Business Portal for Microsoft Dynamics® GP 2010

User's Guide

Release 5.0

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Contents

Introduction

Welcome to Business Portal for Microsoft Dynamics® GP . Business Portal gives you access to business information and allows you to participate in business processes using a web-based portal. Business Portal provides the following features:

- **Role-based desktop** Business Portal information and applications are organized by role. The information you see in Business Portal is only the information that is relevant to your job.
- **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.
- **Web browser access to Microsoft Dynamics GP windows** With Business Portal, you have access to Microsoft Dynamics GP through Internet Explorer® (using Windows® Terminal Services technology). You can browse directly to a Microsoft Dynamics GP window without leaving Business Portal.
- **Integrated web-based applications** In Business Portal, web-based applications share data, a common login, a common look and feel, and uniform navigation. Business Portal applications expand the business tasks users can perform without having access to a full Microsoft Dynamics GP client installation.

Check for current instructions

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

This introduction is divided into the following sections:

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

What's in this manual

This manual provides instructions for using Business Portal. It includes the following chapters:

- Chapter 1, "Business Portal concepts," explains the basic concepts used in Business Portal.
- Chapter 2, "Business Portal pages," describes the types of pages in Business Portal.
- Chapter 3, "Company and employee information," explains how to view your personal information, and company information such as benefits and policies.

- Chapter 4, "Queries," explains how to create customized queries that provide access to information stored in your back office system.
- Chapter 5, "Back office access," describes how to access back office windows through Internet Explorer (using Windows Terminal Services technology).
- Chapter 6, "User preferences," describes how to personalize Business Portal for your use.

Symbols and conventions

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

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

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

Convention	Description
Saving favorite queries	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.
Business Data Catalog functionality is available only if you're using Business Portal with Office SharePoint Server 2007, Enterprise Edition	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.

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

Business Portal Administrator's Guide The Administrator's Guide (BusinessPortalAdminGuide.pdf) explains how to set up and configure 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 Microsoft® Windows SharePoint® Services page, or a Microsoft Office SharePoint Server 2007 page.

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

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

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.

Chapter 1: Business Portal concepts

Understanding the basic concepts of Business Portal will help you understand how you can use Business Portal in the course of your daily work. Concepts are explained in the following sections:

Business Portal terms and definitions

You may encounter the following terms while using Business Portal.

Term	Definition
business entity	A logical grouping of business data. In Business Portal, business entities are used as the basis for data access for result viewers and queries. Examples: sales order, customer, item.
center site	A site that contains role-related information. For example, the Sales Center site contains information that is important to a salesperson or sales manager, such as customer information and sales queries. For more information, see *Center sites* on page 8.
dashboard	A group of pages that bring together related information. Salesperson and sales manager dashboards are provided with Business Portal, if you're using Business Portal with Office SharePoint Server, Enterprise Edition.
information page	A page that combines result viewer web parts to present current data from the back office. For example, the Customers information page displays a customer list and result viewer web parts that show real-time details about the customer selected in the list. For more information, see *Information pages* on page 13.
list page	A page that presents current data from the back office. For example, the Customer List page displays a list of customers. List pages appear on most Business Portal center sites, and can be identified by the word "list" in their names. List pages are available only if you're using Business Portal with Office SharePoint Server, Enterprise Edition.
query	A method of searching for and organizing data. For more information, see *Query pages* on page 14.
Quick Launch	A SharePoint navigation element that appears on the left side of Business Portal pages. You'll use the Quick Launch to navigate to most pages in Business Portal.
result viewer web part	Special type of web part used to display your business data in an appropriate format. Result viewer web parts, used on information pages, may interact with one another.

Log on to Business Portal

You can access your company's Business Portal site by entering the Business Portal URL in the address field of Internet Explorer. Depending on how Internet Explorer security is set up, your credentials may automatically be authenticated using Windows Authentication. You may be required to log on using your Windows user name and password.

If your credentials are automatically authenticated, once you are logged on to your computer, anyone with access to your computer can access Business Portal using your credentials.

Navigate Business Portal

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

Use the top link bar to access Business Portal center sites. You have access to center sites based on the roles and groups you are assigned to. For more information about center sites, refer to *Center sites* on page 8.

The appearance of the top link bar depends on how Business Portal was implemented. The top link bar works in one of the following ways:

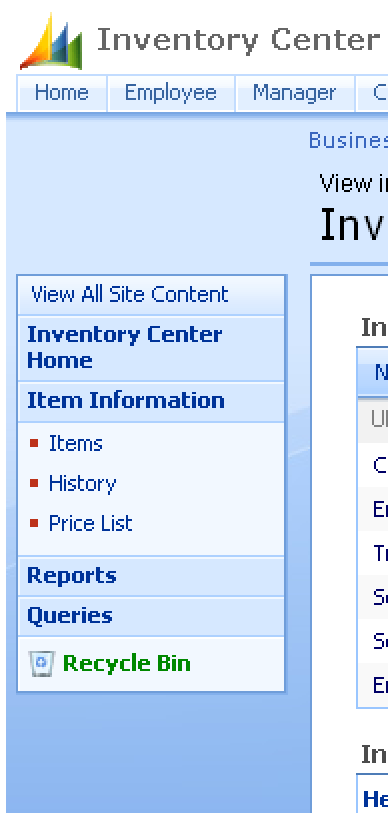
- The top level menu contains links to all Business Portal center sites. Click a center site link to go to that site's Home page.

- 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 all the pages within a center site.



Center sites

Business Portal center sites contain information and tasks related to a department or role. For example, if you're a salesperson, use the Sales Center site as a starting point to view or change customer and sales order information.

Some center sites are available to all Business Portal users. For example, all Business Portal users can view the Employee Center site, which contains employee information and related tasks. Multiple roles may have access to the same center site, but the data and pages accessible on each center site may vary between roles. For example, a salesperson and sales manager both see the Sales Center site, but the sales manager has access to additional information that isn't available to the salesperson.

You can access center sites by clicking center site links either in the top navigation menu or in the Quick Launch of the Business Portal Home page.

Queries

You can use query pages and result viewer web parts in Business Portal to create customized queries that provide access to information stored in your back office system, including information about customers, vendors, transactions, and items. You can save frequently used queries to save time; you can access a saved query with one click rather than creating the query again. And you can export query page results to Microsoft Excel®, as well as display them on the screen. For more information about queries, refer to Chapter 4, "Queries."

Search

The Search feature is available only if you're using Business Portal with Office SharePoint Server, Enterprise Edition.

The Search feature in Office SharePoint Server can be used to locate Microsoft Dynamics GP data along with data stored in Windows SharePoint Services.

You also can perform queries of Microsoft Dynamics GP data through Business Portal query pages, which use different technology to locate and return data. For more information about queries, refer to *Chapter 4, "Queries."*

You can access Office SharePoint Server Search functionality from a Business Portal web site, or through a desktop search.

Portal search You can access the Search feature through the **Search** box located in the upper-right corner of all portal pages.

Windows Desktop Search If your system administrator has set up Windows Desktop Search, you can locate Microsoft Dynamics GP data and Windows SharePoint Services content along with content from your desktop.

Search results are displayed in the Search Center in Office SharePoint Server. You can select the **Dynamics** tab in the Search Center to search only Microsoft Dynamics GP data. You can choose to search data for all companies or for a single company.

Summary information is displayed with each Microsoft Dynamics GP data result. If you select a record on the results page, detailed information for that record is displayed. While all users can view the summary information on the results page, you may not have access to details, depending on the web service roles you are assigned to.

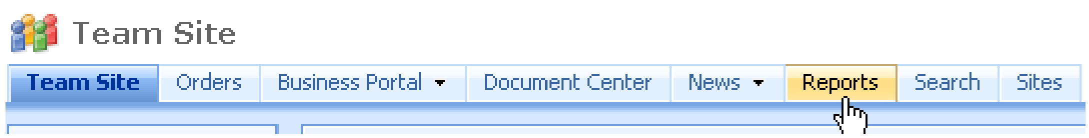
The Report Center site

The Report Center site is available only if you're using Business Portal with Office SharePoint Server, Enterprise Edition.

The Report Center is a site in Office SharePoint Server, Enterprise Edition, that serves as a central location to manage business-critical information sources, such as reports, spreadsheets, and Microsoft SQL Server® Reporting Services data connections.

If you're using Business Portal with Windows SharePoint Services, reports pages are used instead of the Report Center site. For more information, refer to Reports pages on page 15.

The Report Center site is available at the same level of navigation as the top-level Business Portal site.



The Report Center site contains 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.

Report libraries are automatically created on the Report Center site for Microsoft Dynamics GP reports. Links to these report libraries appear in the Quick Launch on the Report Center site, as shown in the following illustration.

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.

Using SharePoint functionality, you can receive alerts when new reports are added to Report Center libraries, create document workspaces to collaborate on reports, set up workflows to review reports, and even access reports offline. For more information about using SharePoint features, refer to the SharePoint documentation.

For information about publishing reports to the Report Center site, see the Business Portal Administrator's Guide.

Chapter 2: Business Portal pages

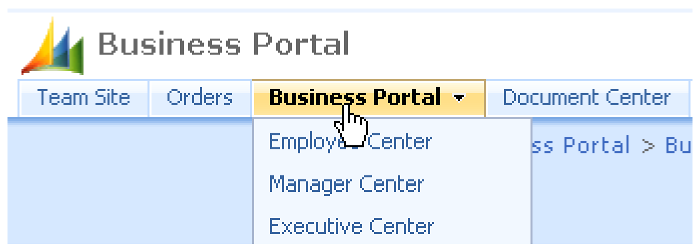
The major types of Business Portal pages are explained in the following sections:

- *Business Portal Home page*
- *Center site home pages*
- *Information pages*
- *Query pages*
- *Reports pages*
- *List pages*
- *Dashboard pages*

Business Portal Home page

The Business Portal Home page is your entrance into Business Portal. This page provides an overview of what is available to you, including company information and important links.

Depending on how Business Portal was implemented, you can return to the home page in one of two ways. If a **Business Portal** link appears in the top level of navigation, you can click it to access the home page.

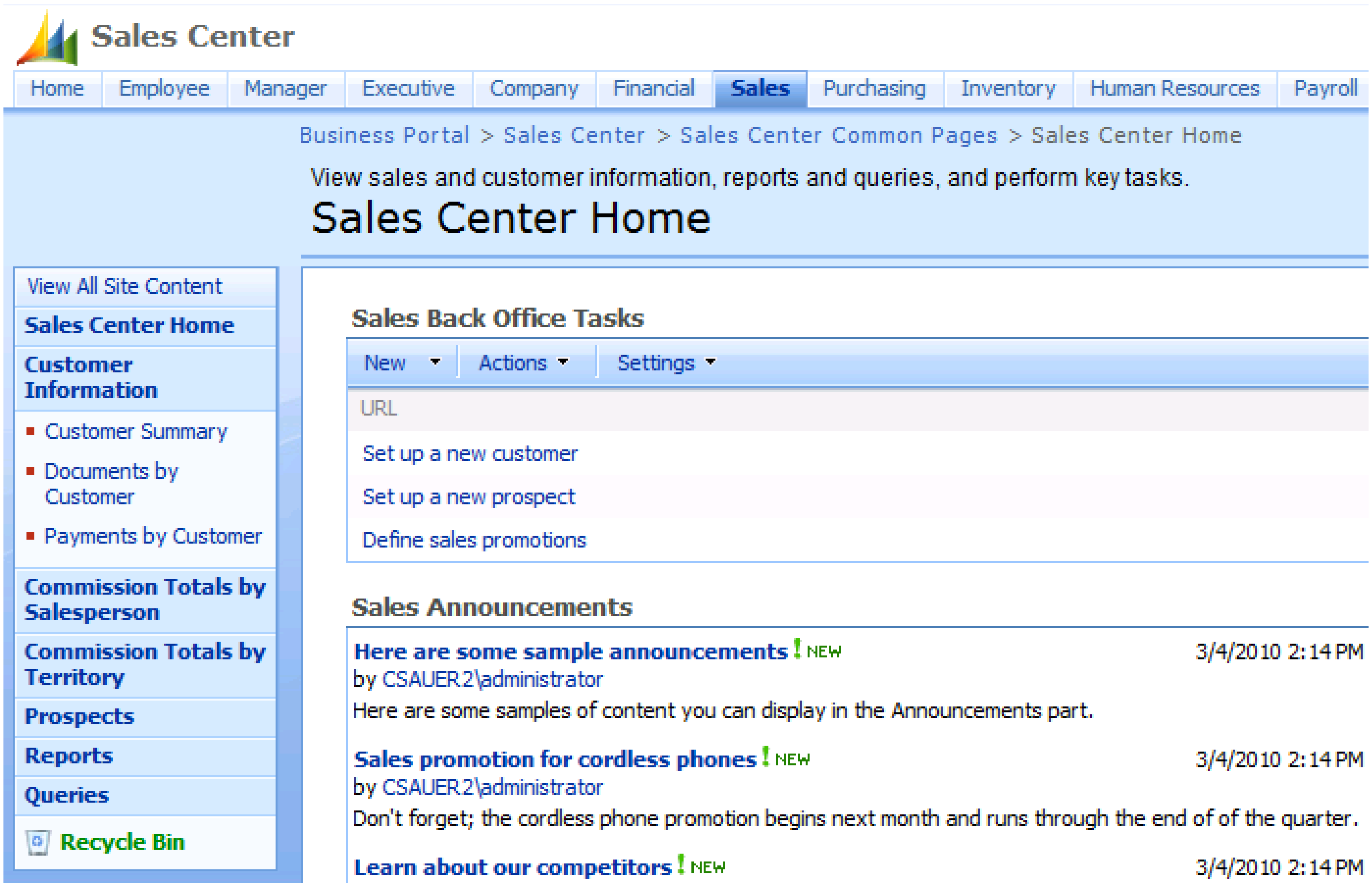


If a **Business Portal** link does not appear, you can get to the home page by clicking the **Home** link in the top navigation.

The Business Portal administrator controls which web parts appear, but you may be able to modify your personal view of the page. For more information, refer to *Modify parts and pages* on page 29.

Center site home pages

Center site home pages are your entrance point into center sites. Each center site home page provides an overview of what is available to you in that center.



You can access center site home pages by clicking center site links either in the top navigation menu or in the Quick Launch of the Business Portal Home page.

Your Business Portal administrator can customize center site home pages to fit your company's needs. The following parts typically appear on a center site home page:

Back Office Tasks Some of the key tasks you can perform related to your role. For example, if you're a salesperson, you might have a task called, "Set up a new customer". Clicking on the link opens the Customer Maintenance window in your Microsoft Dynamics GP system.

Announcements A place for announcements related to the center.

Top 5 Reports A list of the five reports in the center that you use most often, with the most frequently viewed report at the top of the list. The report web part will be empty until you have viewed at least one report. These reports are .txt, .pdf, .htm, or .doc files that are regularly updated. (For "real-time" information, use a query page.)

Related Information Links to other web sites related to the center.

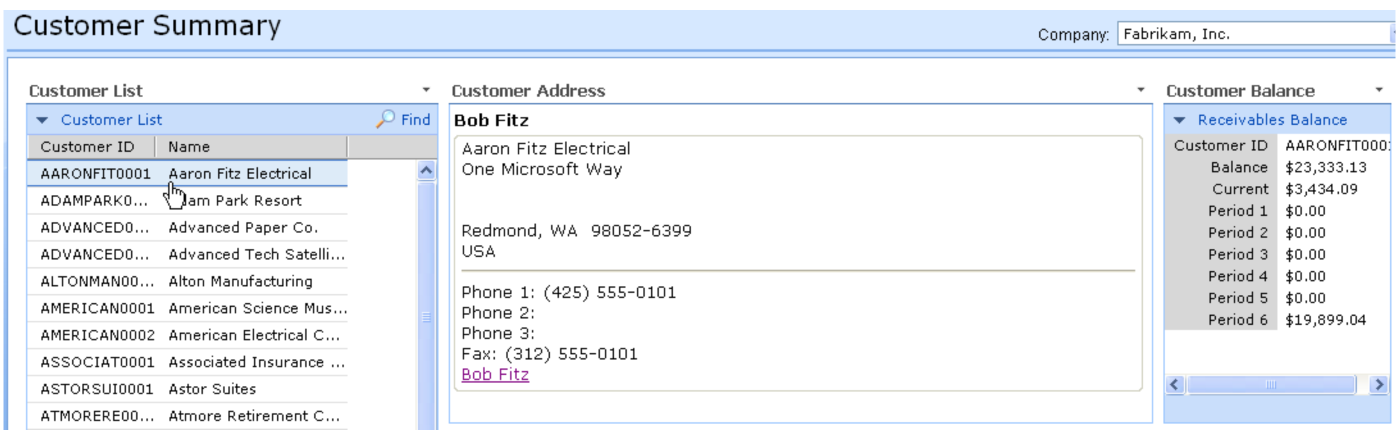
Center site home pages can contain web parts from many different Business Portal applications. To get help for a web part not listed here, click a link in the web part to open the application, then click the Help icon button from within the application.

The center site home pages in your Business Portal may also contain other web parts not listed here. Your Business Portal administrator controls which web parts appear, but you may be able to modify your personal view of a page. For more information, refer to *Modify parts and pages* on page 29.

Information pages

Information pages combine a number of parts—mainly result viewer web parts—to present current data from the back office. For example, the Customer Summary information page displays current customer information. The Customer Summary information page contains the following parts:

- A list of customers
- A part showing the selected customer's name, address, and contact information
- A part showing the selected customer's balance information
- A part showing the selected customer's sales history



Result viewer web parts are special web parts used to display real-time business data in an appropriate format, such as a list or a business card. An important characteristic of result viewer web parts is that they may interact with one another. For example, when you select a customer in the list on the left side of the Customer Summary information page, the other result viewer web parts on the page respond to your selection, showing detailed information for the selected customer.

You can find links to information pages on the Quick Launch of center sites. For example, a link to the Customer Summary information page appears in the Quick Launch of the Sales Center site.

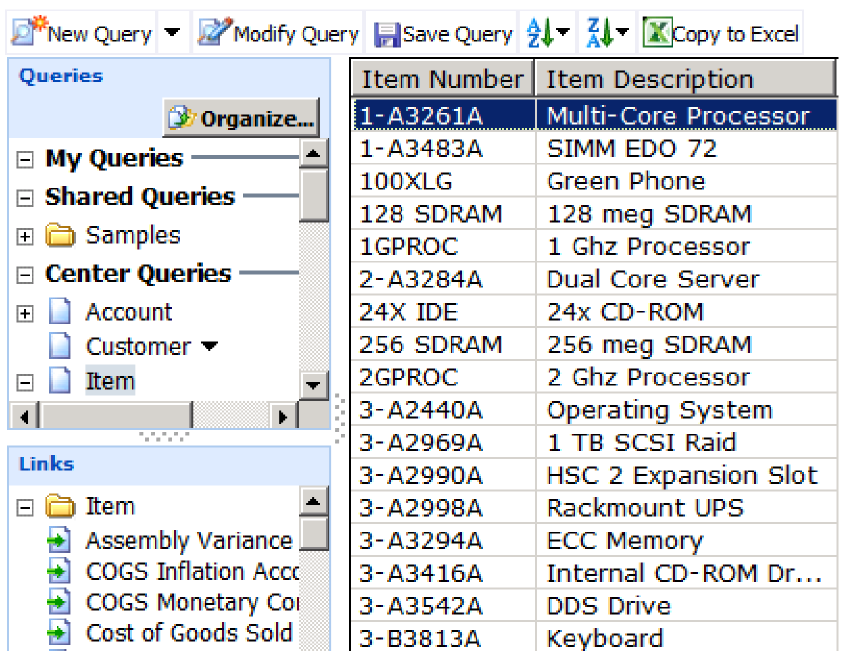
Some information pages are available by default with Business Portal. Your Business Portal administrator can also build new information pages to fit your company's needs.

The information pages in your Business Portal may also contain other parts not listed here. Your Business Portal administrator controls which parts appear, but you may be able to modify your personal view of a page. For more information, refer to *Modify parts and pages* on page 29.

Query pages

Query pages, found on Business Portal center sites, provide access to information stored in your back office system. For example, the Financial Center site includes the Financial Queries page and the Sales Center site includes the Sales Queries page.

A Business Portal center site's related query page has a set of default read-only queries on the primary business entities to make searching easy. The default queries, such as Customer and Item, are listed on the left side of the query page, as shown in the following illustration.



You can find links to query pages on the Quick Launch of center sites. For example, a link to the Financial Queries page appears in the Quick Launch of the Finance Center site.

About queries

Business Portal provides many predefined queries for business entities. By modifying the default query on an entity, you can create a variety of customized queries. For example, there are many columns available for each 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.

Query results can be exported to Microsoft Excel for further analysis. For example, by combining Business Portal's querying capability, Excel's capability to organize and sort data, and Word's mail merge capability, you can create mass mailings that tailor your message to individual customers.

The **Back** and **Forward** buttons in Internet Explorer will browse between Business Portal pages; you can't use the them to browse between query result sets. The browser's **Refresh** button will cause the entire page to refresh—not just the query.

To learn more about using queries, see the following topics:

- *Create a new query on a query page* on page 21
- *Modify a query on a query page* on page 23
- *View query page results* on page 24
- *Change the appearance of query page results* on page 24
- *Print or export query page results* on page 25
- *Create a new result viewer web part query* on page 25
- *Modify a result viewer web part query* on page 26

Query links

For many queries, associated links appear in the lower left corner of the query page when the query is processed. These links lead to queries of related information. For example, if the result set is a list of customers, you could select a customer, then select the link that leads to sales orders. The customer query results would be replaced by the sales order query results.

Query page options

Use the Query Page Options page to change the way query results appear in your query pages. To open the Query Page Options page, click the **Options** button on a query page. You can change the font and font size for query results. You can also choose the number of query results returned at a time. For more information about query page options, see *Change the appearance of query page results* on page 24.

Reports pages

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

Reports pages display reports for a center in Business Portal. These reports are .txt, .pdf, .htm, or .doc files that are regularly updated. A back office user selects which reports are published and how often. The date a report was last updated is displayed in the **Reports** web part on the corresponding center site home page and in the **Report List** on the reports page. (For "real-time" information, use a query page.)

Each reports page contains two web parts. The web part on the left lists reports that have been published for the center site and are accessible by your role. Select a report on the left in the **Report List**; the report you selected is displayed on the right.

You can find links to reports pages on the Quick Launch of center sites. For example, a link to the Purchasing Reports page appears on the Quick Launch of the Purchasing Center site.

If you're using Business Portal with Office SharePoint Server, Enterprise Edition, the Report Center site is used instead of reports pages. For more information, refer to The Report Center site on page 9.

For information about publishing reports, see the Business Portal Administrator's Guide.

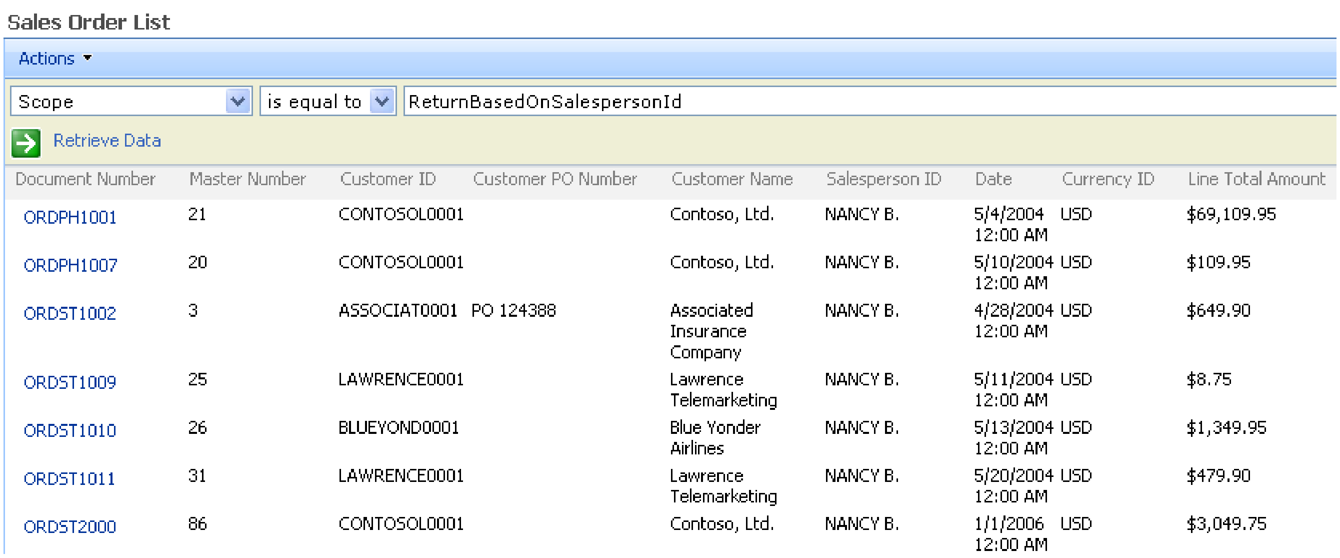
List pages

List pages are available only if you're using Business Portal with Office SharePoint Server, Enterprise Edition.

List pages use the Office SharePoint Server Business Data List web part to present current data from the back office. For example, the Sales Order List page displays a current list of sales orders. List pages appear on most Business Portal center sites, and can be identified by the word "list" in their names.

Business data web parts don't display the results of Business Portal queries; they display data from the Business Data Catalog. Query results are displayed in result viewer web parts, which are used on information pages. For more information, see Information pages on page 13.

The following illustration shows a list page. A maximum of 1000 records at a time will be returned on a list page, even if more records are available.



Sales Order List

Actions

Scope | is equal to | ReturnBasedOnSalespersonId

Retrieve Data

Document Number	Master Number	Customer ID	Customer PO Number	Customer Name	Salesperson ID	Date	Currency ID	Line Total Amount
ORDPH1001	21	CONTOSOL0001		Contoso, Ltd.	NANCY B.	5/4/2004 12:00 AM	USD	$69,109.95
ORDPH1007	20	CONTOSOL0001		Contoso, Ltd.	NANCY B.	5/10/2004 12:00 AM	USD	$109.95
ORDST1002	3	ASSOCIAT0001	PO 124388	Associated Insurance Company	NANCY B.	4/28/2004 12:00 AM	USD	$649.90
ORDST1009	25	LAWRENCE0001		Lawrence Telemarketing	NANCY B.	5/11/2004 12:00 AM	USD	$8.75
ORDST1010	26	BLUEYOND0001		Blue Yonder Airlines	NANCY B.	5/13/2004 12:00 AM	USD	$1,349.95
ORDST1011	31	LAWRENCE0001		Lawrence Telemarketing	NANCY B.	5/20/2004 12:00 AM	USD	$479.90
ORDST2000	86	CONTOSOL0001		Contoso, Ltd.	NANCY B.	1/1/2006 12:00 AM	USD	$3,049.75

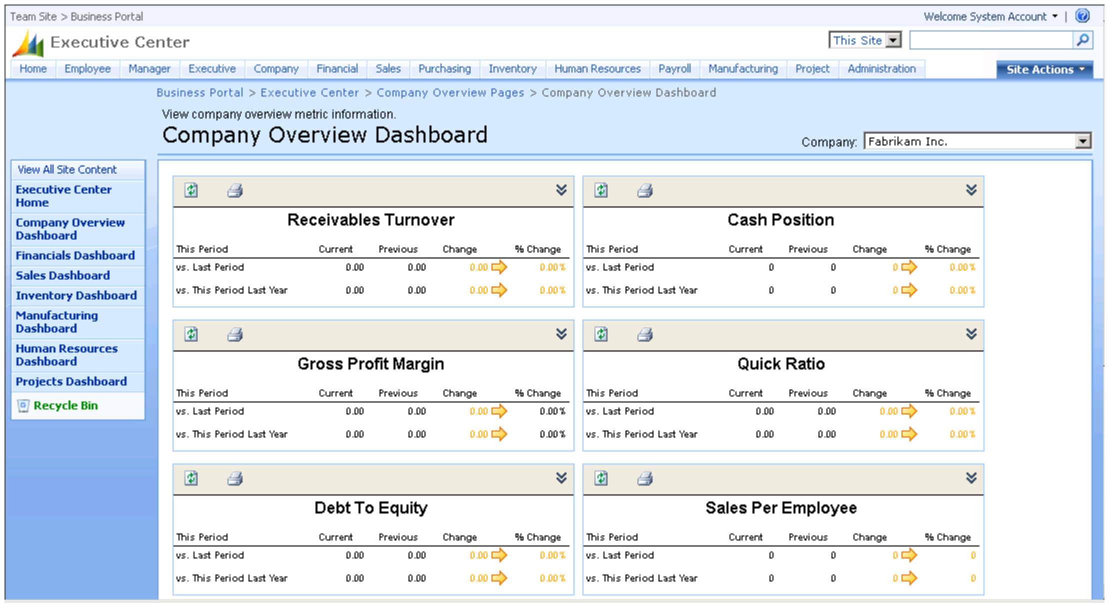
By default, the information in some List web parts is set to filter by your salesperson ID or sales territory ID. If you have rights to view data for other salespeople or other sales territories, you can change the scope using the fields beneath the Actions menu. Enter a scope of ReturnAll to return additional records.

If you have access to the data, you can click an item in a 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 list to view the business data profile, or detailed information, for that order.

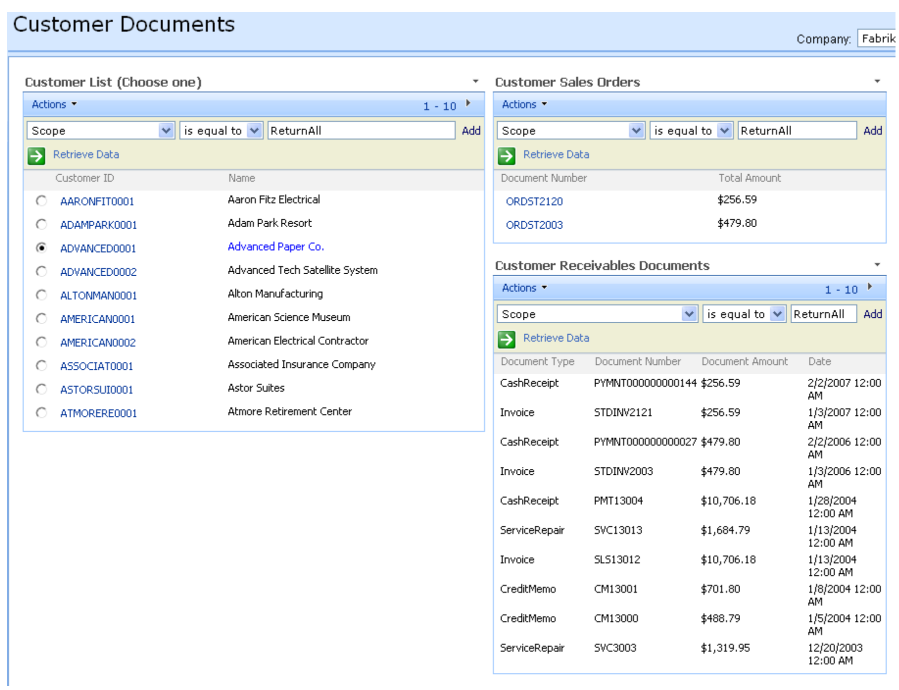
Dashboard pages

Dashboards bring together related information to help people perform their jobs effectively. Each dashboard may consist of a number of pages.

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.



If you're using Business Portal with Office SharePoint Server, Enterprise Edition, the My Sales Dashboard is available from the Sales Center site. The My Sales Dashboard includes the Sales and Commissions page, the Customer Balances page, and the Customer Documents page. These dashboards are available for salespeople and sales managers. The Sales Dashboard dashboard pages use Office SharePoint Server business data web parts to display data.



Business data web parts don't display the results of Business Portal queries; they display data from the Business Data Catalog. Query results are displayed in result viewer web parts, which are used on information pages. For more information, see *Information pages on page 13.*

Chapter 3: Company and employee information

You can use Business Portal to view your personal information and company information such as benefits and policies. This information includes the following topics:

- *Profile*
- *Benefits*
- *Policies*
- *Directory*

Profile

The Profile page is your tool for viewing your personal records. The personal information displayed in Business Portal comes from the Microsoft Dynamics GP Human Resources and Payroll system. Depending on how Business Portal was implemented, you can display the Profile page using one of the following methods:

- Point to **Business Portal** on the top link bar, click **Employee Center**, then click **Profile** on the Quick Launch.

- Click **Employee** on the top link bar, then click **Profile** on the Quick Launch.

The following tabs typically appear on the Profile page.

Personal Your personal information, including your name, home address and phone number, marital status, and Social Security number.

Work Your work-related information, including your position and work address and phone number.

Emergency Contacts A person the company notifies in an emergency. The contact doesn't need to be a relative; the person can be a neighbor or a friend.

Dependents People who rely on you for some type of support, for example, your children. Other dependents can include your spouse or domestic partner, parents, siblings, and guardian. Government regulations and company policies determine whether you can enroll them as your dependents.

Position History Dates of employment for each position you've held in the company.

Job Description The detailed job description on record for you in Human Resources.

You can change your personal information if the Human Resources Management Self Service Suite is installed. Contact your Human Resources administrator to change your information if the **Modify** option is not available to you.

Benefits

The Benefits page is used to publish your company's benefits information to employees. All employees can view this page. Your Business Portal administrator can customize the page to meet your company's needs. Depending on how Business Portal was implemented, you can display the Benefits page using one of the following methods:

- Point to **Business Portal** on the top link bar, click **Company Center**, then click **Benefits** on the Quick Launch.
- Click **Company** on the top link bar, then click **Benefits** on the Quick Launch.

You can remove or minimize some web parts; others are not removable. For information about customizing pages, see *Modify parts and pages* on page 29.

Policies

The Policies page is used to publish company information to employees. All employees can view the page. Your Business Portal administrator can customize the page to meet your company's needs. Depending on how Business Portal was implemented, you can display the Policies page using one of the following methods:

- Point to **Business Portal** on the top link bar, click **Company Center**, then click **Policies** on the Quick Launch.
- Click **Company** on the top link bar, then click **Policies** on the Quick Launch.

You can remove or minimize some web parts; others are not removable. For information about customizing pages, see *Modify parts and pages* on page 29.

Directory

You can locate employees and display their contact information using the Directory page. The information comes from employee records in the back office. Depending on how Business Portal was implemented, you can display the Directory page using one of the following methods:

- Point to **Business Portal** on the top link bar, click **Company Center**, then click **Directory** on the Quick Launch.
- Click **Company** on the top link bar, then click **Directory** on the Quick Launch.

Chapter 4: Queries

You can use query pages and result viewer web parts in Business Portal to create customized queries that display information stored in your back office system, including information about customers, vendors, transactions, and items. You can save frequently used queries to save time; you can access a saved query with one click rather than creating the query again. And you can export query page results to Microsoft Excel, as well as display them on the screen.

Query information is divided into the following sections:

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 will be able to choose the following:

Data permission The subset of entity information that this query will be based on. Using the drop-down arrow next to the **New Query** button, you can choose to create a new query based on the previous query's data permission, or based on a new data permission.

Your Business Portal administrator should create all of the necessary data permissions for your business entities. For more information about data permissions, see the Business Portal Administrator's Guide.

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 display just the Customer Name and Balance Due, rather than all available columns. (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 $1000 and $2000. 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 22 and *Advanced query restriction options* on page 22.

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 you want 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 you want to restrict on 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 contained in 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. The properties you compare must use 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. If you save modifications, the query is saved to your **My Queries** folder and becomes a personal query. You are the only one who can use your personal queries. Saving modified queries makes it easier to generate the same query in the future.

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 tab(s) for the properties you want to modify, and make your changes.
4. To run the query, click **OK**.

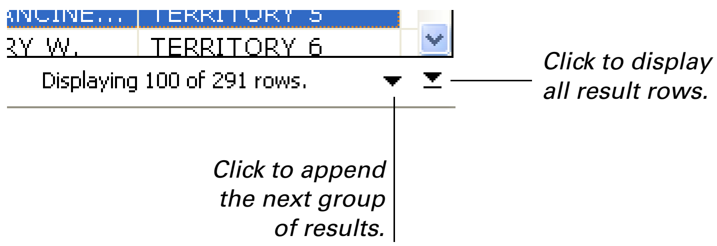
5. To save your changes, click **Save Query**. You will be asked to give the query a name and a location. Queries you save will appear under the My Queries heading on query pages.

*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 initially process the query.

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



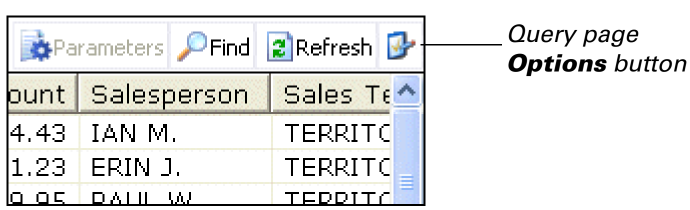
To always return all results of a query at one time, select the unlimited option on the Query Page Options page. For more information about query page options, see Change the appearance of query page results on page 24.

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. The settings you select here 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 you want 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 initially 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 24.

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

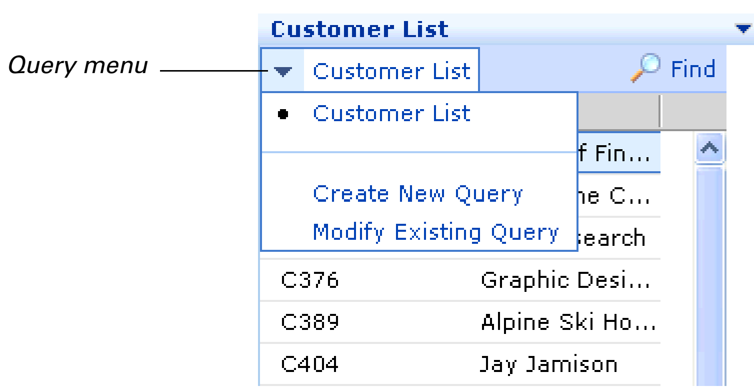
Query results can be sent to Microsoft Excel for additional sorting and analysis. For example, you can search for information about customers, export the results to Excel, then use Excel and Microsoft Word to create mailings targeted to specific groups of customers based on those results.

To print or export the currently displayed query results, click **Copy to Excel** on a query page; your query results will be displayed in an Excel spreadsheet. From within Microsoft 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 containing the query results is also placed on your desktop automatically. Add the .xls extension to the file name for the file to be recognized by Excel.

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 has been provided for you in the query menu.



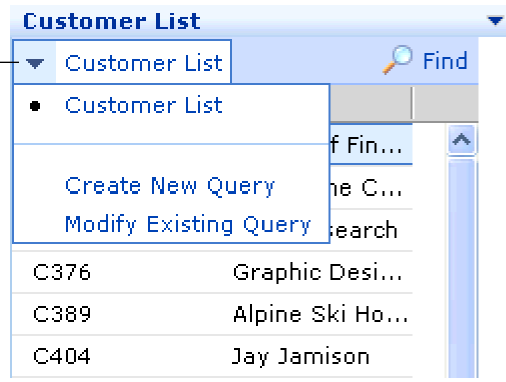
If the **Create New Query** option is available, you can click it to launch the **Create a Query** wizard and define a new query for the result viewer web part. The wizard steps are the same as those for creating a new query on a query page (see Create a new query on a query page on page 21), except that you will not select a data permission for the query. Your new query for the result viewer web part will be based on the data permission that was selected when the web part was first configured.

When you create a new query for a result viewer web part, only you can view the new query. Only the Business Portal administrator can make query changes that apply 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 has been provided for you in the query menu.

Query menu



If the **Modify Existing Query** option is available, you can click it 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 click **Save**, the changes will be made to only your view of the query. Only the Business Portal administrator can make query changes that apply to everyone who has access to the web part.

Chapter 5: Back office access

From Business Portal, you can access back office windows through Internet Explorer (using Windows Terminal Services technology). Use this method when the software isn't installed on your computer, or when you want fast access to a specific window, directly from Business Portal.

Web-browser access is explained in the following sections:

- *How web browser-based access works*
- *Access a back office window*

How web browser-based access works

When you use Business Portal to access a Microsoft Dynamics GP window (and the back office software is not installed on your computer), the connection is accomplished using Windows Terminal Services. This method is also known as thin-client access.

The thin client connects to the Terminal Services server, and displays the back office user interface. All operating system functions—as well the actual back office application—run on the Terminal Services server. When you log on, you see only your individual session, which is independent of any other user's back office session. Business Portal queries of back office data are not processed through the Terminal Services server.

You must be set up as a back office user in order to have thin-client access to Microsoft Dynamics GP through Business Portal. Terminal Services starts the back office application and you will be required to log on to Microsoft Dynamics GP in the same way you always do. Because Business Portal uses a connection to the Terminal Services server, the Business Portal administrator must also assign you a Terminal Services user name.

Access a back office window

In Business Portal, clicking a link in a Back Office Tasks web part will take you to a Microsoft Dynamics GP back office window. Back Office Tasks web parts are displayed on most Business Portal center site home pages.

If you're using web-browser based access to the back office, clicking task links will open the appropriate window in your web browser. For more information about accessing the back office system through the Web, see *How web browser-based access works* on page 27.

Depending on the Terminal Services configuration, you may be required to log on to the Terminal Services server.

Chapter 6: User preferences

You can modify some of the information on the pages in your Business Portal. The following sections describe how to personalize Business Portal for your use:

- *Modify parts and pages*
- *Change your personal settings*
- *Set browser settings for a workstation*
- *Delete temporary Internet files*

Modify parts and pages

You may be able to customize the way Business Portal parts and pages appear, depending on the permission level your Business Portal role is associated with.

Most Business Portal users and groups have the Read permission level, and by default have the ability to change only their own view of Business Portal parts and pages by default. To modify your personal view of a page, click **Welcome <User Name>**. In the menu that appears, click **Personalize This Page**.

Only users with Contribute, Design, and Full Control permission levels can modify parts and pages for other users. To modify the shared version of a page, click **Site Actions**. In the menu that appears, click **Edit Page**.

For more information about modifying pages and web parts, refer to the Windows SharePoint Services documentation.

Change your personal settings

Use the Business Portal Settings page to select your default company.

Use the My Settings page (click **Welcome <User Name>**, then click **My Settings**) to change your e-mail address and other personal settings. For more information about the My Settings page, see the Windows SharePoint Services documentation.

1. In the top right corner of Business Portal, click **Welcome <User Name>**. In the menu that appears, click **My Business Portal Settings**.

2. Select the company database where you normally do your work. You will be logged on to this company by default every time you start Business Portal.

   If you have access to more than one company, you can switch to a different company using the company list that appears below the navigation menu.

3. Click **Save** to save your changes.

Set browser settings for a workstation

Be sure that the Internet Explorer options for your workstation are set so that content is refreshed. Also, Internet Explorer security should be set up so that ActiveX® controls are allowed to run on the Business Portal web site. If ActiveX controls are not allowed to run, Business Portal won't function properly.

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 on to the workstation.

In some environments, you might have problems using links in Business Portal that go to web sites that use cookies. If that's the case, refer to the Business Portal Installation Guide for information about other browser settings you might want to change.

To set browser settings in Internet Explorer 7.0 or 8.0:

1. Start Internet Explorer and open the Internet Options window.
   Tools > Internet Options

2. Click the **General** tab. Under **Browsing history**, click **Settings**.

3. The Temporary Internet Files and History Settings window is displayed. Be sure the **Check for newer versions of stored pages** option is *not* set to **Never**.

4. Click **OK** to close the settings window.

5. Click the **Security** tab, highlight **Trusted Sites**, and click **Sites** to open the Trusted Sites window.

   *If Business Portal doesn't use Secure Sockets Layer, you must clear the **Require server verification (https) for all sites in this zone** check box. If you can't clear the check box, you must change the security settings for the Local Intranet zone instead of adding Business Portal to your Trusted Sites list.*

6. In **Add this Web site to the zone,** enter the Business Portal URL and click **Add**.

7. Click **OK** to close the Trusted Sites window.

8. In the Internet Options window, be sure **Trusted Sites** is still selected and click **Custom Level** to open the Security Settings window.

9. In the **ActiveX controls and plug-ins** section, select **Enable** for the following settings:

   - Download signed ActiveX controls
   - Initialize and script ActiveX controls not marked as safe for scripting
   - Run ActiveX controls and plug-ins

   Changing these options will allow ActiveX controls to run automatically on all web sites in your Trusted Sites zone. This zone contains sites that you believe you can download or run files from without worrying about damage to your computer or data. The security level for trusted sites is typically lower than the general Internet or Intranet security level.

10. Click **OK**. An alert message will be displayed, asking if you're sure that you want to change the security settings for the zone. Click **Yes**.

11. Click **OK** to close the Internet Options window.

Delete temporary Internet files

Some Business Portal pages are cached by Internet Explorer for 30 days. After an upgrade, these temporary files need to be deleted so that new versions will be displayed instead. If the temporary files are not deleted, errors may occur when you attempt to access certain cached pages.

Internet Explorer options are set for each user on a single computer. If multiple users share a single client workstation, temporary files will need to be deleted with each of the users logged in to the workstation.

To delete temporary Internet files in Internet Explorer 7.0:

1. Start Internet Explorer and open the Internet Options window.
   Tools > Internet Options

2. Click the **General** tab. Under **Browsing history**, click **Delete**.

3. The Delete Browsing History window is displayed. Under **Temporary Internet Files**, click **Delete files**.

   Deleting files may take some time, depending on the number of temporary files on your computer.

4. Click **Close** to close the Delete Browsing History window and click **OK** to close the Internet Options window.

To delete temporary Internet files in Internet Explorer 8.0:

1. Start Internet Explorer and open the Internet Options window.
   Tools > Internet Options

2. Click the **General** tab. Under **Browsing history**, click **Delete**.

3. The Delete Browsing History window is displayed. Mark **Temporary Internet files**, click **Delete files**.

   Deleting files may take some time, depending on the number of temporary files on your computer.

4. Click **Close** to close the Delete Browsing History window and click **OK** to close the Internet Options window.

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