



Microsoft Dynamics® GP  
**Business Analyzer**  
April 6, 2012

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# Introduction

You can use Microsoft Dynamics® GP Business Analyzer to have access reports from your desktop. You take actions on the reports and easily share information with others.

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## **Check for current instructions**

This information was current as of April 6, 2012. The documentation may be updated as new information becomes available. Check the Documentation Resources for Microsoft Dynamics GP 2010 Web site <http://go.microsoft.com/fwlink/?LinkId=161199> for the most current documentation.

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This introduction is divided into the following sections:

- [What's in this manual](#)
- [Symbols and conventions](#)
- [Send us your documentation comments](#)

## **What's in this manual**

This manual provides guidelines for installing and using the Business Analyzer desktop application. The manual is divided into the following chapters:

- [Chapter 1, "Installation,"](#) describes how to install the Business Analyzer desktop application.
- [Chapter 2, "Configuration,"](#) describes how to set up Business Analyzer for use.
- [Chapter 3, "Using Business Analyzer,"](#) describes how to use Business Analyzer.
- [Chapter 4, "Maintenance,"](#) describes how to change the Report Service Web URL and enable a log file for Business Analyzer

## **Symbols and conventions**

This documentation uses the following symbols and conventions 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.

## **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](mailto:bizdoc@microsoft.com).

To send comments about specific topics from within Help, click the Documentation Feedback link, which is located at the bottom of each Help topic.

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



# Chapter 1: Installation

Use this information to install Business Analyzer on your desktop. The following information is discussed.

- [System requirements](#)
- [Before you begin](#)
- [Installing Business Analyzer](#)
- [Creating an installation package](#)
- [Starting Business Analyzer](#)

## System requirements

The following is a list of system requirements if you want to use Business Analyzer on your desktop. For current system requirements for Microsoft Dynamics GP and Business Analyzer, see <http://go.microsoft.com/fwlink/?LinkId=161197>.

Item	Requirements
Microsoft <sup>®</sup> SQL Server <sup>®</sup>	Microsoft SQL Server 2008 Microsoft SQL Server 2008 R2 Microsoft SQL Server 2012
SQL Server Reporting Services	Reporting Services 2008 Reporting Services 2008 R2 Reporting Services 2012
Report Builder	Report Builder 2.0 or later
Operating System	Microsoft Windows Vista <sup>®</sup> Microsoft Windows <sup>®</sup> 7 Microsoft Windows Server <sup>®</sup> 2008 Microsoft Windows Server 2008 R2
SharePoint	Windows SharePoint <sup>®</sup> Services 3.0 or later Microsoft Office SharePoint Server, Enterprise Edition Microsoft SharePoint Foundation 2010 Microsoft SharePoint Server 2010
Web browser	Internet Explorer <sup>®</sup> 9 Internet Explorer 8 Internet Explorer 7
Unified Communications	Microsoft Office Communicator 2007 R2 Microsoft Lync 2010
Microsoft Dynamics GP	Microsoft Dynamics GP 2010 R2 or later SQL Server 2012 is compatible with Microsoft Dynamics GP 2010 11.00.1914 or later and Microsoft Dynamics GP Business Analyzer 11.00.1914 or later and
Runtime components	Installing Business Analyzer automatically installs the following components, if they are not already on your computer. – Microsoft Lync 2010 SDK Runtime – Microsoft Windows Installer 4.5 – Microsoft .NET Framework 3.5 SP1

Depending on the operating system that you are using, you can use the Add or Remove Programs control panel or the Programs and Features control panel to verify whether required components are installed on your computer. If a component isn't installed, you can download the component from <http://www.microsoft.com>.

## Before you begin

Before you install the Business Analyzer, you must install and configure Reporting Services 2008, Reporting Services 2008 R2, or Reporting Services 2012, and then deploy Microsoft Dynamics GP Reporting Services reports. To deploy reports to reports library in SharePoint, you must install SharePoint and create a reports library before deploying reports. You also must set up security for Reporting Services reports using Report Manager or SharePoint.

## Installing Business Analyzer

Use this procedure to install Business Analyzer on your desktop.

### To install Business Analyzer:

1. From the Microsoft Dynamics GP installation media, double-click the Setup.exe file.
2. If one or more of the following components isn't installed on your computer, the Microsoft Dynamics GP Release Bootstrapper Setup window opens and you can choose to install the missing component or components.
  - Microsoft Windows Installer 4.5
  - Microsoft .NET Framework 3.5 SP1
  - Microsoft Lync 2010 SDK Runtime
3. Choose Microsoft Dynamics GP Business Analyzer, and then choose Install.
4. Mark the option to accept the terms of the End-User License Agreement, and then choose Next.
5. In the SQL Server Reporting Services Server Location window, enter the Report Server Web Service URL.

This is the location of the report server site that hosts the web service. You can view the Report Server Web Service URL in the Reporting Services Configuration Manager. The URL should follow this general syntax:

#### SQL Server 2008 and SQL Server 2008 R2

http://<servername>/ReportServer

#### SQL Server 2012

http://<servername>/<SharePoint site>/\_vti\_bin/ReportServer

6. If you are using SharePoint, mark the **My Report Server is configured in the SharePoint Integrated mode** option and enter the URL of the library.

The URL should follow this general syntax:

http://<servername>/Reports/ReportsLibrary

7. Choose Next.
8. In the Ready to Install window, choose Install.
9. In the Installation Complete window, choose Exit.

## Installation package overview

You can use a client installation package to install Microsoft Dynamics GP Business Analyzer on additional computers without having to physically go to each computer and use the Microsoft Dynamics GP Business Analyzer installation wizard. When you create an installation package, the installation package stores the files required to install a Business Analyzer installation.

When creating the installation package, you'll select the shared network location where the installation package will be created, enter the location for the report server web service URL, and the reports library if you are using SharePoint.

The installation package must be created in a shared network location that each client computer has access to. The location where Business Analyzer will be installed must be a valid location for each client computer.

After the installation package is created, it can be run from the shared network location to install Business Analyzer without the user having to make install decisions. A progress window shows how the process is progressing.

How Business Analyzer is installed on the client computer using the installation package depends on the tools and applications that you use. You can send an e-mail with a link to the installation package. The user can click the link to install Business Analyzer. Or, you can create a deployment package using a software distribution tool, such as Systems Management Server so that Business Analyzer is automatically installed after the user logs on to their computer.

## Creating an installation package

You can use an installation package to install Business Analyzer on your client computers. An installation package contains all the information required to install Business Analyzer.

### To create an installation package:

1. Create a shared network location or verify that the client computers have access to a shared network location.
1. From the Microsoft Dynamics GP installation media, double-click the Setup.exe file.
2. Choose Microsoft Dynamics GP Business Analyzer, and then click Create Installation Package.
3. In the Installation Location window, enter or select the folder where the installation package will be created. It is recommended that you use a Universal Naming Convention (UNC) path or a mapped drive letter that is common across all targeted machines. The network location must be accessible from any computer that will have Business Analyzer installed on it using the installation package.

Choose Next.

4. In the SQL Server Reporting Services Server Location window, enter the Report Server Web Service URL.

This is the location of the report server site that hosts the Web Service. You can view the Report Server Web Service URL in the Reporting Services Configuration Manager. The URL should follow this general syntax:

**SQL Server 2008 and SQL Server 2008 R2**

http://<servername>/ReportServer

**SQL Server 2012**

http://<servername>/<SharePoint site>/\_vti\_bin/ReportServer

5. If you are using SharePoint, mark the My Report Server is configured in the SharePoint Integrated mode option and enter the URL of the library. The URL should follow this general syntax:

http://<servername>/Reports/ReportsLibrary

6. Choose Next.
7. In the Ready to Install window, choose Install.
8. The Installation Progress window appears, where you can view the status of the installation.
9. In the Create Installation Package Complete window, choose Finish.

The installation package is installed in the shared network location you specified. The installation package stores the files that are required to install a custom configured Microsoft Dynamics GP installation, such as BusinessAnalyzer.exe and BusinessAnalyzer.exe.config.

10. How Business Analyzer is installed on the client computer using the installation package depends on the tools and applications that you use. You can send an e-mail with a link to the installation package. Or, you can create a deployment package using a software distribution tool such as Systems Management Server so that Business Analyzer is automatically installed after the user logs on to their computer.

## Starting Business Analyzer

To start Business Analyzer, choose Start >> Programs >> Microsoft Dynamics >> Business Analyzer.

The Microsoft Dynamics GP Business Analyzer Configuration window is displayed the first time you start Business Analyzer. For more information about setting up Business Analyzer, see [Chapter 2, "Configuration."](#)

## Chapter 2: Configuration

Use the following information to select user preferences to view reports, select which report to display in Business Analyzer, and assign reports to contacts in Microsoft Lync or Office Communicator 2007 using the Microsoft Dynamics GP Business Analyzer Configuration window. The Microsoft Dynamics GP Business Analyzer Configuration window is displayed the first time that you start in to Business Analyzer.

This following information is discussed:

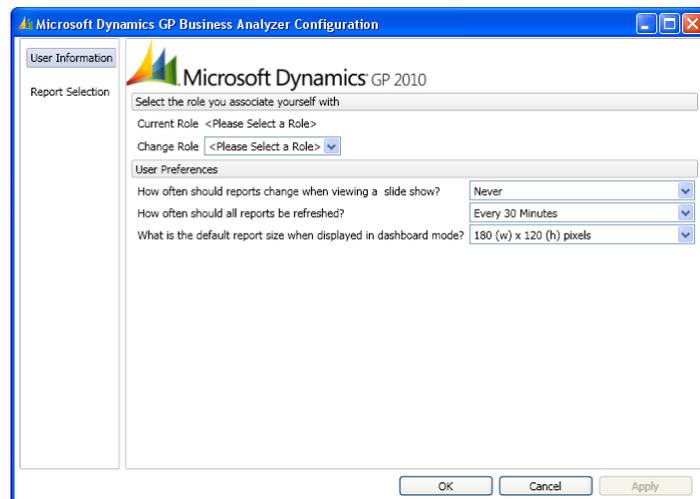
- [Selecting user settings for Business Analyzer](#)
- [Selecting report settings for Business Analyzer](#)
- [Assigning reports to contacts](#)

### Selecting user settings for Business Analyzer

The User Information page in the Microsoft Dynamics GP Business Analyzer Configuration window allows you to define your user preferences for reports. You can select your role, how often reports should be refreshed, and the size of the reports displayed in Business Analyzer.

#### To select user settings for Business Analyzer:

1. Open the Microsoft Dynamics GP Business Analyzer Configuration window. From the Business Analyzer window, choose Options.



The Microsoft Dynamics GP Business Analyzer Configuration window appears automatically the first time that you start in to Business Analyzer.

2. Select the role that is closest to your job responsibilities.
3. After selecting or changing your role, a message appears, asking if you want to load default reports for the selected role. Choose Yes.
4. Select how often reports should change when viewing a slide show.
5. Select how often the reports should be refreshed in Business Analyzer.

6. Select the default size that reports should be displayed in dashboard mode.
7. To select which report to display in Business Analyzer, select Report Information. For more information about selecting report settings, see [Selecting report settings for Business Analyzer](#). To save your changes and close the window, choose OK.

## Selecting report settings for Business Analyzer

The Report Selection page in the Microsoft Dynamics GP Business Analyzer Configuration window allows you to define which reports you want to display in Business Analyzer. You can arrange the order of the reports that appear in Business Analyzer. You also can add or remove multiple reports.

The Reports Available list has tree views that you can use to select the reports to display in Business Analyzer. You can select reports by company, series, reports, and charts and KPIs. The tree view has the following levels depending on the Show Detailed Folder View option.

The Show Detailed Folder View option is marked.

- Company
  - Series
    - Report
      - Charts And KPIs

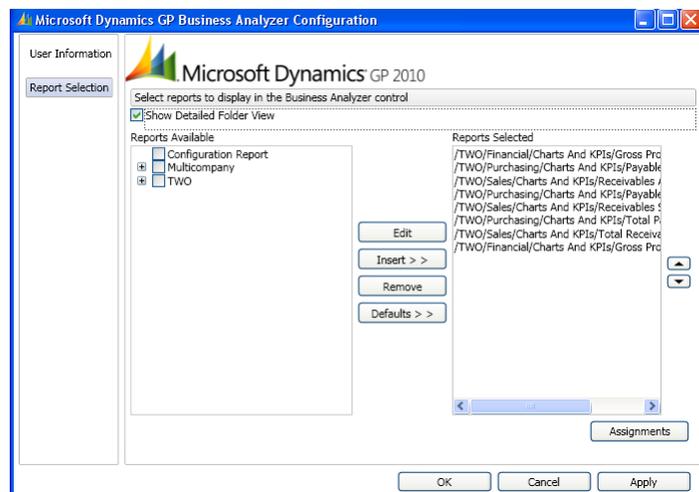
The Show Detailed Folder View option is unmarked.

- Series
  - Report
    - Charts And KPIs

You can choose the + symbol next to a level to view additional levels in the tree view. You can collapse and expand portions of the tree.

### To select report settings for Business Analyzer:

1. Open the Microsoft Dynamics GP Business Analyzer Configuration window. From the Business Analyzer window, choose Options.
2. Select Report Information.



Default reports appear in the Reports Selected list if you loaded the default reports assigned to the role you selected in the User Information page.

3. If the Show Detailed Folder View option is marked, reports in the Reports Selected list display their folder location in the report server. If this option is unmarked, the report names grouped by series.
4. In the Reports Available list, select the report or the reports that you want to display in Business Analyzer and choose Insert.
5. You can select a report from the Reports Selected list and then complete one of the following actions.
  - Choose Move Up or Move Down to rearrange the order that the reports are displayed in Business Analyzer. You can move multiple reports.
  - Choose Remove to remove the report that you selected from the Reports Selected list. You can select to remove multiple reports
  - Choose Defaults to mark the default reports in the Reports Available list for your role. You can then choose Insert.
  - Choose Edit to open the Microsoft SQL Server Report Builder window, where you can edit the selected report. You must be using Report Builder 2.0 or Report Builder 3.0 to modify SQL Server reporting services reports.
6. To assign contacts to reports, you must choose Apply before you can choose the Assignments button to open the Manage Unified Communication/Reports Assignments window. You must be using Communicator or Lync for this button to be available.

To save you changes and close the window, choose OK.

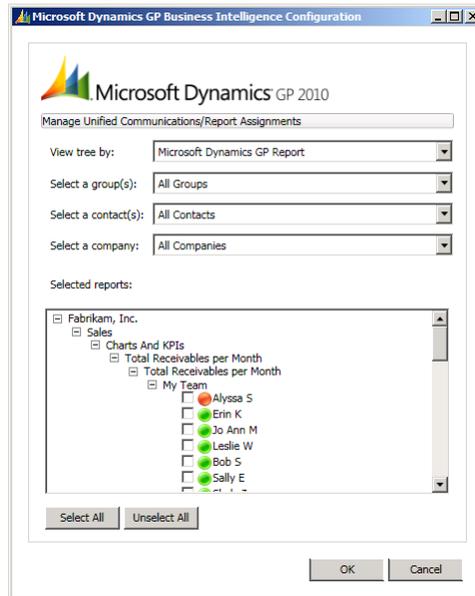
## Assigning reports to contacts

Use the Manage Unified Communication/Reports Assignments window to assign contacts in Microsoft Lync 2010 or Office Communicator 2007 to reports.

### To assign contacts to reports:

1. Open the Microsoft Dynamics GP Business Analyzer Configuration window. From the Business Analyzer window, choose Options.
2. Select Report Information.
3. In the Reports Available list, select a report or the reports that you want to display in Business Analyzer and choose Insert.
4. Choose Apply.
5. In the Reports Selected list, select the reports or reports that you want to assign to contacts.

6. Choose Assignments.



7. Select display information in the Selected reports list tree view by contact or by report.
8. Select to display a group of contacts or all contact groups in the Selected reports list.
9. Select a contact or all contacts.
10. The information displayed in the Selected Reports list depends on your previous selections.
11. Depending on your previous selections, you can assign reports to contacts or reports to contacts.

To select all contacts or reports displayed in the list, choose Select All.

12. Choose OK to save your changes and close the window.

# Chapter 3: Using Business Analyzer

You can use Business Analyzer to help you make business decisions by viewing Microsoft Dynamics GP reports from your desktop. You can take actions on the reports and share report information with others.

This following information is discussed:

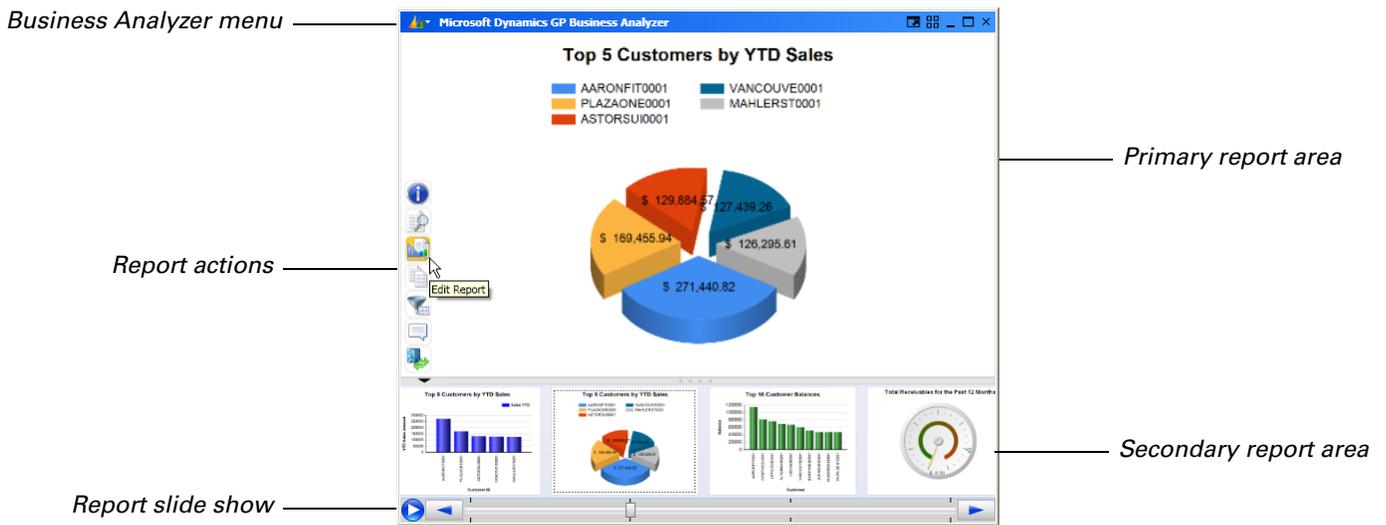
- [Business Analyzer overview](#)
- [Business Analyzer actions for reports](#)
- [Displaying reports in Business Analyzer](#)
- [Filtering reports in Business Analyzer](#)
- [Reloading reports in Business Analyzer](#)
- [Communicator or Lync actions for Business Analyzer](#)

## Business Analyzer overview

You can use Business Analyzer to select and view SQL Server Reporting Services reports in Microsoft Dynamics GP from your desktop. To view reports, you must have security access to the Microsoft SQL Server Reporting Services reports in Report Manager or Microsoft SharePoint.

You can perform actions for reports in Business Analyzer, such as editing the report in Report Builder or selecting the company or companies you want to view reports from. You can assign contacts in Lync or Communicator to reports so you can share report data with people that you commonly work with.

The following areas make up Business Analyzer.



### Primary report area

Displays the main report or reports for you to view. A main report is typically a single report. You can have more than one report displayed in the area. The report actions are available for each report within the primary report area.

### Secondary report area

Displays the secondary report or reports for you to view. Secondary reports are typically multiple reports. You may have more than one report displayed in the area. You can click a report in the secondary report area to display the report in the primary report area.

### Business Analyzer menu

Use this menu to select how to display reports in Business Analyzer by choosing the Window Mode from the menu. You can use filters to display only the reports that you want to view. Choose Reload Reports to update You also can update reports.

Choose Options to open the Microsoft Dynamics GP Business Analyzer Configuration window, where you can define your user settings, select which reports to display in the application, and to add contacts to or remove contracts from reports in Lync or Communicator.

### Report actions

Use report actions that are available for each report within the primary report area. When you place the cursor over a report, the action buttons are displayed. For more information about the report actions, see [Business Analyzer actions for reports](#) on page 14.

### Report slide show

View the previous or next report in the secondary report area. You also can start or pause a slide show of your reports. How often the reports change when viewing a slide show depends on your selection in the User Information pane in the Microsoft Dynamics GP Business Analyzer Configuration window.

## Business Analyzer actions for reports

The following actions are available for each report within the primary report area. When you place the cursor over a report, the action buttons are displayed.

Icon	Name	Description
	Show Report Information	Opens a window that displays the name of the company, the date and time the report was rendered, and the location of the report. You can click the report information window to keep the window open.  Note: If you were assigned to only to the browser role in Report Manager, the company name does not display.
	View Report	Open the report in Report Viewer or in SharePoint, depending on how the report server was set up. By viewing the report, you can render the report using different parameters. For example, if chart is using columns to display information, you can render the report with lines.
	Edit Report	Opens Microsoft SQL Server Report Builder, where you can modify a report.  Before you can modify a report, you must have access to modify the report.
	Copy Report Image	Copies an image of a report to the clipboard so you can share the report by pasting the report in an email or another application. If you want to copy a report to Communicator or Lync, you must save the report image to a file, and then copy the file into a conversation.
	Change Date	Allows you to render the report using a different date based on different date tokens. You also can enter a custom date.

Icon	Name	Description
	Start Communication	<p>Allows you to share report data with people you commonly work with.</p> <p><b>Add Contact to Report</b> Opens the Manage Unified Communication/Reports Assignments window, where you can assign contacts in Lync or Office Communicator to reports. You also can remove contacts.</p> <p><b>Select Other Contact</b> Opens the Send an Instant Message window, where you can select a contact. Click OK to start a conversation with the contact.</p>
	Select Company	Displays a list of companies that you can select to view reports for. Reports are displayed in Business Analyzer are from the company or companies you select.

## Displaying reports in Business Analyzer

You can select how to display reports in Business Analyzer by choosing Window Mode from the Business Analyzer menu. You can display reports in Split Mode, Dashboard Mode, or Full Screen.

If you select Dashboard Mode, all the reports display in the primary report area. If you select Split Mode, one report displays in the primary report area while the rest of the reports display in the secondary report area.

## Filtering reports in Business Analyzer

You can use filters to display only the reports you want to view. You can display reports for multiple companies and reports from a specific series. You can filter reports by choosing Filter Reports from the Business Analyzer menu.

The Sample company will appear in the company list. The system administrator can hide the TWO, Inc. folder in SQL Server Reporting Services.

## Reloading reports in Business Analyzer

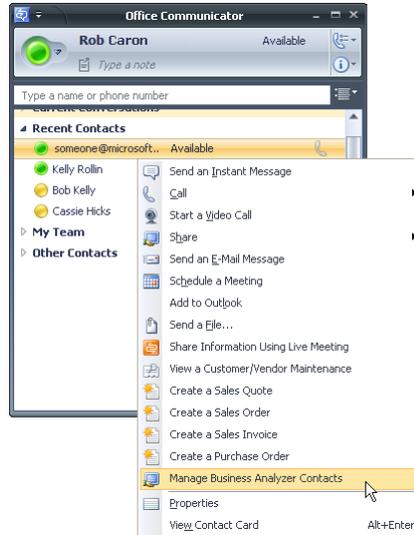
You can update reports by choosing Reload Reports from the Business Analyzer menu. For example, if you change the date on a report, you can update the information on the report.

## Communicator or Lync actions for Business Analyzer

You can select actions from Communicator or Lync to add contacts to reports displayed in Business Analyzer or to remove contacts from reports. To display the actions in Communicator or Lync, complete the following steps.

- Start Communicator or Lync
- Sign in to your Communicator or Lync account on the same computer as Business Analyzer
- Enter messenger addresses in the Internet Information window in Microsoft Dynamics GP for your customers, sales people, vendors, and employees

In the Communicator window, you can right-click on a contact name or group name to display a list of actions. If you are predicating in an instant message conversation, you also can right-click on a contact name in the Conversation window to display a list of actions. You can select the Manage Business Analyzer Contacts action to open the Manage Unified Communication/Reports Assignments window.



In the Manage Unified Communication/Reports Assignments window, you can add contacts to reports or remove contacts from reports. For more information, see [Assigning reports to contacts](#).

# Chapter 4: Maintenance

This documentation contains information about changing the Report Service Web URL.

This following information is discussed:

- [Changing the Report Service Web Service URL](#)
- [Troubleshooting](#)

## Changing the Report Service Web Service URL

If you change your report server or change the reporting services configuration, use the Configuration option in Program Maintenance to update your the Report Service Web Service URL.

### To change the Report Service Web Service URL:

1. Start the Program Maintenance wizard. You can use one of the following methods.
  - If you are using Windows XP or Windows Server 2003, open the Add or Remove Programs control panel, and select **Microsoft Dynamics GP Business Analyzer**. Click **Configuration** to open the Program Maintenance window.  
  
—or—
  - If you are using Windows Vista or Windows Server 2008, open the Control Panel and double-click Programs and Features. Select **Microsoft Dynamics GP Business Analyzer**. Click **Configuration** to open the Program Maintenance window.  
  
—or—
  - If you're using Windows 7, choose Start > Control Panel > Uninstall a program. Select **Microsoft Dynamics GP Business Analyzer**. Click **Configuration** to open the Program Maintenance window.
2. In the SQL Server Reporting Services Server Location window, enter the Report Server Web Service URL.

This is the location of the report server site that hosts the web service. You can view the Report Server Web Service URL in the Reporting Services Configuration Manager. The URL should follow this general syntax:

#### SQL Server 2008 and SQL Server 2008 R2

http://<servername>/ReportServer

#### SQL Server 2012

http://<servername>/<SharePoint site>/\_vti\_bin/ReportServer

3. If you are using SharePoint, mark the **My Report Server is configured in the SharePoint Integrated mode** option and enter the URL of the library.

The URL should follow this general syntax:

http://<servername>/Reports/ReportsLibrary

4. Click **Next**.
5. In the Repair window, click **Repair**.
6. In the Repair Complete window, click **Exit**.

## Troubleshooting

If you start Business Analyzer and you receive an error that there is an error loading the server, use the Reporting Services Configuration Manager to verify that the Report Service Status is Started. If the service has stopped, click the **Start** button.

You also should verify that the Report Server Web Service URL is correct. You can compare the Report Server Web Service URL in the Reporting Services Configuration Manager with the URL location in the BusinessAnalyzer.exe.config file or the SQL Server Reporting Services Server Location window in the Program Maintenance wizard.

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