access to specific Microsoft Dynamics GP information. For example, a user in the Employee role and associated with an employee ID would have access to personal employee information, such as paystubs and time off, but would not have access to any other employee's information.

For more information about portal and advanced roles, see Roles overview on page 47.

If you're adding several users to a role, you may want to use the Roles page instead. For more information, see Modify the users associated with a portal role on page 50.

Use the following steps to change a user's role assignments.

1. Go to the Site Settings page for the top-level Business Portal web site.

2. Under **Business Portal Administration**, click **Users**. The Users page appears.

3. Select a user name and click the **Roles** tab. Role information associated with the selected name appears in the **User Properties** web part.

4. Click **Modify** to change the user's role assignments. The Modify Roles page appears.

5. Select a specific company or All Companies in the **Company** field.

6. Select portal roles for the user, or clear the check boxes for roles to remove.

   You should not remove users from the User role. Users removed from this role will not be able to access Business Portal, regardless of their other role assignments.

7. Select an advanced role/company combination in the **Role/Company** field.

   Enterprise refers to all companies in the Microsoft Dynamics GP system.

8. Select or remove back office IDs to associate with the user in the selected advanced role and company. If you clear the ID for a role and don't select another one, the user will be removed from the advanced role.

   Select **Unspecified** to use the advanced role without assigning it to a specific ID.

9. Click **OK**.

Modify a user's permissions

Users view Business Portal information based on the data permissions that are associated with the roles they are assigned to. For more information, see Chapter 10, "Managing data permissions."

Users can perform secured tasks in Business Portal based on secured task permissions. A secured task permission provides security on business logic.

Because it is not efficient to directly maintain large numbers of user accounts, we recommend that you don't assign permissions at the individual level for Business Portal. We recommend that you assign users to MBF roles as much as possible to avoid having to track individual user permissions.

Use the following procedure to add or remove data permissions or secured task permissions for a user.

1. Go to the Site Settings page for the top-level Business Portal web site.
2. Under **Business Portal Administration**, click **Users**. The Users page appears.
3. Select a user name.
4. Click the **Permissions** tab on the **User Properties** web part.
5. Click **Modify**. The Modify User Permissions page appears.
6. Select or remove the secured task permissions for the selected user.
7. To modify data permission access, first select a business entity. The data permissions associated with the selected entity appear.
8. Select or remove data permissions for the selected user.
9. Click **OK**.

Remove MBF users

You can remove most users from MBF. If a user is assigned to an active business process, that user cannot be removed.

You must remove users from Business Portal before removing them from Microsoft Dynamics GP or from Active Directory. If Business Portal users have been removed from Active Directory or from Microsoft Dynamics GP, you will encounter errors.

1. Go to the Site Settings page for the top-level Business Portal web site.
2. Under **Business Portal Administration**, click **Users**. The Users page appears.
3. Select **Remove users** from the task area of the **User List** web part. The Remove Business Portal Users page appears.

Do not delete the Network Service Account user. This account is used to run requisition processes in Business Portal.

4. Select users and click **Remove**.

Chapter 9: Managing Microsoft Business Framework roles

Roles allow you to control access to Microsoft Dynamics GP data in Business Portal. You can use roles to logically group Business Portal users based on job responsibilities.

Many roles are provided with Business Portal. For example, Administrator, Sales Manager, and User are default Business Portal roles. You also can create specialized roles for your business.

Use the Roles page to create, copy, or remove roles and to view and modify role properties.

Information about managing Business Portal roles is divided into the following sections:

- *Roles overview*
- *Portal roles*
- *Advanced roles*
- *Create a portal role*
- *Modify a role description*
- *Modify the users associated with a portal role*
- *Modify the permissions associated with a role*
- *Copy a portal role*
- *Remove a portal role*

Roles overview

Roles help you set up and maintain access to Microsoft Dynamics GP data displayed in Business Portal.

Roles control access to data through data permissions. If a Business Portal user's role is assigned to a data permission, that user will be able to access business entity data through that data permission. For more information about entities and data permissions, see Chapter 10, "Managing data permissions."

You can assign a user to a role in a specific company, multiple companies, or all companies. If a user is associated with a role in more than one company, you can specify a default company to determine the information that will first appear when the user logs on to Business Portal. See *Modify MBF user information* on page 44 for more information.

There are two types of roles in Business Portal: portal roles and advanced roles. A portal role is used to grant users who share job functions access to the same data. An advanced role identifies a specific user with an ID in Microsoft Dynamics GP, such as an employee, salesperson, customer, or vendor. You can associate users with multiple portal and advanced roles, depending on their job responsibilities. For example, a user might be assigned to both the Employee and Salesperson roles. For more information about portal and advanced roles, see *Portal roles* on page 48 and *Advanced roles* on page 48.

MBF roles correspond to SharePoint groups in many cases, but the two are not automatically synchronized. You must assign users to MBF roles and SharePoint groups separately.

Portal roles

A portal role is used to grant users who share job functions access to the same data. Users that belong to different portal roles may have access to the same pages but see different information based on their data permissions. For example, a sales manager and order entry clerk will use the Sales Center site, but each may see a different set of data.

For most portal roles, the data is related to a specific Business Portal center site. In order to give users appropriate access, you must assign them to both SharePoint groups and portal roles. Following are some examples of portal roles, SharePoint groups, and the center sites they are associated with.

Portal role	SharePoint group	Associated center site
Accounting Specialist	BP Accounting Specialist	Finance
Purchasing Manager	BP Purchasing Manager	Purchasing
Inventory Manager	BP Inventory Manager	Inventory
Payroll Administrator	BP Payroll Administrator	Payroll
Human Resources Administrator	BP Human Resources Administrator	Human Resources
Sales Manager	BP Sales Manager	Sales
Order Entry Clerk	BP Order Entry Clerk	Sales
Administrator	BP Administrator	Business Portal
Manager	BP Manager	Manager

Default portal roles, such as Accounting Specialist, Sales Manager and Administrator, are installed with Business Portal. See Chapter 25, "Default portal roles and security permissions," for more information about default portal roles.

You also can create specialized roles for your business. For information about creating portal roles, refer to *Create a portal role* on page 49.

Advanced roles

In MBF, an *advanced role* identifies a specific user with an ID in Microsoft Dynamics GP, such as an employee, salesperson, customer, or vendor. For example, you can map users to their employee IDs so they can access their own information, such as paystubs and available time off. Similarly, you can map a salesperson, customer, or vendor to a salesperson ID, customer ID, or vendor ID.

Back office IDs containing an ampersand (&) can't be assigned to Business Portal users using MBF advanced roles.

Default advanced roles, such as the Salesperson and Vendor roles, are installed with Business Portal. See Chapter 26, "Default advanced roles and security permissions," for a list of default advanced roles. You can't create new advanced roles.

The following table provides examples of users and their associated back office information.

User	MBF role	Back office ID	Company
TestUser1	Employee	ADAMPARK0001	Fabrikam, Inc.
TestUser2	Customer	AARONFIT0001	Fabrikam, Inc.
TestUser3	Vendor	Unspecified	Fabrikam, Inc.

Users may have multiple IDs, depending on the number of roles they hold in Microsoft Dynamics GP. For example, a user might be both an employee and a salesperson. Therefore, you may want to assign users to multiple IDs to give them access to all necessary Microsoft Dynamics GP information in Business Portal.

Assigning a user to an advanced role and ID does not automatically restrict the data available to that user. When you create new queries, web parts, and pages, you must use data permissions with row-level restrictions to limit the data based on user IDs. For more information, refer to Chapter 10, "Managing data permissions."

Create a portal role

Use the Create a Role wizard to create a new portal role and grant a group of users access to Microsoft Dynamics GP data. (You can't create new advanced roles.)

If the role you want to create is similar to an existing portal role, you can copy the existing role and modify it. For more information about copying a role, refer to Copy a portal role on page 51.

Use the following steps to create a portal role.

1. Go to the Site Settings page for the top-level Business Portal web site.

2. Under **Business Portal Administration**, click **Roles**. The Roles page appears.

3. Select **Create a role** from the task area of the **Role List** web part.

4. On the Welcome page, click **Next**.

5. Type a name and description for the role.

   You cannot change role names later; however, you can modify the description at any time. For more information, see Modify a role description on page 50.

   Click **Next**.

6. Specify the company that users in the role will be assigned to. You can also assign users to a role in all companies.

7. Select the users to assign to the role for the selected company.

8. Assign users to the role in other companies by repeating steps 6 and 7.

   Click **Next**.

9. Select a business entity and the related data permissions that users in the role will have access to. Specify additional data permissions for this role by repeating this step.

   For more information, see Chapter 10, “Managing data permissions.”

   Click **Next**.

10. Review the selections you made, then click **Finish**.

Modify a role description

You can modify the description associated with a role at any time. The description should identify the purpose of the role or the users assigned to it.

1. Go to the Site Settings page for the top-level Business Portal web site.
2. Under **Business Portal Administration**, click **Roles**. The Roles page appears.
3. Select a role name and click the **Description** tab.
4. Click **Modify**. The Modify Role Description page appears.
5. Enter or modify the role description.
6. Click **OK**.

Modify the users associated with a portal role

Use the Roles page to add or remove users associated with a portal role.

This procedure applies only to portal roles. To modify users associated with an advanced role, such as Employee, use the Users page. For more information, see *Change a user’s MBF role assignments* on page 45.

1. Go to the Site Settings page for the top-level Business Portal web site.
2. Under **Business Portal Administration**, click **Roles**. The Roles page appears.
3. Select a role name and click the **Users** tab.
4. Click **Modify**. The Modify Users page appears.
5. From the **Company** list, select a specific company or **All Companies**.
6. Select the users to assign to the role, or clear the check boxes for users that you want to remove from the role.

   You should not remove users from the User role. Users removed from this role will not be able to access Business Portal.

7. Click **OK**.

Modify the permissions associated with a role

Use the following procedure to add or remove data permissions and secured task permissions for a selected role. For more information, see Chapter 10, "Managing data permissions."

1. Go to the Site Settings page for the top-level Business Portal web site.
2. Under **Business Portal Administration**, click **Roles**. The Roles page appears.
3. Select a role name and click the **Permissions** tab.
4. Click **Modify**. The Modify Role Permissions page appears.
5. Select the secured task permissions to assign to the role, or clear the check boxes for the task permissions that you want to remove.
6. To change the data permissions associated with the role, expand the node for a business entity. The data permissions associated with that entity appear.
7. Select the data permissions to assign to the role, or clear the check boxes for the data permissions that you want to remove.
8. Click **OK**.

Copy a portal role

Use the Copy a Role wizard to create a new portal role by copying and modifying an existing role. (You can't copy advanced roles, the Administrator role, or the User role.)

1. Go to the Site Settings page for the top-level Business Portal web site.
2. Under **Business Portal Administration**, click **Roles**. The Roles page appears.
3. Select the portal role to copy and click **Copy a role** in the task area of the **Role List** web part.
4. On the Welcome page, click **Next**.
5. Type a name and description for the role. You cannot change role names later; however, you can modify the description at any time. For more information, see *Modify a role description* on page 50.

   Click **Next**.
6. Specify the company that users in the role will be assigned to. You can also assign users to a role in all companies.
7. Select the users to assign to the role for the selected company. By default, the users assigned to the role being copied are selected.
8. Assign users to the role in other companies by repeating steps 6 and 7.

   Click **Next**.

9. Select a business entity and the related data permissions that users in the role will have access to. By default, the data permissions assigned to the role being copied are selected. Specify additional data permissions for this role by repeating this step.

   For more information, see Chapter 10, “Managing data permissions.”

   Click **Next**.

10. Review the selections you made, then click **Finish**.

Remove a portal role

When you remove a portal role, the users assigned to the role no longer have access to the associated permissions for the role.

Default portal roles installed with Business Portal cannot be removed. See Chapter 25, “Default portal roles and security permissions,” *for a list of these roles.*

1. Go to the Site Settings page for the top-level Business Portal web site.

2. Under **Business Portal Administration**, click **Roles**. The Roles page appears.

3. Select **Remove roles** from the task area of the **Role List** web part. The Remove Roles page appears.

4. Select the portal roles to remove.

5. Click **Remove**.

Chapter 10: Managing data permissions

Data permissions are used by the Microsoft Business Framework to control access to the back office data that can be displayed in Business Portal.

Use the Data Permissions page to create, view, modify, and remove data permissions. You also can check for and repair invalid queries.

Information about data permissions is divided into the following sections:

- *Data permissions overview*
- *Row-level restrictions*
- *Data permission naming conventions*
- *Create a data permission*
- *Modify a data permission description*
- *Modify the roles associated with a data permission*
- *Modify access to individual entity properties*
- *Change row-level restrictions for a data permission*
- *Look up queries based on a data permission*
- *Check for and repair invalid queries*
- *Remove a data permission*

Data permissions overview

Microsoft Business Framework (MBF) uses business entities to retrieve data from the Microsoft Dynamics GP database. A business entity is a representation of a record from the Microsoft Dynamics GP back office. Customer, purchase order, and item are examples of entities.

Entities contain properties, or attributes, that refer to specific data. For example, customer ID, customer name, and customer contact are attributes of the customer entity. You can set up data permissions that allow users to see only certain properties or attributes of an entity.

For example, the following illustration shows query data. A data permission can be used to control access to the Salesperson ID property in this query.

A column-level restriction specifies access to the Salesperson ID property.

Customer ID	Customer Name	Salesperson ID
AARONFIT0001	Aaron Fitz Electrical	PAUL W.
ADAMPARK0001	Adam Park Resort	GREG E.
ADVANCED0001	Advanced Paper Co.	PAUL W.
ADVANCED0002	Advanced Tech Satellite System	GARY W.
ALTONMAN0001	Alton Manufacturing	GREG E.
AMERICAN0001	American Science Museum	PAUL W.
AMERICAN0002	American Electrical Contractor	NANCY B.
ASSOCIAT0001	Associated Insurance Company	NANCY B.

For each entity, you can exclude properties entirely, or you can set the following levels of access to entity properties.

Read/Write Access Access to view and modify data. Currently, write access is limited primarily to Business Portal applications that provide data entry forms. If you add applications to Business Portal that include data entry forms, you can grant read/write access to their entities as needed.

Read-Only Access Access to view data. Most data provided in Business Portal is read-only.

Customized Access Combines read/write access and read-only access to an entity's properties. For example, you might set read/write access to employee address information and read-only access to employee IDs.

See *Create a data permission* on page 55 for additional information.

Row-level restrictions

A data permission is a *column-level restriction*, which controls access to entity properties. (For more information, see *Data permissions overview* on page 53.) You can also apply *row-level restrictions* to data permissions to control access to the individual rows of data in Microsoft Dynamics GP SQL tables.

The following illustration shows query data. A data permission can be used to specify access to the Document Number, Customer Name, Document Amount, and Sales Territory ID columns. A row-level restriction could be applied to that data permission, specifying that data for only a particular sales territory can be returned in the query.

Apply a row-level restriction to return data from a single sales territory.

Document Number	Customer Name	Document Amount	Sales Territory ID
ORDST2226	Aaron Fitz Electrical	$930.20	TERRITORY 1
ORDST2228	Cellular Express	$571.65	TERRITORY 1
ORD1004	Vision Inc.	$73,947.65	TERRITORY 2
ORD1007	Astor Suites	$31.95	TERRITORY 2
ORD1009	Adam Park Resort	$2,567.95	TERRITORY 2

Data permissions, with row-level restrictions applied, are installed by default for the Customer role. When query results are returned through these data permissions, users in the Customer role can see only records that contain their own customer ID.

You can't create new row-level restrictions.

Data permission naming conventions

To be consistent when creating data permissions, use the following format to name them: *Entity Name - Access*, where *Entity Name* is the name of the business entity for which you are creating a data permission and *Access* specifies the level of access to data.

Use the word **All** if there are no restrictions. Use the word **Restricted** if only certain properties can be accessed by the data permission. For example, a data permission named *Sales Order - All* would provide access to all properties of the Sales Order entity. A data permission named *Sales Order - Restricted* would provide access to a subset of the entity's properties.

If you need to create several data permissions with restricted access, we recommend that you add two or three words after the word **Restricted** to further indicate the type of data that is restricted.

Refer to Chapter 25, "Default portal roles and security permissions," and Chapter 26, "Default advanced roles and security permissions," for examples of how data permissions are named.

Create a data permission

Data permissions provide rights to Microsoft Dynamics GP data for the various query functions in Business Portal. When you create a data permission, you specify which business entity properties are accessible, and the type of access that is granted. See *Data permissions overview* on page 53 for more information.

Use the following steps to create a data permission.

1. Go to the Site Settings page for the top-level Business Portal web site.

2. Under **Business Portal Administration**, click **Data permissions**. The Data Permissions page appears.

3. Select **Create data permission** from the task area of the **Data Permission List** web part. The Create a Data Permission wizard appears.

4. Review the Welcome page, then click **Next**.

5. Type a name and description for the data permission. For naming conventions, see *Data permission naming conventions* on page 55.

   This name cannot be modified after the data permission is created; however, you can modify the data permission description. See Modify a data permission description on page 56 for additional information.

   Click **Next**.

6. Select the entity to create the data permission for, then select a property access method. You can set read/write, read-only, or customized access to an entity's properties. Click **Next**.

7. If you chose **Customize attribute settings**, set individual property access. Click **Next**.

8. Select a row-level restriction, if needed, for the selected entity. See *Row-level restrictions* on page 54 for additional information.

   Click **Next**.

9. Review the selections you made, then click **Finish**.

Modify a data permission description

You can modify the description associated with a data permission at any time.

1. Go to the Site Settings page for the top-level Business Portal web site.
2. Under **Business Portal Administration**, click **Data permissions**. The Data Permissions page appears.
3. Expand the business entity associated with the data permission, then select the data permission.
4. Click the **Description** tab, then click **Modify**. The Modify Data Permission Description page appears.
5. Enter or modify the data permission description, then click **OK**.

Modify the roles associated with a data permission

You can assign additional roles to a data permission, allowing more users access to the entity data associated with the data permission. You also can remove roles from a data permission, taking away access to the business entity data. Use the following guidelines when assigning data permissions to roles.

- If a data permission is specific to a role, assign it to that role.
- You can assign a data permission to multiple roles.
- If a data permission should apply to all users, assign it to the User role.
- For roles assigned to users outside your company, such as Customer or Vendor, be especially careful to assign only data permissions that have been restricted to include only the user's own data.

When access to a data permission is removed, any portal elements that depend on that data permission may not function. For example, any queries that are based on the data permission will no longer work if the user doesn't have access to the underlying data permission.

Before you modify a data permission, you should view the queries based on that data permission, so you can determine the effects of a change. For information about viewing the queries that are based on a particular data permission, see *Look up queries based on a data permission* on page 58.

Use the following steps to modify the roles associated with a data permission.

1. Go to the Site Settings page for the top-level Business Portal web site.
2. Under **Business Portal Administration**, click **Data permissions**. The Data Permissions page appears.
3. Expand the business entity associated with the data permission, then select the data permission.
4. Click the **Roles** tab, then click **Modify**. The Modify Roles page appears.
5. Select the check boxes for the roles to assign to the data permission, or clear check boxes for the role associations to remove.
6. Click **OK**.

Modify access to individual entity properties

You can modify the read and write access settings to a business entity's properties (also called attributes). See *Data permissions overview* on page 53 for additional information about the levels of access. When you modify a data permission, all of the queries based on that data permission are affected.

Before you modify a data permission, you should view the queries that are based on that data permission, so you can determine the effects of a change. For information about viewing the queries that are based on a particular data permission, see *Look up queries based on a data permission* on page 58.

1. Go to the Site Settings page for the top-level Business Portal web site.
2. Under **Business Portal Administration**, click **Data permissions**. The Data Permissions page appears.
3. Expand the business entity associated with the data permission, then select the data permission.
4. Click the **Attribute Settings** tab, then click **Modify**. The Modify Attribute Settings page appears.
5. Click **Customize**.
6. Modify any of the entity's properties by selecting or clearing the **Read** and **Write** check boxes.
7. Click **OK**. A message appears, asking if you want to check for queries that are not valid based on the changes you made. See *Check for and repair invalid queries* on page 59 for additional information.

Change row-level restrictions for a data permission

You can change which row-level data restriction is associated with a data permission. When you modify a restriction on a data permission, all of the queries based on that data permission are affected.

Before you modify a data permission, you should view the queries that are based on that data permission, so you can determine the effects of a change. For information about viewing the queries that are based on a particular data permission, see *Look up queries based on a data permission* on page 58.

1. Go to the Site Settings page for the top-level Business Portal web site.

2. Under **Business Portal Administration**, click **Data permissions**. The Data Permissions page appears.

3. Expand the business entity associated with the data permission, then select the data permission.

4. Click the **Data Restrictions** tab and click **Modify**. The Modify Restriction Policies page appears.

5. Select a restriction policy to associate with the data permission.

6. Click **OK**.

Look up queries based on a data permission

Queries are based on data permissions, so when data permissions are modified, queries may no longer work properly. Before you modify a data permission, you should view the queries based on that data permission, so that you can determine the effects of a change.

1. Go to the Site Settings page for the top-level Business Portal web site.

2. Under **Business Portal Administration**, click **Data permissions**. The Data Permissions page appears.

3. Expand the business entity associated with the data permission, then select the data permission.

4. Click the **Queries** tab. The queries based on the selected data permission are displayed. Any changes made to the data permission will affect the queries that are listed.

   For more information about the query **Location** field, refer to *How queries are organized* on page 75.

Check for and repair invalid queries

Queries are based on data permissions, so when data permissions are modified, queries may no longer work properly. For example, you might remove access to an entity property that is used in a query restriction, which would make that query restriction invalid. We recommend searching for and repairing invalid queries after you modify a data permission.

1. Go to the Site Settings page for the top-level Business Portal web site.

2. Under **Business Portal Administration**, click **Data permissions**. The Data Permissions page appears.

3. Expand the business entity associated with the data permission, then select the data permission.

4. Click the **Queries** tab. The queries based on the selected data permission are displayed.

   For more information about the query **Location** field, refer to *How queries are organized* on page 75.

5. Click **Check for Invalid Queries**.

   If there are invalid queries, the Invalid Queries page appears. The name, status, and location of the invalid query appears at the top of the page. One of three values appears in the **Status** column:

   Invalid An invalid property is used as a display column within a sort.

   Invalid - Restriction An invalid property is used in a row-level restriction. This status also may appear if the invalid property is used as a display column within a sort.

   Valid Appears only after an invalid query has been repaired.

6. Select the queries to repair, if necessary.

7. Click **Repair**. Repairing a query removes invalid fields, or properties, from the display, sort, and restriction properties of the query. The status of the repaired query changes to **Valid**.

   *If query restrictions are removed during repair, users could see data that is not intended for them. To modify a repaired query, select the query on the Invalid Queries page and click **Open**. The Modify Query page appears, where you can set the appropriate properties.*

   For additional information about modifying queries, see *Modify a query on a query page* on page 69 and *Modify a result viewer web part query* on page 72.

8. Click **OK**.

Remove a data permission

To remove a data permission (for example, if you've created a data permission that you no longer need), use the following procedure.

We recommend that you not remove default data permissions. If you do so, queries that use the data permission will become unusable. We recommend that you contact Microsoft Dynamics GP Technical Support for assistance with removing default data permissions.

1. Remove all users and roles from the data permission. For additional information, see *Modify a user's permissions* on page 46 and *Modify the roles associated with a data permission* on page 56.

2. Delete all queries based on the data permission you are removing. Refer to *Look up queries based on a data permission* on page 58 for more information about finding associated queries.

   If you remove a data permission before deleting its associated queries, the queries can't be removed from the system.

3. Go to the Site Settings page for the top-level Business Portal web site.

4. Under **Business Portal Administration**, click **Data permissions**. The Data Permissions page appears.

5. Select **Remove data permissions** from the task area of the **Data Permission List** web part. The Remove Data Permissions page appears.

6. Select the business entity associated with the data permission.

7. Select the check box for the data permission. You can select multiple data permissions.

8. Click **Remove**.

Chapter 11: Managing web service users

Business Portal includes pages that retrieve data using Web Services for Microsoft Dynamics GP. You must set up users in web service roles, which are sets of web service operations and tasks, in addition to assigning them to MBF roles.

Only information related to web service user setup is included here. For more information about using Web Services for Microsoft Dynamics GP, refer to the Microsoft Dynamics GP Web Services Installation and Administration Guide.

This information is divided into the following sections:

Add users to web service roles

Some pages in Business Portal retrieve data using the Microsoft Dynamics GP web service. In order for users to view the data, you must assign them to web service roles using the Dynamics Security Console.

A role assignment consists of the following:

- A role (with its associated tasks and operations)
- A company or companies
- A user or group for which access is being granted

When the role assignment is created, the users or groups of users will have access to the items in the role for the specified company or companies.

Adding users to web service roles is only one step in giving them access to Business Portal. Users also must be added to SharePoint groups for site and page access.

For more information about using Web Services for Microsoft Dynamics GP, refer to the Microsoft Dynamics GP Web Services Installation and Administration Guide.

To add a new role assignment, complete the following steps:

1. Open the Dynamics Security Console. (On a computer where the console is installed, click **Start** > **Administrative Tools** > **Dynamics Security Console**.)

2. Select the **Role Assignments** node in the left pane of the Dynamics Security Console.

3. In the **Action** menu, click **Add**. The Add Role Assignments window will appear.

4. In the **Role** list, select the role that you want to assign users or groups to.

5. Click the **Add Windows Users** button to add individual windows users to the role assignment. Click the **Add Groups** button to add application level groups or enterprise level groups to the role assignment.

6. Select whether the access applies to all companies. If you choose **Select Individual Companies**, mark the appropriate companies in the list.

7. Click **OK** to save the new role assignment.

Assign back office IDs for data access

In some cases, you'll want to map users to Microsoft Dynamics GP IDs, which provides access to specific information. For example, you can map users to their employee IDs so they can access their own information, such as paystubs and available time off. Similarly, you can map a salesperson, customer, or vendor to a salesperson ID, customer ID, or vendor ID.

The following table provides examples of users and their associated back office information.

User	Web service role	Back office ID	Company
TestUser1	Employee	ADAMPARK0001	Fabrikam, Inc.
TestUser2	Customer	AARONFIT0001	Fabrikam, Inc.
TestUser3	Vendor	Unspecified	Fabrikam, Inc.

Users may have multiple IDs, depending on the number of roles they hold in Microsoft Dynamics GP. For example, a user might be both an employee and a salesperson. Therefore, you may want to assign users to multiple IDs to give them access to all necessary Microsoft Dynamics GP information in Business Portal.

Use the Microsoft Dynamics Security Console to identify a specific user with a Microsoft Dynamics GP ID, such as a salesperson or a customer. You must be designated as an Entity ID Assignment Administrator in order to assign users to entity IDs.

For more information about using Web Services for Microsoft Dynamics GP, refer to the Microsoft Dynamics GP Web Services Installation and Administration Guide.

To assign a back office ID, complete the following steps:

1. Open the Dynamics Security Console. (On a computer where the console is installed, click **Start** > **Administrative Tools** > **Dynamics Security Console**.)

2. Select the **Entity ID Assignments** node in the left pane of the Dynamics Security Console.

3. In the **Action** menu, click **Add**. The Add Entity ID Assignments window will appear.

4. Click **Select Windows User** to select the user you would like to assign to a back office entity.

5. In the **Entity Type** list, select the entity type you would like to assign to the user.

6. In the **Company** list, select the company where the entity exists. A list of entity IDs for the selected entity type and company will appear.

*To filter results, enter search text in the **Filter by ID** field and click the associated button. Clearing the text and clicking the button again will clear any filters.*

7. In the **Entity** list, select the ID you would like to assign to the user.

8. Click **OK** to save the new assignment.

Part 3: Portal elements

This part of the documentation explains the elements that make up Business Portal, including queries and web parts.

- Chapter 12, "Creating queries," explains how to create and modify Business Portal queries of back office data.
- Chapter 13, "Organizing queries," explains how to organize Microsoft Dynamics GP queries that are used on query pages and in result viewer web parts throughout Business Portal.
- Chapter 14, "Managing web parts," describes web parts, the building blocks for pages.

Chapter 12: Creating queries

Queries are used to display Microsoft Dynamics GP data in Business Portal. When you run a query, Business Portal uses business entities to retrieve data from the Microsoft Dynamics GP database.

You can create and modify queries from predefined query pages in functional area centers (such as Financial, Sales, and Inventory). You also can create and modify queries as you design new pages.

Query results can be displayed on query pages. In addition, you can display query results in result viewer web parts. You can save frequently used queries, and you can export query results to Excel.

Query information is divided into the following sections:

- *Create a new query on a query page*
- *Query operators*
- *Advanced query restriction options*
- *Modify a query on a query page*
- *View query page results*
- *Change the appearance of query page results*
- *Print or export query page results*
- *The result viewer query menu*
- *Create a new result viewer web part query*
- *Modify a result viewer web part query*

Create a new query on a query page

Use the **Create a Query** wizard to set up queries of your back office data. To start the wizard, click **New Query** on a query page. In the **Create a Query** wizard, you can choose the following:

Data permission The subset of entity information that this query will be based on. You can create a new query based on the previous query's data permission, or based on a new data permission.

You must create all of the necessary data permissions for your business entities before creating queries. For more information about data permissions, see Chapter 10, "Managing data permissions."

Columns The fields of data (also known as properties) you want to display. Many columns may be defined for a particular entity, and you can choose to display some or all of them.

For example, if you are creating a query about customers, you can select to display just the Customer Name and Balance Due, rather than all available properties of a customer. (If there are columns already selected that you don't want to include, click the associated check boxes to clear them.)

Rows The restrictions to limit the number of records returned by the query. For example, you may choose to display only customers with balances between $1,000 and $2,000. Rows can be restricted based on any column, even if that column is not displayed in the query results.

Row restrictions can be basic or advanced. For an advanced restriction, you'll be given a greater selection of operators to choose from, and you'll be able to use more complex restrictions. For example, you could use variables or comparisons to restrict your query. For more information about restricting the data a query returns, see Query operators on page 68 and Advanced query restriction options on page 69.

With a query row restriction, the excluded rows are still available if the user modifies the query, but are excluded from the current view. With a row-level data restriction, the user does not have access to the excluded rows. For more information, refer to Row-level restrictions on page 54.

Sorting The order of the query results. You can sort by multiple columns, and indicate for each query column whether you want to sort results in ascending or descending order. For example, you may want to sort the list of customers alphabetically, or you may want to sort the list from largest balance due to smallest balance due.

Name The name of the query. Saved queries must be assigned names. The name you enter will identify the query in your personal query folder (viewable on the query page), and in the query menu of any result viewer web parts the query is associated with.

Query operators

For either a basic or advanced query restriction, you'll select a column to base the restriction on, an operator, and the values to include or exclude.

For some operators, you can enter multiple values. To select additional values for a restriction, choose the lookup button; you can't enter values using the keyboard. If you include multiple values in a restriction, the query will return results that fit any of the values.

The operators available will vary, depending on whether you're using a basic or advanced restriction.

Basic restriction

With a basic restriction, you'll be able to use the following operators, depending on the type of data contained in the column:

- Is equal to
- Is not equal to
- Is less than
- Is greater than
- Contains
- Begins with

Advanced restriction

With an advanced restriction, you can create more complex queries. The following additional operators are available, depending on the type of data contained in the column:

- Is one of
- Is not one of
- Is between

Advanced query restriction options

Use advanced restriction options to create more complex queries. For example, to restrict a query based on columns that aren't displayed in the results, you must use the advanced restriction. You must also use the advanced restriction to create a query that prompts the user to enter a value each time the query is selected.

To use advanced restrictions, select **Advanced** when you're restricting the rows for the query. The type of data contained in the column to restrict will determine which operators and which of the following advanced restriction options are available.

Values

For some operators, you can enter multiple values. Use this option to specify more than one value that should be used to select the results. If you include multiple values in a restriction, the query will return results that match any of the values.

Variables

You can restrict the results returned by a query by specifying a variable such as Current User or Last Month. The available variables depend on the data type of the property you chose to create a restriction for.

Compare to

You can restrict the results returned by comparing selected properties with one another. For example, you can create a query for customers whose balance due is greater than their credit limit. The properties you compare must have the same data type. For example, you can compare two date properties or two quantity properties, but you can't compare a date property to a quantity property.

Parameters

A parameter is a placeholder for a query restriction. If a query uses a parameter, the user will be prompted to enter a value when that query is selected. You can create a query containing one or more parameters. When you create an advanced restriction using a parameter, you'll specify the message that appears when the user is prompted to enter the parameter's value, and if necessary, a default value for the parameter.

Modify a query on a query page

You can modify queries using the **Modify Query** option on query pages. There are many columns available for each query page entity. To make queries easier to review and understand, you should use as few columns as possible, while still providing the information you're looking for. Even if you choose not to display a certain column, you can still create a query restriction based on that column. (Query page entities can't be modified.)

Saving modified queries makes it easier to generate the same query in the future. Modified queries are saved to your **My Queries** folder and become personal queries. The changes affect only you. (For information about sharing queries, refer to *Share a query among users* on page 76.)

Use the following steps to modify a query on a query page.

1. On a query page, select the query you want to change.

2. Click **Modify Query**.

3. You can change the columns that are displayed, column order, restrictions on rows returned by the query, column sort order, and query options. Click the tabs for the properties you want to modify, and make your changes.

4. To run the query, click **OK**.

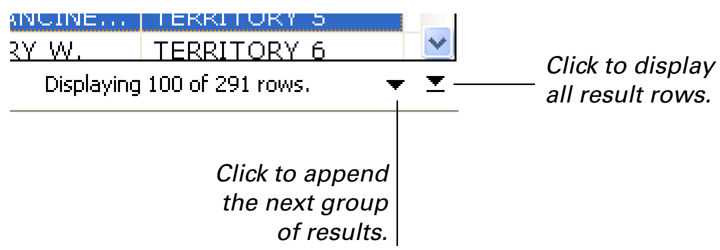
5. To save your changes, click **Save Query**. You will be asked to give the query a name and a location. Queries you save will appear under the My Queries heading on query pages.

*You can't create Internet Explorer favorites for queries; you must save modified queries using the **Save Query** button.*

View query page results

Query results are returned in blocks. This means that if your query page options are set to display 1000 results at a time, and a query has 2000 result rows, you'll see only the first 1000 records when you process the query.

To see the rest of the results, use the arrow buttons at the bottom of the page.



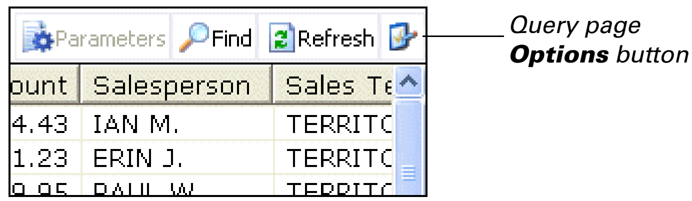
To always return all results of a query at one time, select the **Unlimited** option on the Query Page Options page. For more information about query page options, see *Change the appearance of query page results*.

If your data includes a large number of records, returning all result rows may take a long time. Because queries return data from your back office database, returning a large number of records also may adversely affect back office performance.

Change the appearance of query page results

Use the Query Page Options page to change the way query results appear in your query pages. You can choose the font and font size for query results. You can also choose the number of query results returned at a time. Query page appearance settings apply to all query pages you have access to; not just the current query page.

1. Click the **Options** button on a query page to open the Query Page Options page. The **Options** button appears in the upper right corner of the query page, as shown in the following illustration.



2. Select the number of query result rows to return at a time.

   For example, if you enter 1000 and a query has 2000 result rows, you'll see only the first 1000 records when you process the query. To see the rest of the results, you would need to click the arrow button at the bottom of the page. For more information, see *View query page results* on page 70.

   To return all query results at once, you can select the **Unlimited** option.

*Selecting the **Unlimited** option may cause queries with large result sets to take a long time to process. Because queries return data from your back office database, returning a large number of records also may adversely affect back office performance.*

3. Select the font style and size you want query results to appear in.

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

Print or export query page results

Query results can be sent to Microsoft Office Excel for additional sorting and analysis. For example, you can search for information about customers, export the results to Excel, then use Excel and Microsoft Office Word to create promotional letters targeted to specific groups of customers based on those results.

To print or export query results, click **Copy to Excel** on a query page; your query results will be displayed in an Excel spreadsheet. From within Excel, you can perform calculations, create a chart or graph, or print a spreadsheet of your query results.

When you copy to Excel, a file is also placed on your desktop automatically. Add the .xls extension to the file name for the file to be recognized by Excel.

The result viewer query menu

The query menu on result viewer web parts displays the names of queries associated with the result viewer web part. Available queries are listed alphabetically, and a bullet appears next to the query that is currently being displayed.

For information about displaying a query in a web part, see *Result viewer configuration options* on page 84 and *Configure a result viewer web part* on page 87. For information about the query menu options available for each result viewer web part style, see *Query menu* on page 85.

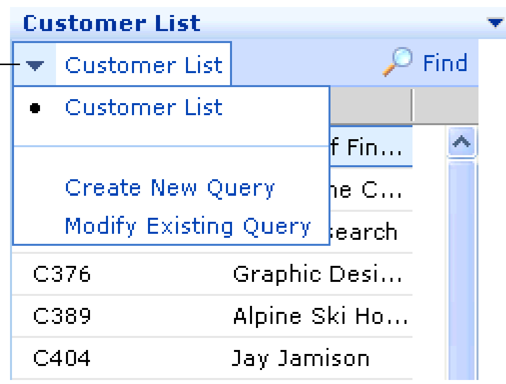
If a result viewer web part has multiple queries associated with it, the query defined when the result viewer web part was first configured is displayed by default. If a user chooses a different query in the web part menu, that query displays by default the next time the user accesses the result viewer web part.

Using the options in the query menu, users and administrators can modify the current query or create a new query based on the current data permission. For more information about modifying and creating queries, refer to Create a new result viewer web part query on page 72 and Modify a result viewer web part query on page 72.

Create a new result viewer web part query

You can create a new query for a result viewer web part if the **Create New Query** option appears in the query menu.

Query menu



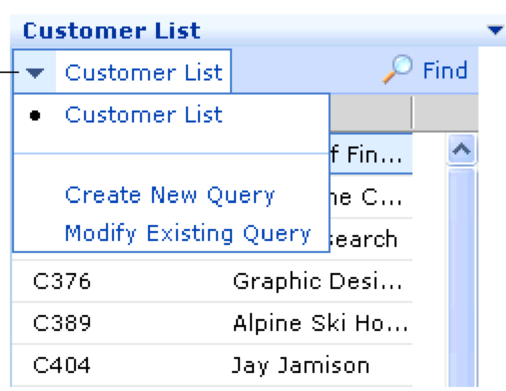
Click **Create New Query** to launch the **Create a Query** wizard. The wizard steps are the same as those for creating a new query on a query page (see Create a new query on a query page on page 67), except that you will not select a data permission. The new query will be based on the data permission that was selected when the web part was first configured.

When the administrator creates a new query for a result viewer web part, the change applies to everyone who has access to the web part.

Modify a result viewer web part query

You can modify a result viewer web part query if the **Modify Existing Query** option appears in the query menu.

Query menu



Click **Modify Existing Query** to open a window for changing result viewer web part query properties. You can change the columns that are displayed, column order, the restrictions on rows returned by the query, and column sort order. When you modify a query this way, you are creating a personalized version of the query. The changes affect only you.

You can also use the **Modify Query** option on the web part tool pane, when a page is in edit mode. When you modify a query this way, you are modifying a shared version of the query. Changes affect all users who have access to the web part, if they aren’t using a personalized version of the query.

Chapter 13: Organizing queries

From the Query Organization page, you can see all queries created by all users. Use the Query Organization page to move, share, rename, and delete queries. Information about organizing Business Portal queries is divided into the following sections:

- *How queries are organized*
- *Share a query among users*
- *Move a query*
- *Delete a query*
- *Rename a query*
- *Set query permissions*
- *Set query folder permissions*

How queries are organized

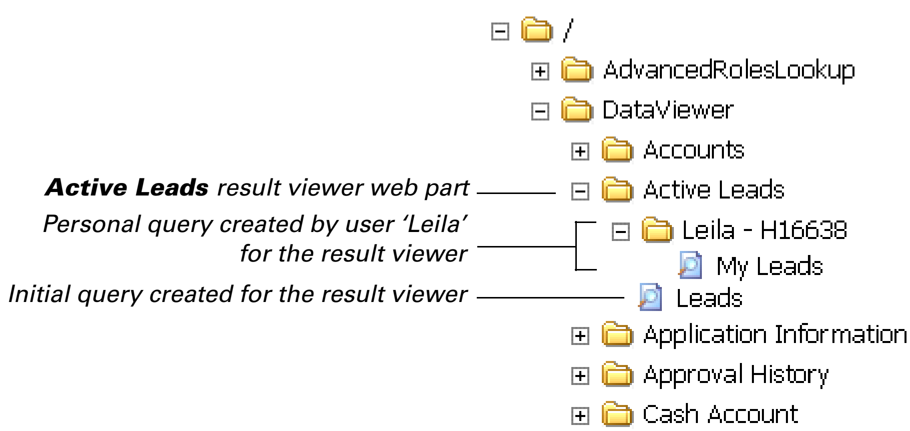
The Query Organization page displays the folder structure used to organize queries in Business Portal. The root directory includes these folders:

AdvancedRolesLookup The **AdvancedRolesLookup** folder contains the queries used on the Modify Portal and Advanced Roles page (opened by clicking **Modify** on the **Roles** tab of the Users page). The queries also are used in the **Add Users** wizard.

DataViewer The **DataViewer** folder contains subfolders for result viewer web parts. Each time you configure a result viewer, a subfolder for the result viewer automatically is created in the **DataViewer** folder. The subfolder stores queries that can be displayed by the result viewer. The name assigned to the subfolder is the same as the name of the result viewer.

Initially, a result viewer web part subfolder contains only the query created during result viewer configuration. You can move additional queries into a result viewer web part's subfolder. For more information, see *Move a query* on page 77.

Each time a user creates or modifies a query for a result viewer web part, a subfolder is automatically created for that user in the result viewer's subfolder. The user's personal queries for the web part are stored in this subfolder. The following illustration provides an example.



Dynamics The **Dynamics** folder contains predefined queries. You can use these queries in result viewers and on query pages.

Microsoft The **Microsoft** folder contains system queries that are used by Business Portal and Microsoft Business Framework applications.

*Predefined subfolders and queries in the **AdvancedRolesLookup**, **Microsoft**, and **Dynamics** folders should not be deleted, moved, or renamed. The Business Portal system requires them.*

QueryPages The **QueryPages** folder contains subfolders for each Business Portal query page. Each of the subfolders contains another level of subfolders labeled **Personal** and **Shared**.

- When a user creates a query in one of the functional area centers, the query is saved in a subfolder named for the user inside the query page's **Personal** folder. Queries in the **Personal** folder can be used by only the user who created them.
- Queries in the **Shared** folder were created by individual users but can be used by everyone who has access to the functional area center that corresponds to the folder.

Share a query among users

Only the Business Portal administrator can choose which queries to share; individual users cannot share the queries they create.

1. Go to the Site Settings page for the top-level Business Portal web site.
2. Under **Business Portal Administration**, click **Query organization**. The Query Organization page appears.
3. In the list of all existing queries in the tree view on the left, select the query to share among users. For information about finding a query, see *How queries are organized* on page 75.
4. Click **Move to Folder** to move the query to a shared query folder. The **Browse for Folder** dialog box appears, where you can select a shared folder for any one of the functional area center pages. This makes the query available to all users of the query page associated with that center page.
5. Click **OK** to save changes.

   In order for other users to modify the original query, you need to give them permission to do so. You can set query permissions by user or by role. For more information about setting permissions, refer to *Set query permissions* on page 79.

Move a query

You can move queries between the DataViewer and QueryPages folders. Queries moved to DataViewer folders become additional queries for the associated result viewer web part, if applicable. (Simple list, form viewer, and subscribing rich list result viewers can have only one query associated with them.) Queries moved to QueryPages folders become additional queries on the associated query page.

Do not move predefined queries from the ***AdvancedRolesLookup****,* ***Microsoft****, or* ***Dynamics*** *folders. The Business Portal system requires these queries, and if you move them, parts of the system will be unusable. Also, do not move the root query folders—* ***AdvancedRolesLookup****,* ***DataViewer****,* ***Dynamics****,* ***Microsoft****, or* ***QueryPages****—because this will cause all queries from the folders to be unusable.*

This procedure does not create a copy of the query in the new location; it moves the query. To have the same query in multiple locations, for example in two different DataViewer folders, you need to create that query separately for each corresponding result viewer web part.

Use the following steps to move a query.

1. Go to the Site Settings page for the top-level Business Portal web site.
2. Under **Business Portal Administration**, click **Query organization**. The Query Organization page appears.
3. In the list of all existing queries in the tree view on the left, select the query to move. For information about finding a query, see How queries are organized on page 75.
4. Click **Move to Folder** to move the query to another query page or result viewer web part. The **Browse for Folder** dialog box appears, where you can select a different folder for the query. The folder you select determines where the query will appear and whether or not the query will be available to all users.

   When you move a query to a **Personal** folder, you can allow the new user of the query to modify the original query, rather than saving modifications to a copy of the query. For more information about setting query permissions, see Set query permissions on page 79.

   If you move the only query associated with a result viewer web part, that web part displays the "Query returned no results" message, because the query cannot be found. If you want to use a different query, you must remove all instances of the web part from pages and then recreate it with the new query. See *Remove web parts from a page on page 94 and Adding web parts to a page on page 83.*

5. Click **OK** to save changes.

Delete a query

When you remove a result viewer web part from a page, delete a page, or remove a user, you should also delete the associated queries. You can delete subfolders and queries using the Query Organization page.

*Do not delete predefined queries from the **AdvancedRolesLookup**, **Microsoft**, or **Dynamics** folders. The Business Portal system requires these queries, and if you delete them, parts of the system will be unusable. Also, do not delete the root query folders—**AdvancedRolesLookup**, **DataViewer**, **Dynamics**, **Microsoft**, or **QueryPages**—because this will cause all queries from the folders to be unusable.*

Use the following steps to delete a query.

1. Go to the Site Settings page for the top-level Business Portal web site.
2. Under **Business Portal Administration**, click **Query organization**. The Query Organization page appears.
3. In the list of queries in the tree view on the left, select the query to delete. For information about finding a query, see *How queries are organized* on page 75.
4. Click **Delete** to delete the query.

   If you delete the only query associated with a result viewer web part, that web part displays the "Query returned no results" message, because the query cannot be found. If you want to use a different query, you must remove all instances of the web part from pages and then recreate it with the new query. See Remove web parts from a page on page 94 and Adding web parts to a page on page 83.

5. A message appears asking if you are sure that you want to delete the query. Click **Yes**.

Rename a query

Query names appear in the **Queries** list on query pages and in the title bars of result viewer web parts. If more than one query is associated with a result viewer web part (in the case of a primary publishing list or publishing rich list web part), query names appear as selections in the result viewer web part's query menu.

*Do not rename predefined queries from the **AdvancedRolesLookup**, **Microsoft**, or **Dynamics** folders. The Business Portal system requires these queries, and if you rename them, parts of the system will be unusable. Also, do not rename the root query folders—**AdvancedRolesLookup**, **DataViewer**, **Dynamics**, **Microsoft**, or **QueryPages**—because this will cause all queries from the folders to be unusable.*

Use the following steps to rename a query.

1. Go to the Site Settings page for the top-level Business Portal web site.
2. Under **Business Portal Administration**, click **Query organization**. The Query Organization page appears.
3. In the list of all existing queries in the tree view on the left, select the query to rename. For information about finding a query, see *How queries are organized* on page 75.

4. Click **Rename** and type a new name for the query. Queries can have the same name if they are stored in separate folders.

If you rename a query associated with a result viewer web part, that web part will display the "Query returned no results" message, because the query cannot be found. If you want to rename a query associated with a web part, you must recreate the web part and associate it with the renamed query.

5. Click **OK** to save changes.

Set query permissions

When a user creates a query in one of the functional area centers, that query is saved to a subfolder for the user inside the query page's **Personal** folder on the Query Organization page.

You can move a query from one user's personal folder to another user's folder. In order for the new user to modify the original query, you need to give them permission to do so. You can set query permissions by user or by role.

By default, all queries are accessible to the User role. However, information is returned based on data permissions. Do not change query permissions to control access to data. Instead, change the role applied to the underlying data permission. For more information, see *Modify the roles associated with a data permission* on page 56.

1. Go to the Site Settings page for the top-level Business Portal web site.
2. Under **Business Portal Administration**, click **Query organization**. The Query Organization page appears.
3. In the list of all existing queries in the tree view on the left, select the query to set permissions for. For information about finding a query, see *How queries are organized* on page 75.
4. Click **Modify**. In the **Security** dialog box, select the user or role that should be able to modify the original query.
5. Click **OK** to save changes.

Set query folder permissions

Use the Query Organization page to set folder permissions, which determine who can delete a folder.

1. Go to the Site Settings page for the top-level Business Portal web site.
2. Under **Business Portal Administration**, click **Query organization**. The Query Organization page appears.
3. In the left column, select the folder to set permissions for. For information about folders, see *How queries are organized* on page 75.
4. Click **Modify**. In the **Security** dialog box, select the user or role that should be able to delete the folder.
5. Click **OK** to save changes.

Chapter 14: Managing web parts

A web part is a modular unit of information on a page. In Business Portal, you can use several different types of web parts. You can use all of the web part types provided with SharePoint Foundation; you also can use result viewer web parts or tab web parts, which are unique to Business Portal.

Information about web parts is divided into the following sections:

Web parts overview

Web parts are modular units of information that are the building blocks of pages. You can use the following kinds of web parts in Business Portal.

Business Portal result viewer web parts Result viewers display the results of real-time queries of Microsoft Dynamics GP data. Result viewer web parts are unique to Business Portal. For information about the types of result viewer web parts, see *Types of result viewer web parts* on page 83.

Business Portal tab web parts Tab web parts organize information by placing it on separate tabs within a single web part. Tab web parts are unique to Business Portal. For more information about tab web parts, refer to *Configure a tab web part* on page 89.

SharePoint web parts SharePoint web parts can display announcements, document libraries, surveys, and other SharePoint content. For more information about creating SharePoint web parts, refer to *Create a SharePoint web part* on page 88.

External list web parts External lists use external content types in Business Connectivity Services in SharePoint to present current data from the back office. For more information about External list web parts, refer to the SharePoint documentation.

Dynamics GP report viewer web parts Dynamics GP Report Viewer web parts are used to view company-specific Microsoft SQL Server Reporting Services reports. For more information about Dynamics GP report viewer web parts, refer to *Configure a Dynamics GP report viewer web part* on page 91.

Web part connections overview

Some web parts on a page can be connected, with data passing back and forth between them. One web part provides the data (publisher), and the other web part acts on the data (subscriber).

Types of web parts you can connect

You can create the following types of connections.

- You can connect result viewer web parts to one another. For information about connecting result viewers, refer to *Connect result viewer web parts to one another* on page 92.
- You can connect SharePoint web parts to one another. For more information, refer to SharePoint documentation.
- You can connect external list web parts to one another. For more information, see the SharePoint documentation.

Connection methods

Business Portal provides two methods for connecting web parts: the standard method delivered with SharePoint, and an alternative method delivered with Business Portal. You must use the alternative method when connecting result viewer web parts to one another. We recommend using the standard method in all other cases.

Standard method SharePoint handles the communication between web parts. Using SharePoint for web part communication is referred to as the *standard* method of publishing and subscribing.

Alternative method Result viewer web parts use the alternative method of publishing and subscribing. You can use the alternative connection between only result viewer web parts; you cannot use it with SharePoint web parts.

The web part gallery

Web parts are made available to users from the web part gallery, which is shared by all sites in a site collection. Web parts in the gallery are organized into groups. Business Portal result viewer and KPI web parts are contained in a group called **Business Portal web parts**.

By default, web parts in the gallery inherit permissions from the top-level site in the collection. However, the BP Internal User SharePoint group has access to web parts in the Business Portal web parts group.

For more information about the web part gallery, refer to the SharePoint documentation.

Adding web parts to a page

To add web parts to a page, click **Site Actions** > **Edit Page**. The page will switch to edit mode, so you can select and configure web parts.

Once you have added a web part to a page, additional menus and tool panes become available, so you can define web part properties and, if applicable, connect web parts. Web part tool pane options differ depending on the type of web part.

Information about SharePoint web parts and their options is available in the SharePoint documentation. For information about configuring result viewer or tab web parts after adding them to a page, see *Configure a result viewer web part* on page 87 and *Configure a tab web part* on page 89.

Types of result viewer web parts

There are four types of result viewer web parts you can use to display query results: primary publishing list, rich list, simple list and form viewer. Choose a result viewer web part based on the number and complexity of the query results you want to display. For more detailed information about how you can define the properties of result viewer web parts, see *Result viewer configuration options* on page 84.

Result viewer web parts can be used only on the top-level Business Portal site and its subsites.

Primary publishing list

Use a primary publishing list to display a list of query results with few columns of data. The primary publishing list is a publisher, which means that if you select an item in the list, that data can be transmitted to a subscriber web part. If a subscriber web part is connected to the publisher, the subscriber web part updates its content when selections in the publishing list change.

Rich list

Use a rich list to display a list of query results with many columns of data. A rich list can display data based a query, or based on an item selected in a publisher web part. The rich list web part can be a publisher, subscriber, or both at the same time.

Simple list

Use a simple list to display limited sets of data where there are between one and 50 records in the list, and between one and five columns of data. For example, a simple list could show balances on a customer’s recent statements or a list of users in the MBF Administrator role.

Like the rich list, the simple list can be a publisher, subscriber, or both at the same time. However, the simple list doesn’t have paging, menu, or Find capabilities.

Form viewer

Use a form viewer to display a single row of data, in vertical format. Headings run down the left side, rather than across the top. The form viewer web part is a subscriber. A form viewer web part can include a menu and an action area; however, it has no Find capabilities.

Result viewer configuration options

Following are descriptions of the properties you can define as you configure a result viewer web part on a page. The default settings for each result viewer type are also included. For more information about the different types of web parts, see *Types of result viewer web parts* on page 83.

Query selection

You can choose an existing query or create a new query for a result viewer web part. The **Create New Query** button on the web part tool pane launches the Create a Query wizard. (For more information about creating a query, see Chapter 12, "Creating queries.") The **Use Existing Query** button allows you to select a query that has already been defined.

Once you've specified a query for the web part, a **Modify Query** button replaces those for selecting a query in the web part tool pane, so you can make changes whenever needed. For information about using this option, see *Modify a result viewer web part query* on page 72.

Number of rows returned

You can specify whether all results for a query should be displayed at once, or only a specific number of rows should be displayed. For example, if a query returns 2000 result rows, a result viewer can be set to display 100 rows at a time.

If you choose to return a specific number of rows for a primary publishing list or rich list result viewer, then you also must choose to display the Status area, which is where paging buttons are displayed. See *Status area* on page 87.

If a result viewer web part returns all results at once, and the query returns a large number of rows, it can take a long time to display the results. We recommend that result viewers display 50 or fewer rows at a time.

Result viewer type	Default setting
Primary publishing list	Yes. Display 50 rows.
Rich list	
Simple list	Not applicable
Form viewer	

Automatic refresh

You can indicate whether information in a web part should be updated (refreshed) automatically, and if so, how often. If you do not choose automatic refresh, then the data will be updated only when the page is opened or when you click the browser's **Refresh** button.

By default, data is not refreshed automatically for any of the result viewer types.

Web part communication

The following table shows which result viewer web parts can be used to publish and which can be used to subscribe.

Result viewer type	Publish	Subscribe
Primary publishing list	X	
Rich list	X	X
Simple list	X	X
Form viewer		X

For information about setting up web parts to communicate with each other, see *Connect result viewer web parts to one another* on page 92.

Query menu

Primary publishing list and publishing rich list result viewers can have multiple queries. For these web parts, you can include a query menu, which allows users to choose which query they want to see results for. You can also provide menu options to create a new query or modify the existing query.

You can include the query menu on other web parts to provide the **Modify Existing Query** option. You also can choose not to include the menu on the web part, if you don’t want users to have any of these options.

Result viewer type	Default setting
Primary publishing list	Show “Create New Query” and Show “Modify Existing Query”
Rich list	Show “Create New Query” and Show “Modify Existing Query” (When the rich list is used as a subscriber, the **Create New Query** option will not appear in the query menu, even if this option is selected in the tool pane.)
Simple list	Not applicable
Form viewer	Show “Modify Existing Query” (The option to show “Create New Query” is not applicable.)

For information about using the **Modify Existing Query** option, see *Modify a result viewer web part query* on page 72.

Find option

For some result viewers, you can allow users to search query results by displaying a **Find** option.

Result viewer type	Default setting
Primary publishing list	Yes. Display the Find option.
Rich list	
Simple list	Not applicable
Form viewer	

The **Find** feature cannot search for custom data types. These include:

Custom data type	Example
Money	$342.19
Quantity	57
Phone number	(312) 555-0101
Time	8:30
Date	08/30/03
Percent	15%
Account number	000-1103-00

Column headings

Column headings allow users to resize and reorganize columns in a result viewer web part. By default, all result viewer types display column headings.

If a user changes columns, that modifies the query and therefore runs the query again. You may not want users to change column headings if the query is run on a large data table. It could take a long time to process results each time a column is changed.

Row selection

For some result viewers, users can select a single row of data to perform tasks or actions against, or to publish to another web part.

You must enable row selection if you are creating a publisher web part that will be connected to a subscriber web part. When a user clicks a row in the publisher web part, that data is published for the subscriber. For example, a user could click a customer name in a primary publishing list showing all customers, and then a subscribing rich list could display that customer’s recent orders.

Result viewer type	Default setting
Primary publishing list	Yes. Enable row selection.
Rich list	
Simple list	
Form viewer	Not applicable

Multiple row selection

For some result viewers, you can choose multiple rows to publish. Check boxes are displayed on the result viewer web part if you enable multiple row selection.

Result viewer type	Default setting
Primary publishing list	No. Do not display check boxes.
Rich list	
Simple list	Not applicable
Form viewer	

Status area

Result viewer web parts can contain a status area. On simple list and form viewer web parts the status area displays error messages. On primary publishing list and rich list result viewers, the status area displays error messages and buttons for paging through query results. If you have chosen to return a specific number of rows in a primary publishing list or rich list result viewer, then you must choose to display the status area, so paging buttons will be available.

By default, all result viewer types display a status area.

Custom "No Results" message

When a result viewer web part returns no results because no data for the query exists, the standard message that appears in the web part is "Query returned no results." For all result viewer styles, you can use this default message or create a custom message for users.

Style sheet URL

You can link to a cascading style sheet (CSS) file, which will determine the size, color, and style of the web part.

Result viewer type	Default setting
Primary publishing list	/BusinessPortal/UI/ResultViewer/Stylesheets/PPL.css
Rich list	/BusinessPortal/UI/ResultViewer/Stylesheets/RichList.css
Simple list	/BusinessPortal/UI/ResultViewer/Stylesheets/SimpleList.css
Form viewer	/BusinessPortal/UI/ResultViewer/Stylesheets/Form.css

Appearance, layout, and advanced web part properties

The result viewer web part tool panes include SharePoint settings for the appearance, layout, and advanced behavior of web parts. These properties are described in SharePoint documentation and in ToolTips that appear when you move the pointer over each option.

Configure a result viewer web part

Use the following procedure to configure a result viewer web part on a page. Result viewer web parts can be used only on sites in the Business Portal site collection.

1. Click **Site Actions** > **Edit Page**. The page will switch to edit mode.

2. Click **Add a Web Part** in the zone where you want to add the web part. For more information, see *Adding web parts to a page* on page 83.

3. Click the link inside the web part to open its properties tool pane.

4. Set the properties for the result viewer web part. For more information about each option, see *Result viewer configuration options* on page 84.

   For more information about connecting web parts, refer to Web part connections overview on page 82.

5. To see the web part as it will appear to users, while keeping the tool pane open for additional configuration, click **Apply**.

6. To save your settings and close the tool pane, click **OK**.

Create a SharePoint web part

Result viewer 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. The following steps explain how to create a SharePoint web part.

These steps apply to all SharePoint content types, such as document libraries, announcement lists, surveys, and discussion boards.

1. Go to the web site where you want to create a SharePoint web part and click **Site Actions** > **Create**.
2. Click the type of content that you want to create. (For example, **Document Library**.)
3. Follow the instructions displayed to create the new item.
4. After you have created the content item, go to the Business Portal page where you'd like to display it.
5. Click **Site Actions** > **Edit Page**. The page will change to edit mode.
6. Click **Add a Web Part** in the zone where you want to add the new item.
7. On the Add Web Parts page, browse through the web parts listed until you find your new content item.
8. Mark the check box for the item and click **Add**. The web part is added to the page.
9. Click **Exit Edit Mode**.

Back Office Tasks web parts

Most center site home pages include a Back Office Tasks web part, which is a SharePoint task web part that displays links to windows in Microsoft Dynamics GP. Clicking a task link opens a new Remote Desktop Services session. For information about setting up Remote Desktop Services for Business Portal, see *Set up Microsoft Dynamics GP Terminal Services or Remote Desktop Server access* on page 19.

By default, each Back Office Tasks web part has an associated view, which shows only those tasks associated with the center site where the web part is displayed. There is also an All Links view that shows all available tasks, whether or not they're assigned to center sites.

All users with access to a center site have access to the Back Office Tasks web part. However, users must log on to Microsoft Dynamics GP in order to access Microsoft Dynamics GP windows.

To change the tasks listed in a Back Office Tasks web part, you'll need to create a new view and associate that view with the web part.

1. Go to the center site home page where you want to modify the Back Office Tasks web part.

2. Click **View All Site Content**.

3. Under **Lists**, click the back office tasks list.

4. In the **List Tools** tab, click List. Select the **All Links** from the Current View drop-down list. Make note of the IDs of the tasks you want to include in the new view.

5. Click **Create View**.

   Choose a view format.

6. If you want to include the tasks that are already in the web part, click the current view name under **Start from an existing view**.

7. Enter a name for the view.

8. In the **Filter** section, add filters based on the task IDs you noted earlier.

9. Click **OK** when you're finished setting up the view.

10. Go back to the center site home page where the web part appears.

11. Click **Modify Shared Web Part**.

12. Under **Selected View**, select the view you just created.

13. Click **OK** to exit edit mode.

Configure a tab web part

Use a tab web part to organize information by placing it on separate tabs within a single web part. For example, employee profile information can be separated onto tabs for personal information, emergency contacts, dependents, position history, and more. Rather than create a page with individual web parts for each type of information—which can be difficult to organize and may require the user to scroll to find all of the web parts—you can create a tab web part with a separate tab for each type of information, as shown here.

To provide content for each tab in a tab web part, you can use .htm, .asp, and .aspx files that already have been created.

Use the following steps to configure a tab web part on a page.

1. Click **Site Actions** > **Edit Page**. The page will change to edit mode.

2. Click **Add a Web Part** in the zone where you want to add the tab web part.

3. On the Add Web Parts page, under **Business Portal web parts**, select the check box next to **Tab Web Part** and click **Add**. The web part is added to the page.

4. In the web part title bar, click **Edit** > **Modify Shared Web Part** to open the web part's properties tool pane.

5. In the tool pane, click **Add** to add a tab for the web part.

6. Type a name for the tab in the **Name** box.

7. To fill the content area of the tab, type the URL of any standard web page, including .htm, .asp, or .aspx files.

   If you're using a file you created (rather than an Internet address), you should place the file in the Business Portal folder on the web server, and use the path /businessportal/*<subfolder>*/*<file name>*.

8. To include an icon on the tab, type the path or address to the image file in the **Icon** box. You can use any image file format supported by Internet Explorer, including .gif, .jpeg, and .png. The image you use should be small (16 x 16 pixels is recommended), because it cannot be resized in the tab.

   We recommend placing the image file in the Business Portal folder on the web server, and using the path /businessportal/images/*<image file name>*.

9. To display a ToolTip when users move the pointer over this tab, type descriptive text in the **ToolTip** box.

10. To provide a shortcut for accessing this tab, type a single key in the **Keyboard Shortcut** box. When users type ALT + *<key>* (for example, ALT + S), this tab will be displayed.

    You can use the same shortcut key for more than one HTML element on a page. Users would need to re-type the keyboard shortcut until they have found the desired link. (This is similar to using ALT + TAB to cycle through open applications.)

11. To update and save the web part with this tab, click **Apply**.

12. Add tabs by repeating steps 5 through 11.

13. To close the tool pane, click **OK**.

Dynamics GP report viewer configuration options

Following are descriptions of the properties you can define as you configure a Dynamics GP report viewer web part on a page.

Report Information

You can enter a relative path to the Reporting Services report or use the report lookup window to select a report. A relative report path is the location of the

Reporting Services report relative to the folder name of the company database where the Reporting Services reports were deployed.

Report view

The toolbar provides page navigation, refresh, search, export, and print functionality for reports. You can specify how to display the toolbar in the Web part.

Toolbar Display Mode	Settings displayed
Full	Page navigation controls, Page display controls, Search field, Refresh button, Export formats, Print Icon, Show and Hide icons
Navigation	Page navigation controls, Search field, Show and Hide icons
Minimal	Refresh button, Print Icon, Show and Hide icons
None	The toolbar isn't displayed in the Web part.

Parameters are values that are used to select or filter specific data for your report. After you specify a parameter, click View Report in the Web part to get the data. You can specify how to display the parameters in the Web part.

Parameter Area Display Mode	Settings displayed
Collapsed	The parameters can be hidden or shown in the Web part.
Displayed	The parameters are displayed in the Web part.
Hidden	The report parameters aren't displayed in the Web part.

A report can contain links to other reports. The report that opens when you click the link in the main report is known as a drillthrough report. You can specify whether to have the drillthrough report to display in a new window.

Appearance, layout, and advanced web part properties

The Dynamics GP report viewer web part tool panes include SharePoint settings for the appearance, layout, and advanced behavior of web parts. These properties are described in SharePoint documentation and in ToolTips that appear when you move the pointer over each option.

Configure a Dynamics GP report viewer web part

Use the following procedure to configure a Dynamics GP report viewer web part on a page. Dynamics GP report viewer web parts should be used only on sites in the Business Portal site collection.

1. Click **Site Actions** > **Edit Page**. The page will switch to edit mode.

2. Click **Add a Web Part** in the zone where you want to add the web part. For more information, see *Adding web parts to a page* on page 83.

3. Click the link inside the web part to open its properties tool pane.

4. Set the properties for the Dynamics GP report viewer web part. For more information about each option, see *Dynamics GP report viewer configuration options* on page 90.

5. To see the web part as it will appear to users, click **Exit Edit Mode**.

6. To save your settings and close the tool pane, click **OK**.

Result viewer communication behaviors

When connected, there are several result viewer web part behaviors to keep in mind:

- Rich publishing list and simple list result viewer web parts can publish one business entity and subscribe to another; however, they cannot publish and subscribe to the same entity.

- Result viewer web parts cannot publish or subscribe to multiple entities.

- If a result viewer web part is a subscriber, current data won't be displayed until a selection is made in its connected publisher web part.

- If a result viewer web part is a publisher but not a subscriber, its data is updated immediately upon opening the page. If it also is subscribing, it will not update its data until a selection is made in its connected publisher web part.

Connect result viewer web parts to one another

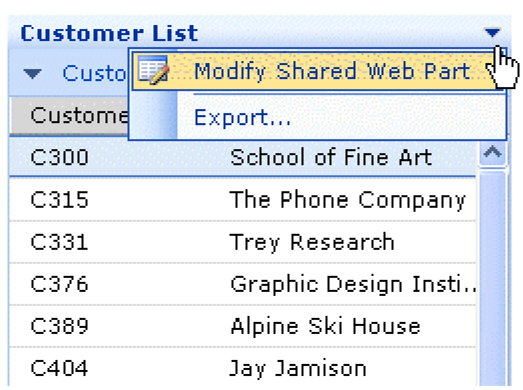
Once you've added result viewer web parts to a page, you can go to that page and connect parts. You can make this connection from the publisher to the subscriber or from the subscriber to the publisher.

Connecting result viewer web parts includes the following steps:

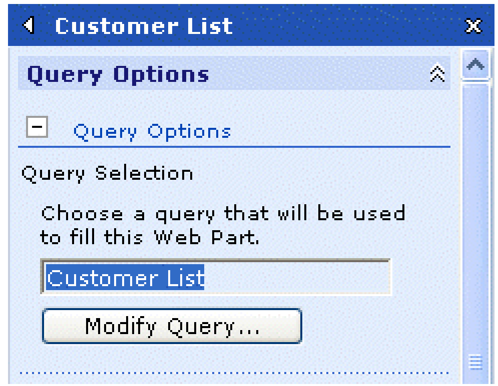
- Configuring the publishing result viewer web part
- Configuring the subscribing result viewer web part
- Setting the page to edit mode to connect the parts

The following procedure describes connecting result viewer web parts after they have been added to a page. If you prefer, you can also connect them as you add and configure them, with the page in edit mode. You can see which ones can be connected to each other using the ***Connections*** *submenu of the web part menu.*

1. To configure the publishing result viewer web part, select **Modify Shared Web Part** from the web part menu.

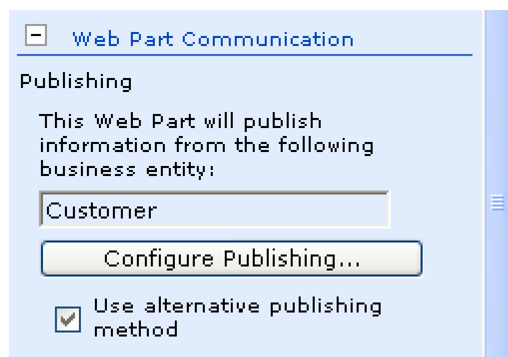


2. In the result viewer tool pane that appears, you can create a new query, use an existing query, or modify the query already associated with the web part. For information about modifying a result viewer query, refer to *Modify a result viewer web part query* on page 72.



3. Click the plus sign next to **Web Part Communication** and click **Configure Publishing** to open the Web Part Communication dialog box. Select the entity the result viewer should publish data from, and click **Save**.

   Also, select **Use alternative publishing method**.



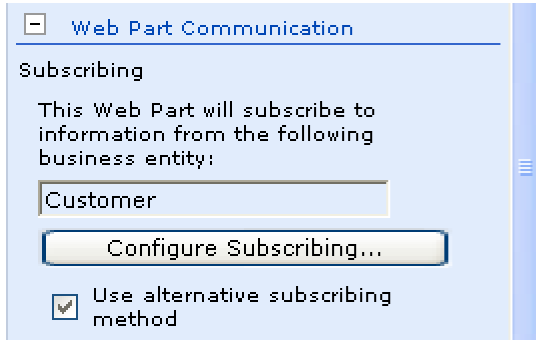
4. Set any other configuration options needed in the tool pane. For descriptions, see *Result viewer configuration options* on page 84. Click **OK** to save changes and close the tool pane.

5. To configure the subscribing result viewer web part, select **Modify Shared Web Part** from the web part menu.

6. In the result viewer tool pane, you can create a new query, use an existing query, or modify the query already associated with the web part. Be sure the query uses the same business entity as the publishing result viewer web part's query.

7. Click the plus sign next to **Web Part Communication** and click **Configure Subscribing** to open the Web Part Communication dialog box. Select the same entity you chose for the publisher part, and click **Save**.

Also, select **Use alternative subscribing method**.



8. Set any other configuration options needed in the tool pane. For descriptions, see *Result viewer configuration options* on page 84. Click **OK** to save changes and close the tool pane. Query results should appear in publishing and subscribing web parts as soon as the page is refreshed.

Web part menu options

The following options can be available on the web part menu, depending on the type of web part, its configuration, and your level of permission.

- **Delete** removes the web part from the page and permanently deletes it from the web part gallery. For more information, see *Remove web parts from a page* on page 94.
- **Minimize** collapses the web part so only the title bar is visible. To expand the web part, choose **Restore** from the web part menu.
- **Close** removes the web part from the page. The web part is stored in the web part gallery and can be added back to the page later.
- **Modify** starts edit mode and opens the web part tool pane, so you can change web part properties. SharePoint web part properties are explained in SharePoint documentation. For information about result viewer or tab web part properties, see *Result viewer configuration options* on page 84 and *Configure a tab web part* on page 89.
- **Connections** shows which web parts can be connected to each other and which connection methods can be used. For more information about web part connections, refer to *Web part connections overview* on page 82.
- **Export** allows you to save web part files for use outside of Business Portal. For more information about this option, refer to the SharePoint documentation.
- SharePoint web parts also include a **Help** option, which opens SharePoint help.

Remove web parts from a page

You can remove web parts from a page either in edit mode or when you browse to the page.

Use edit mode

There are two main ways to remove web parts from a page in edit mode:

- Click **Close** in the upper right corner of the web part or click the web part menu and select **Close**. This removes the web part from the page and stores it in the web part gallery.
- Click the web part menu and select **Delete**. This removes the web part from the page and permanently deletes it from the web part gallery.

When a result viewer web part is removed using the ***Delete*** *option, the associated query subfolder should be removed from the corresponding DataCenter folder using the* ***Organize Queries*** *page. See* *Delete a query on page 78.*

Browse to the page

If the **Allow Close** option was selected when the web part was configured, you can open the page, then click the **Close** button in the upper right corner of the web part or click the web part menu and select **Close**. The web part is stored in the web part gallery and can be added back to the page later.

If **Allow Close** was not enabled during web part configuration, the web part cannot be closed by users. For more information about web part configuration, see *Configure a result viewer web part* on page 87 and *Configure a tab web part* on page 89.

PART 4: REPORTS ADMINISTRATION

Part 4: Reports administration

Providing users with easy access to the Microsoft Dynamics GP reports they need is a key feature of Business Portal. Depending on your implementation, this capability is provided by either the Reports Catalog or the GP Report Center site.

Reports Catalog is available if you're using Business Portal with SharePoint Foundation. The GP Report Center site is available if you're using Business Portal with SharePoint Server or with SharePoint Foundation.

The following information is included:

- Chapter 15, "Reports Catalog," explains the steps necessary for getting the Reports Catalog ready to use and describes administrative tasks associated with the Reports Catalog.

- Chapter 16, "GP Reports Center," describes how to use the GP Report Center site. The GP Report Center site serves as a central location to manage business-critical information sources, such as reports, spreadsheets, and SQL Server Reporting Services data connections.

Chapter 15: Reports Catalog

Reports Catalog is available only if you're using Business Portal with SharePoint Foundation.

The Reports Catalog stores and manages Microsoft Dynamics GP reports for display in Business Portal.

The Reports Catalog is a file location on a server, plus a SQL table and a business entity. Reports in the Reports Catalog are static—data is displayed as of the date they were published. You determine how often each report is published.

To get started using the Reports Catalog to store Microsoft Dynamics GP reports, you must complete two procedures. First, you'll need to map report sets to Business Portal center sites, using the Set Up Reports Catalog page. Then you'll need to create the reports so they are available to users. After you've set up Reports Catalog, you can change the center site or MBF role assigned to a particular report.

If you're using Business Portal with SharePoint Server, see Chapter 16, "GP Reports Center."

Information about Reports Catalog is divided into the following sections:

Assign report sets to centers

The first step in setting up Reports Catalog is to decide which Business Portal center site, such as Finance, Sales, or Inventory, each report set should be associated with. A report set includes all reports specific to a particular series in Microsoft Dynamics GP.

After you've mapped report sets to center sites, you can change the default center site for an individual report using the Manage Reports Catalog page. For more information, see *Change the center site assigned to a report* on page 101.

1. Go to the Administration Home page on the Business Portal web site.
2. Under **Reports Catalog**, click **Reports Catalog setup**. The Reports Catalog Setup page appears.
3. Using the **Business Portal Center Pages** lists, select a center site to map to each corresponding Microsoft Dynamics GP report set.
4. Click **Save**.

Publish Microsoft Dynamics GP reports to Reports Catalog

When Business Portal is installed, sample reports are installed in a shared folder (called SampleReports) on the web server. The first time you open the Reports Catalog Management page (**Site Actions** > **Site Settings** > under **Reports Catalog**, click **Reports Catalog management**) and select **Reports - All** from the Reports query menu, sample reports will appear in the **Reports** list.

To publish your own reports, we recommend setting up a new shared folder to make your reports more secure. You can set up the shared folder on the web server, on the Microsoft Dynamics GP server, or on a file server on your network. For more information about creating and granting access to the shared reports folder, refer to the Business Portal Installation Guide.

Once the shared folder has been set up, you will need to run the Report Scheduler to publish reports. Report Scheduler is a Microsoft Dynamics GP application that enables flexible, secure scheduling and publishing of your Report Writer reports. Use the Microsoft Dynamics GP Report Scheduler to indicate when and how often a particular Report Writer report should be published to the shared reports folder.

Besides viewing reports associated with their Business Portal roles, users who have a Microsoft Dynamics GP user ID can create, schedule, and publish new reports and assign these reports to center sites and MBF roles using Report Scheduler.

Report Scheduler is installed automatically when you install Microsoft Dynamics GP. You can access Report Scheduler by choosing **Microsoft Dynamics GP** > **Tools** > **Routines** > **Company** > **Report Schedule** in Microsoft Dynamics GP. For information about using Report Scheduler, refer to the Report Scheduler documentation.

Report Scheduler report publishing can slow down Microsoft Dynamics GP performance, so it is best to have reports run during off-peak hours.

How users view reports

In order for users to view reports in the Reports Catalog, you must modify their MBF roles to include the ReportCatalog_All and ReportCatalog_RoleDAP data permissions. This applies to all users except those in the Administrator and Reports Catalog Administrator roles. See *Modify the permissions associated with a role* on page 51 for more information.

On center site home pages—such as **Finance Home** or **Inventory Home—**there is a **Top 5 Reports** web part. As a user views reports, a list of the five reports reviewed most often is built and displayed in the **Top 5 Reports** web part. The list changes based on the user's viewing habits. The user can click on a report in this web part to display the report.

Assigned/not assigned reports

In the **Reports** list on the Reports Catalog Management page, you can use the query menu to show all reports, assigned reports, or not assigned reports.

A report is considered assigned when it has been assigned to one or more Business Portal center sites or MBF roles. If a report has not been assigned to any center sites or MBF roles, the report is considered not assigned and will not appear on the Reports page of any Business Portal center sites.

Change the center site assigned to a report

During Reports Catalog setup, you assigned sets of reports to Business Portal center sites. You can change this information for individual reports using the Reports Catalog Management page.

For example, you may have assigned all inventory reports to the Inventory Center site during setup. Using the Reports Catalog Management page, you can select an individual inventory report, such as an inventory items list, and assign it to the Purchasing Center site.

Use the following steps to change the center site assigned to a report, or to assign a center site to a report that hasn’t yet been set up in Reports Catalog.

1. Go to the Administration Home page on the Business Portal web site.
2. Under **Reports Catalog**, click **Reports Catalog management**. The Reports Catalog Management page appears.
3. In the **Reports** list, select the report to assign to a different Business Portal center site.
4. In the **Business Portal Center Pages** web part, click **Modify** and select or clear the necessary check boxes.
5. Click **OK** to save changes.

Change the MBF roles assigned to a report

The **Roles** web part on the Reports Catalog Management page displays MBF roles assigned to the report selected in the **Reports** list. These roles are assigned when you schedule a report to be published using Report Scheduler. You can change the assigned roles using the Reports Catalog Management page.

1. Go to the Administration Home page on the Business Portal web site.
2. Under **Reports Catalog**, click **Reports Catalog management**. The Reports Catalog Management page appears.
3. In the **Reports** list, select the report for which to change roles.
4. In the **Roles** web part, click **Modify** and select or clear the necessary check boxes.
5. Click **OK** to save changes.

Chapter 16: GP Reports Center

The GP Reports Center is a site that serves as a central location to manage business-critical information sources, such as reports, spreadsheets, and SQL Server Reporting Services data connections.

Information about using the GP Reports Center site is divided into the following sections:

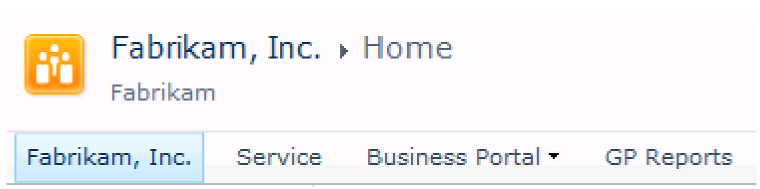
- *GP Reports Center overview*
- *Microsoft Dynamics GP report libraries*
- *Security for Microsoft Dynamics GP report libraries*
- *Publishing reports to the GP Reports Center site*
- *Viewing reports with versioning or content approval*

GP Reports Center overview

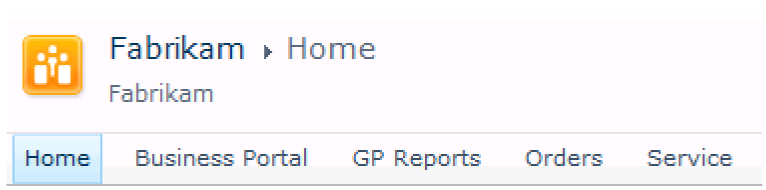
The GP Reports Center site is essentially a group of SharePoint libraries. A library is a location on a site where you can create, collect, update, and manage files with team members. A library displays a list of files and key information about the files, which helps people to use the files to work together. You can create and manage documents, spreadsheets, presentations, forms, and other types of files in a library.

When you install Business Portal, a GP Reports Center site is created under the top-level SharePoint site (at the same level as the top-level Business Portal site). Users in the BP Internal User SharePoint group automatically have access to the GP Reports Center site.

The appearance of the top-level menu depends on how Business Portal was implemented. The following illustration shows the GP Reports Center site if you are using SharePoint Server.



The following illustration shows the GP Reports Center site if you are using SharePoint Foundation.



Additional report libraries are automatically created on this GP Reports Center site for Microsoft Dynamics GP reports. For more information about the report libraries created with Business Portal, see *Microsoft Dynamics GP report libraries* on page 105. Links to these report libraries appear in the Quick Launch on the GP Reports Center site, as shown in the following illustration.

Microsoft Dynamics GP reports can be published to the GP Reports Center site in many different file formats. You can choose which file formats can be uploaded to your GP Reports Center site. You can also publish other types of reports, such as Management Reporter for Microsoft Dynamics ERP reports or reports from applications like Microsoft Office Excel.

Reports contained in GP Reports 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. For more information about publishing reports to the GP Reports Center site, see *Publishing reports to the GP Reports Center site* on page 106.

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

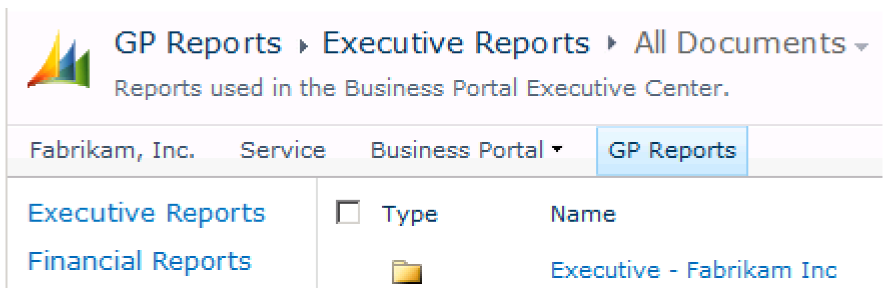
Microsoft Dynamics GP report libraries

When you install Business Portal, the following report libraries are created on the GP Reports Center site:

- Executive Reports
- Financial Reports
- Human Resources Reports
- Inventory Reports
- Manufacturing Reports
- Payroll Reports
- Purchasing Reports
- Sales Reports

Use these libraries to publish your Microsoft Dynamics GP reports.

Within each report library, a folder is automatically created for each company in Microsoft Dynamics GP. Each folder name consists of the name of the report library followed by the company name. For example, folders in the Executive Reports library for companies 1, 2, and 3 would appear as shown in the following example.



Some special characters can't be used in folder names, so they will be removed from company names when folders are created. The following characters are prohibited: tilde (~), quotation mark ("), number sign (#), percent (%), ampersand (&), asterisk (*), colon (:), angle brackets (< and >), question mark (?), slash mark (/), backslash (\), pipe (|), apostrophe ('), plus sign (+), equal sign (=), comma (,), semicolon (;), brackets ([and]), at sign (@), and braces ({ and }).

If you add a new company to the database after installing Business Portal, you must create the appropriate company folder in each report library; it won't be created automatically.

Security for Microsoft Dynamics GP report libraries

When you install Business Portal, SharePoint groups are automatically created to enable you to secure reports by company on the GP Reports Center site. For each company-specific reports folder in a report library, a corresponding SharePoint group is created that permits read-only access to that reports folder. (For more information about company folders, refer to Microsoft Dynamics GP report libraries on page 105.)

You can add users to SharePoint groups for just the companies that they have access to. For example, assume the Financial Reports library contains a folder called Financial Reports - Fabrikam. In order to grant access to this folder, a corresponding SharePoint group called BP Financial Reports - Fabrikam is created. The group is granted read-only access to that folder. Users in the BP Financial Reports - Fabrikam group have access only to the reports in the Financial Reports - Fabrikam folder; they don’t have access to other folders for other companies.

Some special characters can’t be used in group names, so they will be removed from company names when groups are created. The following characters are prohibited: tilde (~), quotation mark (“), number sign (#), percent (%), ampersand (&), asterisk (*), colon (:), angle brackets (< and >), question mark (?), slash mark (/), backslash (\), pipe (|), apostrophe (’), plus sign (+), equal sign (=), comma (,), semicolon (;), brackets ([and]), at sign (@), and braces ({ and }).

If you’re using versioning or content approval on the GP Reports Center site, you may need to change your settings so that users in company-specific SharePoint groups can view reports. For more information, see *Viewing reports with versioning or content approval* on page 107.

If you add a new company to the database after installing Business Portal, you must create the appropriate company groups and give them access to the appropriate folders; groups won’t be created or assigned automatically.

Publishing reports to the GP Reports Center site

There are two ways to publish reports to the GP Reports Center site in SharePoint. You can use the Microsoft Dynamics GP Report Scheduler, or you can use standard SharePoint document library features.

You can also use a combination of the two methods. You can use the Report Scheduler to automatically publish reports, and then use SharePoint document library features to manage those reports on the GP Reports Center site. You can also use SharePoint document library features to publish documents that can’t be published through the Report Scheduler, such as Management Reporter for Microsoft Dynamics ERP reports or Excel spreadsheets.

Publishing using Report Scheduler

Users who have a Microsoft Dynamics GP user ID can create, schedule, and publish new reports and assign those reports to GP Reports Center site libraries using Report Scheduler. If users are publishing reports to the report libraries created with Business Portal, they must also belong to the BP Report Publisher SharePoint group.

Use the Microsoft Dynamics GP Report Scheduler to indicate when and how often a particular Report Writer report should be published to the GP Reports Center site. You can access Report Scheduler by choosing **Microsoft Dynamics GP** > **Tools** > **Routines** > **Company** > **Report Schedule** in Microsoft Dynamics GP.

For more information about using Report Scheduler with SharePoint, refer to the Report Scheduler documentation.

Report Scheduler report publishing can slow down Microsoft Dynamics GP performance, so it is best to have reports run during off-peak hours.

Using SharePoint document library features

Uploading files to report libraries works just like uploading files to any other SharePoint document library. You can also use document library features to control how documents are viewed, tracked, managed, and created. You can track versions, including how many and which type of versions, and you can limit who can see documents before they are approved.

If you're using versioning or content approval on the GP Reports Center site, you may need to change your settings so that users in company-specific SharePoint groups can view reports. For more information, see *Viewing reports with versioning or content approval* on page 107.

For more information about managing document libraries, see the SharePoint documentation.

Viewing reports with versioning or content approval

If you're using versioning or content approval on the GP Reports Center site, users in the default SharePoint groups may not be able to view reports as soon as they are published using Reports Scheduler or uploaded to a folder.

By default, the SharePoint groups created with Business Portal do not have permission to view draft items. Drafts are created in two situations:

- If the library tracks major and minor versions, and no major version of the file has been published. (Minor versions are considered drafts.)
- If content approval is required, and a file has been created or updated but not yet approved.

If major and minor versions are being tracked, a minor version of a file is only visible to people who have permission to see draft items. To make a report viewable, you must publish a major version. When a major version is published, the file is displayed to anyone with Read permission.

When content approval is required, a file remains in a draft state until it is approved. To make a report viewable, you must approve it. When the file is approved, it is assigned an Approved status in the library, and it is displayed to anyone with Read permission.

Use the Document Library Versioning Settings page to specify whether to track versions and require approval. You can also specify whether users with Read permission can view draft items. To modify versioning and content approval settings on the GP Reports Center site, click the **Page** tab. On the ribbon, click **Library Settings**. Under **General Settings**, click **Versioning settings**.

For more information about versioning and content approval, see the SharePoint documentation.

PART 5: BUSINESS CONNECTIVITY SERVICES

Part 5: Business Connectivity Services

The Business Connectivity Services allows users to view Microsoft Dynamics GP data. Information about the Business Connectivity Services is divided into the following section:

- Chapter 17, "Business Connectivity Services concepts," provides an overview of how the Business Connectivity Services works with Microsoft Dynamics GP and Business Portal.

Chapter 17: Business Connectivity Services concepts

Information about how Business Connectivity Services is used to make Microsoft Dynamics GP data accessible in Business Portal is divided into the following sections:

Business Connectivity Services overview

The Business Connectivity Services is a service that is used for registering business data types and properties of applications such as Microsoft Dynamics GP.

When you install Business Portal on SharePoint, the Microsoft Dynamics GP web service is registered with the Business Connectivity Services. The web service for Microsoft Dynamics GP provides access to the primary documents in the accounting system. Registering the web service makes Microsoft Dynamics GP data accessible on sites in the Business Portal site collection.

Microsoft Dynamics GP data can be displayed in external lists. By default, Business Portal includes list pages and dashboard pages that use business data web parts. For more information, see *External list pages and dashboard pages* on page 111.

For more information about the Business Connectivity Services, refer to the SharePoint documentation.

External list pages and dashboard pages

In its default configuration, Business Portal includes external list pages and dashboard pages that retrieve data using the Microsoft Dynamics GP web service and Business Connectivity Services.

External list pages contain lists of commonly used data. Users can click an item in the list to show detailed information about the selected object. For example, the Customer List page appears on the Sales Center site. You can click on a customer in the list to view detailed information for that customer. External list pages appear on most Business Portal center sites, and can be identified by the word “list” in their names.

Dashboard pages bring together varied information to help people perform their jobs effectively. The Sales Dashboard pages appear by default only on the Sales Center site, and are available for salespeople and sales managers. For example, the My Sales Dashboard includes the Customer Balances page.

While page security for external list and dashboard pages works the same as for all other Business Portal pages, data security is handled through web services instead of through MBF. For example, users in the BP Inventory Manager SharePoint group have access to the Sales Item List page by default. In order to view the data on that page, those users must also belong to the WMS role in web services. For more information about adding users to web service roles, see *Add users to web service roles* on page 61.

Assign the application pool identity to the BDC Administrator role

In order to display data from the Business Connectivity Services 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. Use the following procedure to add this account to the BDC Administrator role.

1. Determine which application pool Business Portal is using:
    - On the Business Portal web server, open Internet Information Services (IIS) Manager by choosing **Start** > **Administrative Tools** > **Internet Information Services (IIS) Manager**.
    - Click the plus sign next to your server name.
    - Click the plus sign next to **Sites**.
    - Right-click the web site where Business Portal is installed. Select Manage Web Site, and then click **Advanced Settings**.
    - In the Advanced Settings window that appears, find the **Application pool** field. The application pool that is entered in this field is the Business Portal application pool.
2. Determine which account the Business Portal application pool is running as:
    - In IIS Manager, click the plus sign next to your server name.
    - Click **Application Pools**.
    - Right-click the Business Portal application pool. Click **Advanced Settings**.
    - In the Advanced Settings window that appears, find the **Identity** field under Process Model. The account shown in this tab is the account the application pool is running as.
3. Add the account to the BDC Administrator role in web services. For more information, refer to *Add users to web service roles* on page 61.

Part 6: Customizations

This part of the documentation describes how to customize Business Portal. The following information is provided:

- Chapter 18, "Customizing Business Portal," explains how to create sites and pages and describes how to manage navigation.
- Chapter 19, "Setting up a customer portal," contains information about setting up secure access to Business Portal for external users, such as customers.

Chapter 18: Customizing Business Portal

Information about customizing Business Portal is divided into the following sections:

Create a new center site

You can create additional subsites of the top level Business Portal site. When you create a new Business Portal subsite, you should apply the Business Portal *master page*. A master page contains the page design and layout elements that you want to repeat on multiple pages in a site. The Business Portal master page contains the company selection list that appears in the upper-right corner of Business Portal pages.

- When you create a new subsite in SharePoint Server, you can apply the Business Portal master page. Click **Site Actions** > **Site Settings** > under **Galleries,** click **Master page** > select **BusinessPortalDefault.master**.
- If you're using SharePoint Foundation only, you can't change the master page through site settings. If you want to use the Business Portal master page, refer to the Business Portal 5.1 for Microsoft Dynamics GP 2010 Software Development Kit.

For more information about sites and master pages, see the SharePoint documentation.

Create a page

You can create additional pages, either on the default Business Portal center sites, or on new sites that you create.

1. Go to the site where you want to create the page and click **Site Actions** > **More Options**.

2. Click **Business Portal Web Part Page** from the Type list in the Create window nd then click the **Create** button.

   Business Portal page templates can be used only on the top-level Business Portal site and its subsites. For more information about the site hierarchy, refer to *Business Portal site structure* on page 8 and *The Business Portal subsite* on page 33.

3. On the New Web Part Page page, you can select a layout either with or without a Quick Launch. After you've named and chosen a location for the page, click **Create**.

4. To add web parts, go to the page and click **Site Actions** > **Edit Page**. The page will switch to edit mode, so you can select and configure web parts. For more information, see *Adding web parts to a page* on page 83.

Business Portal web parts can be used only on the top-level Business Portal site and its subsites. For more information about the site hierarchy, refer to *Business Portal site structure* on page 8 and *The Business Portal subsite* on page 33.

5. Modify page permissions, if necessary. By default, the page will inherit permissions from the site. For more information about setting security on pages that you create, refer to Chapter 6, "Managing page security."

Customize navigation

Links for navigation (called navigation items) appear in the link bar at the tops of pages and on the left side of pages in the Quick Launch. Your options for customizing the navigation depend on whether you're using SharePoint Foundation or SharePoint Server.

- If you're using SharePoint Server, use the Site Navigation Settings page to configure which navigation items appear under which headings, and to specify their order. (On the home page for the site, click **Site Actions** > **Site Settings** > under **Look and Feel**, click **Navigation**.)
- If you're using SharePoint Foundation only, you can choose to inherit the top link bar from the parent site. You can also modify the Quick Launch for a site. (On the home page for the site, click **Site Actions** > **Site Settings** > under **Look and Feel**, click **Tree view** or **Quick Launch**.)

For more information about Business Portal navigation, see *Business Portal navigation* on page 9. For more information about customizing navigation, see the SharePoint documentation.

Remove access to a center site

If you don't want to use a default center site, we recommend hiding it from users rather than deleting it. To hide a site, you can remove security to it so that it doesn't appear in the user's navigation.

1. Go to the Site Settings page for the site.
2. Under **Users and Permissions**, click **People and groups**.
3. Click **Site Permissions** in the Quick Launch.
4. Select the users and groups for which you want to remove access to the site.
5. Click **Actions** > **Remove User Permissions**.

Chapter 19: Setting up a customer portal

This documentation explains the procedures you must perform to provide secure Business Portal access to external users.

Typically, external users are people in other companies, such as customers or vendors; internal users are people within your company, such as employees and salespeople.

You can give external access to Business Portal to employees from your company, but they are still considered internal users.

This information is divided into the following sections:

- *Customer portal checklist*
- *Set up user accounts for external users*
- *Restrict data for customers*

Customer portal checklist

If you're going to allow customers access to Business Portal through the Internet, you should create a portal tailored to those customers. Creating a customer portal is much like setting up Business Portal for internal employee access. You'll perform many of the same tasks.

Step	For more information
1. Set up an ISA server or perimeter network, if you don't already have one.	Business Portal Installation Guide
2. Create user accounts for your external users.	*Set up user accounts for external users* on page 118
3. Be sure the Customer MBF role has appropriate data permissions assigned to it, and create queries using those data permissions.	*Restrict data for customers* on page 118
4. Create pages and web parts to display customer data.	*Create a new center site* on page 115 *Create a page* on page 115 Chapter 14, "Managing web parts"
5. Create a SharePoint group for customers and give the new SharePoint group access to your customer pages.	Chapter 7, "Managing SharePoint groups and permissions" SharePoint documentation
6. Assign users to the Customer MBF role and an associated ID.	*Add users to MBF roles* on page 41
7. Assign users to the customer SharePoint group you created.	*Add users to SharePoint groups* on page 38

When you're setting up your customer portal, keep the following in mind:

- We don't recommend assigning external users to internal roles.

- We don't recommend assigning an external role to any data permission without a row-level restriction applied to it.

- When creating result viewer web parts for customers, you may want to turn off the **Create New Query** and **Modify Query** options in the web part menu, to further restrict their access to your data.

Set up user accounts for external users

A user's access type (internal or external) is determined by role assignments. Typically, internal users are people within your company, such as employees and salespeople; external users are people in other companies, such as customers or vendors.

Both internal and external users must have valid Windows user accounts. Internal users typically have domain accounts on your internal network, with access to internal network resources. External users can have either domain accounts or local accounts on the web server.

Use caution when assigning external users to Windows accounts or groups. You should give external users the least amount of access that is necessary. Typically, you'll want to give external users access to resources only in your perimeter network.

When to use local Windows accounts

We recommend using local Windows accounts for external users in an extranet configuration with a single web server. Local accounts, with the default permissions assigned to the Everyone group in Windows Server® 2008, limit access to only the web server.

If you have performed security hardening steps on your web server, create a test local Windows account and verify that it has sufficient permissions to use Business Portal before creating external user accounts.

When to use domain accounts

If your configuration includes multiple web servers, use domain accounts or shadow accounts for external users. You also may want to use domain accounts or shadow accounts if the external users need access to resources or applications on your other networks.

Restrict data for customers

If you want to give those outside your organization access to Business Portal, you need to restrict their access to only those records that contain their own Customer ID. To limit the data external users can view, set row-level restrictions on customer information. A row-level restriction is used along with a data permission, which restricts the columns or fields of data that are available. For more information about, and examples of, data permissions and row-level restrictions, refer to *Data permissions overview* on page 53 and *Row-level restrictions* on page 54.

Default data permissions, with row-level restrictions, are provided for customer-related data in Business Portal. By default, the Customer MBF advanced role is assigned to the data permissions. The ID associated with a user in that role determines which data is displayed. Users in the role will be allowed to see only their own data on Business Portal pages.

Before using the default data permissions, you should verify that the available properties are appropriate for your customers. It is up to your organization to determine which data should be made available. Refer to Chapter 26, "Default advanced roles and security permissions," for a list of restricted data permissions provided with Business Portal.

Each row-level restriction can be used with any data permission that is based on the same entity. You can't use the restrictions with data permissions based on other entities. We don't recommend making other entities available to your customers. If you don't use row-level restrictions, customers may be able to view each other's information.

You must create your own queries and pages using these data permissions; no default queries or pages are provided. For more information about creating a customer portal, refer to *Customer portal checklist* on page 117.

PART 7: TUNING, TROUBLESHOOTING, AND MAINTENANCE

Part 7: Tuning, troubleshooting, and maintenance

This part of the documentation contains procedures you can use to improve Business Portal performance, and to troubleshoot the installation.

The following information is included:

- Chapter 20, “Performance tuning,” describes some adjustments you can make to your Business Portal installation to ensure peak performance.
- Chapter 21, “Troubleshooting,” describes common problems and their solutions, including information about disabling the prompt for credentials when you open an Administration page.
- Chapter 22, “Maintenance,” contains procedures for adding companies, adding sample users, or removing Business Portal. Information about changing passwords and backing up Business Portal is also included.
- Chapter 23, “Configuration changes,” includes information about changing your Business Portal configuration, including configuring Business Portal for Secure Sockets Layer (SSL) and moving from a single web server to a server farm environment.

Chapter 20: Performance tuning

To ensure that you're getting the best possible performance from your Business Portal configuration, review this information.

This information is divided into the following sections:

Performance-tuning overview

After configuring your Business Portal system, you should test it and evaluate the results. It is possible that you'll need to fine-tune your system to achieve optimal performance. Once you've achieved the desired results, create a maintenance plan; server performance changes over time based on the number of users and the types of queries your users are generating.

Performance tuning tasks can be grouped into two areas: Business Portal tuning and system configuration tuning.

Business Portal tuning

The performance of Business Portal can be greatly influenced by the activities and settings of Business Portal and Microsoft Dynamics GP users. Refer to the following topics to learn more:

- *Restrict access to long queries* on page 124
- *Page tuning* on page 124
- *Publish scheduled reports at off-peak times* on page 124
- *Allow sufficient space for temporary Internet pages* on page 125

System configuration tuning

There are also changes you can make to your Business Portal configuration to improve performance. Refer to these topics:

- *Tune SharePoint* on page 125
- *Application domain recycling* on page 125
- *Antivirus software and ASP.NET* on page 126
- *SQL optimization* on page 126
- *Hardware requirements* on page 127
- *Load balancing with multiple web servers* on page 127

Restrict access to long queries

When a user creates or runs a query, the data tables on the Microsoft Dynamics GP SQL server are scanned. SQL Server processing will take more time if one or more of the following is true:

- The query is long. A long query joins data from different entities and has advanced restrictions, or is run against a large table in Microsoft Dynamics GP.
- The user sorts the results on a non-indexed field. For more information about indexed views, refer to SQL Server Books Online.
- The user restricts the results on a non-indexed field.

If users frequently use complex queries, or sort or restrict the results, performance will drop for both Business Portal users and Microsoft Dynamics GP users. You can take the following steps to reduce query-related performance issues:

- Carefully consider which Business Portal users will be given access to the query pages. Educate users about the implications of performing long queries or sorting large amounts of data in the Business Portal.
- Optimize your SQL Server settings. For more information, refer to *SQL optimization* on page 126.
- Extend the query time-out value by editing the BusinessFramework.config file. For more information, refer to *Extending the query time-out value* on page 131.

Page tuning

The number of result viewer or external list web parts on a page directly affects how long it takes the page to display. Reducing the number of data web parts on Business Portal pages reduces page display times.

You might also want to limit the number of web parts that are included on any new pages you create. For example, instead of creating one slower Business Portal page with six web parts on it, you might want to create two pages with three web parts on them.

Publish scheduled reports at off-peak times

You can use the Report Scheduler to schedule Microsoft Dynamics GP reports and publish them to Business Portal. If you are frequently updating many reports in Microsoft Dynamics GP, you should carefully consider the timing of publishing updated reports to Business Portal.

In order for a report to be created and published to Business Portal, the user who publishes that report must be logged on to Microsoft Dynamics GP. To publish reports at off-peak times, you might want to set up a scheduled Windows task to log on to Microsoft Dynamics GP, start the scheduled reports, and then log off when publication is complete.

Allow sufficient space for temporary Internet pages

Be sure that the browser settings allow sufficient space for storing temporary Internet files. Internet Explorer options are set for each user on a single computer. If multiple users share a single client workstation, these settings will need to be made with each of the users logged in to the workstation.

1. Start Internet Explorer and open the Internet Options window.
   Tools > **Internet Options**

2. Click the **General** tab.

3. Under **Browsing History**, click **Settings**.

4. Increase the value in **Disk space to use**.

5. Click **OK** to save your changes and close the Temporary Internet Files and History Settings window. Click **OK** to close the Internet Options window.

Tune SharePoint

As with any software, some features of SharePoint use more resources than others. For example, features that rely on the Microsoft SharePoint Timer service, such as alerts and usage analysis log processing, can have a substantial impact on your server performance. You can control the impact these features have on performance by configuring appropriate settings or choosing to disable them.

The following features have a greater impact on performance than other features in SharePoint:

- Antivirus protection
- HTML viewing
- Usage analysis logging and processing
- Site use confirmation and auto-deletion
- Alerts

For more information about SharePoint performance, refer to the SharePoint 2010 Technical Library on Microsoft TechNet (technet.microsoft.com).

Application domain recycling

ASP.NET applications like Business Portal sometimes are "recycled" or restarted when file changes occur. When the application domain is recycled, performance can be affected. The application domain is most commonly recycled when:

- The Business Portal web server is restarted.
- Configuration files are changed.
- Any files in the \bin folder are changed.
- Files are scanned by antivirus products. (For more information, refer to *Antivirus software and ASP.NET* on page 126.)

You can use the Event Viewer to determine how often the application domain is being recycled. Investigate why it is being recycled, and then work to minimize those occurrences. To use the Event Viewer, click **Start** > **Administrative Tools** > **Event Viewer**, then click **Application**.)

When you check the Event Viewer, note the number of times the application domain is restarted and determine what other applications or utilities on the computer could be causing those events. Turn off one application at a time and continue to monitor the Event Viewer until you've identified the application or utility causing the application to recycle. When you have that information, you can decide what action is appropriate. For example, you might be able to move that application to another computer.

Antivirus software and ASP.NET

A small number of antivirus products cause ASP.NET to recycle the application domain. Refer to Microsoft Knowledge Base Article #312592 for more information and recommendations. (Go to support.microsoft.com and type **312592** in the **Search** box.)

Only a few antivirus products cause this, but we recommend reviewing the antivirus product you use.

Some antivirus software makes changes each time a file is scanned. These instances are indistinguishable from real, intentional file changes. When ASP.NET detects these file changes, other events are triggered. If the change is to a configuration file or a file in the /bin folder, for example, the application (application domain) is restarted. When that happens, the global state of the application is lost and the application must be reloaded. If this happens several times in a minute, there will be a severe drop in performance.

SQL optimization

SQL Server has several tools that you can use to tune your company's SQL server performance. Some of those tools are described here, but it's best to get a database administrator to make these changes.

Indexes

If your company has a SQL database administrator (DBA), that person might be able to add SQL indexes to some tables, reducing the impact of queries that sort on certain fields. However, adding indexes to SQL tables will also slow down Microsoft Dynamics GP performance.

SQL Profiler

After you've installed Business Portal, you can use SQL Profiler (**Start** > **Programs** > **Microsoft SQL Server** > **Performance Tools** > **SQL Profiler**) to view information about the events that are occurring on your SQL Server. Using the Profiler can help you to pinpoint bottlenecks.

SQL Server Management Studio

If you're using SQL Server 2005 or SQL Server 2008, you can use SQL Server Management Studio (**Start** > **Programs** > **Microsoft SQL Server** > **SQL Server Management Studio**) to get a better understanding of the SQL tables and queries.

SQL Server settings

You can use SQL Server Management Studio to check your SQL Server memory settings. If you've configured SQL Server to dynamically configure its memory, be sure that the maximum memory setting is not 100 percent of what's available.

Hardware requirements

Depending on the issues you're facing in your configuration, you might want to consider upgrading your hardware. For more information about system requirements, refer to the System Requirements area of CustomerSource (https://mbs.microsoft.com/customersource/support/documentation/systemrequirements).

Scalability If your issues have to do with the scalability of Business Portal—if you've added several Business Portal users, for example, and then found that many users are timing out—you should review your hardware configuration. Specifically, you should compare the specifications of your Microsoft Dynamics GP server to those that have been recommended. You might want to upgrade the processors, increase the number of processors, or add RAM.

You should also be sure that your network bandwidth—especially between the web server and the Microsoft Dynamics GP server—is optimal. For more information about network requirements, refer to the Business Portal Installation Guide.

Responsiveness If the issue has to do with the performance of a particular user or group of users, you might see a dramatic improvement if you upgrade client hardware. You should compare the client workstation's specifications with the recommendations for client workstations.

Load balancing with multiple web servers

If you have a large number of Business Portal users, you may want to use multiple web servers to run Business Portal. Having a group of Business Portal web servers enables you to use Network Load Balancing.

Network Load Balancing distributes incoming TCP/IP traffic between multiple servers. When you use Network Load Balancing, programs on the group of servers, especially web-server programs, can handle more traffic and provide faster response times. You can specify the load percentage that each web server will handle, or the load can be equally distributed across all the web servers.

For more information about Network Load Balancing, refer to the Windows Server 2003 Technical Reference at: http://www.microsoft.com/resources/documentation/WindowsServ/2003/all/techref/en-us/Default.asp. You can also refer to the SharePoint documentation for information about capacity planning.

Query performance may still be an issue with multiple web servers, because all users who run queries will still access data on a single Microsoft Dynamics GP server.

Chapter 21: Troubleshooting

This documentation includes information about how to find and fix common problems that might occur in Business Portal.

This information is divided into the following sections:

Error message: Insufficient authorization to perform this action

The message "Insufficient authorization to perform this action" might be displayed when trying to access the My Sales Dashboard, the Returns List, or the Service Calls List. This error occurs if you do not have an entity assignment for a salesperson for sales dashboards or a customer ID for returns and service calls in the Dynamics Security Console.

1. Open the Dynamics Security Console. (On a computer where the console is installed, click **Start** > **Administrative Tools** > **Dynamics Security Console**.)

2. Click Continue to open the Dynamics Security Console.

3. Expand the Microsoft Dynamics Security node in the left pane of the Dynamics Security Console.

4. Expand the Microsoft Dynamics GP Web Services node.

5. Select the Entity ID Assignments node.

6. In the Action menu, choose Add. The Add Entity ID Assignments window will appear.

7. Click the Select Windows User button to display the dialog that allows you to select a Windows user. Specify the user that you are creating the entity ID assignment for.

8. Select Salesperson or Customer s the entity type.

9. Specify the company the company in Microsoft Dynamics GP that the entity ID is defined for. After a few moments, the available IDs of the specified type will be listed.

10. In the list of available entity IDs, select the ID to assign to the selected Windows User ID.

11. Click OK to save the new entity ID assignment and close the window. Click Apply to save the entity ID assignment to add another.

Error message: An unexpected error has occurred

Your users may receive the message "An unexpected error has occurred" when trying to access Business Portal in the following situations.

- The attempt to load the page has timed out. Click the **Refresh** button in Internet Explorer to attempt to load the page again.
- The user is assigned to a SharePoint group that has access to the page, but has not been assigned to an MBF role that has access to the data. Be sure that the user is assigned to all necessary roles and groups.

Error message: Only one usage of each socket address is normally permitted

When you perform a full crawl of Microsoft Dynamics GP data, you may see the error "Only one usage of each socket address (protocol/network address/port) is normally permitted" in the Windows Event Viewer.

This error typically occurs when multiple threads are attempting to access the Microsoft Dynamics GP web service at the same time using the same connection method.

If no exceptions are logged in the Dynamics GP Web Service Exception Management Console and no corresponding errors or warnings appear in the SharePoint trace log, you can disregard this error.

To check for web service exceptions:

1. Open the Dynamics GP Web Service Exception Management Console. (On a computer where the console is installed, click **Start** > **Administrative Tools** > **Dynamics GP Web Service Exception Management Console**.)
2. Select the **All Exceptions** node.
3. Be sure that the **From** and **To** dates are set appropriately.
4. Review any errors that appear in the list.

To check for trace log errors:

1. Open the appropriate SharePoint trace log. By default, trace logs are located at \Program Files\Common Files\Microsoft Shared\web server extensions\14\LOGS.

   Trace logs are named in the following format: Computer_name-YYYYMMDD-HHMM.log, where YYYYMMDD is the date and HHMM is the time.

2. Look for errors occurring at the same time as the errors in the Windows Event Log.

Domains aren't listed in the Add Users wizard

On some networks, the **Domain** list on the Select Domain Users page of the Add Users wizard may not display a complete list of domains. If this occurs, you should modify the BusinessFramework.config file to use a different method of locating domains.

To modify the BusinessFramework.config file, complete the following procedure on the Business Portal web server.

1. Create a backup copy of the BusinessFramework.config file located in the bin folder. (The bin folder is located in 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. Open the BusinessFramework.config file using a text editor, such as Notepad.

3. Search for the **<Microsoft.BusinessFramework.Portal.Administration.Active DirectoryReaderConfig>** section.

4. In the following line, change the value to **True**.

```
<useAlternativeDomainLookup type="Boolean" value="False" />
```

5. Save and close the BusinessFramework.config file.

6. Restart the Add Users wizard.

Extending the query time-out value

If users frequently use complex queries or sort the results, performance will drop for both Business Portal users and Microsoft Dynamics GP users. You can improve performance by extending the query time-out value.

For other suggestions for improving query performance, refer to *Restrict access to long queries* on page 124.

1. Create a backup copy of the BusinessFramework.config file located in the bin folder. (The bin folder is located in 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. Open the BusinessFramework.config file using a text editor, such as Notepad.

3. Search for the **Microsoft.BusinessFramework.Data.Storage.StorageUtil-StorageTrace** section.

4. If this section does not exist, add the following to the file:

```
<Microsoft.BusinessFramework.Data.Storage.StorageUtil-StorageTrace>
       <commandTimeout type="Int32" value="30" />
</Microsoft.BusinessFramework.Data.Storage.StorageUtil-StorageTrace>
```

If you add the section, place it somewhere between the first and last lines in the file, as shown here:

```
<Microsoft_BusinessFramework_Configuration>
     Add new section
</Microsoft_BusinessFramework_Configuration>
```

5. If the **Microsoft.BusinessFramework.Data.Storage.StorageUtil-StorageTrace** section does exist, then add only the following line:

```
<CommandTimeout type="Int32" value="30" />
```

The line must be added between the first and last lines of this section, as shown here:

```
<Microsoft.BusinessFramework.Data.Storage.StorageUtil-StorageTrace>
        <Other configuration parameter>
        <Other configuration parameter>
        <commandTimeout type="Int32" value="30" />
</Microsoft.BusinessFramework.Data.Storage.StorageUtil-StorageTrace>
```

6. In this section, the default command time-out value is 30 seconds. Increase the value to up to 160 seconds.

7. Save and close the BusinessFramework.config file.

Configuration file not set up properly for the Add Users wizard

If you get an error message stating, “The BusinessFramework.config file is not set up properly for the Add Users wizard,” you should verify that the appropriate .dll files are in the bin folder. This message occurs if a .dll file is missing, the wrong version of a .dll file is found, or a .dll file has the wrong name.

1. Open the BusinessFramework.config file using a text editor, such as Notepad.

   The BusinessFramework.config file is located in the bin folder. (The bin folder is located in 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. Search for the **Microsoft.BusinessFramework.Portal.RoleMatchingConfig** section.

3. Note the assembly (.dll) names listed in this section. In the following example, the assembly name is **Microsoft.Dynamics.RoleMatching**.

```
    <assemblyName_1 type="String" value="Microsoft.Dynamics.RoleMatching,
Version=3.0.0.0, Culture=neutral, PublicKeyToken=31bf3856ad364e35" />
```

4. Verify that the assemblies listed in the **Microsoft.BusinessFramework.Portal. RoleMatchingConfig** section are located in the same folder as the BusinessFramework.config file.

5. If you are unable to locate the appropriate .dll files, contact Microsoft Dynamics GP Support.

External lists issues when company drop-down list is blank

You may have issues with external lists not having data if the company drop-down list is blank. You should verify the following conditions.

- Be sure that Web Services for Microsoft Dynamics GP is running.
- Be sure that permissions for the web services are set up. The domain account should be able to perform work on behalf of another user on the Business Portal site where the web applications are running. (Restart the service after making your changes.)
- Be sure that Web Services for Microsoft Dynamics GP is installed for a company. If Web Services for Microsoft Dynamics GP is not installed for the company you want to use, you won't be able to select that company. If you haven't installed Web Services for Microsoft Dynamics GP for any of your companies, an error occurs in the external lists.
- Be sure that you have you updated your domain account for any service or application pool after you changed your password. You can use Services Microsoft Dynamics Console(**Start** > **Administrative Tools** > **Services**) or SharePoint Central Administration (**Start** > **All Programs** > **Microsoft SharePoint 2010 Products** > **SharePoint Central Administration**).

Chapter 22: Maintenance

This documentation contains information about adding companies, adding sample users, and removing Business Portal. Information about changing passwords and backing up Business Portal also is included.

This information is divided into the following sections:

- *Change passwords*
- *Back up Business Portal*
- *Repair Business Portal files*
- *Initialize databases*
- *Remove Business Portal*

Change passwords

In order to function properly, Business Portal uses a SQL Server user account to access data; a Windows account for SharePoint; and a Windows account to display reports. If you change the password for any of these accounts, you will need to update the information used by Business Portal. The following procedures explain which user accounts are used by Business Portal, and how to update password information.

SQL Server user account

A SQL Server user account is entered in the Business Portal SQL Configuration window during the installation, and is used to access your Microsoft Dynamics GP data. If the password for this user account changes, complete the following procedure.

1. On the computer where Business Portal is installed, double-click the **DBAuthenticationUtility.exe** file, which is stored in the bin folder.

   The bin folder is located in 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. The User Name and Password Utility window appears. Expand the tree until you see **BusinessPortalUser**.

3. Right-click **BusinessPortalUser** and choose **Edit**.

4. The Edit User window appears. Type and confirm the new password for the SQL Server user account.

5. Click **OK** to save changes and close the window.

FileServices user account

Reports are displayed on Reports pages by the FileServices component service, which runs under a user account. If the password for this user account changes, complete the following procedure.

1. On the computer where Business Portal is installed, choose **Start** > **Administrative Tools** > **Component Services**.

2. Expand the **Component Services** > **Computers** > **My Computer** > **COM+ Applications** node.

3. Right-click **Microsoft.BusinessFramework.Reports.FileService** and select **Properties**.

4. The Microsoft.BusinessFramework.Reports.FileService Properties window appears. On the **Identity** tab, be sure the correct user is selected, and type and confirm the new password.

5. Click **OK** to save changes and close the window.

WSS user account

SharePoint requires a user account to start services, run processes, and connect to the SQL server. When the password for this account expires or changes, you'll receive a "service unavailable" message when you try to view the Business Portal site or the administration pages for the site or server.

To restore access to Business Portal and SharePoint, you'll need to update the password in SharePoint. For more information about changing passwords, refer to the SharePoint documentation.

You also may see a "cannot connect to configuration database" error message if you are using SQL Server authentication and the password associated with the system account for SQL Server has expired or changed. If you see this message, you must reset the password in SQL Server. For more information about changing passwords in SQL Server, see the SQL Server documentation.

Back up Business Portal

You should make regular backups of the SharePoint databases and web applications for Business Portal.

To back up your SharePoint web applications, indexes, and databases, open SharePoint Central Administration (**Start** > **All Programs** > **Microsoft SharePoint 2010 Products** > **SharePoint Central Administration**) on the web server where SharePoint and Business Portal are installed. Click **Backup and Restore** in the Quick Launch. Under **Farm Backup and Restore**, click **Perform a backup**. Select the items you want to back up, and specify other backup options.

You should back up SharePoint content at the same time as you back up your Microsoft Dynamics GP databases. For more information about backing up and restoring, see one of the following links.

SharePoint	Link
SharePoint Foundation	http://go.microsoft.com/fwlink/?LinkId=208745
SharePoint Server	http://go.microsoft.com/fwlink/?LinkId=208746

Repair Business Portal files

Use the repair option to fix Business Portal files installed on your web server. If you need to repair SQL objects, refer to *Initialize databases* on page 137 instead.

1. Depending on your operating system, open the Programs and Features control panel, and select **Business Portal for Microsoft Dynamics GP**. Click **Change** to open the Modify Business Portal Installation window.

2. The **Back up SharePoint Databases** window appears.You must make a back up of the SharePoint Content database and the SharePoint Configuration database before continuing. For more information about making a backup, see one of the following links.

SharePoint	Link
SharePoint Foundation	http://go.microsoft.com/fwlink/?LinkId=208745
SharePoint Server	http://go.microsoft.com/fwlink/?LinkId=208746

After you have made a backup of your SharePoint databases, mark the **I have made a backup of the SharePoint Content and SharePoint Configuration databases** option, then click **OK**.

3. Click **Repair**.

4. The Ready to Repair window appears. Click **Repair** to continue.

5. After the repair process is complete, the Finish window appears. Click **Finish**.

Initialize databases

When Business Portal is installed, SQL objects are added to your company databases. If the SQL objects aren't added to your company databases, or if you add companies after you've installed Business Portal, you can use this procedure to add the SQL objects. If you reinstall the sample company data in the Microsoft Dynamics GP application you will also need to complete this procedure.

If you install Business Portal and then remove a company from Microsoft Dynamics GP, the Business Portal tables and information associated with that company automatically are removed.

1. Depending on your operating system, open the Programs and Features control panel, and select **Business Portal for Microsoft Dynamics GP**. Click **Change** to open the Modify Business Portal Installation window.

2. The **Back up SharePoint Databases** window appears.You must make a back up of the SharePoint Content database and the SharePoint Configuration database before continuing. For more information about making a backup, see one of the following links.

SharePoint	Link
SharePoint Foundation	http://go.microsoft.com/fwlink/?LinkId=208745
SharePoint Server	http://go.microsoft.com/fwlink/?LinkId=208746

After you have made a backup of your SharePoint databases, mark the **I have made a backup of the SharePoint Content and SharePoint Configuration databases** option, then click **OK**.

3. Click **SQL Configuration**.

4. The Connection Information window appears.

Select the type of authentication that should be used when the Business Portal software accesses your SQL data to create the SQL tables and objects in Microsoft Dynamics GP. These credentials are used *only during this 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**.

For more information about authentication methods, refer to the Business Portal Installation Guide.

5. The Ready to Install window appears. Click **Install**.
6. After the installation process is complete, the Finish window appears. Click **Finish**.

Remove Business Portal

Use the installation wizard to remove Business Portal from your computer.

You must uninstall Benefit Self Service and Certification, License & Training Manager before you uninstall Business Portal. (To uninstall, right-click their .msi files and select Uninstall.) Uninstalling Business Portal will not automatically uninstall Benefit Self Service or Certification, License & Training Manager and you won't be able to uninstall those applications after Business Portal is uninstalled.

1. Depending on your operating system, open the Add or Remove Programs control panel or the Programs and Features control panel, and select **Business Portal for Microsoft Dynamics GP**. Click **Change** to open the Modify Business Portal Installation window.
2. The **Back up SharePoint Databases** window appears.You must make a back up of the SharePoint Content database and the SharePoint Configuration database before continuing. For more information about making a backup, see one of the following links.

SharePoint	Link
SharePoint Foundation	http://go.microsoft.com/fwlink/?LinkId=208745
SharePoint Server	http://go.microsoft.com/fwlink/?LinkId=208746

After you have made a backup of your SharePoint databases, mark the **I have made a backup of the SharePoint Content and SharePoint Configuration databases** option, then click **OK**.

3. Click **Remove**.
4. The Ready to Remove window appears. Select **Remove Business Portal data** to remove SQL data related to Business Portal.

When you remove Business Portal data, the Business Portal subsites, the SharePoint data contained on those sites, and your Business Portal users, roles, and permissions are removed. Your Microsoft Dynamics GP data will be unaffected.

If you've installed Business Portal on multiple web servers and are removing Business Portal from one of them, do not select the option to remove Business Portal data. If you do, the Business Portal installations on the remaining web servers will not work.

Click **Next**.

5. The Connection Information window appears. Select the type of authentication to use when the removal process accesses your SQL Server.

    - 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**.

6. After processing is finished, click **Finish** to close the wizard.

Chapter 23: Configuration changes

This documentation includes information about changing your Business Portal configuration, including configuring Business Portal for Secure Sockets Layer (SSL) and moving from a single web server to a server farm environment.

The following sections are included:

- *Configure Business Portal to use Secure Sockets Layer*
- *Disable Secure Sockets Layer for Business Portal*
- *Update SQL logon information for a moved database*

Configure Business Portal to use Secure Sockets Layer

If you've installed Business Portal and you decide to use Secure Sockets Layer (SSL) for the web site at a later time, you must complete some additional procedures. The procedures you must complete depend on which Business Portal features you have installed. The procedures include:

- Configuring Secure Sockets Layer.
- Modifying the BusinessFramework.config file.
- Modifying the registry.
- Changing public URLs for the site collection.

Additional procedures may be required for other Business Portal applications. Refer to the Administrator's Guide for each Business Portal application for more information.

If your web site was set up to use SSL before you installed Business Portal, you don't need to perform any of these procedures.

To configure Secure Sockets Layer:

1. Set up the web site to use SSL. For more information, refer to your Windows documentation.

2. Import the SSL certificate to the default web directories, including Business Portal.

   Refer to the IIS documentation on Microsoft TechNet (www.microsoft.com/technet) for more information about certificates.

To modify the BusinessFramework.config file:

1. Create a backup copy of the BusinessFramework.config file, located in the Business Portal bin folder.

   The bin folder is located in 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. Using a text editor, such as Notepad, open the BusinessFramework.config file.

If any workflow process instances are active, do not change SSL settings in the BusinessFramework.config file. Doing so will cause errors when users try to perform actions on the tasks associated with those processes.

3. In the Microsoft.BusinessFramework.Portal.PortalConfig section of the configuration file, modify the **WSSSiteServer** node. Replace **http** with **https**, and replace the TCP port number with the SSL port number.

   The URL should be similar to the following:

Line	Entry
WSSSiteServer	https://*ServerName:SSLPort/*BP

*To find out which port is used by the Business Portal virtual server, view the web site's properties in IIS Manager (**Administrative Tools > Internet Information Services (IIS) Manager >** right-click the Business Portal web site **>** choose **Properties**).*

4. Save and close the BusinessFramework.config file.

To modify the registry:

1. Start the registry editor.
   Start > **Run** > type **regedit** > click **OK**

2. Locate the entry **HKEY_LOCAL_MACHINE\Software\Microsoft\Business Portal\Install**.

3. Right-click **SiteCollection** and select **Modify**. The **Edit String** window is displayed.

4. In the **Value data** field, change **http** to **https** and replace the TCP port number with the SSL port number.

*To find out which port is used by the Business Portal virtual server, view the web site's properties in IIS Manager (**Administrative Tools > Internet Information Services (IIS) Manager >** right-click the Business Portal web site **>** choose **Properties**).*

   Refer to the following table for an example:

SSL not enabled	SSL enabled
http://*ServerName*:*TCPPort*/BP	https://*ServerName*:*SSLPort*/BP

5. Click **OK** to close the **Edit String** window.

6. Right-click **URIPath** and select **Modify**. The **Edit String** window is displayed.

7. In the **Value data** field, change **http** to **https** and replace the TCP port number with the SSL port number.

*To find out which port is used by the Business Portal virtual server, view the web site's properties in IIS Manager (**Administrative Tools > Internet Information Services (IIS) Manager >** right-click the Business Portal web site **>** choose **Properties**).*

Refer to the following table for an example:

SSL not enabled	SSL enabled
http://*ServerName*:*TCPPort*/BP	https://*ServerName*:*SSLPort*/BP

8. Click **OK** to close the **Edit String** window and save changes.

To change public URLs for the site collection:

1. Go to SharePoint Central Administration (**Start** > **Administrative Tools** > **SharePoint 3.0 Central Administration**).

2. Click **Operations** in the Quick Launch.

3. Under **Global Configuration**, click **Alternate access mappings**.

4. On the Alternate Access Mappings page, click **Edit Public URLs**.

5. Select the URL for the Business Portal site collection and change “http” to “https” for the site collection’s URLs.

6. Click **Save**.

Disable Secure Sockets Layer for Business Portal

If you decide to disable Secure Sockets Layer (SSL) for the Business Portal web site, you must complete some additional procedures. The procedures you must complete depend on which Business Portal features you have installed. The procedures include:

- Modifying the BusinessFramework.config file.

- Modifying the registry.

- Changing public URLs for the site collection.

Additional procedures may be required for other Business Portal applications. Refer to the Administrator’s Guide for each Business Portal application for more information.

Before you perform these procedures, disable SSL for the web site where Business Portal is installed. For more information, refer to your Windows documentation.

To modify the BusinessFramework.config file:

1. Create a backup copy of the BusinessFramework.config file, located in the Business Portal bin folder.

   The bin folder is located in 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. Using a text editor, such as Notepad, open the BusinessFramework.config file.

If any workflow process instances are active, do not change SSL settings in the BusinessFramework.config file. Doing so will cause errors when users try to perform actions on the tasks associated with those processes.

3. In the Microsoft.BusinessFramework.Portal.PortalConfig section of the configuration file, modify the **WSSSiteServer** node to have the same information as the **WSSObjectModelSiteURL** node.

   The URL should be similar to the following:

Line	Entry
WSSObjectModelSiteURL	http://*ServerName:TCPPort/*BP
WSSSiteServer	http://*ServerName:TCPPort/*BP

*To find out which port is used by the Business Portal virtual server, view the web site's properties in IIS Manager (**Administrative Tools > Internet Information Services (IIS) Manager >** right-click the Business Portal web site **>** choose **Properties**).*

4. Save and close the BusinessFramework.config file.

5. Use Internet Explorer to navigate to Business Portal. The URL should be something like:

   http://*ServerName:TCPPort*/BP

   where *ServerName* is the name of the computer where you've installed Business Portal.

To modify the registry:

1. Start the registry editor.
   Start > **Run** > type **regedit** > click **OK**

2. Locate the entry **HKEY_LOCAL_MACHINE\Software\Microsoft\Query Services\1.0\Install**.

3. Right-click **URIPath** and select **Modify**. The **Edit String** window is displayed.

4. In the **Value data** field, change **https** to **http** and replace the SSL port number with the TCP port number.

*To find out which port is used by the Business Portal virtual server, view the web site's properties in IIS Manager (**Administrative Tools > Internet Information Services (IIS) Manager >** right-click the Business Portal web site **>** choose **Properties**).*

   Refer to the following table for an example:

SSL enabled	SSL not enabled
https://*ServerName*:*SSLPort*/BP	http://*ServerName*:*TCPPort*/BP

5. Click **OK** to close the **Edit String** window and save changes.

To change public URLs for the site collection:

1. Go to SharePoint Central Administration (**Start** > **All Programs** > **Microsoft SharePoint 2010 Products** > **SharePoint 2010 Central Administration**).

2. Click **Operations** in the Quick Launch.

3. Under **Global Configuration**, click **Alternate access mappings**.

4. On the Alternate Access Mappings page, click **Edit Public URLs**.

5. Select the URL for the Business Portal site collection and change "https" to "http" for the site collection's URLs.

6. Click **Save**.

Update SQL logon information for a moved database

If you restore your SQL database on a different instance of SQL Server than the one on which the backup was created, you should perform the following steps to update logon information.

1. Run **sp_change_users_login** to update logon information in SQL Server. For more information, refer to the SQL Server Books Online (search for *sp_change_users_login*).

2. Create a backup copy of the BusinessFramework.config file located in the Business Portal bin folder.

   The bin folder is located in C:\inetpub\wwwroot\wss\VirtualDirectories \<*port number*>, where <*port number*> is the port number of the IIS web site where Business Portal is installed.

3. Open the BusinessFramework.config file using a text editor.

4. In the Microsoft.BusinessFramework.Portal.PortalConfig section of the configuration file, replace the old server name in the *WSSSiteURL* node and the *WSSObjectModelSiteURL* node with the new server name.

5. Save and close the BusinessFramework.config file.

6. Create a backup copy of the ~privatefile.dbauthentication.config file, also located in the bin folder.

7. Open the ~privatefile.dbauthentication.config file using a text editor.

8. Find the old server name and replace it with the name of the new server.

9. Save and close the ~privatefile.dbauthentication.config file.

Part 8: Role and group reference

This part of the documentation lists default roles, groups and security permissions for Business Portal. The following information is included:

- Chapter 24, "Default SharePoint groups and security permissions," lists the SharePoint groups installed with Business Portal, along with the default site and page permissions associated with each group.
- Chapter 25, "Default portal roles and security permissions," lists the portal roles installed with Business Portal, along with the default data permissions associated with each role.
- Chapter 26, "Default advanced roles and security permissions," lists the advanced roles installed with Business Portal, along with the default data permissions associated with each role.

Chapter 24: Default SharePoint groups and security permissions

The default SharePoint groups installed with Business Portal are listed below. Default site and page permissions associated with each SharePoint group also are included.

Note that some Business Portal applications include their own default SharePoint groups and permissions, which are added to Business Portal when you install the applications. Those default groups and permissions are listed in each individual application's administrator documentation.

To view group permissions in SharePoint, go to a Site Settings page and under **Users and permissions**, click **People and groups**. Click **Groups** in the Quick Launch, then click the name of the group you want to view permissions for. Click **Settings** > **View Group Permissions**.

BP Accounting Specialist

This group is used to manage access to pages provided for members of your accounting department.

Site	Page library	Page	Permission level
Financial Center	Financial Center Common Pages	All	Contribute
	Financial Center Pages	All	Read
	Transaction Flowcharts	All	Read

BP Administrator

This group is used to manage access to the entire Business Portal. Users in this group can manage page access for all other Business Portal users.

Site	Page library	Page	Permission level
Reports	All report libraries	N/A	Full Control
Business Portal top-level site	All	All	Full Control
All Business Portal subsites	All	All	Full Control

BP Employee

This group is used to manage access to pages provided for all employees in your company.

Site	Page library	Page	Permission level
Company Center	Company Center Common Pages	All	Read
	Company Center Pages	All	Read
Employee Center	Employee Center Common Pages	All	Read
	Employee Center Pages	All	Read

BP Executive

This group is used to manage access to pages provided for CEOs and CFOs in your company.

Site	Page library	Page	Permission level
Executive Center	Executive Center Common Pages	All	Contribute
	Company Overview Dashboard Pages	Company	Contribute
	Financials Dashboard Pages	Financials	Contribute
	Sales Dashboard Pages	Sales	Contribute
	Inventory Dashboard Pages	Inventory	Contribute
	Manufacturing Dashboard Pages	Manufacturing	Contribute
	Human Resources Dashboard Pages	Human Resources	Contribute
	Project Dashboard Pages	Project	Contribute

BP Executive Reports - *Company Name*

This group is used to manage access to reports provided for CEOs and CFOs in your company.

Site	Document library	Folder	Permission level
Reports	Business Portal Executive Reports	*<Company>*	Read

BP Field Service Reports - *Company Name*

This group is used to manage access to reports provided for Field Service users in your company.

Site	Document library	Folder	Permission level
Reports	Business Portal Field Service Reports	*<Company>*	Read

BP Financial Reports - *Company Name*

This group is used to manage access to reports provided for users in the Financial department of your company.

Site	Document library	Folder	Permission level
Reports	Business Portal Financial Reports	*<Company>*	Read

BP HR Administrator

This group is used to manage access to pages provided for members of your Human Resources department.

Site	Page library	Page	Permission level
Company Center	Company Center Common Pages	All	Contribute
Employee Center	Employee Center Common Pages	All	Contribute
Manager Center	Manager Center Common Pages	All	Contribute

Site	Page library	Page	Permission level
Human Resources Center	Human Resources Center Common Pages	All	Contribute
	Human Resources Center Pages	All	Read

BP Human Resources Reports - *Company Name*

This group is used to manage access to reports provided for members of your Human Resources department.

Site	Document library	Folder	Permission level
Reports	Business Portal Human Resources Reports	*<Company>*	Read

BP Internal User

All internal Business Portal users must be assigned to the BP Internal User group. (External users, such as customers, shouldn't be assigned to this group.)

Site	Page library	Page	Permission level
Top-level site in the collection	N/A	N/A	Read
Business Portal top-level web site	Business Portal Common Pages	All	Read

BP Inventory Manager

This group is used to manage access to pages provided for employees who manage inventory information.

Site	Page library	Page	Permission level
Inventory Center	Inventory Center Common Pages	All	Contribute
	Inventory Center Pages	All	Read

BP Inventory Reports - *Company Name*

This group is used to manage access to reports provided for employees who manage inventory information.

Site	Document library	Folder	Permission level
Reports	Business Portal Inventory Reports	*<Company>*	Read

BP Manager

This group is used to manage access to pages provided for managers in your company.

Site	Page library	Page	Permission level
Manager Center	Manager Center Common Pages	All	Read
	Manager Center Pages	All	Read

BP Manufacturing Reports - *Company Name*

This group is used to manage access to reports provided for employees who manage production operations of your company.

Site	Document library	Folder	Permission level
Reports	Business Portal Manufacturing Reports	<*Company*>	Read

BP Operations Manager

This group is used to manage access to pages provided to employees who manage the sales, purchasing, inventory, and production operations of your company.

Site	Page library	Page	Permission level
Inventory Center	Inventory Center Common Pages	All	Contribute
	Inventory Center Pages	All	Read
Manufacturing Center	Manufacturing Center Common Pages	All	Contribute
	Manufacturing Center Pages	All	Read
Purchasing Center	Purchasing Center Common Pages	All	Contribute
	Purchasing Center Pages	All	Read
Sales Center	Sales Center Common Pages	All	Contribute
	Sales Center Pages	Commission Totals by Salesperson	Read
		Commission Totals by Territory	Read
		Customer List	Read
		Customer Summary	Read
		Documents by Customer	Read
		Payments by Customer	Read
		Prospects	Read
		Sales Order List	Read
		Sales Queries	Read
		Sales Reports	Read

BP Order Entry Clerk

This group is used to manage access to pages provided for employees who process sales orders.

Site	Page library	Page	Permission level
Sales Center	Sales Center Common Pages	All	Read
	Sales Center Pages	Customer List	Read
		Customer Summary	Read
		Documents by Customer	Read
		Payments by Customer	Read
		Prospects	Read
		Sales Order List	Read
		Sales Queries	Read
		Sales Reports	Read

BP Payroll Administrator

This group is used to manage access to pages provided for members of your payroll department.

Site	Page library	Page	Permission level
Business Portal top-level site	N/A	N/A	BP Administration
Payroll Center	Payroll Center Common Pages	All	Contribute
	Payroll Center Pages	All	Read

BP Payroll Reports - *Company Name*

This group is used to manage access to reports provided for members of your payroll department.

Site	Document library	Folder	Permission level
Reports	Business Portal Payroll Reports	*<Company>*	Read

BP Production Manager

This group is used to manage access to the pages provided to employees who manage the production process.

Site	Page library	Page	Permission level
Manufacturing Center	Manufacturing Center Common Pages	All	Contribute
	Manufacturing Center Pages	All	Read

BP Purchasing Manager

This group is used to manage access to pages provided for members of your purchasing department.

Site	Page library	Page	Permission level
Purchasing Center	Purchasing Center Common Pages	All	Contribute
	Purchasing Center Pages	All	Read

BP Purchasing Reports - *Company Name*

This group is used to manage access to reports provided for members of your purchasing department.

Site	Document library	Folder	Permission level
Reports	Business Portal Purchasing Reports	*<Company>*	Read

BP Report Publisher

This group is used to manage access to company report folders on the GP Reports Center site for users who publish Microsoft Dynamics GP reports.

Site	Page library	Page	Permission level
Reports	All report libraries	N/A	Contribute

BP Reports Catalog Administrator

This group is used to manage access to pages used to set up and configure the Reports Catalog.

Site	Page library	Page	Permission level
Business Portal top-level site	N/A	N/A	BP Administration
	Reports Catalog Pages	All	Read

BP Sales Manager

This group is used to manage access to pages provided for sales managers in your company.

Site	Page library	Page	Permission level
Inventory Center	Inventory Center Common Pages	All	Contribute
	Inventory Center Pages	All	Read

Site	Page library	Page	Permission level
Sales Center	Sales Center Common Pages	All	Contribute
	Sales Center Pages	Commission Totals by Salesperson	Read
		Commission Totals by Territory	Read
		Customer List	Read
		Customer Summary	Read
		Documents by Customer	Read
		Payments by Customer	Read
		Prospects	Read
		Sales Order List	Read
		Sales Queries	Read
		Sales Reports	Read

BP Sales Reports - *Company Name*

This group is used to manage access to reports provided for salespeople and sales managers in your company.

Site	Document library	Folder	Permission level
Reports	Business Portal Sales Reports	<*Company*>	Read

BP Salesperson

This group is used to manage access to pages provided for salespeople in your company.

Site	Page library	Page	Permission level
Inventory Center	Inventory Center Common Pages	All	Read
	Inventory Center Pages	All	Read
Sales Center	Sales Center Common Pages	All	Read
	Sales Center Pages	Customer List	Read
		Customer Summary	Read
		Documents by Customer	Read
		Payments by Customer	Read
		Prospects	Read
		Sales Order List	Read
		Sales Queries	Read
		Sales Reports	Read
	Salesperson Dashboard Pages	All	Read

Chapter 25: Default portal roles and security permissions

The default portal MBF roles installed with Business Portal are listed below. Default data permissions associated with each portal role also are included.

Note that some Business Portal applications include their own default MBF roles and security permissions, which are added to Business Portal when you install the applications. Those default roles and permissions are listed in the individual application's administrator documentation.

To view MBF role permissions in Business Portal, go to the Site Settings page for the top-level Business Portal web site. Under **Business Portal Administration**, click **Roles**. On the Roles page, select a role name and click the **Permissions** tab.

Accounting Specialist

This role is used to manage access to data provided for members of your accounting department, such as General Ledger account balances.

Data permissions
Account - All AccountCategory - All AllocationFinancialAccount - All AllocationUnitAccount - All Bank - All Budget - All Checkbook - All Comment - All CreditCard - All Currency - All CurrencyAccess - All ExchangeTable - All ExchangeTableAccount - All FinancialAccount - All FiscalYear - All FixedAllocationFinancialAccount - All FixedAllocationUnitAccount - All Ledger Transaction Detail - All LedgerTransactionSummary - All LedgerTransactionSummaryHistory - All MulticurrencyAccount - All MulticurrencyDefaults - All SingleFinancialAccount - All SingleUnitAccount - All UnitAccount - All VariableAllocationFinancialAccount - All VariableAllocationUnitAccount - All

Administrator

This role is used to give full control of Business Portal data. No data permissions are assigned to this role, but users in the role have access to all data. Users in this role can manage data access for all other Business Portal users.

Executive

This role is used to manage access to data provided for CEOs and CFOs in your company.

Data permissions
Account - All Budget - All Checkbook - All Customer - All InventoryPeriodSummary - All InventorySummary - All Item - All ItemClass - All LedgerTransactionDetail - All LedgerTransactionSummary - All ManufacturingOrder - All ManufacturingOrderVariance - All ReceivablesSummary - All ReportCatalog_RoleDAP SalesDocument - All SalesReturn - All Work Center - All Work Center Loading - All

Fixed Assets Stakeholder

This role is used to manage access to data provided for fixed asset stakeholders in your company.

Data permissions
FA Books - All FA Class ID - All FA Location ID - All FA Physical Location - All Fixed Asset Book - All Fixed Asset Financial Detail - All Fixed Asset General Information - All Fixed Asset Retirement - All Fixed Asset Transfer - All

Human Resources Administrator

This role is used to manage access to data (such as benefits and recruiting information) provided for members of your Human Resources department.

Data permissions
Applicant - All Benefit - All BenefitSetup - All Course - All Deduction - All DeductionSetup - All Department - All Division - All Employee - All Employee - Restricted Directory Information LocalTaxSetup - All Location - All MCDepartment - All MCDivision - All MCPosition - All Paycode - All PaycodeSetup - All PayStub - All Position - All Requisition - All RequisitionApplicant - All RequisitionApplicantCost - All Requisition - Restricted Current Company Skill - All SkillSet - All SkillSetLine - All StateTaxSetup - All Supervisor - All TestAndCertificationSetup - All TimeCodeSetup

Inventory Manager

This role is used to manage access to data (such as quantities and pricing) provided for employees who manage inventory information.

Data permissions
BatchHistory - All DiscontinuedItem - All FlatFeeItem - All InventoryDocument - All InventoryDocumentCommon - All InventoryDocumentHistory - All InventoryLineBase - All InventoryPeriodSummary - All InventoryPurchaseOrderReceiptLineHistory - All InventorySalesInvoiceLineHistory - All InventorySalesReturnLineHistory - All InventorySummary - All Item - All ItemClass - All ItemClassCurrency - All ItemCurrency - All ItemLotAttributeHistory - All ItemQuantities - All ItemSiteQuantities - All Kit - All LotAttribute - All MiscellaneousChargesItem - All PriceGroup - All PriceLevel - All ServicesItem - All Site - All UnitOfMeasureSchedule - All

Operations Manager

This role is used to manage access to data provided to employees who manage the sales, purchasing, inventory, and production operations of the company.

Data permissions		
Batch - All	PayablesInvoiceUnposted - All	ReceivablesReturnUnposted - All
BatchHistory - All	PayablesManualPaymentUnposted - All	ReceivablesScheduledPayment - All
Buyer - All	PayablesMiscellaneousCharge - All	ReceivablesScheduledPaymentDocument - All
Checkbook - All	PayablesMiscellaneousChargeHistory - All	ReceivablesScheduledPaymentHistory - All
CorporateCustomer - All	PayablesMiscellaneousChargeUnposted - All	ReceivablesServiceCharge - All
CreditCard - All	PayablesPayment - All	ReceivablesServiceChargeHistory - All
Customer - All	PayablesPaymentHistory - All	ReceivablesServiceChargeUnposted - All
CustomerClass - All	PayablesPaymentUnposted - All	ReceivablesSetup - All
DiscontinuedItem - All	PayablesReturn - All	ReceivablesStatement - All
DropShipPurchaseOrder - All	PayablesReturnHistory - All	ReceivablesSummary - All
Intrastat - All	PayablesReturnUnposted - All	ReceivablesTaxHistory - All
InventoryDocument - All	PayablesScheduledPayment - All	ReceivablesWarranty - All
InventoryDocumentCommon - All	PayablesScheduledPaymentDocument - All	ReceivablesWarrantyDocument - All
InventoryDocumentHistory - All	PayablesScheduledPaymentHistory - All	ReceivablesWarrantyHistory - All
InventoryLineBase - All	PayablesTaxHistory - All	ReceivablesWarrantyUnposted - All
InventoryPeriodSummary - All	PaymentTerm - All	SalesBackOrder - All
InventoryPurchaseOrderReceiptLineHistory - All	PriceGroup - All	SalesBackOrderDocument - All
InventorySalesInvoiceLineHistory - All	PriceLevel - All	SalesBackOrderHistory - All
InventorySalesReturnLineHistory - All	Prospect - All	SalesDocument - All
InventorySummary - All	PurchaseOrder - All	SalesInventoryItem - All
Item - All	PurchaseOrderDocument - All	SalesInvoice - All
ItemClass - All	ReceivablesApply - All	SalesInvoiceDocument - All
ItemClassCurrency - All	ReceivablesApplyHistory - All	SalesInvoiceHistory - All
ItemCurrency - All	ReceivablesBatch - All	SalesOrder - All
ItemLotAttributeHistory - All	ReceivablesBatchHistory - All	SalesOrderDocument - All
ItemQuantities - All	ReceivablesCashReceipt - All	SalesOrderHistory - All
ItemSiteQuantities - All	ReceivablesCashReceiptHistory - All	SalesOrderIntrastat - All
ItemVendor - All	ReceivablesCashReceiptUnposted - All	SalesOrderTaxHistory - All
Kit - All	ReceivablesCommission - All	Salesperson - All
LotAttribute - All	ReceivablesCommissionHistory - All	SalespersonPeriodSummary - All
Manufacturing Order - All	ReceivablesCredit - All	SalespersonSummary - All
Manufacturing Order Variance - All	ReceivablesCreditMemo - All	SalesProcessHold - All
MiscellaneousChargesItem - All	ReceivablesCreditMemoHistory - All	SalesProcessHoldDetail - All
MRP Item - All	ReceivablesCreditMemoUnposted - All	SalesQuote - All
MRP Site - All	ReceivablesCreditPosted - All	SalesQuoteDocument - All
PayablesApply - All	ReceevablesCreditUnposted - All	SalesQuoteHistory - All
PayablesApplyHistory - All	ReceivablesDebit - All	SalesReturn - All
PayablesBatch - All	ReceivablesDebitMemo - All	SalesReturnDocument - All
PayablesBatchHistory - All	ReceivablesDebitMemoHistory - All	SalesReturnHistory - All
PayablesCredit - All	ReceivablesDebitMemoUnposted - All	SalesTerritory - All
PayablesCreditMemo - All	ReceivablesDebitPosted - All	SalesTerritoryPeriodSummary - All
PayablesCreditMemoHistory - All	ReceivablesDebitUnposted - All	SalesTerritorySummary - All
PayablesCreditMemoUnposted - All	ReceivablesDocument - All	ServicesItem - All
PayablesCreditPosted - All	ReceivablesDocumentMaster - All	ShippingMethod - All
PayablesCreditUnposted - All	ReceivablesFinanceCharge - All	SingleItem - All
PayablesDebit - All	ReceivablesFinanceChargeHistory - All	Site - All
PayablesDebitPosted - All	ReceivablesFinanceChargeUnposted - All	StandardPurchaseOrder - All
PayablesDebitUnposted - All	ReceivablesIntrastat - All	TaxDetail - All
PayablesDocument - All	ReceivablesInvoice - All	TaxSchedule - All
PayablesDocumentMaster - All	ReceivablesInvoiceHistory - All	UnitOfMeasureSchedule - All
PayablesFinanceCharge - All	ReceivablesInvoiceUnposted - All	Vendor - All
PayablesFinanceChargeHistory - All	ReceivablesPeriodSetup - All	VendorClass - All
PayablesFinanceChargeUnposted - All	ReceivablesPeriodSummary - All	VendorPeriodSummary - All
PayablesIntrastat - All	ReceivablesReturn - All	VendorSummary - All
PayablesInvoice - All	ReceivablesReturnHistory - All	Work Center - All
PayablesInvoiceHistory - All		Work Center Loading - All

Order Entry Clerk

This role is used to manage access to data provided for employees who process sales orders.

Data permissions	
CorporateCustomer - All	ReceivablesReturnHistory - All
CreditCard - All	ReceivablesReturnUnposted - All
Customer - All	ReceivablesScheduledPayment - All
CustomerClass - All	ReceivablesScheduledPaymentDocument - All
Intrastat - All	ReceivablesScheduledPaymentHistory - All
Item - All	ReceivablesServiceCharge - All
Prospect - All	ReceivablesServiceChargeHistory - All
ReceivablesApply - All	ReceivablesServiceChargeUnposted - All
ReceivablesApplyHistory - All	ReceivablesStatement - All
ReceivablesBatch - All	ReceivablesSummary - All
ReceivablesBatchHistory - All	ReceivablesTaxHistory - All
ReceivablesCashReceipt - All	ReceivablesWarranty - All
ReceivablesCashReceiptHistory - All	ReceivablesWarrantyDocument - All
ReceivablesCashReceiptUnposted - All	ReceivablesWarrantyHistory - All
ReceivablesCommission - All	ReceivablesWarrantyUnposted - All
ReceivablesCommissionHistory - All	SalesBackOrder - All
ReceivablesCredit - All	SalesBackOrderDocument - All
ReceivablesCreditMemo - All	SalesBackOrderHistory - All
ReceivablesCreditMemoHistory - All	SalesDocument - All
ReceivablesCreditMemoUnposted - All	SalesInvoice - All
ReceivablesCreditPosted - All	SalesInvoiceDocument - All
ReceivablesCreditUnposted - All	SalesInvoiceHistory - All
ReceivablesDebit - All	SalesOrder - All
ReceivablesDebitMemo - All	SalesOrderDocument - All
ReceivablesDebitMemoHistory - All	SalesOrderHistory - All
ReceivablesDebitMemoUnposted - All	SalesOrderIntrastat - All
ReceivablesDebitPosted - All	SalesOrderTaxHistory - All
ReceivablesDebitUnposted - All	SalespersonPeriodSummary - All
ReceivablesDocument - All	SalesProcessHold - All
ReceivablesDocumentMaster - All	SalesProcessHoldDetail - All
ReceivablesFinanceCharge - All	SalesQuote - All
ReceivablesFinanceChargeHistory - All	SalesQuoteDocument - All
ReceivablesFinanceChargeUnposted - All	SalesQuoteHistory - All
ReceivablesIntrastat - All	SalesReturn - All
ReceivablesInvoice - All	SalesReturnDocument - All
ReceivablesInvoiceHistory - All	SalesReturnHistory - All
ReceivablesInvoiceUnposted - All	ShippingMethod - All
ReceivablesPeriodSummary - All	TaxDetail - All
ReceivablesReturn - All	TaxSchedule - All

Payroll Administrator

This role is used to manage access to data (such as employee and pay information) provided for members of your payroll department.

Data permissions
Benefit - All
BenefitSetup - All
ComputerCheck - All
Course - All
Deduction - All
DeductionSetup - All
Department - All
Division - All
Employee - All
Employee - Restricted Directory Information
LocalTax-All
Location-All
ManualCheck-All
Paycode-All
PaycodeSetup-All
PayStub-All
PayStubItem-All
Position-All
Skill-All
SkillSet-All
SkillSetLine-All
Supervisor-All
TestAndCertificationSetup-All
TimeCodeSetup

Production Manager

This role is used to manage access to the data provided to employees who manage the production process.

Data permissions
Item - All
ItemClass - All
Manufacturing Order - All
Manufacturing Order Variance - All
MRP Item - All
MRP Site - All
Site - All
Work Center - All
Work Center Loading - All

Purchasing Manager

This role is used to manage access to data (such as vendor information) provided for members of your purchasing department.

Data permissions	
Buyer - All	PayablesInvoiceHistory - All
Checkbook - All	PayablesInvoiceUnposted - All
CreditCard - All	PayablesManualPaymentUnposted - All
DropShipPurchaseOrder - All	PayablesMiscellaneousCharge - All
ItemVendor - All	PayablesMiscellaneousChargeHistory - All
PayablesApply - All	PayablesMiscellaneousChargeUnposted - All
PayablesApplyHistory - All	PayablesPayment - All
PayablesBatch - All	PayablesPaymentHistory - All
PayablesBatchHistory - All	PayablesPaymentUnposted - All
PayablesCredit - All	PayablesReturn - All
PayablesCreditMemo - All	PayablesReturnHistory - All
PayablesCreditMemoHistory - All	PayablesReturnUnposted - All
PayablesCreditMemoUnposted - All	PayablesScheduledPayment - All
PayablesCreditPosted - All	PayablesScheduledPaymentDocument - All
PayablesCreditUnposted - All	PayablesScheduledPaymentHistory - All
PayablesDebit - All	PayablesTaxHistory - All
PayablesDebitPosted - All	PaymentTerm - All
PayablesDebitUnposted - All	PurchaseOrder - All
PayablesDocument - All	PurchaseOrderDocument - All
PayablesDocumentMaster - All	StandardPurchaseOrder - All
PayablesFinanceCharge - All	UnitOfMeasureSchedule - All
PayablesFinanceChargeHistory - All	Vendor - All
PayablesFinanceChargeUnposted - All	VendorClass - All
PayablesIntrastat - All	VendorPeriodSummary - All
PayablesInvoice - All	VendorSummary - All

Reports Catalog Administrator

This role is used to manage access to data used to set up and configure the Reports Catalog.

Data permissions
ReportCatalog_All
ReportCatalog_RoleDAP

Sales Manager

This role is used to manage access to data (such as customer or sales territory information) provided for sales managers in your company.

Data permissions	
Batch - All	ReceivablesReturnHistory - All
CorporateCustomer - All	ReceivablesReturnUnposted - All
CreditCard - All	ReceivablesScheduledPayment - All
Customer - All	ReceivablesScheduledPaymentDocument - All
CustomerClass - All	ReceivablesScheduledPaymentHistory - All
Intrastat - All	ReceivablesServiceCharge - All
InventoryPeriodSummary - All	ReceivablesServiceChargeHistory - All
InventorySummary - All	ReceivablesServiceChargeUnposted - All
Item - All	ReceivablesSetup - All
ItemCurrency - All	ReceivablesStatement - All
ItemQuantities - All	ReceivablesSummary - All
ItemSiteQuantities - All	ReceivablesTaxHistory - All
PriceGroup - All	ReceivablesWarranty - All
PriceLevel - All	ReceivablesWarrantyDocument - All
Prospect - All	ReceivablesWarrantyHistory - All
ReceivablesApply - All	ReceivablesWarrantyUnposted - All
ReceivablesApplyHistory - All	SalesBackOrder - All
ReceivablesBatch - All	SalesBackOrderDocument - All
ReceivablesBatchHistory - All	SalesBackOrderHistory - All
ReceivablesCashReceipt - All	SalesDocument - All
ReceivablesCashReceiptHistory - All	SalesInventoryItem - All
ReceivablesCashReceiptUnposted - All	SalesInvoice - All
ReceivablesCommission - All	SalesInvoiceDocument - All
ReceivablesCommissionHistory - All	SalesInvoiceHistory - All
ReceivablesCredit - All	SalesOrder - All
ReceivablesCreditMemo - All	SalesOrderDocument - All
ReceivablesCreditMemoHistory - All	SalesOrderHistory - All
ReceivablesCreditMemoUnposted - All	SalesOrderIntrastat - All
ReceivablesCreditPosted - All	SalesOrderTaxHistory - All
ReceivablesCreditUnposted - All	Salesperson - All
ReceivablesDebit - All	SalespersonPeriodSummary - All
ReceivablesDebitMemo - All	SalespersonSummary - All
ReceivablesDebitMemoHistory - All	SalesProcessHold - All
ReceivablesDebitMemoUnposted - All	SalesProcessHoldDetail - All
ReceivablesDebitPosted - All	SalesQuote - All
ReceivablesDebitUnposted - All	SalesQuoteDocument - All
ReceivablesDocument - All	SalesQuoteHistory - All
ReceivablesDocumentMaster - All	SalesReturn - All
ReceivablesFinanceCharge - All	SalesReturnDocument - All
ReceivablesFinanceChargeHistory - All	SalesReturnHistory - All
ReceivablesFinanceChargeUnposted - All	SalesTerritory - All
ReceivablesIntrastat - All	SalesTerritoryPeriodSummary - All
ReceivablesInvoice - All	SalesTerritorySummary - All
ReceivablesInvoiceHistory - All	ShippingMethod - All
ReceivablesInvoiceUnposted - All	SingleItem - All
ReceivablesPeriodSetup - All	Site - All
ReceivablesPeriodSummary - All	TaxDetail - All
ReceivablesReturn - All	TaxSchedule - All
	UnitOfMeasureSchedule - All

User

All users added to Business Portal automatically are assigned to the User role. No data permissions are assigned directly to this role.

Chapter 26: Default advanced roles and security permissions

The default advanced MBF roles installed with Business Portal are listed below. Default data permissions associated with each advanced role also are included. We recommend that you not remove advanced roles, because new ones cannot be created.

Note that some Business Portal applications include their own default MBF roles and security permissions, which are added to Business Portal when you install the applications. Those default roles and permissions are listed in the individual application's administrator documentation.

To view MBF role permissions in Business Portal, go to the Site Settings page for the top-level Business Portal web site. Under **Business Portal Administration**, click **Roles**. On the Roles page, select a role name and click the **Permissions** tab.

Customer

This role is used to manage access to data provided for your company's customers. It can be linked to a Customer ID from Microsoft Dynamics GP.

Data permissions	
Customer - Restricted Self	ReceivablesServiceChargeHistory - Restricted Self
CustomerItem - Restricted Self	ReceivablesSummary - Restricted Self
ReceivablesCashReceipt - Restricted Self	ReceivablesWarranty - Restricted Self
ReceivablesCashReceiptHistory - Restricted Self	ReceivablesWarrantyHistory - Restricted Self
ReceivablesCredit - Restricted Self	SalesBackOrder - Restricted Self
ReceivablesCreditMemo - Restricted Self	SalesBackOrderDocument - Restricted Self
ReceivablesCreditMemoHistory - Restricted Self	SalesBackOrderHistory - Restricted Self
ReceivablesDebit - Restricted Self	SalesDocument - Restricted Self
ReceivablesDebitMemo - Restricted Self	SalesInvoice - Restricted Self
ReceivablesDebitMemoHistory - Restricted Self	SalesInvoiceDocument - Restricted Self
ReceivablesDocument - Restricted Self	SalesInvoiceHistory - Restricted Self
ReceivablesFinanceCharge - Restricted Self	SalesOrder - Restricted Self
ReceivablesFinanceChargeHistory - Restricted Self	SalesOrderDocument - Restricted Self
ReceivablesInvoice - Restricted Self	SalesOrderHistory - Restricted Self
ReceivablesInvoiceHistory - Restricted Self	SalesQuote - Restricted Self
ReceivablesReturn - Restricted Self	SalesQuoteDocument - Restricted Self
ReceivablesReturnHistory - Restricted Self	SalesQuoteHistory - Restricted Self
ReceivablesScheduledPayment - Restricted Self	SalesReturn - Restricted Self
ReceivablesScheduledPaymentHistory - Restricted Self	SalesReturnDocument - Restricted Self
ReceivablesServiceCharge - Restricted Self	SalesReturnHistory - Restricted Self

Row-level restrictions are applied to all default data permissions assigned to the Customer role. The Customer ID associated with a user determines which data is displayed. For more information, refer to *Chapter 10, "Managing data permissions."* *Child entities—for example, CustomerAddress, a child entity of the Customer entity— are also restricted through these row-level policies.*

Employee

This role is used to manage access to data (such as company-wide information) provided for all employees in your company. It can be linked to an Employee ID from Microsoft Dynamics GP.

Data permissions	
Applicant - Restricted Self	MCPosition - All
Benefit - Restricted Self	Note - All
BenefitSetup - All	PayCode - Restricted Self
Company - All	PaycodeSetup - All
CompanyAddress - All	PayStubItem - Restricted Self
Course - All	PayStub - Restricted Self
Deduction - Restricted Self	Position - All
DeductionSetup - All	ReportCatalog_RoleDAP
Department - All	RequisitionApplicant - Restricted Manager
Division - All	RequisitionApplicant - Restricted Self
Employee - Restricted Directory Information	Requisition - Restricted Open or Immediate Status
Employee - Restricted Self	Skill - All
HRPayScheduleYear - Restricted Current Year	SkillSet - All
HRTransactionDetail - Restricted Self	SkillSetLine - All
LocalTax - Restricted Self	StateTax - Restricted Self
LocalTaxSetup - All	StateTaxSetup - All
Location - All	Supervisor - All
MCDepartment - All	TestAndCertificationSetup - All
MCDivision - All	TimeCodeSetup

Manager

This role is used to manage access to data (such as human resource policies) provided for managers in your company. It can be linked to a Supervisor ID from Microsoft Dynamics GP.

Data permissions
Applicant - All
Course - All
Department - All
Division - All
Employee - Restricted Directory Information
Employee - Restricted Manager
Location - All
MCDepartment - All
MCDivision - All
MCPosition - All
PaycodeSetup - All
Position - All
RequisitionApplicant - All
RequisitionApplicantCost - All
Requisition - Restricted Current Company
Requisition - RestrictedManager
Skill - All
SkillSet - All
SkillSetLine - All
Supervisor - All
TestAndCertificationSetup - All
TimeCodeSetup

Salesperson

This role is used to manage access to data (such as sales or customer information) provided for salespeople in your company. It can be linked to a Salesperson ID from Microsoft Dynamics GP.

Data permissions	
CorporateCustomer - All CreditCard - All Customer - All CustomerClass - All Intrastat - All InventoryPeriodSummary - All InventorySummary - All Item - All ItemCurrency - All ItemQuantities - All ItemSiteQuantities - All PriceGroup - All PriceLevel - All Prospect - All ReceivablesApply - All ReceivablesApplyHistory - All ReceivablesBatch - All ReceivablesBatchHistory - All ReceivablesCashReceipt - All ReceivablesCashReceiptHistory - All ReceivablesCashReceiptUnposted - All ReceivablesCredit - All ReceivablesCreditMemo - All ReceivablesCreditMemoHistory - All ReceivablesCreditMemoUnposted - All ReceivablesCreditPosted - All ReceivablesCreditUnposted - All ReceivablesDebit - All ReceivablesDebitMemo - All ReceivablesDebitMemoHistory - All ReceivablesDebitMemoUnposted - All ReceivablesDebitPosted - All ReceivablesDebitUnposted - All ReceivablesDocument - All ReceivablesDocumentMaster - All ReceivablesFinanceCharge - All ReceivablesFinanceChargeHistory - All ReceivablesFinanceChargeUnposted - All ReceivablesIntrastat - All ReceivablesInvoice - All ReceivablesInvoiceHistory - All ReceivablesInvoiceUnposted - All	ReceivablesPeriodSummary - All ReceivablesReturn - All ReceivablesReturnHistory - All ReceivablesReturnUnposted - All ReceivablesScheduledPayment - All ReceivablesScheduledPaymentDocument - All ReceivablesScheduledPaymentHistory - All ReceivablesServiceCharge - All ReceivablesServiceChargeHistory - All ReceivablesServiceChargeUnposted - All ReceivablesStatement - All ReceivablesSummary - All ReceivablesTaxHistory - All ReceivablesWarranty - All ReceivablesWarrantyDocument - All ReceivablesWarrantyHistory - All ReceivablesWarrantyUnposted - All SalesBackOrder - All SalesBackOrderDocument - All SalesBackOrderHistory - All SalesDocument - All SalesInvoice - All SalesInvoiceDocument - All SalesInvoiceHistory - All SalesOrder - All SalesOrderDocument - All SalesOrderHistory - All SalesOrderIntrastat - All SalesOrderTaxHistory - All SalesProcessHold - All SalesProcessHoldDetail - All SalesQuote - All SalesQuoteDocument - All SalesQuoteHistory - All SalesReturn - All SalesReturnDocument - All SalesReturnHistory - All ShippingMethod - All Site - All TaxDetail - All TaxSchedule - All UnitOfMeasureSchedule - All

By default, data permissions for the Salesperson Summary, Salesperson Period Summary, Receivables Commission, and Receivables Commission History entities are not available to users in the Salesperson role. To make this information available, we recommend creating new data permissions for these entities using row-level restriction policies. When a row-level restriction is applied, the Salesperson ID associated with a user determines which data is displayed. Row-level restriction policies for these entities are provided by default.

After you've created new data permissions and assigned them to the Salesperson role, you must create new queries using the new data permissions. For more information about data permissions and row-level restrictions, see Chapter 10, "Managing data permissions." For more information about queries, see Chapter 12, "Creating queries."

Vendor

This role is used to manage access to data provided for your company's vendors. It can be linked to a Vendor ID from Microsoft Dynamics GP. There are no data permissions assigned to this role by default.

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