Microsoft Dynamics®

Business Portal for Microsoft Dynamics® GP 2010

Key Performance Indicators

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Introduction

You can use Key Performance Indicators (KPIs) and metrics created using Microsoft® SQL Server® Reporting Services 2008 in Business Portal for Microsoft Dynamics® GP.You can use these KPIs and metrics to calculate measurements of the health of your business, such as your company's total sales, gross profit margin, and current ratio. These business metrics help you monitor your company's progress toward specific performance goals.

The Executive Center displays the Reporting Services KPIs without having to set up and display them in web parts. If you have used KPIs in a previous release of Business Portal and have upgraded to Business Portal for Microsoft Dynamics GP 2010, you can create and display KPIs in a full page or web part.

Check for updated instructions

This information was current as of April 29, 2010. The documentation may be updated as new information becomes available. Check the Microsoft Dynamics GP documentation web site (http://go.microsoft.com/fwlink/?LinkId=185513) for the most current documentation.

This introduction 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

The Key Performance Indicators manual is intended for users who will be installing Key Performance Indicators, creating and administering KPIs, and adding KPIs to pages so other Business Portal users can view them. To get the most benefit from KPIs, you should be familiar with the Microsoft Dynamics GP back office data and know where the information you'll need is located. Because KPIs use Business Portal queries, we also recommend that you have experience working with queries.

This documentation is divided into the following parts:

- Part 1, **Setup**, describes how to create and display KPIs.
- Part 2, **Administration**, describes how to maintain KPIs and the pages and web parts that are used to display them.
- Part 3, **Executive Center site**, describes the Executive Center site and explains how to modify the site pages to display key information for your organization.

Symbols and conventions

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

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

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

Convention	Description
Create a KPI	Italic type indicates the name of a section or procedure.
File > **Print**	The (>) symbol indicates a sequence of actions, such as clicking items on a menu or a toolbar or clicking buttons in a window. This example directs you to go to the **File** menu and click **Print**.
Bold	Bold type indicates the names of fields, tabs, menus, commands, and buttons, and text you should type.
TAB or ENTER	Small capital letters indicate a key or a key sequence.
This information applies 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.

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.

Common KPIs Guide The Common KPIs Guide (CommonKPIsGuide.pdf) explains how to create some of the more common KPIs you might use for your company.

Help

Help is available by clicking the Help icon button, located in the upper-right corner of any page. The help that is displayed depends on whether you open help from a Business Portal page, a Microsoft Windows® SharePoint® Services page, or a Microsoft Office SharePoint Server 2007 page or Microsoft SharePoint Server 2010 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 or Microsoft SharePoint Server 2010, additional help related to SharePoint Server features also will be available

Technical support

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

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: Setup

This part of the documentation provides step-by-step instructions for installing the Business Intelligence feature. If you have used KPIs in a previous release of Business Portal and have upgraded to Business Portal for Microsoft Dynamics GP 2010, you can create a KPI and displaying it to Business Portal users.

This information is divided into the following topics:

- Chapter 1, "Installation," explains how to install the Business Intelligence feature in Business Portal
- Chapter 2, "Key concepts," explains concepts you'll need to understand before you create and display KPIs.
- Chapter 3, "Creating KPIs," explains how to set up a KPI.
- Chapter 4, "Displaying KPIs," explains how to display a KPI in a full page or web part.

Chapter 1: Installation

Before you can begin using the key performance indicators and metrics provided with Business Portal, you must install the Business Intelligence feature.

This information is divided into the following sections:

- *Install Microsoft SQL Server Reporting Services 2008*
- *Install the Business Intelligence feature*

Install Microsoft SQL Server Reporting Services 2008

Before you install Business Intelligence feature, you must install and configure Reporting Services 2008, and then deploy Microsoft Dynamics GP Reporting Services reports. You also must set up security for Reporting Services reports.

Reporting Services 2008 is required for the Business Intelligence feature, but you can use either the SQL Server 2008 database engine or the SQL Server 2005 database engine for Microsoft Dynamics GP.

The Business Intelligence feature contains predefined Reporting Services KPIs and metrics created using Reporting Services 2008. Your customer data is displayed in these KPIs and metrics in Executive Center dashboard pages. You can use the dashboard pages to organize the metrics for executives. The KPIs and metrics must be deployed before you can access them in a dashboard.

You can use the following checklist as a guide for installing and setting up Reporting Services to use with the Executive Center dashboard pages. For more detailed information about installing and setting up Reporting Services for use with Microsoft Dynamics GP, go to the Microsoft Dynamics GP 2010 documentation resources Web site (http://go.microsoft.com/fwlink/?LinkId=161199) for the most current documentation.

Step	Detail
1. Select a Reporting Services deployment configuration.	You must use Kerberos Authentication with Reporting Services if you are using Windows Authentication and your configuration has SQL Server on one computer and the Web server on another computer. For more information see How to use Kerberos authentication in SQL Server (http://support.microsoft.com/kb/319723/en-us).
2. Install Reporting Services 2008. The configuration options available depend whether you are installing Reporting Services at the same time as other SQL Server components or are installing Reporting Services as an additional component.	During the Reporting Services installation, you can specify one of the following options as the type of Reporting Services installation to create. **Native mode default configuration** Installs a report server instance using the default values for the report server databases, service account, and URL reservations. The report server instance is ready to use after installation is complete. The report server database is created using a local Database Engine instance, and a report server is configured to use default values. **SharePoint mode default configuration** Installs a report server instance using the default values for the report server databases, service account, and URL reservations. The report server database is created in a format that supports content storage and addressing from a SharePoint site. **Unconfigured Reporting Services installation** Installs the report server program files, creates the Report Server service account, and registers the report server Windows Management Instrumentation (WMI) provider. After the installation is complete, you must create the report server database and configure the report server before it can be used.

Step	Detail
3. Configure Reporting Services 2008.	This step is required if you selected the **Unconfigured Reporting Services installation** option when installing Reporting Services.
4. Create a site collection.	This step is required if you installed a SharePoint mode default configuration.
5. Install the SQL Server Reporting Services Add-in for SharePoint Technologies.	This step is required if you installed a SharePoint mode default configuration. For Windows SharePoint Services and Microsoft Office SharePoint Server, see http://go.microsoft.com/fwlink/?LinkId=188858.
6. Install the SQL Server Reporting Services Wizard.	Locate the Microsoft Dynamics GP installation folder that was downloaded to your computer. Browse the folder and double-click the **Setup.exe** file. Under Additional Products, click **SQL Server Reporting Services Wizard**, and then click **Install**.
7. Deploy predefined Reporting Services reports.	On the computer where Reporting Services is installed, open the Microsoft SQL Server Reporting Services Wizard. (**Start > All Programs > Microsoft Dynamics > Business Intelligence > Microsoft SQL Server Reporting Services Wizard**)
8. Use the Reporting Tools Setup window in Microsoft Dynamics GP to define locations of the Report Server, Report Manager, and Reports Library.	In Microsoft Dynamics GP, open the Reporting Tools Setup window. (**Microsoft Dynamics GP menu > Tools > Setup > System > Reporting Tools Setup**) You must define a location for the Reports Library if you have installed Reporting Services using the SharePoint integrated mode.
9. Set up security for Reporting Services.	

Install the Business Intelligence feature

If you did not select to install the Business Intelligence feature when running the Business Portal installation wizard, use the Setup Wizard to add it to your Business Portal installation. If you've installed Business Portal on multiple web servers, you must add the Business Intelligence feature to each of them.

Before installing

Before you can install the Business Intelligence feature, you must:

- Verify that you're registered for Key Performance Indicators in the back office. You can view the applications you're registered for using the Microsoft Dynamics GP Options window. Refer to your Microsoft Dynamics GP documentation for more information.

- Verify that you are a member of the Administrators group on the Business Portal server.

To install the Business Intelligence feature

To install Key Performance Indicators, you must run the Setup Wizard. To start the Setup Wizard, use one of the following methods:

- Locate the Business Portal installation folder that was downloaded to your web server computer. Browse the folder and double-click the **CDSetup.exe** file. Under **Install**, click **Business Portal for Microsoft Dynamics GP**. Click **Add/Remove Features**.

- Open the Add or Remove Programs control panel and select **Business Portal for Microsoft Dynamics GP 2010**. Click **Change** to open the Modify Business Portal Installation window. Click **Add/Remove Features**.

For detailed instructions, refer to the "Additional applications" chapter of the Business Portal Installation Guide.

Chapter 2: Key concepts

The Executive Center displays the Reporting Services KPIs without having to set up and display them in web parts. If you have used KPIs in a previous release of Business Portal and have upgraded to Business Portal for Microsoft Dynamics GP 2010, you can create and display KPIs in a full page or web part.

Before you begin creating KPIs, you should be familiar with several concepts. This information describes these key concepts and provides examples to help you understand them. You can use Reporting Services 2008 to create your own KPIs and metrics to display in the Executive Center site in Business Portal for Microsoft Dynamics GP. The concepts in this chapter describe how to create KPIs using pages within Business Portal.

This information is divided into the following sections:

- *Overview of KPI creation methods*
- *KPI creation method: Use query*
- *KPI creation method: Use existing KPI*
- *KPI creation method: Copy existing KPI*
- *How KPIs are assigned to companies*
- *Select data calculation options*
- *Calculate KPI values for multiple time periods*
- *Display KPI values for multiple time periods*
- *Alert ranges*
- *Related KPIs*
- *Security by roles and groups*

Overview of KPI creation methods

You can create a KPI using a query, by basing it on one or more existing KPIs, or by copying and modifying an existing KPI.

Use query

You can create KPIs that obtain their results by performing a mathematical operation on a specific column of a query. The query must include either a calendar or fiscal date column so the results for specific time periods can be calculated. For example, suppose you create a query that calculates your company's average sales. You specify that this query should include the **Document Date** column so you can calculate the query for specific time periods based on that column—such as the current year and current period.

You can set up the queries before or at the same time you create the KPI you'll be using it for. After you create or select the query that includes the data you'll be monitoring, you'll then select a data column. For example, to calculate the average sales amount, you'd need to select the column that contains sales amounts. You'll then select the math operation you want to perform—that is, the type of calculation you want executed against the query. For example, you can calculate the sum of your company's sales or the average sales amount.

Finally, you'll specify which column in the query contains a calendar date or fiscal time period. This ensures that values will be calculated for the appropriate time periods.

For more information, see *KPI creation method: Use query* on page 10.

Use existing KPI

You can create KPIs that obtain their results by performing mathematical operations on the results of other KPIs. You'll do this by entering an equation that contains existing KPIs.

For example, suppose you've already created two KPIs called Net Sales and Net Receivables. You now want to create a KPI that monitors the receivables turnover. To do so, you'd select the **Use KPI** option and then type the following equation:

"Net Sales"/"Net Receivables"

For more information see, *KPI creation method: Use existing KPI* on page 12.

Copy an existing KPI

You can create a new KPI by making a copy of an existing KPI and modifying it as needed. The modifications you'll make to the new copy of the KPI depend on whether the KPI you're copying and modifying is based on a query or on existing KPIs.

For more information see, *KPI creation method: Copy existing KPI* on page 12. For information about copying other KPIs, see *Copy a KPI* on page 42.

KPI creation method: Use query

If you are going to create KPIs based on queries, you can create the queries you'll need before you begin creating the KPIs. You also can create the queries at the same time you create the KPIs. In either case, the queries must:

- Have a column that contains the data you want to monitor
- Have a column that contains a calendar date or fiscal time period
- Be assigned to a specific company
- Be saved in a shared folder

The following information describes these requirements in greater detail.

Have a column that contains the data you want to monitor Suppose you want to monitor your company's total sales. To do so, you could create a query that displays the amounts of your sales orders and back orders using the Sales Document entity and the SalesDocument - All data permission. The **Document Amount** column in this query contains the data you want to monitor.

In this example, the ***Document Amount*** *column contains the data you want to monitor.*

Document Number	Document Date	Customer Customer ID	Document Amount
ORDST2225	5/23/2007	CENTRALD0001	$1,925.95
STDINV2255	5/23/2007	LASERMES0001	$115.50
STDINV2256	5/23/2007	FRANCHIS0001	$1,070.00
ORDST2223	5/8/2007	AMERICAN0001	$0.00
BKO1005	4/21/2007	BREAKTHR0001	$256.64
BKO1006	4/21/2007	ADAMPARK0001	$352.95
INVSP1005	4/21/2007	ASTORSUI0001	$199.95
INVPS1007	4/12/2007	WESTCENT0001	$99.75
INVSP1003	4/12/2007	COMPUTER0001	$128.35
INVSP1004	4/12/2007	COUNTRYV0001	$89.89
ORDST2226	4/12/2007	AARONFIT0001	$930.20

Have a column that contains a calendar date or fiscal time period Because KPI values are calculated for the time periods you specify, the query must include calendar or fiscal date information. In order for the values to be calculated correctly for the appropriate time periods, you must specify which column in the query contains calendar dates, or which columns contain fiscal years and periods.

If the query contains calendar dates, you can calculate the KPI for both calendar and fiscal periods. However, if the query doesn't contain calendar dates, you can calculate the KPI only for fiscal periods.

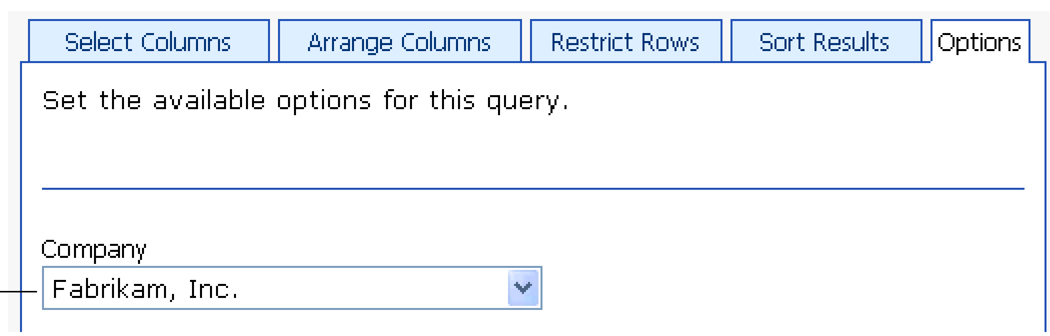
*In this example, the **Document Date** column contains calendar dates.*

Document Number	Document Date	Customer Customer ID	Document Amount
ORDST2225	5/23/2007	CENTRALD0001	$1,925.95
STDINV2255	5/23/2007	LASERMES0001	$115.50
STDINV2256	5/23/2007	FRANCHIS0001	$1,070.00
ORDST2223	5/8/2007	AMERICAN0001	$0.00
BKO1005	4/21/2007	BREAKTHR0001	$256.64
BKO1006	4/21/2007	ADAMPARK0001	$352.95
INVSP1005	4/21/2007	ASTORSUI0001	$199.95
INVPS1007	4/12/2007	WESTCENT0001	$99.75
INVSP1003	4/12/2007	COMPUTER0001	$128.35
INVSP1004	4/12/2007	COUNTRYV0001	$89.89
ORDST2226	4/12/2007	AARONFIT0001	$930.20

Be assigned to a specific company The query that a KPI is based on must be assigned to a specific company. If you did not specify a company when you first created the query, you must modify the query so it is assigned to a company.

To modify a query, you first must display the query. Then click the **Modify Query** button to open the Modify Query page. Click the **Options** tab. Select a specific company from the list (do not select the **<Any>** option), and click **Save**.

*You must select a specific company. Do not select **<Any>**.*



Be saved in a shared folder When you create a query that will be used with a KPI, save the query in a shared folder so you can display the KPI to your Business Portal users. If you save the query in a personal folder, only the Business Portal users who have access to that folder can see the KPI. See the Business Portal Administrator's Guide for more information about sharing queries among users.

KPI creation method: Use existing KPI

The second way of setting up KPIs is by entering an equation that contains existing KPIs.

For example, suppose you've already created two KPIs called Net Sales and Net Receivables. You now want to create a KPI that monitors the receivables turnover, which indicates how efficiently your company receives payment for its products, and how effective its credit policies, payment terms, and collection efforts are. To do so, you'd select the **Use KPI** option and then type the following equation:

"Net Sales"/"Net Receivables"

If you use more than one KPI in an equation, such as in this example, the KPIs must be assigned to the same company. For more information about how multiple companies affect KPI creation, see *How KPIs are assigned to companies on page 13.*

KPI creation method: Copy existing KPI

The third way of setting up KPIs is by copying and modifying an existing KPI. The steps you'll take to modify your new query depend on whether the original KPI is based on a query or on other KPIs. To determine which kind of KPI you're copying, view the information on the KPI Management page. If the KPI was created using a query, information is displayed on the **Query Details** tab. If the KPI was created using an existing KPI, information is displayed on the **Equation** tab.

Copy a KPI based on a query If the KPI you want to copy is based on a query, follow these steps to copy it:

1. Copy the original KPI.

   When you create a copy of a KPI that is based on a query, a copy of that query also is created. The query will be placed in the KPIQueries folder in a separate folder that has the same name as the associated KPI. (For example, if you copy the Actual Expenses - TWO KPI, which is based on the Actual Expenses query, and name the new KPI Revised Actual Expenses, the copy of the Actual Expenses query will be placed in the KPIQueries\Revised Actual Expenses folder.)

2. Change the company the new query is assigned to

3. Make any other necessary modifications to the query, such as changing any account restrictions to fit your company's account structure.

Copy a KPI based on existing KPIs If the KPI is based on existing KPIs, follow these steps to copy it:

1. Copy the component KPIs used in the original KPI's equation.

   When you create a copy of a KPI that is based on a query, a copy of that query also is created. The query will be placed in the KPIQueries folder in a separate folder that has the same name as the associated KPI. (For example, if you copy the Actual Expenses - TWO KPI, which is based on the Actual Expenses query, and name the new KPI Revised Actual Expenses, the copy of the Actual Expenses query will be placed in the KPIQueries\Revised Actual Expenses folder.)

2. Change the company the new queries are assigned to, and make any other necessary modifications to the queries, such as changing any account restrictions to fit your company's account structure.

3. Copy the original KPI.

4. Modify the equation used in the new KPI so it uses the copies of the component KPIs (created in step 1).

To copy and modify an existing KPI, log on to Business Portal using the company you're modifying the KPI for, and then follow the steps described in *Create a KPI by copying an existing KPI* on page 25.

How KPIs are assigned to companies

When you create a KPI, it is automatically assigned to a specific company. The creation method you use determines how a KPI is assigned to a company.

Using a query

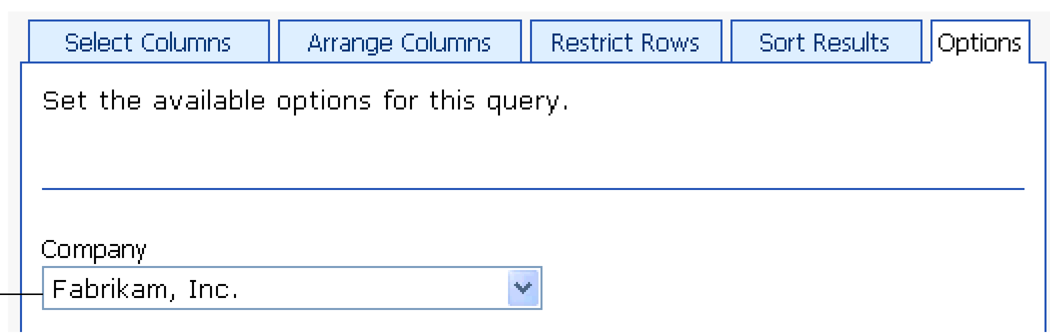
If you use a query to create a KPI, the KPI is automatically assigned to the company the query is assigned to.

For example, if the query you're using is assigned to Fabrikam, Inc., then the KPI also will be assigned to Fabrikam, Inc. You can change the company the KPI is assigned to by changing the company the query is assigned to.

To view the company the query is assigned to, either select an existing query or create a new query, and then click the **Modify Query** button. The Modify Query page appears.

Click the **Options** tab to display the company the query is assigned to.

Your KPI will be assigned to the company shown here.



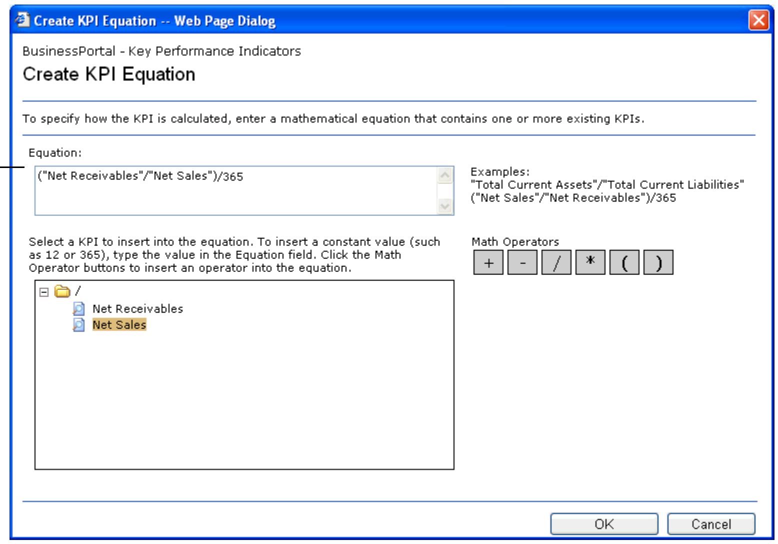
Using an existing KPI

If you create a KPI by using existing KPIs, the new KPI is assigned to the same company as the KPIs used in the equation. For example, suppose you typed the following equation:

(“Net Sales”/“Net Receivables”)/365

The new KPI will be assigned to the same company as the Net Sales and Net Receivables KPIs.

Your new KPI will be assigned to the same company as the KPIs used in this equation.



If you use more than one KPI in an equation, such as in this example, all of them must be assigned to the same company.

You can change the company the KPI is assigned to by changing the company the underlying queries for the KPIs are assigned to.

For example, if the Net Sales and Net Receivables KPIs were based on queries, you’d change the company those queries are assigned to. That would change the company for the Net Sales and Net Receivables KPIs, and for any KPI based on those KPIs.

Select data calculation options

When you create a KPI based on a query, you can select which column includes the data that should be calculated, how the information should be calculated, and how the values should be formatted.

Data column

When you create a KPI, you must select the column from the query that contains the data you want to monitor. The calculation type you select will be executed against this column.

For example, suppose you're using a sales query. To create a KPI that monitors total sales, you might want to calculate the sum of the values in the **Document Amount** column.

*In this example, the **Document Amount** column contains the data you want to monitor.*

Document Number	Document Date	Customer Customer ID	Document Amount
ORDST2225	5/23/2007	CENTRALD0001	$1,925.95
STDINV2255	5/23/2007	LASERMES0001	$115.50
STDINV2256	5/23/2007	FRANCHIS0001	$1,070.00
ORDST2223	5/8/2007	AMERICAN0001	$0.00
BKO1005	4/21/2007	BREAKTHR0001	$256.64
BKO1006	4/21/2007	ADAMPARK0001	$352.95
INVSP1005	4/21/2007	ASTORSUI0001	$199.95
INVPS1007	4/12/2007	WESTCENT0001	$99.75
INVSP1003	4/12/2007	COMPUTER0001	$128.35
INVSP1004	4/12/2007	COUNTRYV0001	$89.89
ORDST2226	4/12/2007	AARONFIT0001	$930.20

Calculation types

When you create a KPI using a query, you must select a calculation—that is, the math operation you want executed against the column in the query that contains the data you want to monitor. The following calculation types are available.

Math operation	Description
Count	Calculates the number of values (rows) in the column.
Sum	Calculates the sum of the values in the column.
Average	Calculates the average value in the column.
Minimum	Calculates the minimum value in the column.
Maximum	Calculates the maximum value in the column.

If you select either **Minimum** or **Maximum**, you also must indicate whether the column you selected contains transaction amounts, general ledger debit amounts, or general ledger credit amounts:

- If you select **Transaction**, both positive and negative numbers are used.
- If you select **GL Debit Account**, positive numbers are used.
- If you select **GL Credit Account**, negative numbers are used.

For example, to create a KPI that determines the largest liability among your general ledger liability accounts, you would select **Maximum** and **GL Credit Account**.

The math operation you select will be executed against the ***Document Amount*** *column.*

Document Number	Document Date	Customer Customer ID	Document Amount
ORDST2225	5/23/2007	CENTRALD0001	$1,925.95
STDINV2255	5/23/2007	LASERMES0001	$115.50
STDINV2256	5/23/2007	FRANCHIS0001	$1,070.00
ORDST2223	5/8/2007	AMERICAN0001	$0.00
BKO1005	4/21/2007	BREAKTHR0001	$256.64
BKO1006	4/21/2007	ADAMPARK0001	$352.95
INVSP1005	4/21/2007	ASTORSUI0001	$199.95
INVPS1007	4/12/2007	WESTCENT0001	$99.75
INVSP1003	4/12/2007	COMPUTER0001	$128.35
INVSP1004	4/12/2007	COUNTRYV0001	$89.89
ORDST2226	4/12/2007	AARONFIT0001	$930.20

Formatting options

When you create a KPI, you can select how the calculated values should be formatted. You also can specify the number of decimal places that should be displayed.

The following table lists the formatting options that are available.

Option	Example
Number	1,256.00
Currency	$1,256.00
Percent	1256.00%
Quantity	1,256

If the KPI is based on an equation that contains a ratio and you want the calculated value to be formatted as a percentage, you should multiply the ratio by 100.

For example, suppose you want to create a KPI called Gross Margin and you want the calculated value to be formatted as a percentage. You would need to type the following equation:

((“Sales”-“Cost of Sales”)/“Sales”)*100

By multiplying by 100, you would ensure that the calculated value is formatted correctly. For example, the value would be displayed as 60% instead of .60%.

If you later decide that you don’t want the value formatted as a percentage, remove *100 from the equation and choose a different formatting option. For instructions, see *Modify the equation a KPI is based on* on page 49 and *Modify how a KPI value is formatted* on page 47.

Calculate KPI values for multiple time periods

When you create a KPI using the Create KPI pages, you must select which time periods to calculate values for. For example, you can create a KPI that calculates the total sales for the current week, month, and quarter.

The time periods that are available in the **Time Periods** section on the Create KPI pages are determined by the selection you made in the **Data Calculation** section (if you're using a query) or on the Create KPI Equation page (if you're using existing KPIs):

- If you're using a query and you select a column containing calendar dates in the **Time Periods** section, you can calculate values for calendar and fiscal time periods. See Example 1 for more information.
- If you're using a query and you select fiscal year and period columns in the **Time Periods** section, you can calculate values for fiscal time periods only. See Example 2 for more information.
- If you're using existing KPIs, the new KPI you create can include only the time periods that the existing KPIs have in common. See Example 3 for more information.

Example 1

Suppose you're creating a KPI using a query. The query has a column that contains calendar dates, and you select that column name in the **Data Calculation** section. When you get to the **Time Periods** section, you can select calendar time periods (year, quarter, month, week, or day) and fiscal time periods (year or fiscal period).

Example 2

Suppose you're creating a KPI using a query. The query has a column that contains fiscal years and fiscal periods, and you select both of these columns in the **Time Periods** section. When you get to **Time Periods to calculate and include in this KPI**, you can select only fiscal time periods.

Example 3

Suppose you're creating a KPI that is based on an equation using the Net Sales and Net Receivables KPIs. The following table shows the time periods that each of the component KPIs includes, and the time periods available in the new KPI. Note that only the time periods included in both component KPIs are available in the new KPI. You won't be able to calculate values for the *Current week* period, because it isn't included in the Net Receivables KPI, and you won't be able to calculate values for the *Previous year*, *Previous quarter*, or *Previous month* periods, because they aren't included in the Net Sales KPI.

Net Sales KPI periods	Net Receivables KPI periods	Periods available in new KPI
Current year	Current year	Current year
	Previous year	
Current quarter	Current quarter	Current quarter
	Previous quarter	
Current month	Current month	Current month
	Previous month	
Current week		

Display KPI values for multiple time periods

When you create a KPI, you select the time periods to *calculate* values for. When you create a KPI web part, you select the time periods to *display* on the KPI page or web part.

When you're displaying KPIs in web parts, you can display only the time periods for which you've calculated values for the KPI.

For example, when you created a KPI, you might have chosen to calculate the actual expenses values for the current year and previous year. When you display this KPI in one web part or page, you might choose to display only the current year's expenses, but display both the current and previous year expenses in another web part or page.

Alert ranges

When you create a KPI, you can define warning and critical alert ranges to indicate when the calculated values don't meet specified target values. An alert range is a percentage deviation above and/or below a target value. A target value can be based on fixed values, previous time periods, or seasonal values:

Fixed values You can enter a specific target value for each time period. For example, if you're creating a KPI that tracks your total sales, you can enter a targeted sales amount for the week, month, and year.

Previous time periods You can create a target value that is based on information from a previous time period. For example, suppose you're creating a KPI that tracks your yearly expenses. You might want to know when the expenses for this year have exceeded those of last year.

Seasonal values You can set up different target valuesto allow for seasonal fluctuations. For example, monthly sales amounts might vary, depending on the season. You can enter different target values for different time periods to account for this seasonal variation.

Related KPIs

When you create a KPI, you can select KPIs that are related to it. Then when users view a new KPI on a Business Portal page or in a web part, they can click the KPI and choose **View Related KPIs**. The related KPIs are displayed in a grid.

For example, suppose you've created a KPI called Current Assets. When you created this KPI, you selected the Current Liabilities KPI as a related KPI. When you view the Current Assets KPI, you can link to the Current Liabilities KPI. Conversely, when you view the Current Liabilities KPI, you can link to the Current Assets KPI.

When the KPI Scheduler runs, it checks the values of each related KPI, and if the values are not equal, it logs an entry in the KpiScheduler.log file. These entries are for informational purposes only. For more information about the KPI Scheduler log file, see Viewing the KpiScheduler.log file on page 66.

Security by roles and groups

To use Business Portal, all users must be assigned to both Microsoft Business Framework (MBF) roles and SharePoint groups. MBF roles determine the access that users have to data, while SharePoint groups determine the access users have to the sites, pages, and other elements that display data. Security for KPIs is controlled by these roles and groups.

Who can create or modify KPIs

To create KPIs, you must have the following access rights:

- You must be a site collection administrator for the Business Portal site collection.
- You must be a member of the Administrator role and have access to the KPI Management page (on the Site Settings page, under **Key Performance Indicators**, click **KPI management**). By default, only users who belong to the BP Administrator group have access to this page.

Who can view calculated KPI values

When you create a KPI, you must specify which roles will be able to view the calculated values when they're displayed on a KPI page or in a web part.

You also must assign the KPI Default Permission to the selected roles using the Roles page, so the users within those roles can view the KPIs. See the Business Portal Administrator's Guide for more information about assigning data permissions to roles.

By default, the Administrator role has access to all data in Business Portal, so you don't need to add this data permission for the Administrator role.

For example, suppose you have two KPIs: Total Sales and Total Expenses. You've given the Executive role permission to view both KPIs, and you've given the Sales Manager role permission to view only the Total Sales KPI. Both roles have the KPI Default Permission assigned to them.

When John—who is assigned to the Executive role—views the KPI on a page, he'll see the following.

Total Expenses vs Sales

KPI Name	This YR(Fis)	Last YR(Fis)
Total Sales	$948,925.45	$739,408.68
Total Expenses	$481,414.75	$457,283.14

When Sue—who is assigned to the Sales Manager role—views the KPI on a page, she'll see the following.

Total Expenses vs Sales

KPI Name	This YR(Fis)	Last YR(Fis)
Total Sales	$948,925.45	$739,408.68

Who can recalculate KPI values

When you create the query for a KPI, you'll specify which entity and data permission will be used in the query. You'll then specify which roles will be able to view the calculated values when they're displayed on a KPI page or in a web part, and you'll give the selected roles access to the KPI Default Permission so the users within those roles can view the KPIs.

However, users will be able to recalculate these KPI values only if the data permissions that are used in the query are assigned to the users or their respective roles.

For example, suppose you have a KPI that is based on a query that uses the Sales Document entity and the SalesDocument - All data permission. If users have the SalesDocument - All data permission assigned to them, those users can recalculate the KPI values. Otherwise, those users can only view the KPI values that were calculated the last time the KPI Scheduler ran.

Who can view the Executive Center site

By default, users must belong to one of the following SharePoint groups and its associated MBF role to access the Executive Center site.

SharePoint group	MBF role
BP Administrator	Administrator
BP Executive	Executive

Chapter 3: Creating KPIs

The Executive Center displays the Reporting Services KPIs without having to set up and display them in web parts. You can use Reporting Services 2008 to create your own KPIs and metrics to display in the Executive Center site in Business Portal for Microsoft Dynamics GP. If you have used KPIs in a previous release of Business Portal and have upgraded to Business Portal for Microsoft Dynamics GP 2010, you can create and display KPIs in a full page or web part.

You can use the Create KPI pages within Business Portal to set up a KPI that uses a query, that is based on on existing KPIs, or that is a copy of an existing KPI. This information guides you through each option.

Before creating a KPI, review Chapter 2, "Key concepts." This chapter explains concepts you'll need to understand in order to create a KPI.

This information is divided into the following sections:

Create a KPI using a query

You can use the Create KPI pages to create a KPI using a query. Before creating a KPI, review Chapter 2, "Key concepts." This chapter explains concepts you'll need to understand in order to create a new KPI.

Users must be site collection administrators for the Business Portal site collection to create KPIs. See *Security by roles and groups* on page 18 for more information.

Use the following steps to create a KPI using a query. If you'll be saving your KPI to a new folder, you should use the Organize KPIs page to create the folder before you create the KPI. (You also can use this page to organize your KPIs and folders. See Chapter 7, "Administering KPI folders," for more information.)

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

2. Under **Key Performance Indicators**, click **KPI management**. The KPI Management page appears.

3. In the **Pick a Task** area of the **KPI List** web part, click **Create a new KPI** to open the first Create KPI page.

4. In the **Name and Description** area, type a name and a brief description of the KPI.

5. In the **Creation Method** area, select **Use Query**. You can select an existing query that includes the data you want to monitor or create a new query. You also can modify the query you select or create. See *KPI creation method: Use query* on page 10 for more information about creating KPIs based on queries.

   For more information about creating queries, see the Business Portal User's Guide.

6. In the **Data Calculation** section, select the column from the query that contains the data you want to monitor. The math operation you select in step 7 will be executed against this column. See *Select data calculation options* on page 14 for more information.

7. Select the type of calculation to perform on the data. For example, if the query contains sales data, you might want to calculate the sum of all sales, or the average sales amount.

   If you select either **Minimum** or **Maximum**, you also must select whether to find the minimum or maximum value for a transaction, general ledger debit account, or general ledger credit account. See *Select data calculation options* on page 14 for more information.

8. Select how the values should be formatted. For example, if the query contains sales data, you might want the value to be formatted as currency with two decimal places. Values are rounded to the specified number of decimal places.

9. In the **Time Periods** section, specify which column in the query contains calendar dates or fiscal years so values will be calculated correctly for the appropriate time periods:

   - If the query has a column that contains calendar dates, select the name of that column from the **Calendar date column** list.

   - If the query has a column that contains fiscal years, select the name of that column from the **Fiscal year column** list.

   - If the query also has a column that contains fiscal periods, select the name of that column from the **Fiscal period column** list.

10. Select the time periods for which a value will be calculated. For example, you can create a KPI that calculates total sales for the current week, month, and quarter. For more information about how time periods affect calculations, see *Calculate KPI values for multiple time periods* on page 16.

11. Click **Next** to continue to the next Create KPI page.

*When you click **Next**, the information you entered is saved. You can click **Back** to return to the first Create KPI page without losing your changes.*

12. In the **Alert Ranges** area, specify warning and critical alert ranges. For information about setting up alert ranges, see *Set up alert ranges* on page 29.

    If you chose **Seasonal**, continue with step 13. If you chose to base an alert range on a fixed value or time period, continue with step 14.

13. If a target value for one of the alert ranges is based on seasonal values, the **Seasonal Values** section appears. Type a fixed target value for each period or month.

14. In the **Recalculation Rate** area, specify how often the values should be recalculated.

Because the default recalculation rate might not be appropriate for all time periods, you can override the default rate for a particular time period by selecting a new rate in the **Override Default Recalculation Rate** field.

For example, suppose you're creating a KPI that monitors total sales for this fiscal period and the previous fiscal period, and you've chosen **Daily** as the default recalculation rate. Because the value for the previous fiscal period won't change, it's not necessary to recalculate it daily.

In order to recalculate a KPI that is based on a query, users must have access to the specific query. For example, suppose the Total Sales KPI is based on the Sales query. To recalculate the total sales value, users must have access to the Sales query.

15. In the **Related KPIs** area, select the KPIs that are related to the KPI you're creating. This allows you to link from one KPI to another. For more information about related KPIs, see *Related KPIs* on page 18.

16. In the **Roles** area, indicate which roles can view the KPI. For more information about KPI security, see *Security by roles and groups* on page 18.

17. In the **Save to Folder** area, select the folder where the KPI will be saved.

18. Click **OK** to save the KPI. The KPI Management page is redisplayed.

19. Select the new KPI to view its properties in the **View KPI** web part.

    To calculate values for the KPI, click **Calculate Now** on the **General Information** tab. To display these values to Business Portal users, create a KPI page or web part. For more information, see Chapter 4, "Displaying KPIs."

Create a KPI based on existing KPIs

You can use the Create KPI pages to create a KPI using an equation that includes existing KPIs. Before you create a KPI, review Chapter 2, "Key concepts." This chapter explains concepts you'll need to understand in order to create a new KPI.

Users must be site collection administrators for the Business Portal site collection to create KPIs. See *Security by roles and groups* on page 18 for more information.

Use the following steps to create a KPI using one or more existing KPIs. If you'll be saving your KPI to a new folder, you should use the Organize KPIs page to create the folder before you create the KPI. (You also can use this page to organize your KPIs and folders. See Chapter 7, "Administering KPI folders," for more information.)

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

2. Under **Key Performance Indicators**, click **KPI management**. The KPI Management page appears.

3. In the **Pick a Task** area of the **KPI List** web part, click **Create a New KPI** to open the first Create KPI page.

4. In the **Name and Description** area, type a name and a brief description of the KPI.

5. In the **Creation Method** area, select **Use KPI**.

6. Click the **Create KPI Equation** button to open the Create KPI Equation page.

7. Specify how the KPI is calculated by typing an equation. See *KPI creation method: Use existing KPI* on page 12 for more information.

8. Click **OK** to save the equation and return to the Create KPI page.

9. In the **Data Calculation** area, select how the values should be formatted. For example, if the KPI contains sales data, you might want the value to be formatted as currency with two decimal places. Values are rounded to the specified number of decimal places.

10. In the **Time Periods** area, select the time periods for which a value will be calculated. For example, you can create a KPI that calculates total sales for the current week, month, and quarter. For more information about how time periods affect calculations, see *Calculate KPI values for multiple time periods* on page 16.

11. Click **Next** to continue to the next Create KPI page.

*When you click **Next**, the information you entered is saved. You can click **Back** to return to the first Create KPI page without losing your changes.*

12. In the **Alert Ranges** area, specify warning and critical alert ranges. For information about setting up alert ranges, see *Set up alert ranges* on page 29.

    If you chose **Seasonal**, continue with step 13. If you chose to base an alert range on a fixed value or time period, continue with step 14.

13. If a target value for one of the alert ranges is based on seasonal values, the **Seasonal Values** section appears. Type a fixed target value for each period or month.

14. In the **Recalculation Rate** area, specify how often the values should be recalculated.

    Because the default recalculation rate might not be appropriate for all time periods, you can override the default rate for a particular time period by selecting a new rate in **Override Default Recalculation Rate (optional)** field.

    For example, suppose you're creating a KPI that monitors total sales for this fiscal period and the previous fiscal period, and you've chosen **Daily** as the default recalculation rate. Because the value for the previous fiscal period won't change, it's not necessary to recalculate it daily.

If you're creating a KPI based on an equation that uses existing KPIs, the default recalculation rate shouldn't be more frequent than most frequent recalculation rate for the component KPIs.

15. In the **Related KPIs** area, select the KPIs that are related to the KPI you're creating. This allows you to link from one KPI to another. For more information about related KPIs, see *Related KPIs* on page 18.

16. In the **Roles** area, indicate which roles can view the KPI. For more information about KPI security, see *Security by roles and groups* on page 18.

17. In the **Save to Folder** area, select the folder where the KPI will be saved.

18. Click **OK** to save the KPI. The KPI Management page is redisplayed.

19. Select the new KPI to view its properties in the **View KPI** web part.

    To calculate values for the KPI, click **Calculate Now** on the **General Information** tab. To display these values to Business Portal users, create a KPI page or web part. For more information, see Chapter 4, “Displaying KPIs.”

Create a KPI by copying an existing KPI

You can use the KPI Management page to create a KPI by copying and modifying an existing KPI. Before creating a KPI, review Chapter 2, “Key concepts.” This chapter explains concepts you’ll need to understand in order to create a new KPI.

Users must be site collection administrators for the Business Portal site collection to create KPIs. See *Security by roles and groups* on page 18 for more information.

If you’ll be saving your KPI to a new folder, you should use the Organize KPIs page to create the folder before you create the KPI. (You also can use this page to organize your KPIs and folders. See Chapter 7, “Administering KPI folders,” for more information.)

The steps you use to create a KPI by copying an existing KPI depend on whether the KPI that you’re copying is based on a query or other KPIs.

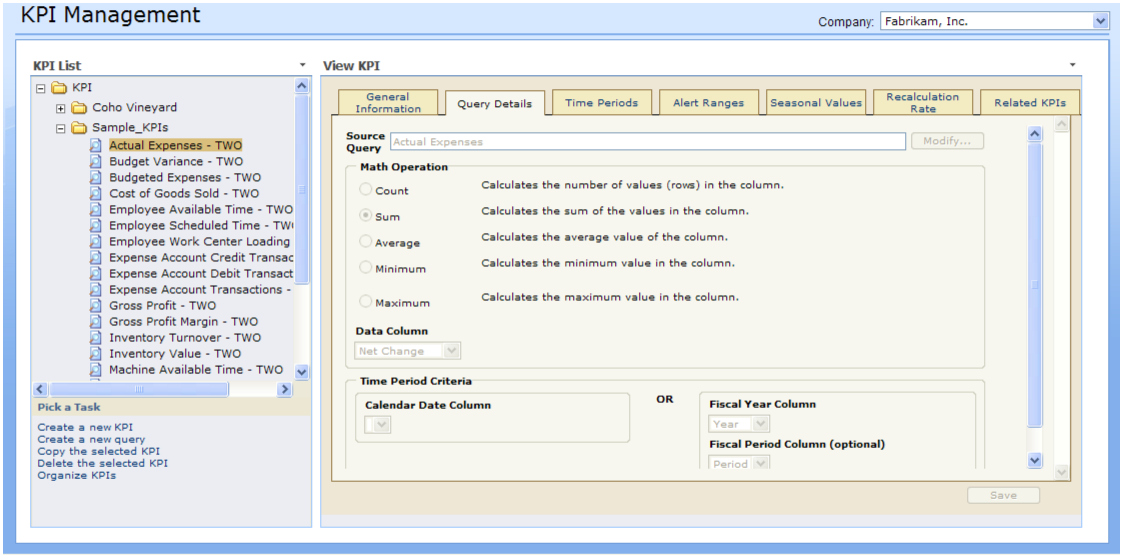
To determine whether a KPI was created based on a query or existing KPIs, view the information on the KPI Management page. If the KPI is based on a query, information is displayed on the **Query Details** tab. If the KPI is based on existing KPIs, information is displayed on the **Equation** tab.

The following examples explain how to copy and modify existing KPIs, depending on whether the KPI is based on a query or KPIs.

Example: Copy an existing KPI based on a query

For this example, suppose you’re copying the Actual Expenses - TWO KPI, which displays the sum of all actual expenses for the sample company, Fabrikam. You want to create a copy of this KPI for your company, Coho Vineyard. You use the following process to copy the KPI.

1. Determine whether the KPI is based on a query or other KPIs View the information for the Actual Expenses - TWO KPI using the KPI Management page. Because information is displayed on the **Query Details** tab for this KPI, you know the KPI is based on a query—in this case, the Actual Expenses query.



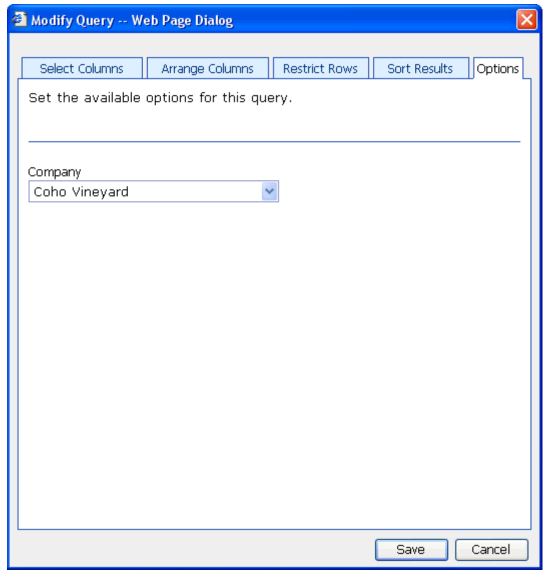
2. Copy the KPI Copy the Actual Expenses - TWO KPI by following the instructions in Copy a KPI on page 42. Name the new KPI Actual Expenses - Coho Vineyard.

When you create a copy of a KPI that is based on a query, a copy of that query also is created. The query will be placed in the KPIQueries folder in a separate folder that has the same name as the new KPI.

3. Modify information for the source query Select the new KPI, Actual Expenses - Coho Vineyard, on the KPI Management page. Click the **Query Details** tab and then click **Modify** to open the Modify Query page, where you modify any necessary information for the Actual Expenses query, such as adding or rearranging columns.

Depending on your company's account structure, you might need to change the account number range for the query using the **Restrict Rows** tab on the Modify Query page. You also might need to change any date restrictions. See the Business Portal User's Guide for more information.

Click the **Options** tab on the Modify Query page and select the company to assign the query to. In this case, assign the query to Coho Vineyard, because that's the company you're using the new KPI with.



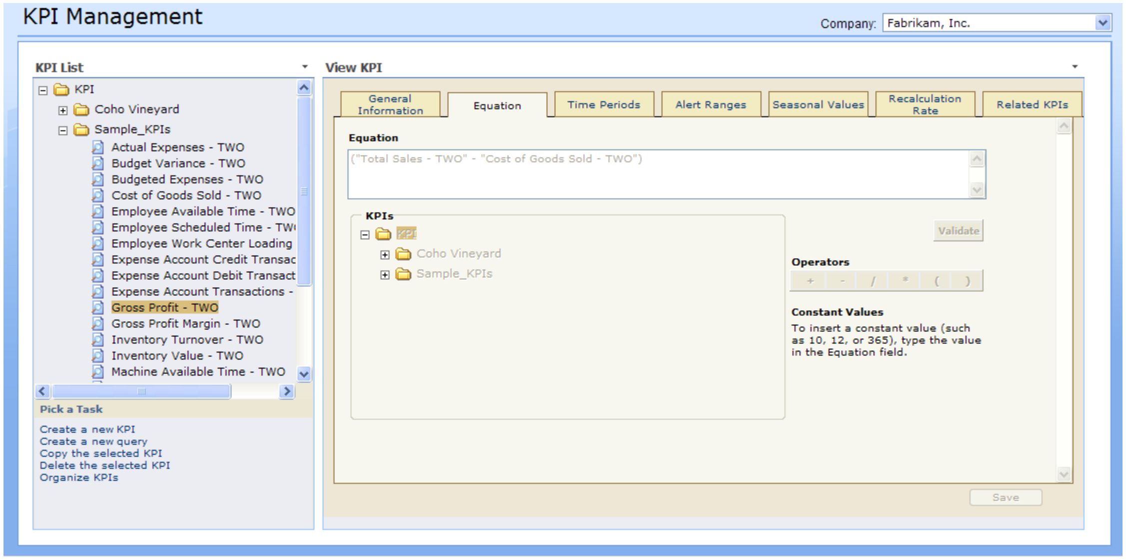
4. Select any related KPIs Click the **Related KPIs** tab and select which KPIs should be related to this KPI. See *Related KPIs* on page 18 for more information.

5. Save your changes Click **Save** on the Modify Query page, and then click **Save** again in the **View KPI** web part.

Example: Copy an existing KPI based on other KPIs

For this example, suppose you're copying a KPI called Gross Profit - TWO. This KPI analyzes the profits and expenses for a company called Fabrikam. You want to create a copy of this KPI for your company, Coho Vineyard.

1. Determine whether the KPI is based on a query or other KPIs View the information for the Gross Profit - TWO KPI using the KPI Management page. Because information is displayed on the **Equation** tab for this KPI, you know the KPI is based on existing KPIs.



2. Determine what the component KPIs are Look at the equation displayed on the **Equation** tab to learn what the component KPIs are–these are the KPIs you'll need to make copies of. In this example, the equation includes the Total Sales - TWO and Cost of Good Sold - TWO KPIs.

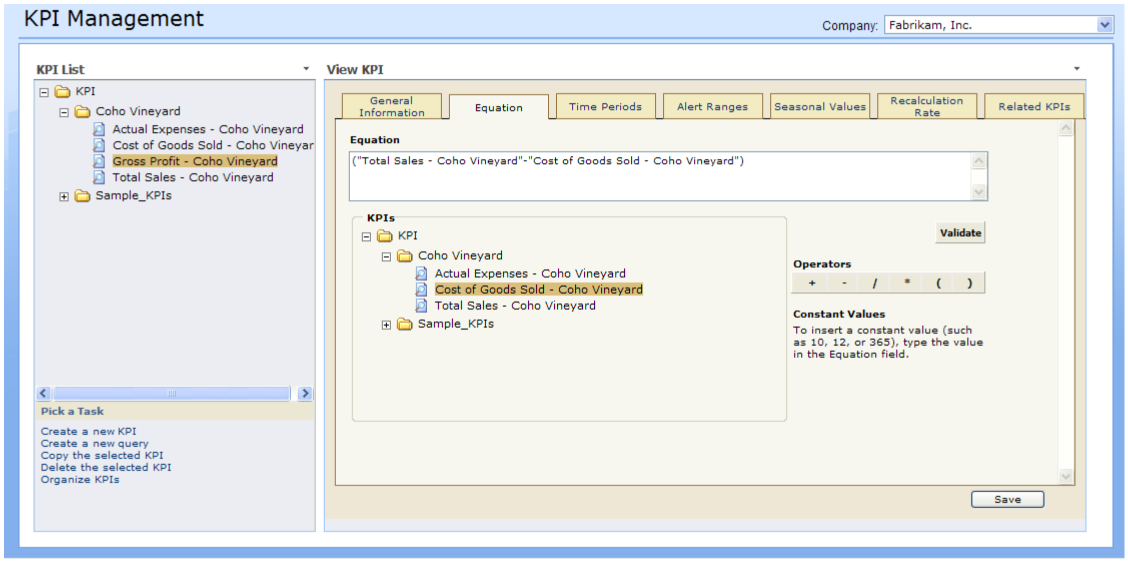
3. Copy the component KPIs used in the equation Copy the Total Sales - TWO and Cost of Goods Sold - TWO KPIs by following the instructions in *Copy a KPI* on page 42. Name the new copies Total Sales - Coho Vineyard and Cost of Goods Sold - Coho Vineyard.

Because the Total Sales and Cost of Goods KPIs are based on the COGS and Total Sales queries, modify those queries to specify the new company the query is assigned to, Coho Vineyard. See the previous example for more information.

Depending on your company's account structure, you might need to change the account number range for the query using the **Restrict Rows** tab on the Modify Query page. You also might need to change any date restrictions. See the Business Portal User's Guide for more information.

4. Copy the KPI from step 1 Copy the Gross Profit - TWO KPI by following the instructions in *Copy a KPI* on page 42, and name the new copy Gross Profit - Coho Vineyard.

5. Modify the equation for the new KPI Click the **Equation** tab on the KPI Management page and modify the equation to include the new KPIs from step 3—the Total Sales - Coho Vineyard and Cost of Goods Sold - Coho Vineyard KPIs.



6. Validate the equation Click **Validate** to verify the equation.

7. Select any related KPIs Click the **Related KPIs** tab and select which KPIs should be related to this KPI. See *Related KPIs* on page 18 for more information.

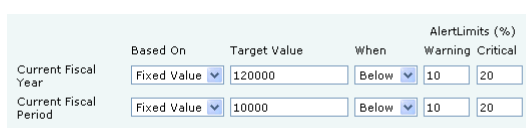
8. Save your changes Click **Save** in the **View KPI** web part.

Set up alert ranges

When you create a KPI using the Create KPI pages, you can set up alert ranges by using a fixed value, a previous time period, or seasonal values. See *Alert ranges* on page 18 for more information about alert ranges.

To set up an alert range using a fixed value:

1. From the **Based On** list, select **Fixed Value**.



2. Type the target value for each time period in the **Target Value** field.

   Using the total sales example, you'd type the sales amount you want to achieve for the week, month, and year.

3. In the **When** field, select whether the alert ranges indicate when you're above the target value, below it, or both.

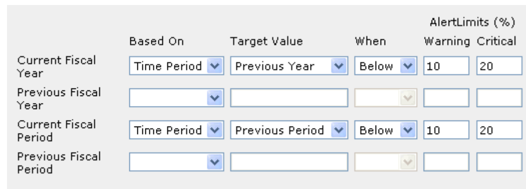
   Continuing with the total sales example, you'd want the warning and critical alert ranges to indicate when the total sales amount is *below* the target value.

4. Type percentages for the critical and warning alert ranges.

   The critical alert range is more severe than the warning alert range, and its value must be higher. For example, the warning range might be defined as 10% or more below the target value, and the critical range might be defined as 20% or more below the target value.

To set up an alert range using a previous time period:

1. From the **Based On** list, select **Time Period**.



2. From the **Target Value** list, select the time period to base the target value on.

   Using the expenses example, you'd select **Previous Year**. This means that you want the alert ranges for this year's expenses to be based on last year's expenses.

3. In the **When** field, select whether the alert ranges indicate when you're above the target value, below it, or both.

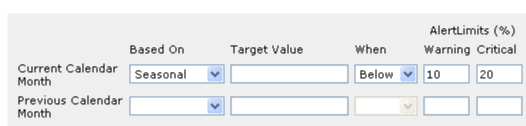
   Continuing with the expenses example, you'd want the warning and critical alert ranges to indicate when your expenses are *above* the target value.

4. Type percentages for the critical and warning alert ranges.

   For example, the warning range might be defined as 10% or more above the target value, and the critical range might be defined as 20% or more above the target value.

To set up an alert range using seasonal values:

1. From the **Based On** list, select **Seasonal**.



2. Leave the **Target Value** field blank. You'll type the seasonal target values in the **Seasonal Values** section.

3. In the **When** field, select whether the alert ranges indicate when you're above the target value, below it, or both.

   Continuing with the total sales example, you'd want the warning and critical alert ranges to indicate when the total sales amount is *below* the target value.

4. Type percentages for the critical and warning alert ranges.

For example, the warning range might be defined as 10% or more below the target value, and the critical range might be defined as 20% or more below the target value.

5. In the **Seasonal Values** section, type the target value for each period or month.

Chapter 4: Displaying KPIs

The Executive Center displays the Reporting Services KPIs without having to set up and display them in web parts. If you have used KPIs in a previous release of Business Portal and have upgraded to Business Portal for Microsoft Dynamics GP 2010, you can create and display KPIs in a full page or web part.

After you create a KPI, you'll need to display it to your Business Portal users. To do so, you'll add a KPI web part to a Business Portal page, and then define which KPIs to display. You can display a Reporting Services 2008 KPI or metric by adding a Dynamics GP report viewer web part to a Business Portal page. This information describes the various ways to display a KPI, and explains how to add a web part to a Business Portal page.

This information is divided into the following sections:

- *KPI display styles*
- *Exporting KPI values to Microsoft Excel*
- *Add a KPI web part to a Business Portal page*
- *Add a Dynamics GP report viewer web part to a Business Portal page*

KPI display styles

KPIs are displayed using KPI web parts on Business Portal pages. You can display one or more web parts on the page. There are three display styles to choose from, and the display style is defined per web part, so the web parts on a page can use different display styles.

Lists

Lists can display multiple KPIs. The list layout makes it easy to compare multiple values for multiple time periods.

You can set up lists to indicate when a value is within a critical or warning alert range. For example, orange text indicates when a value is within the warning alert range, and red text indicates when a value is within the critical alert range.

Yearly Sales by Salesperson

KPI Name	This YR(Fis)	Last YR(Fis)
Ian's Sales	$2,779.00	$719.70
Francine's Sales	$45,638.90	$45,718.50
Gary's Sales	$20,318.00	$23,795.80
Greg's Sales	$245,635.80	$91,216.20

When you click the arrow next to a value, a list displays the following options:

View Details If the KPI was created using a query, clicking **View Details** displays the query rows that were used to calculate the value. If the KPI was created by entering an equation that contains existing KPIs, clicking **View Details** displays the KPIs used in the equation.

View Related KPIs Displays the KPIs that are associated with the KPI you selected.

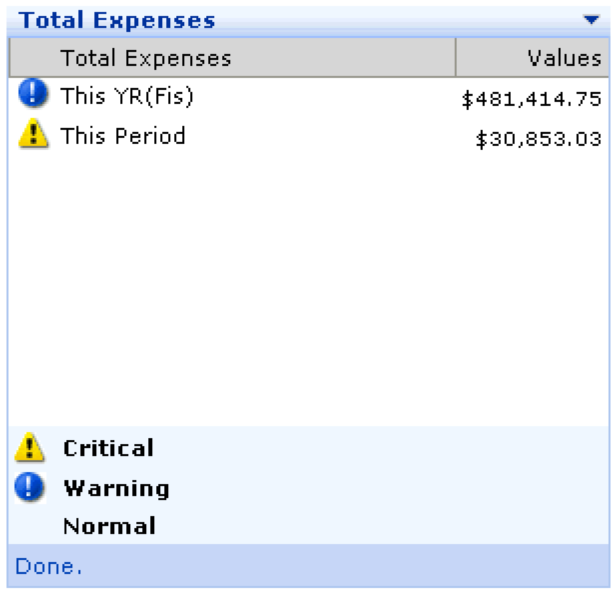
Recalculate Data Recalculates the value.

About this KPI Displays details about the KPI, such as when it was last calculated and what its warning and critical alert ranges are.

Export to Excel Copies all values displayed in the list to a Microsoft Excel® spreadsheet. For more information, see *Exporting KPI values to Microsoft Excel* on page 36.

Alert lists

Alert lists display multiple KPIs and use icons to indicate whether the values fall within alert ranges.



When you click a value, a drop-down list displays the following options:

View Details If the KPI was created using a query, clicking **View Details** displays the query rows that were used to calculate the value. If the KPI was created by entering an equation that contains existing KPIs, clicking **View Details** displays the KPIs used in the equation.

View Related KPIs Displays the KPIs that are associated with the KPI you selected. For more information about related KPIs, see *Related KPIs* on page 18.

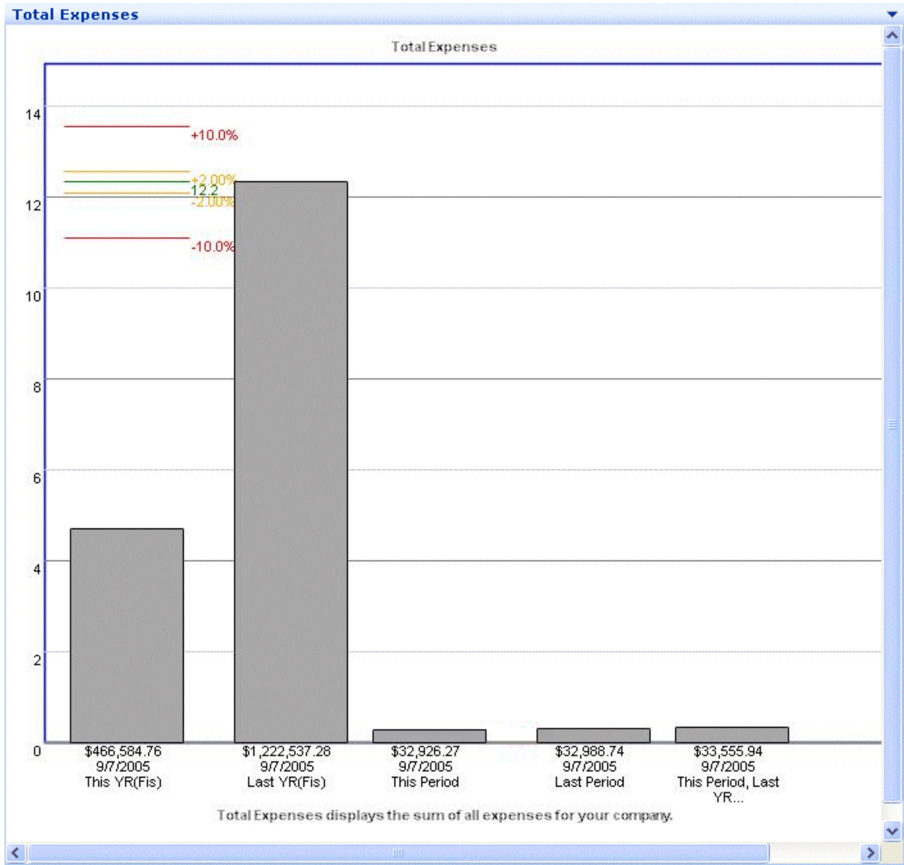
Recalculate data Recalculates the values.

About this KPI Displays details about the KPI, such as when it was last calculated and what its warning and critical alert ranges are.

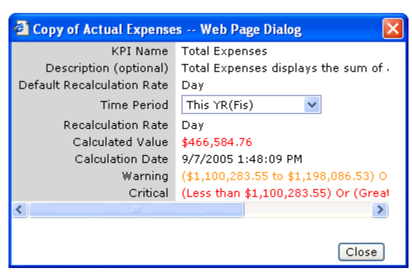
Export to Excel Copies all values displayed in the alert list to an Excel spreadsheet. For more information, see *Exporting KPI values to Microsoft Excel* on page 36.

Bar charts

A bar chart displays a single KPI and graphically illustrates your company's performance for specific time periods.



When you click the bar chart, a page appears that displays additional details about the KPI, such as when it was last calculated and what its warning and critical alert ranges are.



Exporting KPI values to Microsoft Excel

In List and Alert List KPI web parts, users can export the information that's displayed to Microsoft Excel.

In order for users to export information to Excel from a Business Portal KPI web part, you must install Microsoft Office Web Components. If Microsoft Office 2007 or 2010 is installed, you must install the Office XP Web Components. If necessary, the Office XP Web Components (owc10.exe) can be downloaded from the Download Center (www.microsoft.com/downloads).

Add a KPI web part to a Business Portal page

KPIs are displayed in one or more KPI web parts on a page. Regardless of how you display the KPI, the roles you assigned using the Create KPI page affect who can view the KPI web part. For more information about roles, see *Security by roles and groups* on page 18. For information about creating a Business Portal page, see the Business Portal Administrator's Guide.

The following steps describe how to add a KPI web part to a Business Portal page.

1. Go to the Business Portal page where you want to add the KPI web part.
2. On the **Site Actions** menu, click **Edit Page**. In the zone where you'll be adding the web part, click **Add a Web Part**. The **Add Web Parts to [*zone*]** page appears.

3. In the **All Web Parts** list, select the KPI web part to add. You can select **KPI Alert Web Part**, **KPI Bar Chart Web Par**t, or **KPI List Web Part**.
4. Click **Add**. The web part is added to the selected zone on the page.

5. Within the new web part, click **open the tool pane**. The KPI web part tool pane appears. In the **KPI** section, click **Select Existing KPIs.** The Select KPI page opens.

6. Select the KPIs to display in this web part.

   - If you chose the **KPI List Web Part** or **KPI Alert Web Part** style, you can display multiple KPIs in the web part.

   - If you chose the **KPI Bar Chart Web Part** style, you can display only one KPI in the web part.

7. In the **Time Periods** area, click **Select Time Periods.** The Select Time Periods page opens.

8. Select the time periods to display in this web part. Only those time periods that you selected to calculate values for when you created the KPI will appear here. For example, when you created the KPI, you might have chosen to calculate a value for the current year and the previous year. You now might choose to display the value for only the current year in this KPI web part.

If you're displaying multiple KPIs in the same web part, you'll select the time periods specifically for each KPI rather than for the web part as a whole.

9. Select the options to display in the web part. For example, if you chose the **KPI Bar Chart Web Part** style, you can choose whether to display the description, warning alerts, critical alerts, and calculation date.

10. Click **Apply** to save the changes to the page. Click **OK** to save the changes and close the tool pane.

Add a Dynamics GP report viewer web part to a Business Portal page

Dynamics GP Report Viewer web parts are used to view company-specific Microsoft SQL Server Reporting Services reports. Dynamics GP report viewer web parts should be used only on sites in the Business Portal site collection. For more information about Dynamics GP report viewer web parts, see the Business Portal Administrator's Guide.

The following steps describe how to add a Dynamics GP report viewer web part to a Business Portal page.

1. Go to the Business Portal page where you want to add the Dynamics GP report viewer web part.

2. Click **Site Actions** > **Edit Page**. In the zone where you'll be adding the web part, click **Add a Web Part**. The **Add Web Parts to [*zone*]** page appears.

3. In the **All Web Parts** list, select **Dynamics GP Report Viewer**.

4. Click **Add**. The web part is added to the selected zone on the page.

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

6. 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.

7. Specify how to display the toolbar in the web part.

8. Specify how to display the parameters 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.

9. Specify whether to have the drillthrough report to display in a new window.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.

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

You must define the height and width settings for the appearance of the web part. If you don't define the height and width, only the toolbar will appear when you render a report.

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

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

Part 2: Administration

This part of the documentation describes administrative tasks you can perform to maintain KPIs, and the pages and web parts used to display them. Troubleshooting tips also are discussed.

This information is divided into the following topics:

- Chapter 5, "Administering KPIs," explains how to modify KPIs, such as modifying how KPIs are calculated and how values are formatted.
- Chapter 6, "Administering KPI web parts," explains how to modify the KPI pages and web parts you've created.
- Chapter 7, "Administering KPI folders," explains how to manage the folders that appear in the **KPI List** web part on the KPI Management page.
- Chapter 8, "Troubleshooting," explains some issues you might encounter when using the Key Performance Indicators application, and how to resolve them.

Chapter 5: Administering KPIs

The Executive Center displays the Reporting Services KPIs without having to set up and display them in web parts. If you have used KPIs in a previous release of Business Portal and have upgraded to Business Portal for Microsoft Dynamics GP 2010, you can create and display KPIs in a full page or web part.

This information explains how to modify KPIs, such as modifying the name or description, how the KPI is calculated, and how the value is formatted using pages within Business Porta.

This information is divided into the following sections:

- *Rename a KPI*
- *Copy a KPI*
- *Copy a KPI across companies*
- *Move a KPI to another folder*
- *Modify a KPI description*
- *Modify how a KPI value is formatted*
- *Modify which roles can view a KPI*
- *Modify the query a KPI is based on*
- *Modify the equation a KPI is based on*
- *Modify the time periods used in a KPI calculation*
- *Modify the alert ranges for a KPI*
- *Modify how often a KPI is recalculated*
- *Modify which KPIs are related to a specific KPI*
- *Delete a KPI*

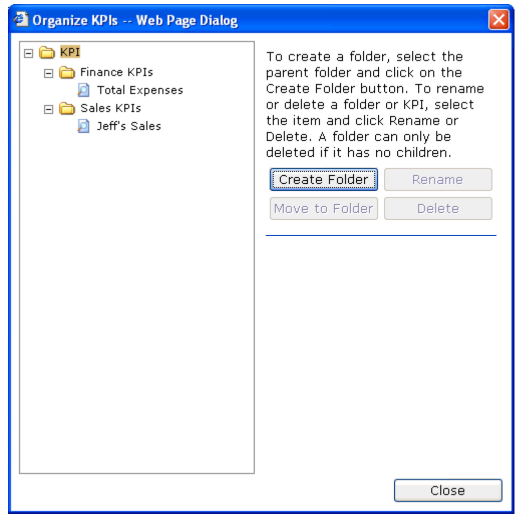
Rename a KPI

Use the Organize KPIs page to rename a KPI at any time. For example, you might want to rename a KPI if you want to make a copy of it and use the existing name for the new KPI.

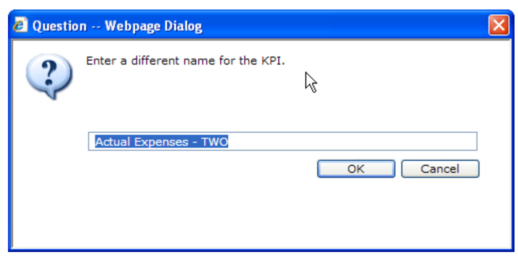
1. Go to the Administration Home page on the Business Portal web site.

2. Under **Key Performance Indicators**, click **KPI management**. The KPI Management page appears.

3. In the **Pick a Task** area of the **KPI List** web part, click **Organize KPIs**. The Organize KPIs page appears.



4. Select the KPI to rename and click **Rename**. Another page appears.



5. Type the new name of the KPI.

6. Click **OK**.

Copy a KPI

You can use the Copy KPI page to copy a KPI. You then can modify it as needed. You might want to copy a KPI if you want to create a similar KPI with minor modifications, or if you want to create a copy of a KPI to use with another company. See *Copy a KPI across companies* on page 43 for more information about using the same KPIs with multiple companies.

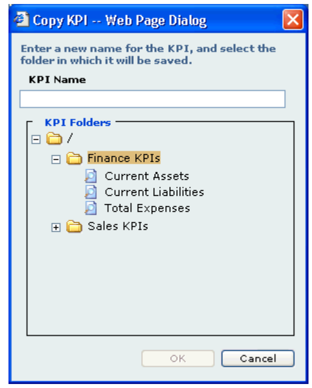
When you create a copy of a KPI that is based on a query, a copy of that query also is created. The query will be placed in the KPIQueries folder in a separate folder that has the same name as the associated KPI. For example, if you copy the Actual Expenses - TWO KPI, which is based on the Actual Expenses query, and name the new KPI Revised Actual Expenses, the copy of the Actual Expenses query will be placed in the KPIQueries\Revised Actual Expenses folder.

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

2. Under **Key Performance Indicators**, click **KPI management**. The KPI Management page appears.

3. In the **KPI List** web part, select the KPI to copy.

4. In the **Pick a Task** area of the **KPI List** web part, click **Copy the selected KPI**. The Copy KPI page appears.



5. Type a name for the new KPI and select the folder where it will be saved.

6. Click **OK**.

Copy a KPI across companies

You can use the same KPI for multiple companies by creating a copy of the KPI to use with each company. See *Copy a KPI* on page 42 for more information about copying KPIs. You can copy a KPI that was created based on a query or an existing KPI.

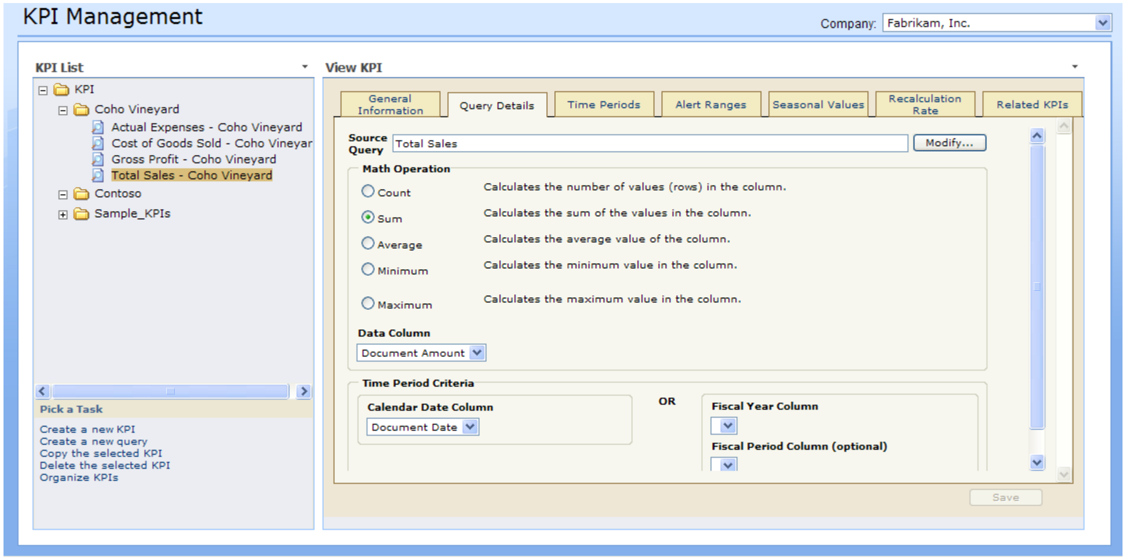
To determine whether a KPI was created based on a query or an existing KPI, view the information on the KPI Management page. If the KPI was created using a query, information is displayed on the **Query Details** tab. If the KPI was created using an existing KPI, information is displayed on the **Equation** tab.

The following examples explain how to copy KPIs across companies depending on whether the KPI is based on a query or another KPI.

Example: Copy a KPI based on a query across companies

For this example, suppose you're copying a KPI called Total Sales - Coho Vineyard, which calculates the total sales for a company called Coho Vineyard. You want to create a copy of this KPI for another company, Contoso. You use the following process to copy the KPI.

1. Determine whether the KPI is based on a query or other KPIs View the information for the Total Sales - Coho Vineyard KPI using the KPI Management page. Because information is displayed on the **Query Details** tab for this KPI, you know the KPI is based on a query—in this case, the Total Sales query.



2. Copy the KPI Copy the Total Sales - Coho Vineyard KPI by following the instructions in *Copy a KPI* on page 42, and name the new KPI Total Sales - Contoso.

When you create a copy of a KPI that is based on a query, a copy of that query also is created. The query will be placed in the KPIQueries folder in a separate folder that has the same name as the new KPI.

3. Modify any information for the source query Select the new KPI, Total Sales - Contoso, on the KPI Management page. Click the **Query Details** tab and then click **Modify** to open the Modify Query page, where you modify any necessary information for the Sales query, such as adding or rearranging columns.

If your companies use different account structures, you might need to change the account number range for the query using the **Restrict Rows** tab on the Modify Query page. See the Business Portal User's Guide for more information.

4. Modify the company the query is assigned to Click the **Options** tab on the Modify Query page and select the company to assign the query to. In this case, assign the query to Contoso, because that's the company you're using the new KPI with.

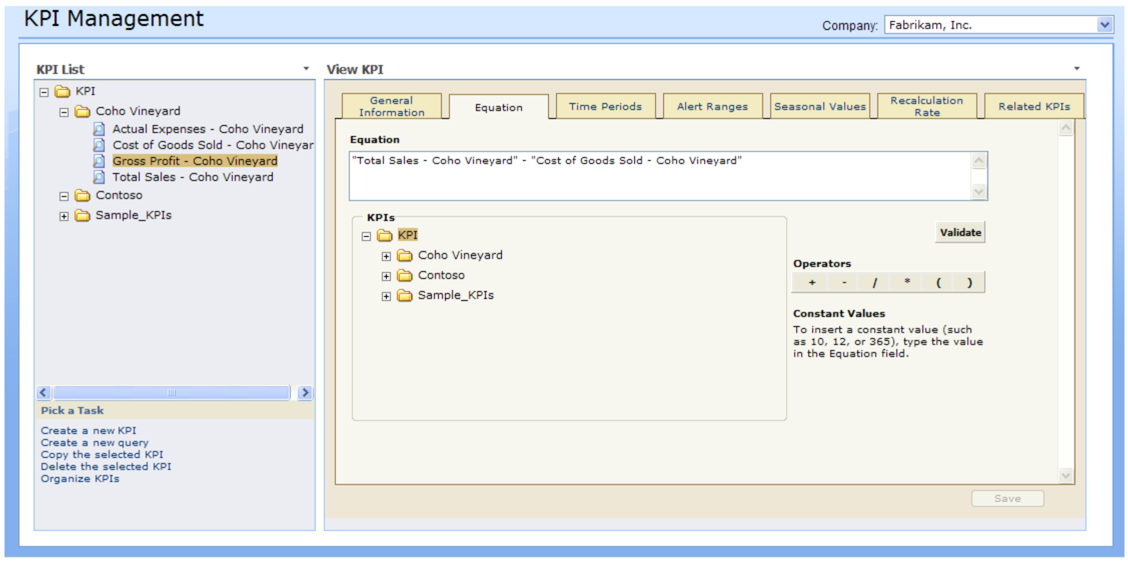
5. Modify any related KPIs Click the **Related KPIs** tab and select which KPIs should be related to this KPI. See *Related KPIs* on page 18 for more information.

6. Save your changes Click **Save** on the Modify Query page, and then click **Save** again in the **View KPI** web part.

Example: Copy a KPI based on another KPI across companies

For this example, suppose you're copying a KPI called Gross Profit - Coho Vineyard. This KPI calculates the gross profit margin for a company called Coho Vineyard. You want to create a copy of this KPI for another company, Contoso.

1. Determine whether the KPI is based on a query or other KPIs View the information for the Gross Profit - Coho Vineyard KPI using the KPI Management page. Because information is displayed on the **Equation** tab for this KPI, you know the KPI is based on two other KPIs—in this case, the Total Sales _ Coho Vineyard KPI and the Cost of Goods Sold - Coho Vineyard KPI.



2. Examine the equation Look at the equation displayed on the **Equation** tab so you know which other KPIs to make copies of. The equation contains the Total Sales _ Coho Vineyard KPI and the Cost of Goods Sold - Coho Vineyard KPI.

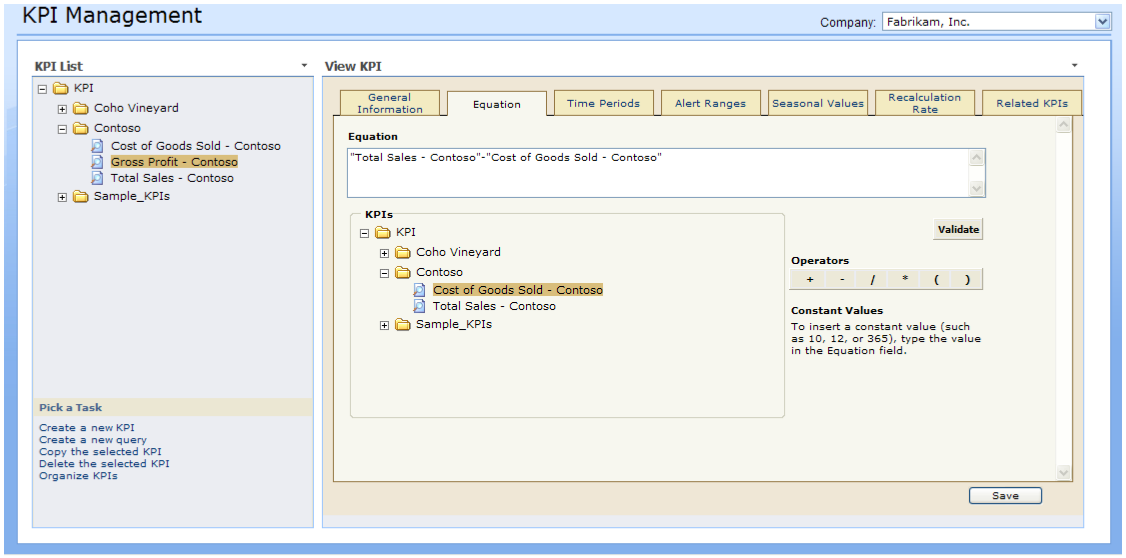
3. Copy the KPIs used in the equation Copy the Total Sales _ Coho Vineyard KPI and the Cost of Goods Sold - Coho Vineyard KPI by following the instructions in *Copy a KPI* on page 42, and name the new copies Total Sales - Contoso and Cost of Goods Sold - Contoso.

Because the Total Sales _ Coho Vineyard KPI and the Cost of Goods Sold - Coho Vineyard KPI are based on queries, modify those queries to specify the new company, Contoso. See the previous example for more information.

If your companies use different account structures, you might need to change the account number range for queries using the **Restrict Rows** tab on the Modify Query page. See the Business Portal User's Guide for more information.

4. Copy the KPI from step 1 Copy the Gross Profit - Coho Vineyard KPI by following the instructions in *Copy a KPI* on page 42, and name the new copy Gross Profit - Contoso.

5. Modify the equation for the new KPI Click the **Equation** tab on the KPI Management page and modify the equation to include the new KPIs from step 3—Total Sales - Contoso and Cost of Goods Sold - Contoso.

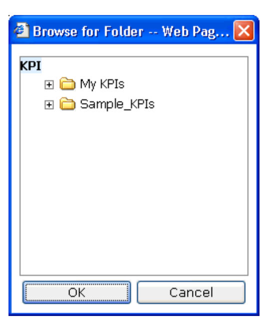


6. Validate the query and save the equation Click **Validate** to validate the query, and then click **Save**.

Move a KPI to another folder

You can use the Organize KPIs page to move a KPI to another folder.

1. Go to the Administration Home page on the Business Portal web site.
2. Under **Key Performance Indicators**, click **KPI management**. The KPI Management page appears.
3. In the **Pick a Task** area of the **KPI List** web part, click **Organize KPIs**. The Organize KPIs page appears.
4. Select the KPI to move and click **Move to Folder**. The Browse for Folder page appears.



5. Select the folder to move the KPI to and click **OK**.

Modify a KPI description

You can use the KPI Management page to modify the description for a KPI. For example, if you created a copy of a KPI to use with another company, you can change the description to reflect that change.

1. Go to the Administration Home page on the Business Portal web site.
2. Under **Key Performance Indicators**, click **KPI management**. The KPI Management page appears.
3. In the **KPI List** web part, select the KPI to modify.
4. In the **View KPI** web part, click the **General Information** tab.
5. In the **Description** field, type a new description of the KPI and click **Save**.

Modify how a KPI value is formatted

Use the KPI Management page to modify how values are formatted. For example, you might want to change a KPI that displays a ratio from a decimal number to a percentage.

1. Go to the Administration Home page on the Business Portal web site.
2. Under **Key Performance Indicators**, click **KPI management**. The KPI Management page appears.
3. In the **KPI List** web part, select the KPI to modify.
4. In the **View KPI** web part, click the **General Information** tab.
5. Using the **Value Type** list, indicate whether the value should be formatted as a decimal number, currency, percentage, or quantity.
6. In the **Decimal Places** field, type the number of decimal places to display for the calculated value and click **Save**.

Modify which roles can view a KPI

Use the Modify Roles page to modify which roles can view a KPI when it's displayed on a page or in a web part. For example, if only users in the Salesperson role can view the KPI, you might want to add the Sales Manager role.

You also must give the selected roles access to the KPI Default Permission using the Roles page, so the users within those roles can view the KPIs within the specified web parts. See the Business Portal Administrator's Guide for more information about assigning data permissions to roles.

1. Go to the Administration Home page on the Business Portal web site.
2. Under **Key Performance Indicators**, click **KPI management**. The KPI Management page appears.
3. In the **KPI List** web part, select the KPI to modify.

4. In the **View KPI** web part, click the **General Information** tab.

5. Click the **Modify** button next to the **View Roles** field. The Modify Roles page appears.

6. Indicate which roles can view the KPI by selecting the appropriate check boxes. Clear the check box next to each role you no longer want to be able to view the KPI.

7. Click **OK** to save your changes on the Modify Roles page.

8. Click **Save** in the **View KPI** web part.

Modify the query a KPI is based on

If a KPI is based on a query, you can use the Modify Query page to modify the query and how the KPI is calculated.

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

2. Under **Key Performance Indicators**, click **KPI management**. The KPI Management page appears.

3. In the **KPI List** web part, select the KPI that's based on the query to modify.

4. In the **View KPI** web part, click the **Query Details** tab.

5. Click the **Modify** button next to the **Source Query** field. The Modify Query page appears.

6. Modify the query as needed and click **Save**. For more information about queries, see the Business Portal User's Guide.

7. The **View KPI** web part is redisplayed. Select a math operation, which is the type of calculation to execute against the query. For example, if the query contains sales data, you might want to calculate the sum of all sales or the average sales amount.

8. In the **Data Column** list, select the column (from the query) that contains the data you want to monitor. The math operation you selected in step 7 will be executed against this column. See *Select data calculation options* on page 14 for more information.

9. In order for values to be calculated correctly for the appropriate time periods, you must specify which column in the query contains calendar dates or fiscal years:

   - If the query has a column that contains calendar dates, select the name of that column from the **Calendar Date Column** list.

   - If the query has a column that contains fiscal years, select the name of that column from the **Fiscal Year Column** list.

   - If the query also has a column that contains fiscal periods, select the name of that column from the **Fiscal Period Column** list.

10. Click **Save**.

Modify the equation a KPI is based on

You can use the KPI Management page to modify the equation a KPI is based on. You can modify the equation only if the KPI is based on another KPI.

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

2. Under **Key Performance Indicators**, click **KPI management**. The KPI Management page appears.

3. In the **KPI List** web part, select the KPI to modify.

4. In the **View KPI** web part, click the **Equation** tab.

5. Modify the equation as needed. For example, suppose you have two KPIs called Net Sales and Net Receivables. To create a KPI that calculates the receivables turnover, you would type the following equation:

   "Net Sales"/"Net Receivables"

6. Click **Validate** to be sure the equation you typed is valid, and then click **Save**.

Modify the time periods used in a KPI calculation

You can use the KPI Management page to modify the time periods to calculate values for.

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

2. Under **Key Performance Indicators**, click **KPI management**. The KPI Management page appears.

3. In the **KPI List** web part, select the KPI to modify.

4. In the **View KPI** web part, click the **Time Periods** tab.

5. Select the check box next to each time period to calculate a value for. Clear the check box next to each time period you no longer want to calculate a value for.

6. Click **Save**.

Modify the alert ranges for a KPI

You can use the KPI Management page to modify the alert ranges for a KPI. For information about and examples of how to set up alert ranges, see *Alert ranges* on page 18.

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

2. Under **Key Performance Indicators**, click **KPI management**. The KPI Management page appears.

3. In the **KPI List** web part, select the KPI to modify.

4. In the **View KPI** web part, click the **Alert Ranges** tab.

5. In the **Based On** list, indicate whether the target value is a fixed value, based on a previous time period, or a seasonal value. For more information about how target values are defined, see *Alert ranges* on page 18.

    - If you selected **Fixed Value**, type the target value in the **Alert Target Value** field.

    - If you selected **Time Period**, select the time period to base the alert range on from the **Alert Target Value** list.

    - If you selected **Seasonal**, type the seasonal values on the **Seasonal Values** tab.

6. In the **When** field, select whether the alert ranges indicate when you're above the target value, below it, or both.

    For example, if you're monitoring total sales, you might want the warning and critical alert ranges to indicate when the total sales amount is *below* the target value.

7. Type percentages for the critical and warning alert ranges.

    For example, if you're monitoring total sales, the warning range might be defined as 10% or more below the target value, and the critical range might be defined as 20% or more below the target value.

8. Click **Save**.

9. If a target value for one of the alert ranges is based on seasonal values, click the **Seasonal Values** tab. Type a fixed target value for each period or month and click **Save**.

Modify how often a KPI is recalculated

You can use the KPI Management page to modify how often a KPI is recalculated.

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

2. Under **Key Performance Indicators**, click **KPI management**. The KPI Management page appears.

3. In the **KPI List** web part, select the KPI to modify.

4. In the **View KPI** web part, click the **Recalculation Rate** tab.

5. From the **Default Recalculation Rate** list, select how often to recalculate the KPI.

   Because the default recalculation rate might not be appropriate for all time periods, you can override the default rate for a particular time period by selecting a new rate in the **Override Default Recalculation Rate** area.

   For example, suppose you're creating a KPI that monitors total sales for this fiscal period and the previous fiscal period, and you've chosen **Daily** as the default recalculation rate. Because the KPI value for the previous fiscal period won't change every day, it's not necessary to recalculate it daily.

6. Click **Save**.

Modify which KPIs are related to a specific KPI

You can use the KPI Management page to modify which KPIs are related to a specific KPI. For more information about related KPIs, see *Related KPIs* on page 18.

KPI relationships are two-way connections; if you relate one KPI to another, both KPIs automatically are related to each other. Likewise, removing a relationship removes it for both KPIs.

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

2. Under **Key Performance Indicators**, click **KPI management**. The KPI Management page appears.

3. In the **KPI List** web part, select the KPI to modify.

4. In the **View KPI** web part, click the **Related KPIs** tab.

5. Select the check box next to each KPI to associate with the KPI you selected in the **KPI List** web part. Clear the check box next to each KPI you no longer want associated with the current KPI.

6. Click **Save**.

Delete a KPI

You can use the KPI Management page to delete KPIs you no longer use.

If you delete a KPI that is a part of the equation for another KPI, that equation will no longer be able to calculate any values. You must modify the equation. See *Modify the equation a KPI is based on* on page 49 for more information.

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

2. Under **Key Performance Indicators**, click **KPI management**. The KPI Management page appears.

3. In the **KPI List** web part, select the KPI to delete.

4. In the **Pick a Task** area of the **KPI List** web part, click **Delete the selected KPI**.

If you delete a KPI that is the only one in a web part, you then can delete the web part. For more information about deleting web parts, see the Business Portal Administrator's Guide.

5. A message appears, asking you to confirm the deletion. Click **Yes**.

Chapter 6: Administering KPI web parts

The Executive Center displays the Reporting Services KPIs without having to set up and display them in web parts. If you have used KPIs in a previous release of Business Portal and have upgraded to Business Portal for Microsoft Dynamics GP 2010, you can create and display KPIs in a full page or web part.

This information explains how to modify the KPI web parts you've created. You also can modify the Dynamics GP report viewer web part. The procedure you'll use to modify a web part depends on how the web part is displayed.

This information is divided into the following sections:

Modify a bar chart

A bar chart can display only one KPI. You can make several changes to a bar chart, including modifying which KPI and time periods that are displayed, and whether the description, the alert levels, and the calculation date are displayed.

1. Go to the KPI bar chart web part to modify.
2. On the **Site Actions** menu, click **Edit Page**.
3. Click **edit** on the KPI bar chart web part menu and click **Modify Shared Web Part**.
4. In the web part tool pane, modify which elements to display in the bar chart. You can modify the following:
   - KPI
   - Time periods
   - Description
   - Warning alert
   - Critical alert
   - Calculation date
5. Click **Apply** to save the changes. Click **OK** to save the changes and close the tool pane.

Modify a list

You can change which KPIs and time periods are displayed in a list, and whether the alerts will be displayed.

1. Go to the KPI list web part to modify.
2. On the **Site Actions** menu, click **Edit Page**.
3. Click **edit** on the KPI list web part menu and click **Modify Shared Web Part**.

4. In the web part tool pane, modify which elements to display in the list. You can modify the following:

   - KPI
   - Time periods
   - Alerts

5. Click **Apply** to save the changes. Click **OK** to save the changes and close the tool pane.

Modify an alert list

You can modify which KPIs and time periods are displayed in an alert list. You can also choose whether the icons used to indicate alert ranges are displayed, which ones should be used, and whether a legend describing the alert icons whould appear.

1. Go to the KPI alert list web part to modify.

2. On the **Site Actions** menu, click **Edit Page**.

3. Click **edit** on the KPI alert list web part menu and click **Modify Shared Web Part**.

4. In the web part tool pane, modify which elements to display in the alert list. You can modify the following:

   - KPI
   - Time periods
   - Alert indicators
   - Legend

5. Click **Apply** to save the changes. Click **OK** to save the changes and close the tool pane.

Modify a report viewer

You can change how to display the toolbar and the parameters in the web part. You also can change the report's relative path and specify whether the drillthrough report should display in a new window.

1. Go to the Dynamics GP report viewer web part to modify.

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

3. Click **edit** on the Dynamics GP report viewer web part menu and click **Modify Shared Web Part**.

4. In the web part tool pane, modify which elements to display in the report viewer. You can modify the following:

   - Relative Report Path
   - Toolbar Display Mode
   - Parameter Area Display Mode
   - Show Drillthrough Report in a New Window

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**.

Chapter 7: Administering KPI folders

The Executive Center displays the Reporting Services KPIs without having to set up and display them in web parts. If you have used KPIs in a previous release of Business Portal and have upgraded to Business Portal for Microsoft Dynamics GP 2010, you can create and display KPIs in a full page or web part.

This information explains how to manage the folders you'll use to organize your KPIs; these folders appear in the **KPI List** web part. The information in this chapter describe how to manage the folders using pages within Business Portal.

This information is divided into the following sections:

- *Create a KPI folder*
- *Rename a KPI folder*
- *Move a KPI folder*
- *Delete a KPI folder*

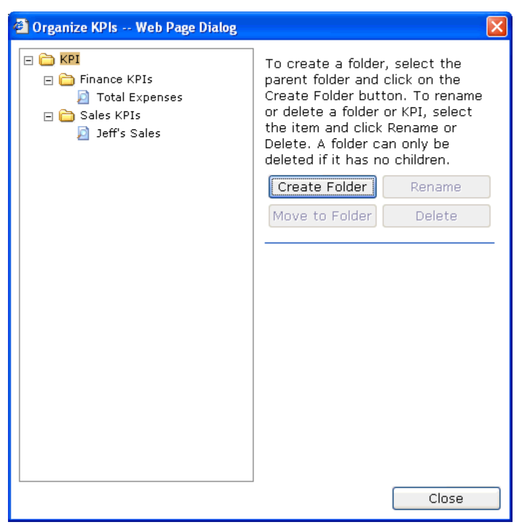
Create a KPI folder

You can use the Organize KPIs page to create a KPI folder. You might want to create multiple folders to help organize KPIs according to the company they're assigned to or the data they represent, such as sales or financial data.

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

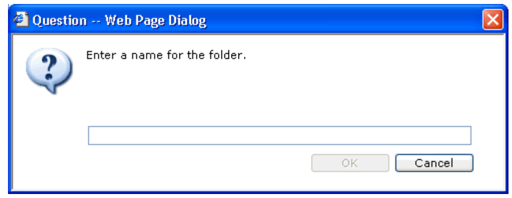
2. Under **Key Performance Indicators**, click **KPI management**. The KPI Management page appears.

3. In the **Pick a Task** area of the **KPI List** web part, click **Organize KPIs**. The Organize KPIs page appears.



4. Select the parent folder, which is the folder that will contain the new folder.

5. Click **Create Folder**. A page appears.



6. Type a name for the new folder.

7. Click **OK** and then click **Close**.

Rename a KPI folder

You can use the Organize KPIs page to rename a KPI folder.

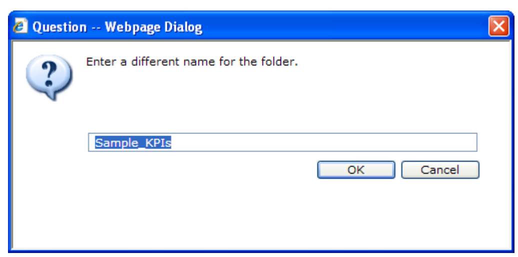
1. Go to the Administration Home page on the Business Portal web site.

2. Under **Key Performance Indicators**, click **KPI management**. The KPI Management page appears.

3. In the **Pick a Task** area of the **KPI List** web part, click **Organize KPIs**. The Organize KPIs page appears.

4. Select the folder to rename.

5. Click **Rename**. A page appears.



6. Type a new name for the folder.

7. Click **OK** and then click **Close**.

Move a KPI folder

You can use the Organize KPIs page to move a KPI folder to a new location.

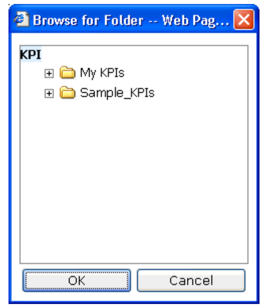
1. Go to the Administration Home page on the Business Portal web site.

2. Under **Key Performance Indicators**, click **KPI management**. The KPI Management page appears.

3. In the **Pick a Task** area of the **KPI List** web part, click **Organize KPIs**. The Organize KPIs page appears.

4. Select the folder to move.

5. Click **Move to Folder**. The Browse for Folder page appears.



6. Select the parent folder, which is the folder that will contain the folder that you're currently moving.

7. Click **OK** and then click **Close**.

Delete a KPI folder

You can use the Organize KPIs page to delete a KPI folder. You can't delete a folder that contains KPIs. You first must either delete the KPIs or move them to another folder.

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

2. Under **Key Performance Indicators**, click **KPI management**. The KPI Management page appears.

3. In the **Pick a Task** area of the **KPI List** web part, click **Organize KPIs**. The Organize KPIs page appears.

4. Select the folder to delete.

5. Click **Delete**.

6. A message appears, asking you to confirm the deletion. Click **Yes** and then click **Close**.

Chapter 8: Troubleshooting

If you have used KPIs in a previous release of Business Portal and have upgraded to Business Portal for Microsoft Dynamics GP 2010, you can create and display KPIs in a full page or web part. The troubleshooting information explains some issues you might encounter when using and how to resolve them. This information doesn't apply to KPIs created using Reporting Services 2008.

This information is divided into the following sections:

- *KPI values are not being recalculated*
- *Access denied error appears when attempting to view KPI details*
- *KPIs on center site home pages not displaying information*
- *Viewing the KpiScheduler.log file*
- *White spaces on Executive Center site pages*

KPI values are not being recalculated

If KPI values aren't being recalculated, do the following:

Check the scheduled task Verify that a scheduled task has been created to run the KPI Scheduler.

To create a scheduled task for the KPI Scheduler:

1. Open the Scheduled Task Wizard window.
   Start > **Control Panel** > **Scheduled Tasks** > **Add Scheduled Task**

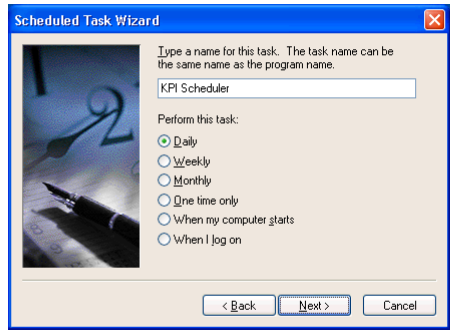
2. Click **Next**. The next window of the wizard appears.

3. Click **Browse** to open the Select Program to Schedule window.

4. Browse to the Microsoft.BusinessPortal.Kpi.KpiScheduler.exe file.

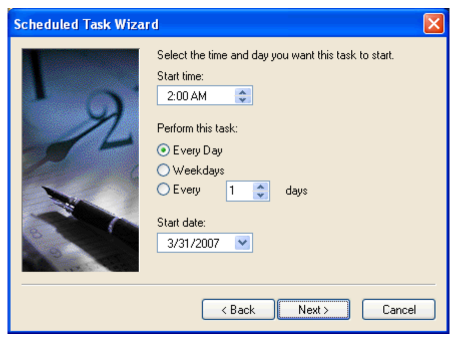
   By default, this file is located in the Business Portal bin folder. The bin folder is located in the directory specified by the Internet Information Services (IIS) virtual server you've set up for Business Portal. (If Business Portal was installed to the Default Web Site, the bin folder is located in C:\Inetpub\wwwroot\wss\VirtualDirectories*port_number*, where *port_number* is the port where you installed Windows SharePoint Services.)

5. Select the file and click **Open**. The next window of the wizard appears.



6. Name the task KPI Scheduler and select the **Daily** option.

7. Click **Next**. The next window of the wizard appears.



8. Do the following:

   - In the **Start time** field, type or select the time the KPI Scheduler should run. We recommend that you select an early morning hour, such as 2:00 AM. That way, values will be calculated correctly for the current day, and your system's resources are not likely to be heavily used at that time.

   - Select the **Every Day** option.

   - In the **Start date** field, type today's date.

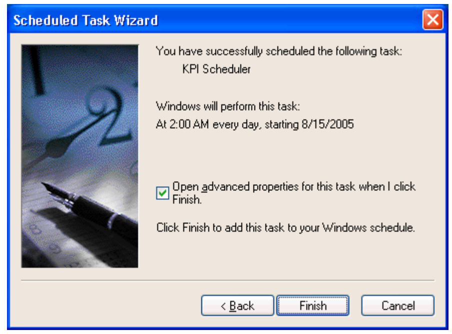
9. Click **Next**. The next window of the wizard appears.

10. Type the Windows user account name and password you created for the KPI Scheduler. Format the account name in this way:

    DomainName\UserName

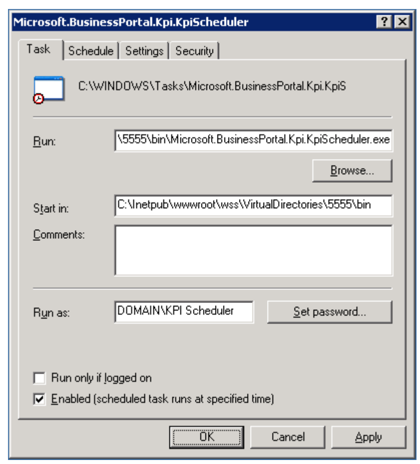
    The Windows user account information that you enter here must meet the requirements listed in To create a local Windows user account for the KPI Scheduler: on page 64.

11. Click **Next**. The next window of the wizard appears.



12. Select the **Open advanced properties for this task when I click Finish** check box.

13. Click **Finish**. The KPI Scheduler window appears.



The **Run** field displays the location of the following file:

Microsoft.BusinessPortal.Kpi.KpiScheduler.exe.

14. If this file location isn't displayed within quotation marks, insert quotation marks before and after the file location name.

15. After the last quotation mark, insert a space and type the following:

    KpiScheduler.log

For example, if you installed Business Portal in the default location, the following text should be displayed in the **Run** field:

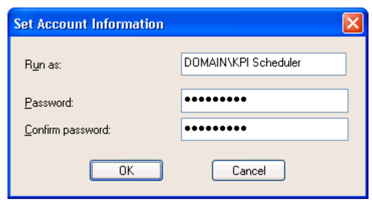
"C:\Inetpub\wwwroot\wss\VirtualDirectories*port_number*\bin\Microsoft.BusinessPortal.Kpi.KpiScheduler.exe" KpiScheduler.log

(Note: *port_number* is the port where you installed Windows SharePoint Services.)

This log file is used to record any errors that occur when the KPIs are recalculated. See *Viewing the KpiScheduler.log file* on page 66 for more information.

16. Verify that the **Enabled** check box is selected.

17. Click **OK**. The Set Account Information window appears.



18. Type and confirm the password for the KPI Scheduler user account.

19. Click **OK**.

Check the Windows user account Verify that the scheduled task you created is running under a Windows user account that meets the requirements listed in below. If you're using a Windows user account that has a password that changes, you might need to reset the password in the properties window for the scheduled task.

To reset the password:

1. Open Control Panel.

2. Double-click **Scheduled Tasks**. The Scheduled Tasks window appears.

3. Double-click the **KPI Scheduler** task. The KPI Scheduler window appears.

4. In the **Task** tab, click **Set password**. The Set Password window appears.

5. Type and confirm the password for the Windows user account.

6. Click **OK**.

To create a local Windows user account for the KPI Scheduler:

The KPI Scheduler is an application that recalculates KPI values to reflect your current data. It determines which KPIs are scheduled to be updated and recalculates the values for them.

You must create a task that will run the KPI Scheduler. When creating this task, you'll need to enter a Windows user account on the Business Portal server. We recommend you create a local Windows user account specifically for running the KPI Scheduler. The account should meet the following criteria:

User name We recommend you name the account KPI Scheduler.

Password We recommend that the password for the account never be modified.

User group The account must be a member of the Users group on the Business Portal server.

Permissions The account must have access to the following files.

File	File location	Permission
Microsoft.BusinessPortal.Kpi.KpiScheduler.exe	C:\Inetpub\wwwroot\wss\VirtualDirectories*port_number*\bin (where *port_number* is the port where you installed Windows SharePoint Services)	Read & Execute Read
KpiScheduler.log		Read Write

Business Portal role You must create a user in Business Portal associated with this account and assign it to the Administrator role. For information about assigning a user to a Business Portal role, see the Business Portal Administrator's Guide.

Access denied error appears when attempting to view KPI details

A user may receive an access denied error when attempting to view the details of a KPI. The error occurs because the user has permission to view the KPI, but not the data that makes up the KPI details. To grant a specific user or all users permission to access KPI details, we recommend giving the specific user or the BP Internal User SharePoint group access to the KPI Details page.

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

2. Click **View All Site Content** on the Quick Launch.

3. On the All Site Content page, click the **Key Performance Indicator Pages** document library.

4. On the Key Performance Indicator Pages page, hold the mouse pointer over **KPI Details** so that a down arrow appears. Click the down arrow and select **Manage Permission**s from the menu.

5. On the Permissions: KPI Details page, click **Actions > Edit Permissions**, then click **New > Add Users**.

6. On the Add Users: KPI Details page, type **BP Internal User** in the **Users/ Groups** field, and mark the **Read - Can view onl**y option. Click **OK**.

KPIs on center site home pages not displaying information

When you add three or more KPI list or KPI alert web parts to a center site home page, the KPIs assigned to those web parts might not display information. If you encounter this issue, you should create one or two KPI list web parts and display multiple KPIs in those web parts, rather than displaying each KPI in a separate web part.

See Chapter 4, "Displaying KPIs," for more information about displaying multiple KPIs in a KPI list web part.

Viewing the KpiScheduler.log file

The KPI Scheduler is an application that recalculates KPI values to reflect your current data. It determines which KPIs are scheduled to be recalculated and recalculates values for them.

If any errors occur during recalculations, those errors are recorded in the KpiScheduler.log file. By default, this file is located in C:\Inetpub\wwwroot\wss\VirtualDirectories*port_number*\bin, where *port_number* is the port where you installed Windows SharePoint Services. You can view the contents of this file in a text editor application such as Notepad.

When the KPI Scheduler runs, it checks the values of each related KPI. If the values aren't equal, an entry is logged in the KpiScheduler.log file. These entries are for informational purposes only.

White spaces on Executive Center site pages

The Executive Center site pages are best viewed on screens with resolutions of 1024 x 768. If your screen has a higher resolution, you might see large white spaces to the right of the middle column on these pages.

You can adjust the width of the web parts in the middle column to fill this white space.

To adjust the width of the web parts:

1. Go to the web part you're modifying.
2. On the **Site Actions** menu, click **Edit Page**.
3. Click **edit** on the web part menu and click **Modify Shared Web Part**.
4. In the web part tool pane, expand the **Appearance** link.
5. In the **Width** area, select **No. Adjust width to fit zone.**
6. Click **OK** to save your changes and close the tool pane.
7. Repeat these steps for each web part in the middle column.

PART 3: EXECUTIVE CENTER SITE

Part 3: Executive Center site

This part of the documentation describes the Executive Center site, which contains information that is of interest to the executives in your organization, such as CEOs and CFOs. The Executive Center in Business Portal for Microsoft Dynamics GP 2010 displays KPIs and metrics created using Microsoft SQL Server Reporting Services 2008. You can use dashboard pages to organize the metrics for executives

If you have used KPIs in a previous release of Business Portal and have upgraded to Business Portal for Microsoft Dynamics GP 2010, you can create and display KPIs in a full page or web part.

This information is divided into the following chapters:

- Chapter 9, "Executive Center site overview," describes the components included with the Executive Center site.
- Chapter 10, "Executive Center site modifications for your company," explains how to modify and display the Executive Center site information for your company or companies.

Chapter 9: Executive Center site overview

The Executive Center site is automatically installed as part of the Business Intelligence feature for Business Portal. Executives such as CEOs and CFOs can use the Executive Center site to view useful information about their organizations in a central location, and gain a deeper understanding of the overall business health of various aspects of their organizations. This helps executives quickly spot trends and current or potential problem areas.

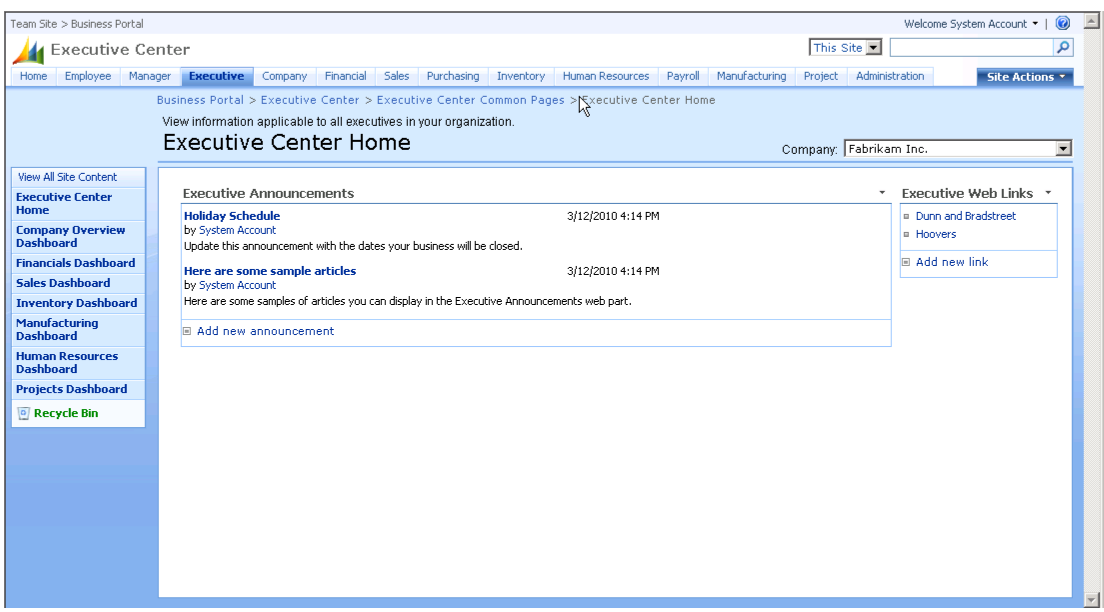
The Executive Center displays KPIs and metrics created using Microsoft SQL Server Reporting Services 2008. Your data is displayed in these KPIs and metrics without having to set up and display them in web parts. If you have used KPIs in a previous release of Business Portal and have upgraded to Business Portal for Microsoft Dynamics GP 2010, you can create and display KPIs in a full page or web part. For more information, see Chapter 10, "Executive Center site modifications for your company."

This information is divided into the following sections:

- *Executive Center site page information*
- *Executive Center metrics*
- *Executive Center site queries*
- *Executive Center site security information*
- *Executive Center site query maintenance*

Executive Center site page information

The Executive Center Home page contains links to all the other pages on the Executive Center site.



Pages

The Quick Launch on the Executive Center Home page contains links to all other Executive pages.

Page	Use this page to...
Executive Center Home	Navigate to other Executive Center site pages
Company Overview Dashboard	View key company overview information
Financials Dashboard	View financial summary overview data, such as total revenue, total expenses, position, and payables and receivables information.
Sales Dashboard	View sales summary data, such as gross profit, top cusotmer balances, top customers by year-to-date sales , and top items by sales quanitity.
Inventory Dashboard	View inventory data, such as inventory turnover information, cost of goods sold, and sales returns information
Manufacturing Dashboard	View metrics related to manufacturing
Human Resources Dashboard	View human resource information
Project Dashboard	View metrics related to projects

If you have used KPIs in a previous release of Business Portal and have upgraded to Business Portal for Microsoft Dynamics GP 2010, the Quick Launch on the Executive Center Home page will contain links to Executive pages from your previous release.

The Reports page is only available if you're using Business Portal with Windows SharePoint Services.

Page	Use this page to...
Company Overview	View key company overview information
Financials	View financial summary data
Sales	View sales summary performance summary data
Budgets	View budget summary data
Operations	View inventory information
Manufacturing	View metrics related to manufacturing
Reports	View published reports that show key organizational information
Queries	Create and run customized views of master records or transaction data

Web parts

The Executive Center site makes use of the following types of web parts to display information:

- KPI alert
- Rich list result viewer
- XML
- Page viewer
- Links

When you're using rich list result viewer web parts, your performance might decrease if the number of rows of data grows considerably over time. You can limit the number of rows that are returned for these web parts.

The Executive Center site is best viewed on a screen with a resolution of 1024 x 768. If your screen has a higher resolution, you might see gaps between the web parts. *See White spaces on Executive Center site pages on page 66 for information about designing the page to remove the gaps.*

Executive Center metrics

To analyze data in a metric, you can click a data point in the metric to open a detailed report or detailed metric for additional information. If a Microsoft Dynamics GP client is locally installed, you can click certain data fields to open the maintenance or inquiry window related to that data field. All metrics are displayed in your functional currency.

Inaccurate results may occur if you modify the predefined Reporting Services metrics installed with Business Portal. You bear the rsk of making any changes.

To display accurate results for the Top Backordered Items metric, the metric must use customers who are using the back order document type. To display accurate results for the Top Returned Items metric, the metric must use customers who are using the Order Processing return document type.

Executive Center site queries

If you have used KPIs in a previous release of Business Portal and have upgraded to Business Portal for Microsoft Dynamics GP 2010, you can display KPIs in a full page or web part. The following queries have been created for the Executive Center site:

- Cash Position
- Total Expenses
- Customers by Aging Period
- Top 10 Customer Sales
- Sales by Customers
- Budgeted Expenses
- Actual Balances
- Account List
- Inventory Summary
- Sales Returns
- Item List
- Standard Cost MOs
- Actual and Average Cost MOs

Because the following queries require specific account information, these queries are restricted to the sample company and its accounts, even if the sample company isn't installed. You need to modify the company and account restrictions on the queries to reflect your company and its account structure:

- Total Expenses Budgeted Expenses
- Actual Balances
- Account List

Executive Center site security information

Users must be assigned to both SharePoint groups and MBF roles so they have the necessary access to the pages and data they need to complete their tasks. By default, users must belong to one of the following groups and its associated role to access the Executive Center site.

SharePoint group	MBF role
BP Administrator	Administrator
BP Executive	Executive

The BP Executive group and Executive role are installed with Business Portal, and are used to manage access to portal pages and data provided for CEOs and CFOs within the company.

See the Business Portal Administrator's Guide for more information about this group and role.

Executive Center site query maintenance

Some of the Executive Center site queries include a year restriction. You should update the year restriction for these queries on an annual basis, so the queries display the appropriate data for the current year.

The following queries include a year restriction, and should be adjusted accordingly for each year:

- Total Expenses
- Budgeted Expenses
- Actual Balances
- Inventory Summary

Chapter 10: Executive Center site modifications for your company

KPIs and metrics created using Reporting Services 2008 display your data in the Executive Center without having to set up and display them in web parts. If you have used KPIs in a previous release of Business Portal and have upgraded to Business Portal for Microsoft Dynamics GP 2010, you can create and display KPIs in a full page or web part. The following information describes how modify the Executive Center site so you can use it with KPIs that weren't created using Reporting Services.

This information is divided into the following sections:

- *Modifications for a single company or for multiple companies*
- *Copy the Executive role for each company*
- *Create the BP Executive group for each company*
- *Modify the queries*
- *Save the Executive Center site as a site template*
- *Create new Executive Center sites using the site template*
- *Set up security for your sites*
- *Add KPIs to KPI web parts*
- *Make your company's reports available*

Modifications for a single company or for multiple companies

The modifications you make to the Executive Center site depend on whether you'll be using the site with a single company or with multiple companies.

Single company modifications

When you modify the Executive Center site to use with a single company, you must complete the following tasks.

Task	For more information, see...
Modify the queries to specify the correct companies, account structures, and years	*Modify the queries* on page 74
Add KPIs to KPI web parts	*Add KPIs to KPI web parts* on page 76
Make your company's reports available to replace the samples	*Make your company's reports available* on page 76

Multiple company modifications

When you're using the Executive Center site with multiple companies, you should create copies of the Executive role and BP Executive group for each company, and then save the Executive Center site as a site template. You can then use that template to create new Executive Center sites for each company, and give the copies of the Executive role and BP Executive group access to the appropriate Executive Center sites.

This allows you to create a separate Executive Center site for each company and assign user access accordingly, so users see the sites only for the companies they have access to.

To do so, you must complete the following tasks.

Task	For more information, see...
Create copies of the Executive role for each company	Copy the Executive role for each company on page 74
Create BP Executive groups for each company	Create the BP Executive group for each company on page 74
Modify the queries to specify the correct companies, account structures, and years	Modify the queries on page 74
Save the Executive Center site as a site template	Save the Executive Center site as a site template on page 75
Create new Executive Center sites using the site template	Create new Executive Center sites using the site template on page 75
Set up security for your sites	Set up security for your sites on page 75
Add KPIs to KPI web parts	Add KPIs to KPI web parts on page 76
Make your company's reports available on the Executive Center site	Make your company's reports available on page 76

After you've set up multiple Executive Center sites for each company, you might want to modify how the sites are displayed to users. For example, you might want to add the sites to the Quick Launch or top link bar, rename the sites, or change the order in which they're displayed. See the Windows SharePoint Services documentation for information about modifying site settings.

Copy the Executive role for each company

You can use the Copy a Role wizard to make a copy of the Executive role for each company. You then can assign the appropriate executives to each company-specific Executive role, so those executives see only the information for their companies.

See the Business Portal Administrator's Guide for more information about copying roles.

Create the BP Executive group for each company

You can create a version of the BP Executive group for each company. You then can assign the appropriate executives to each company-specific BP Executive group, so those executives see only the Executive Center sites for their companies.

See the Windows SharePoint Services documentation for information about creating new SharePoint groups.

Modify the queries

Most of the queries that are used with the Executive Center site have **<Any>** set up as the assigned company, meaning they'll display information for the company you're logged on to Business Portal for.

However, you must change the company and account settings for the following four queries. These queries are assigned to the sample company, Fabrikam, Inc., because they include specific account restrictions:

- Total Expenses
- Budgeted Expenses
- Actual Balances
- Account List

You also might need to modify the year setting for the following four queries:

- Total Expenses
- Budgeted Expenses
- Actual Balances
- Inventory Summary

To modify these queries, use the **Modify Query** option on the appropriate web part tool pane when the portal page is in design mode. See the Business Portal Administrator's Guide for more information.

Save the Executive Center site as a site template

Rather than re-creating the Executive Center site and all its pages for each company, you can save the Executive Center site as a template, and use that template to create new sites with all the same settings and content.

Before you create a site template, be sure you've made any universal changes that you want to make to all your Executive Center sites.

See the Windows SharePoint Services documentation for information about saving sites as templates.

Create new Executive Center sites using the site template

After you've saved the Executive Center site as a site template, you can use that template to create other Executive Center sites for each company. If you use the template, all the pages and web parts are set up, so you don't need to re-create these.

When you create the new sites, you'll select the custom template you created in *Save the Executive Center site as a site template* on page 75 as the template for the site.

See the Windows SharePoint Services documentation for more information about creating sites.

Set up security for your sites

After you've created your company-specific roles, groups, and sites, you need to assign the roles and groups accordingly so users have access only to their own company information.

Business Portal roles and SharePoint groups work together to determine which pages and data users can access.

- Business Portal roles are assigned to companies. Assigning users to the Executive role for their companies specifies which company data those users can access.
- Although SharePoint groups aren't assigned to companies, creating a group for each company allows you to map the appropriate groups to the appropriate sites. If you have a BP Executive - Fabrikam group and an Executive Center - Fabrikam site, you can assign your Fabrikam users to that group, and give that group access to that site.

See the Business Portal Administrator's Guide for information about assigning users to roles. See the Windows SharePoint Services documentation for information about assigning user to groups, and assigning groups to sites.

Add KPIs to KPI web parts

Before you can use the Executive Center sites to display your organization's information, you must add the appropriate KPIs to the KPI web parts on the site pages.

You'll need to do this for each Executive Center site, if you've set up multiple sites for multiple companies.

To add KPIs to KPI web parts, click the **open the tool pane** link in the web part, select the KPI, and specify any settings. See *Add a KPI web part to a Business Portal page* on page 36 for information about displaying KPIs in web parts.

Make your company's reports available

The Reports Catalog is available only if you're using Business Portal with Windows SharePoint Services.

The Reports page on the Executive Center site includes sample reports that can be used only with the sample data for Fabrikam, Inc. Before you can use the Executive Center site to display your company's reports, you must publish your company's reports to a shared folder using the Report Scheduler, and then use the Reports Catalog to add those reports to the appropriate company-specific Reports page on the Executive Center site.

See the Business Portal Administrator's Guide for more information about using the Reports Catalog.

If you're using Business Portal with Office SharePoint Server 2007, Enterprise Edition, see the Business Portal Administrator's Guide for information about using the Report Center to publish and view executive reports.

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