



Microsoft Dynamics GP

Deploying the Workspace Application for Microsoft SharePoint Online

Microsoft Dynamics GP Workspace is a method to enable Microsoft Excel-based dashboards for SharePoint Online. This Microsoft Office 365 SharePoint Online app will provide dashboard information for Microsoft Dynamics GP in Office 365.

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Overview

Microsoft Dynamics GP Workspace is a SharePoint Online application that will create new pages in your existing SharePoint Online site with dashboard information available for Microsoft Dynamics GP. By deploying this application in SharePoint Online and using it to create new pages in Office 365, you will have sample Excel-based dashboards.

This document describes how an IT Administrator can deploy the Microsoft Dynamics GP Workspace App in SharePoint Online. The Administrator will need at least Add and Customize level permissions to deploy the dashboards. The steps for deployment include the following.

1. Installing the application
2. Configuring the pages
3. Refreshing the Excel dashboards
4. Adding a promoted site (optional)

Security to the Microsoft Dynamics GP Workspace pages is controlled through standard SharePoint Online security.

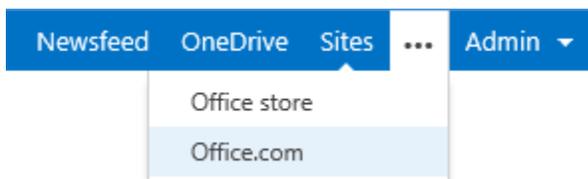
Prerequisites

1. Microsoft Office 365 E3 (or later) subscription
2. Microsoft Dynamics GP 2013 or later version
3. Microsoft Excel 2013 on the local workstation (to refresh the dashboard)
4. The Excel based dashboards must be uploaded or deployed to your Microsoft Office 365 site in a Data Connection library. In Microsoft Dynamics GP 2013 R2 or later, the Excel based dashboards can be deployed to Office 365 SharePoint Online along with the other Excel Reports. See the Excel report deployment section of the System Setup guide for more information on deploying Excel reports.
5. The Excel files need to have the word dashboard in the name of the file such as Financial dashboard.xlsx.

Install the application

Begin by installing the Microsoft Dynamics GP Workspace application from the Office Store.

1. Login to your Microsoft Office 365 account as an Administrator.
2. Go to the site of your Office 365 account where you want to host your application. For example, <https://<sitename>.sharepoint.com>.
3. Click the link for the Office store.

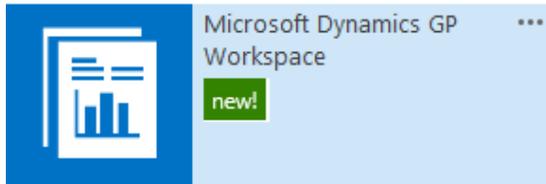


4. Search for and install the Microsoft Dynamics GP Workspace application in Apps for SharePoint. For more information on installing applications see the Office store [FAQ](#).

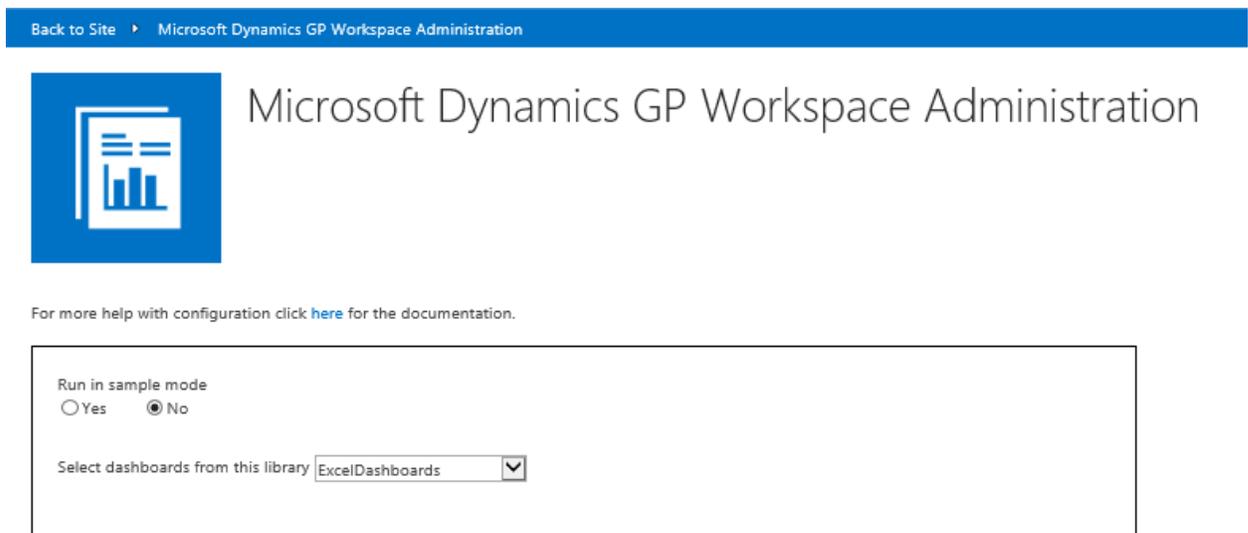
Configuration

After you've installed the application, configure it using the following steps.

1. Open the Site Contents page. (Click Settings icon in top right corner, and then click Site Contents or click Site Contents from left side Quick launch navigation.)
2. Click the Microsoft Dynamics GP Workspace App icon.



3. The Microsoft Dynamics GP Workspace Administration page will open.

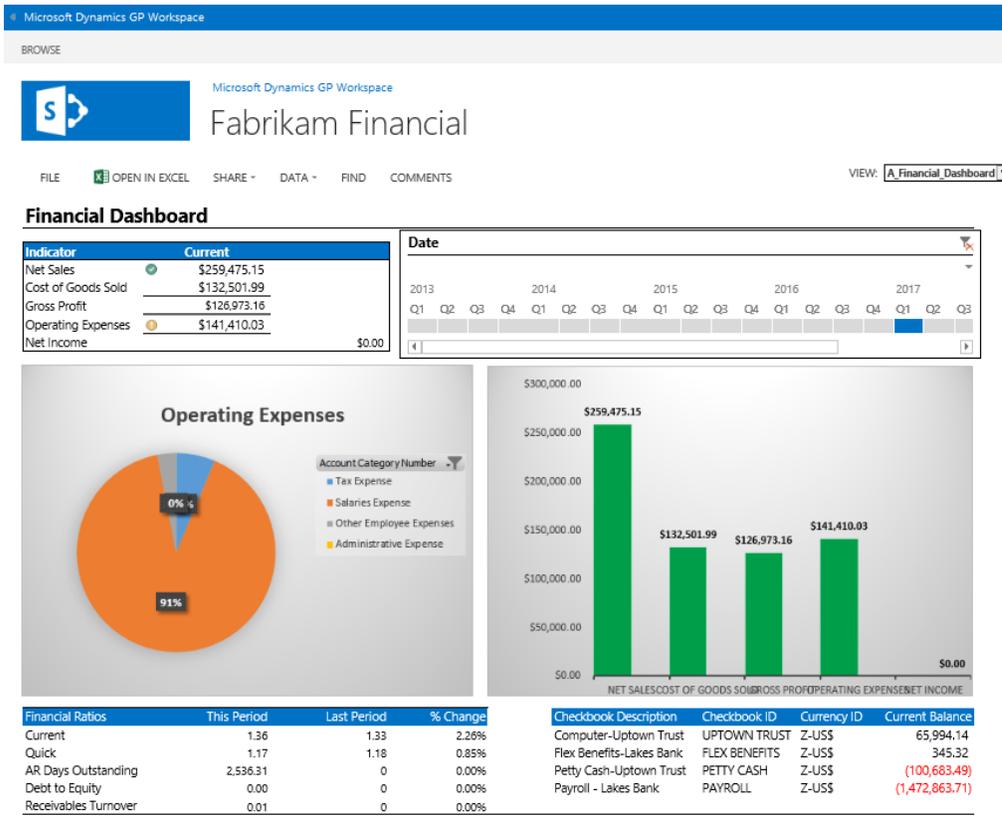


4. To configure sample mode click Yes. After deploying the dashboards, you will return to your Office 365 site where you can see the new pages on the left side of the Quick launch navigation bar.

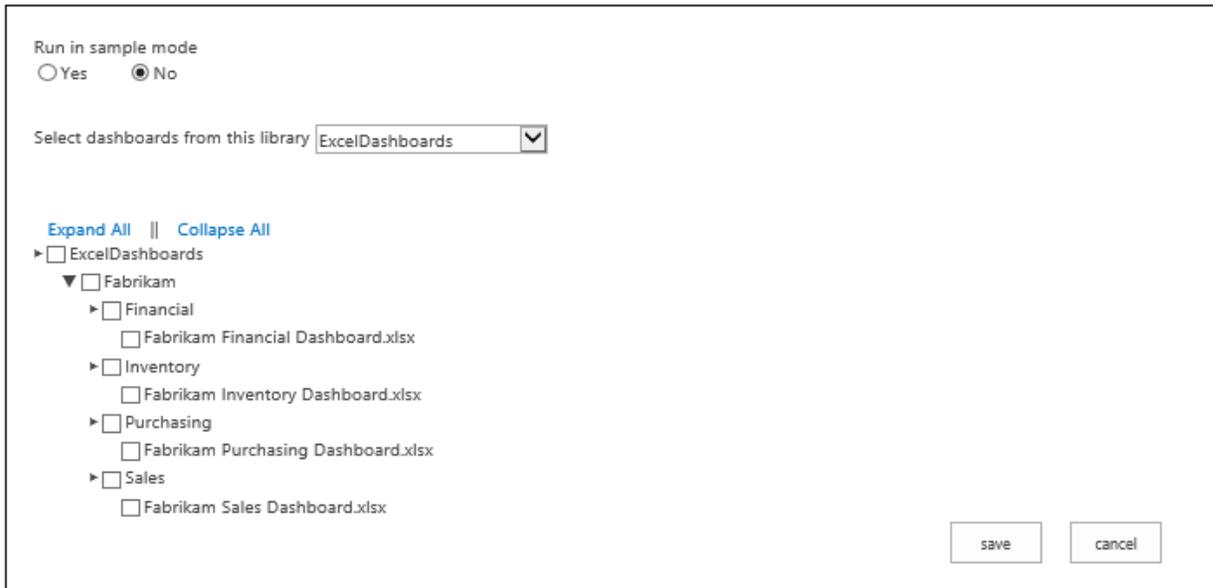
Sample Dashboard

- Sales
- Purchasing
- Financial
- Inventory

5. Click one of the four pages to open dashboard pages with sample dashboards.
6. Use the drop-down menu in the upper right to change from the dashboard view to more detailed view.



7. Click your site name (Microsoft Dynamics GP Workspace) in top blue bar to navigate back to your Office 365 site.
8. To turn off sample mode repeat steps 1-3 and click No. This will remove the 4 sample dashboard pages.
Note: You cannot run in sample mode and deploy dashboards at the same time.
9. Use the following steps to deploy dashboards for your company.
 - a. Go to the Microsoft Dynamics GP Workspace Administration page (steps 1-3 above).
 - b. Click the drop down list next to Select dashboards from this library to display the data connection libraries.
 - c. Choose the library where your dashboards are located in Microsoft Office 365.
 - d. Select which dashboards you want to deploy by clicking the checkbox next to each dashboard. Only files with the word "dashboard" will appear in the tree list.



10. Click Save.

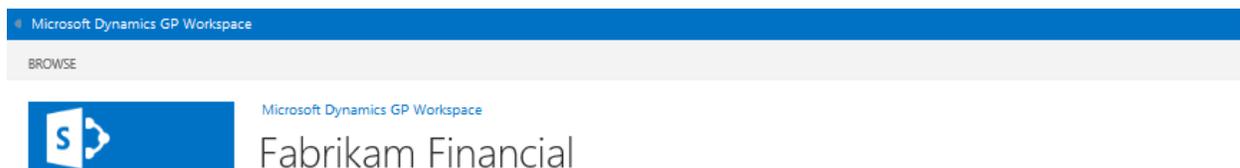
After deploying the dashboards you will return to your Office 365 site where you can see the new pages on the left side Quick launch navigation.



Note: The name of the dashboard pages can be changed by editing the Quick launch navigation. Click the Edit Links option in the Quick launch area.

11. Click Cancel to not deploy any dashboards and return to the previous page.

12. Each dashboard page will open in a browser window. To navigate back to the previous page click your site name (Microsoft Dynamics GP Workspace) in the top left of the blue bar.



Refreshing the Excel spreadsheet with live data

The pages that are created with each dashboard have data that has been uploaded to Microsoft Office 365. Follow these steps to refresh the spreadsheets.

1. Open one of the dashboard pages by using the Quick launch navigation.
2. Click the Open in Excel link at the top. You must have Excel 2013 on your workstation to refresh the data.
3. Once the Excel spreadsheet is open click Refresh All in the Data tab.
4. Click Save and the spreadsheet will automatically save to the data connection library in Microsoft Office 365.

Adding a promoted site link for Workspace

For better navigation to the Workspace site it is helpful to use a Promoted Site. Follow these steps to add a promoted site.

1. In Office 365 start from the Sites menu option.



2. To add a new link, click the Manage link.
3. Click Add a promoted site.
4. In the dialog box, enter a title and URL for the site such as `https://<SiteName>/sharepoint.com/MDGPWorkspace`

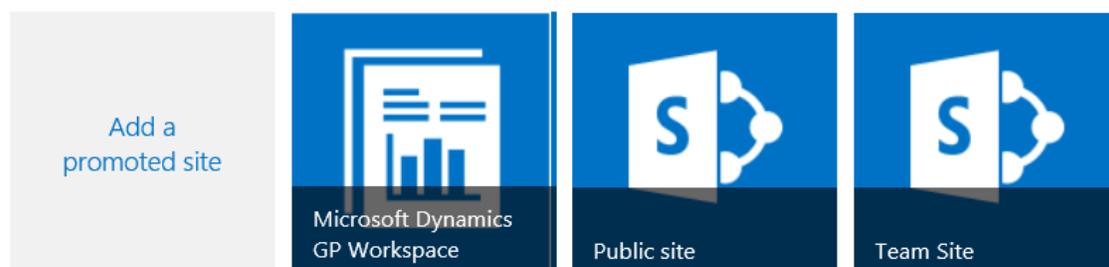
You also can enter a description of the site and the URL for the location of a background image. The image must be available from your images library.

5. Click Save Changes.
6. If you are finished with editing the promoted sites, click [click here](#) to stop editing.

Note: You must click Save Changes in step 5 to stop editing.



Click on a tile below to edit. Once you are done, [click here](#) to stop editing.



Uninstalling the application

To uninstall the application, follow the steps below. You will not be able to recover the Quick launch link and link to your pages in your Office 365 site. You will lose all pages deployed by the application.

1. Open the Site Contents page. (Click Settings icon in top right corner, and then click Site Contents or click Site Contents from left side Quick launch navigation.)
2. Find the Microsoft Dynamics GP Workspace application.



3. Click the ellipses (...) to view the callout properties.
4. In the callout, click the ellipses (...) and then click Remove from the menu.
5. Click Ok.

Note: You need Full Control permission to the site to remove the application. The site owner also has permission to remove the application.

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