# Microsoft Dynamics®

Business Portal for Microsoft Dynamics® GP 2010
## Installation Instructions
Release 5.1
April 2, 2012

# Contents

# Introduction

Use this manual to install Business Portal for Microsoft Dynamics® GP 2010. This documentation contains information about installing and configuring your system.

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### *Check for updated instructions*

This information was current as of April 2, 2012. The documentation may be updated as new information becomes available. Check the Documentation and resources for Microsoft Dynamics GP 2010 web site (http://go.microsoft.com/fwlink/?LinkId=185513) 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*
- *Additional resources*
- *Technical support*
- *Send us your documentation comments*

## What's in this manual

This manual provides step-by-step instructions for installing and deploying Business Portal in your organization. It includes the following parts:

- Part 1, **Preparation**, lists the supported configurations for Business Portal and contains a checklist to guide you through the installation process.

- Part 2, **Network and server configuration**, explains how your network should be configured to run Business Portal. It also contains procedures for setting up your Microsoft® SQL Server® and web server for Business Portal.

- Part 3, **Business Portal installation**, contains the procedures for installing Business Portal and its prerequisites.

- Part 4, **Additional setup**, explains how to set up Reports Catalog in Business Portal, how to set up Terminal Services or Remote Desktop Services for Business Portal, and how to set up Business Portal client computers.

- Part 5, **Extranet deployment**, describes supported extranet configurations and provides recommended settings to run Business Portal in an extranet environment.

## Symbols and conventions

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

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

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

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

# Additional resources

In addition to this manual, the following documentation is included with this release of Business Portal.

### Manuals

The following PDF manuals are included in the Documentation folder on the Business Portal installation media.

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

**Business Portal 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.

### Help

Help is available by clicking the Help icon button, located in the upper-right corner of any page. The help that is displayed depends on whether you open help from a Business Portal page or a SharePoint® 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 Microsoft SharePoint Foundation 2010. General information about these features is provided in the Administering Business Portal help. For more detailed information, refer to the SharePoint Foundation 2010 help, which can be accessed by clicking the Help icon button in the upper-right corner of any SharePoint Foundation 2010 page. If you're using Microsoft SharePoint Server 2010, additional help related to the SharePoint Server 2010 features also will be available.

## Technical support

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

## Send us your documentation comments

We welcome comments regarding the usefulness of the Microsoft Dynamics GP documentation. If you have specific suggestions or find any errors in this manual, send your comments by e-mail to the following address: bizdoc@microsoft.com.

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

# Part 1: Preparation

This part of the documentation provides an overview of the Business Portal installation and contains information about supported configurations for Business Portal. A checklist to guide you through the installation process is also included.

The following information is discussed:

- Chapter 1, "Installation overview," provides an overview of the software configuration for Business Portal, explains the site hierarchy, and includes an installation checklist.

- Chapter 2, "Business Portal configurations," describes supported server configurations for Business Portal.

# Chapter 1: Installation overview

This chapter provides an overview of the Business Portal installation process. The following sections are included:

- *Business Portal installation overview*
- *Business Portal site structure*
- *Choosing a site collection for Business Portal*
- *Installation checklist*
- *User rights for installation*

## Business Portal installation overview

Business Portal is a web-based application used to provide access to Microsoft Dynamics GP data to users who don't have access to the Microsoft Dynamics GP application. You can use Business Portal as your company's intranet by including other content that is used by your organization, but that is not stored in the accounting system, such as your company's employee handbook.

Business Portal is built on a stack of other applications, beginning with Windows Server® 2008 or Windows Server 2008 R2. Internet Information Services (IIS), a component of Windows Server 2008 or Windows Server 2008 R2, hosts virtual servers, each of which can contain a separate web-based application.

Business Portal is installed on a SharePoint web application and site collection. The main Business Portal site will be created as a subsite of the top-level site in the site collection. (For more information about the Business Portal site hierarchy, see *Business Portal site structure* on page 8.)

The following illustration shows the software configuration on a Business Portal web server.
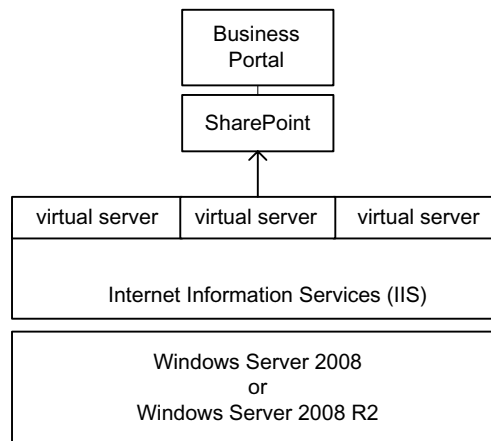


(For illustrations of Business Portal hardware configurations, including other servers, refer to Chapter 2, "Business Portal configurations.")

Domain users can access Business Portal through a web browser. By default, Business Portal is designed for intranet use; it is typically accessed over a local network or through a virtual private network (VPN). However, you can configure Business Portal to support external users. For more information, see Part 5, **Extranet deployment**.

## Business Portal site structure

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

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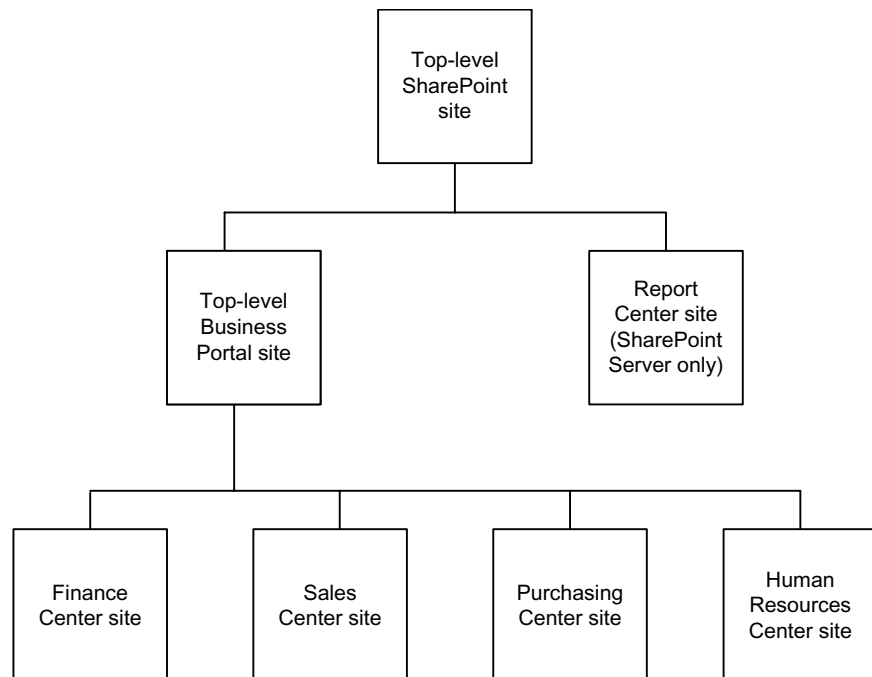


## Choosing a site collection for Business Portal

The Business Portal sites belong to a *site collection*—a hierarchical set of sites that can be managed together. You can install Business Portal into an existing site collection or into a new site collection.

Sites within a site collection have common features, such as shared permissions, galleries for templates, content types, and web parts, and they often share a common navigation. All sites in a site collection are stored together in the same Microsoft SQL Server database. The Business Portal sites interact with the site collection in the following ways.

**Navigation**   Navigation inheritance depends on how Business Portal was implemented.

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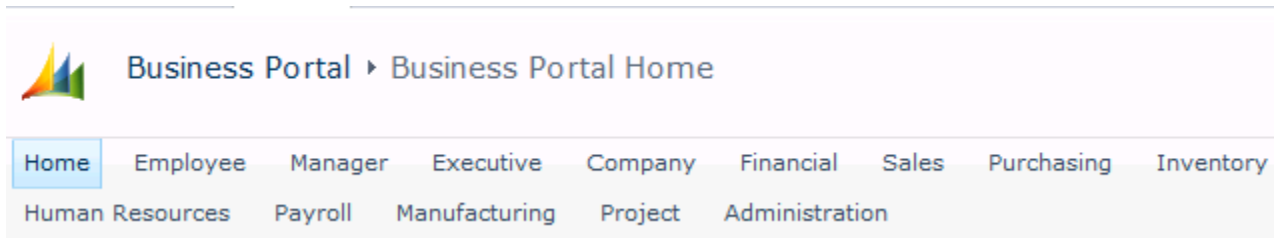


- If you're using Business Portal with SharePoint Server, Enterprise Edition, the Business Portal sites inherit navigation from the top-level site in the site collection. If you install into an existing site collection, a Business Portal item will be added to the top link bar, and Business Portal sites will use the existing navigation of the site collection, as shown in the following illustration.
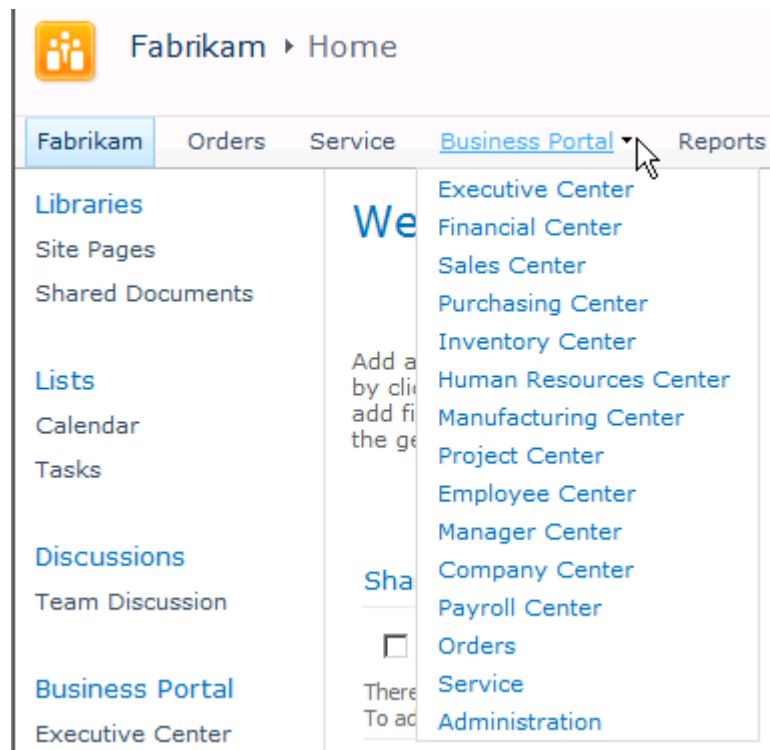


For more information about Business Portal navigation, see the Business Portal Administrator's Guide.

**Permissions**   The Business Portal sites do not inherit permissions from the top-level site in the site collection. Installing into an existing site collection will not affect Business Portal permissions. For more information about Business Portal permissions, see the Business Portal Administrator's Guide.

**Galleries**   Template galleries, content type galleries, and web part galleries are shared between Business Portal sites and other sites in the collection. Install into an existing site collection if you want to share gallery content between your existing sites and your Business Portal sites.

For more information about site collections, see the SharePoint documentation.

## Installation checklist

You must perform the following tasks to install Business Portal.

| Task | For more information, see |
|------|---------------------------|
| 1. Check for new information relating to the installation since the release of this document. | Microsoft Dynamics GP documentation web site: http://go.microsoft.com/fwlink/?LinkId=185513 |
| 2. View the Readme file and make note of the items that pertain to your Business Portal system. | \Media\Documentation\Readme.rtf |
| 3. Be sure that you have the appropriate rights to perform the installation. | *User rights for installation* on page 10 |
| 4. Select a Business Portal configuration. | Chapter 2, "Business Portal configurations" |
| 5. Be sure that your computers meet requirements. | System requirements on the Web: http://go.microsoft.com/fwlink/?LinkId=187656 The Business Portal pages are best viewed on screens with resolutions of 1280 x 1024. |
| 6. Be sure that your network meets requirements. | Chapter 3, "Network environment" |
| 7. Configure the SQL server. | Chapter 4, "SQL Server configuration" |
| 8. Configure the web server. | Chapter 5, "Web server configuration" |
| 9. Install and configure SharePoint Foundation or SharePoint Server, Enterprise Edition, on the web server. | Chapter 6, "SharePoint Foundation configuration" Chapter 7, "SharePoint Server configuration" |
| 10. Install Business Portal on the web server. | Chapter 8, "Before you install" Chapter 9, "Installing Business Portal" Chapter 10, "Additional applications" |
| 11. Configure workstations and perform optional tasks. | Chapter 11, "Reports Catalog setup" Chapter 12, "Terminal and Remote Desktop Services setup" Chapter 13, "Client configuration" |
| 12. Set up Business Portal. | Business Portal Administrator's Guide |
| 13. Set up any additional applications you've installed. | Administrator's Guide for each application |

## User rights for installation

The person installing Business Portal and its prerequisites must be logged on to the web server computer as a user with the following access rights.

**Administrator rights on the server**   The person installing Business Portal must be a member of the Administrators group on the web server where Business Portal is being installed. The administrator user who installs Business Portal automatically becomes the first administrator of Business Portal.

**Administrator rights for SharePoint**   The person installing Business Portal must be the administrator of the site collection where Business Portal is being installed.

**Administrator rights for SQL Server**   If you're using Windows® Trusted Authentication for the Business Portal installation, the person installing Business Portal must have Administrator rights to the SQL Server where Microsoft Dynamics GP information is stored.

**User rights for Web Services for Microsoft Dynamics GP**   The person installing Business Portal must have access to the Microsoft Dynamics GP web service. If you're not already in a web service role, we recommend using the BDC Administrator role.

# Chapter 2: Business Portal configurations

This chapter describes the server configurations that you can use for Business Portal.

Business Portal configurations designated "intranet only" should be deployed only in your internal network; they should not be used in an extranet environment. An extranet, or perimeter network, is an extension of your company's intranet that provides limited access to authorized outside users. For more information about deploying Business Portal in an extranet, refer to Chapter 14, "Extranet environments."

For up-to-date system requirements for the servers in these configurations, see http://go.microsoft.com/fwlink/?LinkID=187656.

This chapter includes the following sections:

- *Capacity planning*
- *Business Portal and Microsoft Dynamics GP on the same server (intranet only)*
- *Business Portal and Microsoft Dynamics GP on separate servers*
- *Terminal Services or Remote Desktop Services configuration (intranet only)*
- *Multiple web servers configuration*
- *Multiple server farms configuration*

## Capacity planning

When selecting the Business Portal configuration that is best for your business, consider the current and future capacity that is required. Capacity planning is the process of matching usage on a web site to the minimum server hardware required to support the load.

It is often difficult to establish clear, detailed performance and scalability requirements for portal site deployments, since it can be hard to predict the level or type of usage. In addition, the level of use frequently grows and changes over time. Nevertheless, you can often use throughput measured as pages per second as a guideline for measuring performance.

For any successful Business Portal deployment, consider:

- Where the users are located
- What type of bandwidth they have between them
- How much of that bandwidth is available for collaboration
- What are the busy hours of the day
- How many users will be hitting the site
- How many users will this solution serve at peak
- How much throughput is needed from the system (pages per second)

For detailed capacity planning information for SharePoint 2010, see the "Performance and capacity management (SharePoint Server 2010)" topic or the "Performance and capacity test results and recommendations (SharePoint Foundation 2010)"in the SharePoint Products Technical Library on Microsoft TechNet (technet.microsoft.com).

## Business Portal and Microsoft Dynamics GP on the same server (intranet only)

In a single server configuration, one computer functions as the SQL database server *and* the web server. It stores your Microsoft Dynamics GP information, and hosts your Business Portal web site.

⚠️ *We don't recommend using this configuration in an extranet environment. For better security, your Microsoft Dynamics GP databases should be on a separate server, inside the firewall.*

## Business Portal and Microsoft Dynamics GP on separate servers

In a separate server configuration, the Microsoft Dynamics GP SQL database and Business Portal are installed on separate servers: your existing Microsoft Dynamics GP server and a web server. You also can add a Terminal Services server, a Remote Desktop Services server, or additional web servers to the configuration. (These configurations are described in *Terminal Services or Remote Desktop Services configuration (intranet only)* on page 14 and *Multiple web servers configuration* on page 15.)

The following illustration shows a separate server configuration.



Back office server    Business Portal (Web server)    Workstation    Workstation
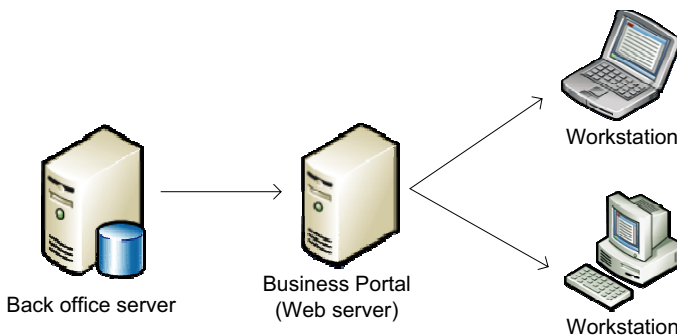
## Terminal Services or Remote Desktop Services configuration (intranet only)

Some links in Business Portal are for tasks performed in Microsoft Dynamics GP. Business Portal can use Terminal Services or Remote Desktop Services, both services are a component of the Windows operating system, to give users access to your Microsoft Dynamics GP software over the Web. This is commonly called "thin client" access.

If a user is set up to use thin client access and clicks a task link that opens a back office window, Business Portal connects to the Terminal Services server or the Remote Desktop Services server, and displays the Microsoft Dynamics GP user interface. All operating system functions—as well as the actual Microsoft Dynamics GP application—run on the Terminal Services server or the Remote Desktop Services server. Terminal Services or Remote Desktop Services is used only for access to Microsoft Dynamics GP windows; Microsoft Dynamics GP data displayed in Business Portal is not processed through the Terminal Services server or Remote Desktop Services server.

⚠ *We don't recommend using this configuration in an extranet environment. For better security, you should not grant access to the Microsoft Dynamics GP application outside of the firewall without a virtual private network (VPN).*

The following illustration shows a configuration that includes a Terminal Services server or Remote Desktop Services server.
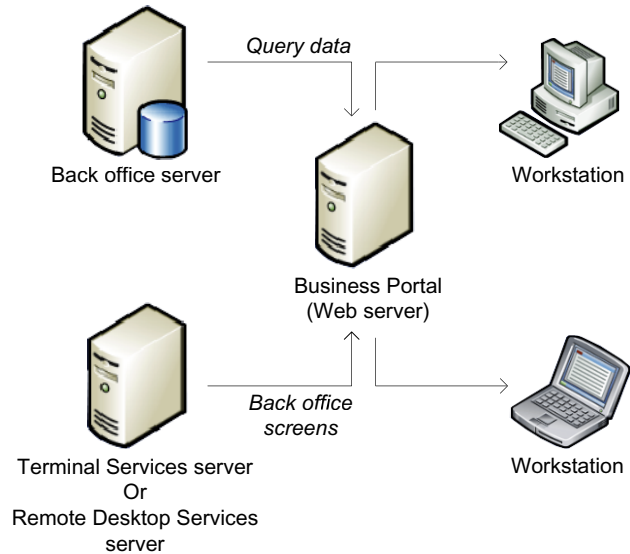


You can include multiple Terminal Services servers or Remote Desktop Services servers in a Business Portal configuration for load balancing.

For more information about setting up Business Portal to use Terminal Services or Remote Desktop Services, refer to Chapter 12, "Terminal and Remote Desktop Services setup."

# Multiple web servers configuration

If there will be a lot of traffic on the Business Portal web site, you might want to add web servers to your configuration to improve performance. For more information about using multiple web servers for load balancing, refer to the Business Portal Administrator's Guide. You might also have separate web servers for Business Portal and Web Services for Microsoft Dynamics GP.

The following illustration shows a server farm—that is, a configuration that includes multiple web servers.
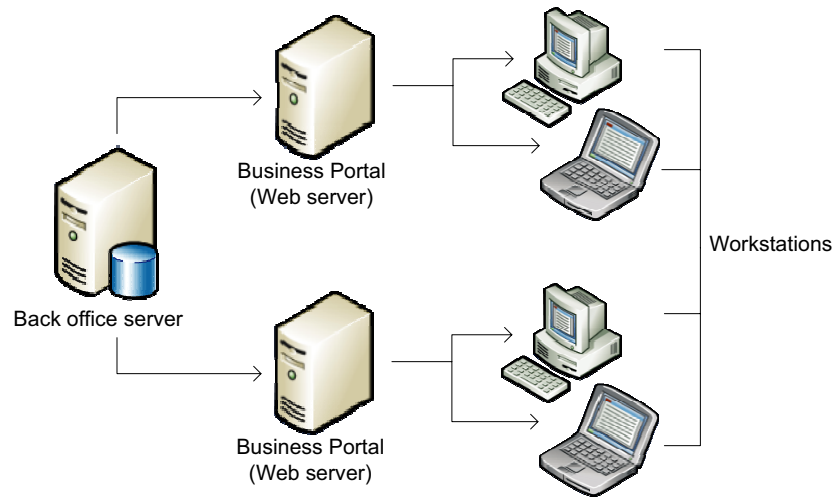


In an extranet environment, you can deploy multiple Business Portal web servers in your intranet and multiple web servers in your extranet.

If you want to deploy separate internal and external Business Portal sites, use multiple server farms. For more information, see *Multiple server farms configuration* on page 16.

## Multiple server farms configuration

If Business Portal will be deployed in an extranet, and you want to segregate functionality for external users, you can deploy separate server farms for internal and external users. (In SharePoint, a server farm can consist of a single web server.)

Each SharePoint farm has its own configuration and content databases, which means that SharePoint features such as navigation, security through SharePoint groups, and Search are separate. However, all Business Portal installations must share a single Microsoft Dynamics GP SQL database. This means that data security through Microsoft Business Framework roles and permissions is shared.

The following illustration shows a configuration with multiple server farms.

# PART 2: NETWORK AND SERVER CONFIGURATION
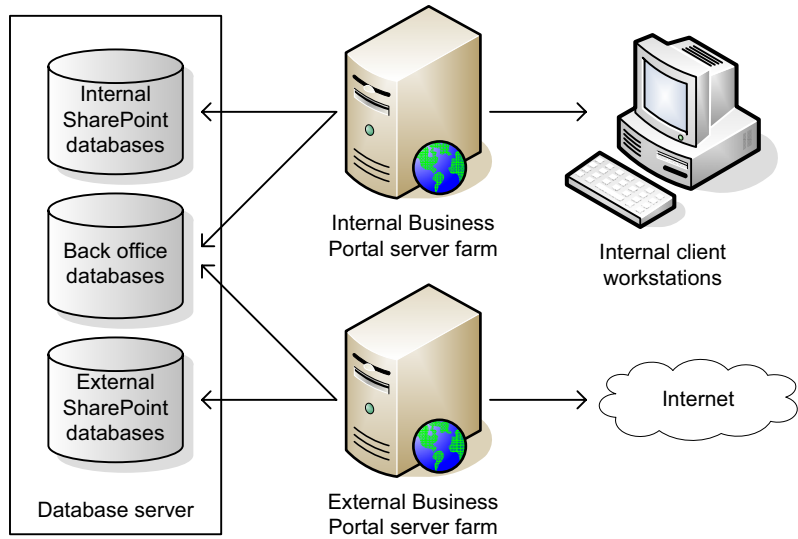
# Part 2: Network and server configuration

This part of the documentation explains how to prepare your network and servers for Business Portal.

The following information is discussed:

- Chapter 3, "Network environment," lists the network requirements for Business Portal.

- Chapter 4, "SQL Server configuration," explains SQL Server concepts related to Business Portal.

- Chapter 5, "Web server configuration," describes how to set up a web server for Business Portal.

- Chapter 6, "SharePoint Foundation configuration," explains installation considerations if you're installing Business Portal on SharePoint Foundation. This chapter also contains procedures for installing and configuring SharePoint Foundation.

- Chapter 7, "SharePoint Server configuration," explains installation considerations if you're installing Business Portal on SharePoint Server, Enterprise Edition. This chapter also contains procedures for installing and configuring SharePoint Server, Enterprise Edition.

# Chapter 3:   Network environment

This chapter contains information about the network configuration that must be in place before installing Business Portal.

For additional network information relating to SharePoint Foundation or SharePoint Server, refer to your SharePoint documentation.

The following sections are included:

- *Network environment requirements*
- *Protocol*
- *Domain*

## Network environment requirements

To get the best possible performance from Business Portal, be sure that your network meets the following requirements.

|  | **Minimum** | **Recommended** |
|---|---|---|
| **Server-to-server** | 100 Mbps Ethernet | 1 GB |
| **Server-to-client** | 10 Mbps Ethernet | 100 Mbps Ethernet |
| **Remote users (VPN or extranet)** | Broadband: cable or DSL | Broadband: cable or DSL |

## Protocol

TCP/IP must be running on your network. For more information about TCP/IP, refer to your Windows documentation.

### IP addresses
Each computer that you use must have a unique IP address (Internet Protocol address) associated with it. For more information about IP addresses, refer to your networking protocol software documentation.

### TCP/IP name resolution
You should use some type of name resolution in your network, so that each computer is identified by a unique hostname. Name resolution is a method of identifying each computer, and can be accomplished by having a specific server act as a domain name server, or putting a hosts file on each client and server.

For more information about name resolution using either a domain name server or hosts files, refer to your networking protocol software documentation.

## Domain

To use Business Portal, your web server, back office server, Terminal Services server (if applicable), Remote Desktop Services server (if applicable), and client workstations must belong to a domain. In addition, all Business Portal users—both internal and external—must have valid Windows domain accounts.

A domain is a group of computers that are part of a network and share a common directory database. A domain is administered as a unit with common rules and procedures. Each domain has a unique name.

If you're deploying Business Portal in an extranet, the perimeter network may belong to the internal domain, or you may set up two domains—one for the internal network and one for the perimeter network. If you have two domains, a trust may be set up between them. For more information about extranet configurations, refer to Chapter 14, "Extranet environments."

For information about setting up and administering a domain, refer to your Windows documentation.

# Chapter 4: SQL Server configuration

This chapter describes SQL Server concepts you should understand before installing Business Portal on your web server.

The following sections are included:

## SQL Server sort order and SharePoint Foundation or SharePoint Server

SharePoint Foundation and SharePoint Server use SQL Server or SQL Server Express databases to store information, depending on which installation type you choose.

**SQL Server**   If you choose the **Server farm** installation for SharePoint Foundation or SharePoint Server, the SharePoint databases will be installed on a SQL Server that you select.

The SharePoint content database can't be installed on a SQL Server that uses binary sort order. If your existing SQL Server uses binary sort order, you can create a new instance of SQL Server with sort order 52 (Dictionary Order, Case Insensitive) and install the SharePoint content database on the new instance. For more information about SQL Server instances and sort orders, refer to SQL Server Books Online.

*Creating a new instance may require additional SQL Server licensing. Refer to your license agreement for more information.*

**SQL Server Express**   If you choose the **Standalone** installation for SharePoint Foundation or SharePoint Server, SQL Server Express will be installed on the web server for the SharePoint databases. SQL Server Express will be set up to use a dictionary order, case insensitive sort order. Your back office SQL Server sort order doesn't matter in this case.

For more information about SharePoint installation types, refer to *SharePoint Foundation installation considerations* on page 31.

## SharePoint databases

SharePoint Foundation and SharePoint Server rely on databases to store all data for a web application, including both configuration settings and site content.

**Configuration database**   The configuration database maintains connections between servers and content databases, stores server settings, and identifies which content is to be provided by which web application. There is one configuration database per stand-alone server or per server farm.

**Content database**  When you create a web application, you choose whether to create a new content database or connect to an existing content database. Content databases store data from the sites: both site management data, such as user names and permissions, and content, such as list data and documents from document libraries.

You can create as many content databases as you need to support the web sites on your servers. For a departmental server, you may need only one content database. For a server farm, you may need thousands. For a web site that is available to members both inside and outside of a firewall (an extranet), you may have one content database linked to two web applications with different URLs.

For more information about the configuration and content databases, refer to your SharePoint documentation.

## SQL Server authentication methods

During the Business Portal installation, you'll need to specify the authentication method you want to use when connecting to the Microsoft Dynamics GP SQL Server.

To be able to use multiple authentication methods, the SQL Server must use mixed-mode authentication. For more information, refer to *Configuring SQL Server to use mixed-mode authentication* on page 24.

There are two authentication methods:

**Windows Trusted Authentication**   If you're using Windows Trusted Authentication, be sure that the user who's logged on to the computer where you're installing Business Portal has administrator rights for the Microsoft Dynamics GP SQL Server, either as a SQL user or as part of the Local Admin group on the SQL server.

When connecting to SQL Server using the Windows Trusted Authentication method, you won't have to enter a SQL Server-specific logon ID and password. Instead, SQL Server identifies you by the Windows user ID you entered when logging on to the network. SQL Server then permits or denies logon access based on that user ID.

**SQL Authentication**   When connecting to SQL Server using the SQL Authentication method, you must enter a SQL Server-specific logon ID and password. SQL Server verifies that the logon ID exists, and then permits access.

For more information about when these methods are used, refer to *SQL Server logon IDs* on page 25.

## Configuring SQL Server to use mixed-mode authentication

The SQL Server that hosts your Microsoft Dynamics GP data must be using mixed-mode authentication. (Mixed-mode authentication allows you to use either Windows Authentication or SQL Authentication to access the SQL Server.) Use the following procedure to set up mixed-mode authentication.

### To configure SQL Server to use mixed-mode authentication:

1.  Open SQL Server Management Studio.
    **Start** > **All Programs** > **Microsoft SQL Server 2012** > **SQL Server Management Studio**

    – Or –

    **Start** > **All Programs** > **Microsoft SQL Server 2008 R2** > **SQL Server Management Studio**

    – Or –

    **Start** > **All Programs** > **Microsoft SQL Server 2008** > **SQL Server Management Studio**

    – Or –

    **Start** > **All Programs** > **Microsoft SQL Server 2005** > **SQL Server Management Studio**

2.  Connect to the server.

3.  Right-click the SQL server with your Microsoft Dynamics GP databases, and click **Properties**.

4.  The **Server Properties** window appears. Select the **Security** page.

5.  Select the **SQL Server and Windows Authentication mode** option.

6.  Click **OK**, then close SQL Server Management Studio.

## SQL Server logon IDs

During the Business Portal installation, you'll need to enter the following SQL Server logon IDs:

*   The SQL Server administrator logon ID—entered in the **Connection Information** window if you choose to use SQL authentication—can be any SQL logon ID that has administrator privileges with access to all Microsoft Dynamics GP SQL databases. You can use the *sa* logon, but are not required to do so.

    These credentials are used only during the Business Portal installation process, to permit the installation wizard to create the Business Portal logon ID. The SQL Server administrator credentials are not used again.

*   The Business Portal logon ID—entered in the **Business Portal SQL Configuration** window—is the logon account Business Portal uses to access data in SQL Server. This logon ID is used continually to access Microsoft Dynamics GP data.

    The default entry in the Business Portal SQL Configuration window is *BusinessPortalUser*. However, you can also use an existing SQL user or create your own SQL user. If you enter a nonexistent SQL logon in the window, that

user will be created automatically in SQL Server during the Business Portal installation.

If you're installing Business Portal on multiple web servers, be sure that the same Business Portal logon ID and password are used for all web servers.

## SQL Server communication

The SQL Server must be set up to use the TCP/IP network protocol. Using the Named Pipes protocol can cause intermittent errors in Business Portal. For information about setting up SQL Server to use TCP/IP, refer to SQL Server Books Online.

# Chapter 5: Web server configuration

This chapter contains information about procedures you should perform on the web server before installing Business Portal.

This information is divided into the following sections:

- *System requirements*
- *Install Internet Information Services (IIS)*
- *Application Server role*
- *Configure Secure Sockets Layer (SSL)*
- *Turn off unnecessary privileges*
- *Using Network Load Balancing with Business Portal*

## System requirements

For up-to-date system requirements for the web servers where you will install Business Portal, see http://go.microsoft.com/fwlink/?LinkID=187656.

## Install Internet Information Services (IIS)

Internet Information Services (IIS) should be installed before you install any other prerequisites on the web server.

For file system-level security, install the IIS web root on a non-system NTFS partition. A non-system partition is one other than the partition containing the operating system files (for example, C:\Winnt). For more information about security best practices for IIS, refer to the IIS Operations Guide, available on Microsoft TechNet (technet.microsoft.com).

1. Open the Server Manager.
   **Start** > **Administrative Tools** > **Server Manager**.

2. Select the **Roles** node in the Server Manager. The currently installed roles are displayed.

3. In the **Action** menu, choose **Add Roles**. The Add Roles Wizard appears. Click **Next** to continue.

4. In the list of available roles, select the Web Server (IIS) role. Click **Next** to continue.

   *A message appears if you are required to install features for the Web Server (IIS) role. Click Add Required Features.*

5. Review the information about the Web Server (IIS) role. Click **Next** to continue.

6. In the Select Role Services window, select the following subcomponents for the Web Server role service.

| Role Service component | Required subcomponent |
|---|---|
| Common HTTP Features | Static Content<br>Default Document<br>Directory Browsing<br>HTTP Errors |

| Role Service component | Required subcomponent |
|---|---|
| Application Development | ASP.NET<br>NET Extensibility<br>ISAPI Extensions<br>ISAPI Filters<br>Server Side Includes |
| Health and Diagnostics | HTTP Logging<br>Request Monitor |
| Security | Basic Authentication<br>Windows Authentication<br>Digest Authentication<br>Request Filtering |
| Performance | Static Content Compression |

*A message appears if you are required to install role services and features for a specific component. Click Add Required Role Services.*

7.  In the Select Role Services window, select the following components for the Management Tools role service.

    - IIS Management Console
    - IIS 6 Management Compatibility

8.  Click **Next**.

9.  Review the installation messages, and then click **Install**.

10. After you have viewed the installation results, click **Close**.

## Application Server role

When running Business Portal on Windows Server 2008, the Application Server role is required. To install this role, complete the following steps.

1.  Open the Server Manager.
    **Start** > **Administrative Tools** > **Server Manager**.

2.  Select the **Roles** node in the Server Manager. The currently installed roles are displayed.

3.  In the **Action** menu, choose **Add Roles**. The Add Roles Wizard appears. Click **Next** to continue.

4.  In the list of available roles, select **Application Server**. Click **Next** to continue.

5.  Review the information about the Application Server role. Click **Next** to continue.

6.  In the Select Role Services window, select the following components for the Management Tools role service.

    - COM+ Network Access
    - Distributed Transactions
    - Incoming Remote Transactions
    - Outgoing Remote Transactions

7.   Click **Next** in the Select Role Services window.

8.   Choose a Server Authentication Certificate for SSL Encryption.

9.   Click **Next**.

10.  Review the installation messages, and then click **Install**.

11.  After you have viewed the installation results, click **Close**.

## Configure Secure Sockets Layer (SSL)

Secure Sockets Layer (SSL) is recommended, but not required, for the Business Portal web site. SSL is a protocol that allows web servers and clients to communicate more securely through the use of encryption. When SSL is not used, data sent between the client and server is vulnerable to anyone with physical access to the network.

> ⚠ *To help protect your data, you must use Secure Sockets Layer (SSL) for your Business Portal web site if it is deployed in an extranet. For more information about extranet deployment, refer to Chapter 14, "Extranet environments."*

To enable authentication through SSL, you must install a certificate and a private key on your web server. For more information about configuring SSL, refer to the IIS Operations Guide, available on Microsoft TechNet (technet.microsoft.com).

We recommend configuring SSL before installing SharePoint Foundation or SharePoint Server and Business Portal. If you implement SSL after Business Portal has been installed, you must make the SSL changes described in the "Configuration Changes" chapter of the Business Portal Administrator's Guide.

## Turn off unnecessary privileges

For better security, you should turn off unnecessary server computer and server site privileges on the web server. For information about securing a Windows Server 2008 computer, refer to the Windows Server 2008 Security Guide, available as a download on the Microsoft TechNet Security Center (www.microsoft.com/technet/security).

## Using Network Load Balancing with Business Portal

Business Portal uses a session state setting of InProc, which means that client sessions are managed by and stored on the web server. (A session is a series of requests issued by the same client within a certain period of time.) The InProc session state setting does not allow session state to be stored across servers in a web farm.

If you're using Network Load Balancing in a web farm, you should set single affinity for the Business Portal application. Affinity is the method used to associate client requests to servers. When no affinity is specified, requests are distributed across the load-balanced cluster without respect to their source. Single affinity always returns each client's traffic to the same server. Directing TCP connections from the IP address to the same server allows Business Portal to maintain session state information in the server memory.

For more information about setting up affinity, see the Network Load Balancing in Windows Server 2008 documentation on Microsoft TechNet (technet.microsoft.com).

# Chapter 6: SharePoint Foundation configuration

This chapter explains how to install and configure SharePoint Foundation 2010 for use with Business Portal. You must install SharePoint Foundation 2010 or SharePoint Server 2010, Enterprise Edition on the web server before installing Business Portal.

If you're installing Business Portal with SharePoint Server 2010, skip this chapter and refer to Chapter 7, "SharePoint Server configuration."

*This chapter doesn't provide comprehensive information about SharePoint Foundation 2010. For complete information about SharePoint Foundation 2010 concepts and setup procedures, see the SharePoint Foundation 2010 documentation.*

This chapter contains the following sections:

- *SharePoint Foundation configuration*
- *User accounts for SharePoint Foundation*
- *Install SharePoint Foundation*
- *Create a web application and site collection using SharePoint Foundation*
- *Configure a Service Principal Name*

## SharePoint Foundation installation considerations

Before installing SharePoint Foundation 2010, you must determine which type of SharePoint installation to perform: Standalone or Server farm. We recommend choosing the Server farm option.

### Standalone

If you choose the **Standalone** option, the following conditions apply.

- Business Portal can be installed on only a single web server. Additional configuration would be necessary to spread the processing load over multiple servers in a server farm.

- The SharePoint databases will be created in a new instance of SQL Server 2008 Express. You will not have the option of using an existing SQL Server instance to store the SharePoint databases.

- A web application and site collection are created on the default web site. This may cause a conflict if you already have content for the default web site.

- The application pool created for the SharePoint site will be run using the Network Service identity. If you install Business Portal on that site, many of its actions will be performed by the Network Service user. Some Business Portal applications such as Benefit Self Service require access to the Web Services for Microsoft Dynamics GP. However, Web Services for Microsoft Dynamics GP cannot be accessed by the Network Service user. This means you will need to change the application pool identity for the Business Portal site to be a standard machine user or domain user.

Choosing the Server farm installation option allows you to make these configuration decisions before you install Business Portal.

### Server farm

If you choose the **Server farm** option, the following conditions apply.

- Business Portal can be installed on more than one web server.

- This option also allows you to install the SharePoint databases on an existing SQL Server instead of on a new instance of SQL Server 2008 Express on the web server. The SharePoint Foundation configuration and content databases will be created on the SQL Server you specify.

*If your existing SQL Server is near capacity, we recommend installing the SharePoint configuration and content databases on a different SQL server. Installing SQL Server on an additional computer may require additional SQL Server licensing. Refer to your license agreement for more information.*

- A web application and site collection must be created manually within SharePoint Central Administration. For more information, refer to *Create a web application and site collection using SharePoint Foundation* on page 33.

## User accounts for SharePoint Foundation

If you're going to install the server farm version of SharePoint Foundation, you must first create user accounts that SharePoint can use to launch services, run processes, and connect to the SQL server.

*You don't need to create these accounts if you're going to use the stand alone installation method for SharePoint Foundation.*

You'll need to create the following user accounts for SharePoint Foundation. For more information about administrative and service accounts for SharePoint Foundation, refer to the SharePoint Products Technical Library on Microsoft TechNet (technet.microsoft.com).

- A domain user account that acts as the application pool identity for the web application where you will create the Business Portal site collection.

  We recommend creating an account called wss_user. This user account must be member of the IIS Worker Process (IIS_WPG) group on the web server, and the account must be dedicated (used only by SharePoint).

  If you're installing on multiple web servers, the account must be a Business Portal user.

  For more information, see *Create a web application and site collection using SharePoint Foundation* on page 33.

- A domain user account that acts as the identity for the SharePoint Central Administration application pool. The SharePoint 2010 Timer service also runs under this account.

## Install SharePoint Foundation

You can download SharePoint Foundation 2010 from the Microsoft Download Center (www.microsoft.com/downloads). Refer to the SharePoint Products Technical Library on Microsoft TechNet (technet.microsoft.com) for information about installing.

Be sure to use the Microsoft SharePoint Products Preparation Tool to install all required prerequisites to use SharePoint Foundation 2010. (Click **Install software prerequisites** on the SharePoint Foundation 2010 Start page.) The SQL Server Reporting Services SharePoint 2010 Add-in is installed as a prerequisite for SharePoint Foundation if Reporting Services is already installed. During the Reporting Services 2012 installation, you had the option to install the add-in.

Be sure to use the SharePoint Products Configuration wizard (**Start > All Programs** > **Microsoft SharePoint 2010 Products** > **SharePoint 2010 Products Configuration wizard)** to configure SharePoint Foundation. The SharePoint Products Configuration Wizard automates several configuration tasks, including installing and configuring the configuration database, installing SharePoint Foundation services, and creating the Central Administration web site.

When you're configuring SharePoint Foundation within the SharePoint Central Administration web site, you can choose either Kerberos authentication or NTLM authentication. Unless you have a specific need for Kerberos authentication, you should choose NTLM authentication. For more information about running SharePoint Foundation using Kerberos authentication, refer to Microsoft Knowledge Base Article 832769. (Go to support.microsoft.com and type **832769** in the **Search** box.)

If you use Kerberos authentication and the application pool identity is a domain account, your domain administrator must configure a Service Principal Name (SPN) for that account. For more information, see *Configure a Service Principal Name* on page 35.

After configuring SharePoint Server within the SharePoint Central Administration web site, use the Initial Farm Configuration wizard to select the services to use with the server farm. You must select Business Data Connectivity Service. This service is used to make Microsoft Dynamics GP data accessible in Business Portal.

## Create a web application and site collection using SharePoint Foundation

If you have installed SharePoint Foundation using the **Server farm** option, a web application and site collection must be created on the virtual server where you want to install Business Portal. You can also a web application and site collection manually using the procedures in this section.

*You don't need to create a web application and site collection as separate steps if you're using the basic installation method for SharePoint Foundation. The basic installation method creates a web application and site collection automatically on the default virtual server.*

For more information about web applications and site collections, refer to the SharePoint Products Technical Library on Microsoft TechNet (technet.microsoft.com).

## To create a web application:

1. Open SharePoint Central Administration.
   **Start** > **Microsoft SharePoint 2010 Products** > **SharePoint 2010 Central Administration**

2. Click **Application Management**.

3. Under the **Web Applications** heading, click **Manage web applications**.

4. Click **New** in the ribbon to open the Create New Web Application page.

5. Select an IIS web site and security configuration.

6. In the **Application Pool** section, click **Create a new application pool** and enter a name (we recommend calling the new application pool *BusinessPortal*).

*When a web application fails, it usually causes the application pool to fail, as well. If you are going to install other web applications on this server, we recommend that you assign them to separate application pools. That way, one failed application can't cause the other applications to fail.*

7. Click **Configurable** and enter the user account you created for SharePoint. (For more information about the user account, refer to *User accounts for SharePoint Foundation* on page 32.) Be sure to enter the account in domain\username format.

8. Verify that the database name and other information on the page is correct and click **OK**. When the process is complete, the Application Created page is displayed.

*We recommend that the database name should be the <Web Application name> - Port#. An example of a database name is MySites - 82.*

9. On the Application Created page, click **OK**.

## To create a site collection:

1. Open the Create Site Collection page. Go to SharePoint Central Administration and click **Application Management**. Under the **Site Collections** heading, click **Create site collections**.

2. Select the web application you just created.

3. Enter a title and description for the site collection.

*You cannot install Business Portal if the name of the site collection contains "BP" or "Business Portal" in its name.*

4. Specify the URL for the site collection, if necessary.

*Be sure the URL does not contain spaces.*

5. Select the Team Site template.

6. Specify a site collection administrator.

7. Click **OK**.

## Configure a Service Principal Name

If the Business Portal web application was configured to use Kerberos authentication and the application pool identity is a domain account, your domain administrator must configure a Service Principal Name (SPN) for that account. Service principal names are unique identifiers for services running on servers. Every service that uses Kerberos authentication must have an SPN so that clients can identify the service on the network.

*If the application pool identity for the SharePoint site is configured to use a built-in account such as Network Service, you do not have to set up an SPN. The built-in accounts are automatically configured to work with Kerberos authentication.*

Use the Setspn.exe command-line tool to configure an SPN. The Setspn.exe command-line tool is available in Windows Server 2008 if you have installed the Active Directory® Domain Services server role using Server Manager. You must run the Setspn.exe command with the appropriate user privilege. Click **Start**, right-click **Command Prompt**, and then click **Run as administrator**.

# Chapter 7: SharePoint Server configuration

This chapter explains how to install and configure SharePoint Server 2010, Enterprise Edition for use with Business Portal. You must install SharePoint Foundation or SharePoint Server on the web server before installing Business Portal.

If you're installing Business Portal with SharePoint Foundation only, skip this chapter and refer to Chapter 6, "SharePoint Foundation configuration."

*This chapter doesn't provide comprehensive information about SharePoint Server. For complete information about SharePoint Server concepts and setup procedures, see the SharePoint Server documentation.*

This information is divided into the following sections:

- *SharePoint Server installation considerations*
- *User accounts for SharePoint Server*
- *Install SharePoint Server*
- *Start services in SharePoint Server*
- *Create a web application and site collection using SharePoint Server*
- *Configure a Service Principal Name*

## SharePoint Server installation considerations

Before installing SharePoint Server, you must determine which type of SharePoint installation to perform: Standalone or Server farm. We recommend choosing the Server farm option.

### Standalone

If you choose the **Standalone** option, the following conditions apply:

- Business Portal can be installed on only a single web server. Additional configuration would be necessary to spread the processing load over multiple servers in a server farm.

- The SharePoint databases will be created in a new instance of SQL Server 2008 Express. You will not have the option of using an existing SQL Server instance to store the SharePoint databases.

- A web application and site collection are created on the default web site. This may cause a conflict if you already have content for the default web site.

- The application pool created for the SharePoint site will be run using the Network Service identity. If you install Business Portal on that site, many of its actions will be performed by the Network Service user. Some Business Portal applications such as Benefit Self Service require access to the Web Services for Microsoft Dynamics GP. However, Web Services for Microsoft Dynamics GP cannot be accessed by the Network Service user. This means you will need to change the application pool identity for the Business Portal site to be a standard machine user or domain user.

Choosing the Server farm installation option allows you to make these configuration decisions before you install Business Portal.

### Server farm

If you choose the **Server farm** option, the following conditions apply.

- Business Portal can be installed on more than one web server.

- This option allows you to install the SharePoint databases on an existing SQL Server instead of on a new instance of SQL Server 2008 Express on the web server. The SharePoint Server configuration and content databases will be created on the SQL Server you specify.

*If your existing SQL Server is near capacity, we recommend installing the SharePoint configuration and content databases on a different SQL server. Installing SQL Server on an additional computer may require additional SQL Server licensing. Refer to your license agreement for more information.*

- A web application and site collection must be created manually within SharePoint Central Administration. For more information, refer to *Create a web application and site collection using SharePoint Server* on page 39.

## User accounts for SharePoint Server

If you're going to install the advanced version of SharePoint Server, you must first create domain user accounts that SharePoint can use to launch services, run processes, and connect to the SQL server.

*You don't need to create these accounts if you're going to use the basic installation method for SharePoint Server.*

You will need to create the following user accounts for SharePoint Server. For more information about administrative and service accounts for SharePoint Server, refer to the SharePoint Server Technical Library on Microsoft TechNet (technet.microsoft.com).

| Domain user account | Description | For more information |
|---|---|---|
| User account 1 | A domain user account that acts as the application pool identity for the web application where you will create the Business Portal site collection.<br>We recommend creating an account called oss_user. This user account must be member of the IIS Worker Process (IIS_WPG) group on the web server, and the account must be dedicated (used only by SharePoint). | *Create a web application and site collection using SharePoint Server* on page 39 |
| User account 2 | A domain user account that is used to crawl content on your sites and create indexes. | |
| User account 3 | A domain user account that acts as the identity for the SharePoint Central Administration application pool. The SharePoint 2010 Timer service also runs under this account. | |

## Install SharePoint Server

Refer to the documentation included on your SharePoint Server DVD for information about installing.

Be sure to use the Microsoft SharePoint Products Preparation Tool to install all required prerequisites to use SharePoint Server 2010. (Click **Install software prerequisites** on the SharePoint Server 2010 Start page.) The SQL Server Reporting

Services SharePoint 2010 Add-in is installed as a prerequisite for SharePoint Server if Reporting Services is already installed. During the Reporting Services 2012 installation, you had the option to install the add-in.

Be sure to use the SharePoint Products Configuration wizard (**Start > All Programs > Microsoft SharePoint 2010 Products** > **SharePoint 2010 Products Configuration wizard)** to configure SharePoint Foundation. The SharePoint Products Configuration Wizard automates several configuration tasks, including installing and configuring the configuration database, installing SharePoint services, and creating the Central Administration web site.

When you're configuring SharePoint Server within the SharePoint Central Administration web site, you can choose either Kerberos authentication or NTLM authentication. Unless you have a specific need for Kerberos authentication, you should choose NTLM authentication. For more information about running SharePoint using Kerberos authentication, refer to Microsoft Knowledge Base Article 832769. (Go to support.microsoft.com and type **832769** in the **Search** box.)

If you use Kerberos authentication and the application pool identity is a domain account, your domain administrator must configure a Service Principal Name (SPN) for that account. For more information, see *Configure a Service Principal Name* on page 41.

After configuring SharePoint Server within the SharePoint Central Administration web site, use the Initial Farm Configuration wizard to select the services to use with the server farm. You must select Business Data Connectivity Service. This service is used to make Microsoft Dynamics GP data accessible in Business Portal.

## Start services in SharePoint Server

After you have installed and configured SharePoint Server on all of your front-end servers, you must configure SharePoint Server services. The services you need to configure depend on your server topology and the server roles you deploy. For Business Portal, you must start the Microsoft SharePoint Foundation Web Application at a minimum.

Use the following procedure to start services. For more information about services, see the SharePoint Server documentation.

1.  Open SharePoint Central Administration.
    **Start** > **Microsoft SharePoint 2010 Products** > **SharePoint 2010 Central Administration**

2.  Under **System Settings**, click **Manage services on server**.

3.  Start the required services for your configuration.

## Create a web application and site collection using SharePoint Server

We recommend that you install SharePoint Server using the **Server farm** option. When you install using the **Server farm** option, a web application and site collection must be created on the virtual server where you want to install Business Portal. Use the procedures in this section to create a web application and site collection manually within SharePoint Central Administration.

*You don't need to create a web application and site collection as separate steps if you're using the basic installation method for SharePoint Server. The basic installation method creates a web application and site collection automatically on the default virtual server.*

For more information, refer to the SharePoint Server documentation.

## To create a web application:

1.  Open SharePoint Central Administration.
    **Start** > **Microsoft SharePoint 2010 Products** > **SharePoint 2010 Central Administration**

2.  Click **Application Management**.

3.  Under the **Web Applications** heading, click **Manage web applications**.

4.  Click **New** in the ribbon to open the Create New Web Application page.

5.  Select an IIS web site and security configuration.

*If Microsoft Dynamics GP Workflow has been installed on this web server, do not select the web site where Workflow was installed. Business Portal and Workflow can't use the same web site.*

6.  In the **Application Pool** section, click **Create a new application pool** and enter a name (we recommend calling the new application pool *BusinessPortal*).

*When a web application fails, it usually causes the application pool to fail, as well. If you are going to install other web applications on this server, we recommend that you assign them to separate application pools. That way, one failed application can't cause the other applications to fail.*

7.  Click **Configurable** and enter the user account you created for SharePoint. (For more information about the user account, refer to *User accounts for SharePoint Server* on page 38.) Be sure to enter the account in domain\username format.

8.  Verify that the database name and other information on the page is correct and click **OK**. When the process is complete, the Application Created page is displayed.

*We recommend that the database name should be <Web Application name> - Port#. An example of a database name is MySites - 82.*

9.  On the Application Created page, click **OK**.

## To create a site collection:

1.  Open the Create Site Collection page. Go to SharePoint Central Administration and click **Application Management**. Under the **Site Collections** heading, click **Create site collections**.

2.  Select the web application you just created.

3.  Enter a title and description for the site collection.

*You cannot install Business Portal if the name of the site collection contains "BP" or "Business Portal" in its name.*

4.  Specify the URL for the site collection, if necessary.

*Be sure the URL does not contain spaces.*

5.  Select the **Team Site** template.

6.  Specify a site collection administrator.

7.  Click **OK**.

# Configure a Service Principal Name

If the Business Portal web application was configured to use Kerberos authentication and the application pool identity is a domain account, your domain administrator must configure a Service Principal Name (SPN) for that account. Service principal names are unique identifiers for services running on servers. Every service that uses Kerberos authentication must have an SPN so that clients can identify the service on the network.

*If the application pool identity for the SharePoint site is configured to use a built-in account such as Network Service, you do not have to set up an SPN. The built-in accounts are automatically configured to work with Kerberos authentication.*

Use the Setspn.exe command-line tool to configure an SPN. The Setspn.exe command-line tool is available in Windows Server 2008 if you have installed the Active Directory Domain Services server role using Server Manager. You must run the Setspn.exe command with the appropriate user privilege. Click **Start**, right-click **Command Prompt**, and then click **Run as administrator**.

# Part 3: Business Portal installation

This part of the documentation contains the procedures you'll need to follow to install Business Portal. This part also contains some initial setup information.

The following information is included:

*   Chapter 8, "Before you install," describes installation concepts you should understand and pre-installation procedures you should perform.

*   Chapter 9, "Installing Business Portal," provides step-by-step instructions for installing Business Portal on your web server. It also provides an overview of the components that are installed with Business Portal.

*   Chapter 10, "Additional applications," includes a list of additional features and applications you can install with Business Portal, and step-by-step instructions for installing them.

For additional setup information, including information about setting up users, refer to the Business Portal Administrator's Guide.

# Chapter 8: Before you install

This chapter contains information you should be aware of before starting the Business Portal installation wizard.

This information is divided into the following sections:

- *Start services on the web server*
- *Install Business Portal prerequisites*
- *Back up SharePoint databases*
- *Register Business Portal applications*

## Start services on the web server

Before installing, verify that the following services are started on the web server where you will install Business Portal:

- IIS Admin Service
- World Wide Web Publishing Service

## Install Business Portal prerequisites

You may need to install the following prerequisites, depending on the Business Portal configuration you plan to install.

**SharePoint Foundation or SharePoint Server**   Business Portal is based on SharePoint Foundation. You must install and configure either SharePoint Foundation or SharePoint Server on web servers before you install Business Portal.

SharePoint Foundation can be downloaded from the Microsoft Download Center. For more information, refer to Chapter 6, "SharePoint Foundation configuration."

SharePoint Server must be purchased separately. For more information, refer to Chapter 7, "SharePoint Server configuration."

**Catalog Maintenance**   This component is required to use the Order Management application. Catalog Maintenance is used to create item catalogs for managing inventory items. You can install this component on any computer that has an ODBC connection to the Microsoft Dynamics GP server.

Catalog Maintenance can be installed using the Business Portal installation program. For more information, refer to the Order Management documentation.

*You can install Catalog Maintenance before installing Business Portal. However, you will encounter errors when opening Catalog Maintenance if Business Portal has not yet been installed. You must install Business Portal before opening Catalog Maintenance.*

**Web Services for Microsoft Dynamics GP**   This component is required to integrate Microsoft Dynamics GP data into Business Connectivity Services in SharePoint.

Web Services for Microsoft Dynamics GP can be installed from the Microsoft Dynamics GP installation media. For more information, refer to the Microsoft Dynamics GP Web Services Installation and Administration Guide.

**Microsoft SQL Server Reporting Services**   Reporting Services 2008, Reporting Services 2008 R2, or Reporing Services 2012 is required for the Business Intelligence feature. The Business Intelligence feature contains predefined Reporting Services KPIs and metrics. Your customer data is displayed in these KPIs and metrics in Executive Center dashboard pages. You must install and configure Reporting Services, and then deploy Microsoft Dynamics GP Reporting Services reports. You also must set up security for Reporting Services reports. 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.

## Back up SharePoint databases

You must make a back up of the SharePoint Content database and the SharePoint Configuration database before continuing with the upgrade of Business Portal. If errors are encountered and you don't have a current backup, data may be lost and significant manual steps will be required to recover data.

For more information about making a backup, see one of the following links

| SharePoint | Link |
|---|---|
| SharePoint Foundation | http://go.microsoft.com/fwlink/?LinkId=208745 |
| SharePoint Server | http://go.microsoft.com/fwlink/?LinkId=208746 |

## Register Business Portal applications

Before you can install Business Portal applications, you must register them in Microsoft Dynamics GP. Some applications may require certain back office modules to be registered, as well. For more information about entering registration keys, refer to your Microsoft Dynamics GP documentation.

# Chapter 9: Installing Business Portal

This chapter guides you through the Business Portal installation wizard. This information is divided into the following sections:

- *Business Portal components*
- *User accounts for Business Portal*
- *Install Business Portal*
- *Start Business Portal*

## Business Portal components

The following Business Portal components are installed by the installation wizard:

**Virtual directory**   A virtual directory called "BusinessPortal" is created in Internet Information Services (IIS). An IIS virtual directory maps to a folder on your web server's hard disk that contains web pages. The virtual directory provides security; people who access your web pages won't be able to determine where the files are located on your web server, and therefore can't modify them.

**Program files**   Business Portal program files are installed on the web server's hard disk.

**SQL Server objects**   SQL Server objects are created in Microsoft SQL Server. These objects include the tables that store Business Portal data, and the SQL Server credentials that Business Portal uses to retrieve data from your databases.

*The Reports Catalog is installed only if you're using Business Portal with SharePoint Foundation.*

**Reports Catalog**   The Reports Catalog enables Business Portal users to view Microsoft Dynamics GP reports that have been published to Reports pages in Business Portal. You can limit users' access to reports based on user roles.

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

Report Scheduler is a module that you can add to Microsoft Dynamics GP to schedule and publish Report Writer reports to the Reports Catalog shared folder. For information about installing and setting up Report Scheduler, refer to Chapter 11, "Reports Catalog setup."

## User accounts for Business Portal

Business Portal uses several user accounts, some of which you must enter during installation.

### SharePoint user account

You must enter a user account that will be used as the application pool identity for the new web application. For more information, see *User accounts for SharePoint Foundation* on page 32 or *User accounts for SharePoint Server* on page 38.

### NT service user account

If you're installing Order Management, you must enter a user account to run the eConnect service. The account must be a member of the DYNGRP role in SQL

Server for the system and company databases you will use with Order Management.

### Business Portal SQL user account

You must enter a SQL logon ID to allow Business Portal to access data in SQL Server if the feature uses Microsoft Business Framework (MBF). MBF is used to control access to data from Microsoft Dynamics GP. This logon ID is used continually to access Microsoft Dynamics GP data. For more information, see *SQL Server logon IDs* on page 25.

### Business Portal Windows user account

To use all the MBF features of Business Portal, Business Portal must have access to your network through a Windows user account. Business Portal automatically uses the Network Service account; you can't choose a different account. This account must exist on the Business Portal web server in order to install Business Portal.

If you are using MBF features, the Network Service account automatically has appropriate permissions. In addition, Windows manages the password, so you won't have problems with password expiration.

## Install Business Portal

Before you install, consider the following:

- We recommend backing up the web.config file before installing Business Portal. The web.config file is located at C:\inetpub\wwwroot\wss\ VirtualDirectories\<*port number*>, where <*port number*> is the port number of the IIS web site where you will install Business Portal.

- We recommend backing up the content (WSS_Content) and configuration (SharePoint_Config) databases of SharePoint before installing Business Portal. The content database is the database that will store the web application that Business Portal will be installed to.

- The web site must use Integrated Windows authentication to complete the installation. If necessary, the installation program will change the authentication method to Integrated Windows before installing and then revert to your original settings when the installation is complete.

- Be sure that the SharePoint site collection is running on the web server before you install Business Portal. You need to be sure that you can browse the site collection from the web server you want to install Business Portal on.

- Internet Information Services (IIS) will be reset during the Business Portal installation. We recommend that you perform this installation at a time when IIS resets will have the least amount of impact on any web applications on this server. If you have disabled the IISReset command-line utility, you must enable it before installing Business Portal. To enable the IISReset command-line utility, click **Start** > **Run** and type **iisreset /enable**, then press ENTER.

Complete the following procedure to install Business Portal. If you have multiple web servers, you should perform this procedure on each server.

1.  From the Business Portal installation media, browse and double-click the **CDSetup.exe** file to open the main Business Portal installation window.

2.  Under **Install**, click **Business Portal for Microsoft Dynamics GP**.

3.  The **Back up SharePoint Databases** window appears.



    You must make a back up of the SharePoint Content database and the SharePoint Configuration database before continuing with the upgrade of Business Portal. If errors are encountered and you don't have a current backup, data may be lost and significant manual steps will be required to recover data.

    For more information about making a backup, see one of the following links.

| SharePoint | Link |
|---|---|
| SharePoint Foundation | http://go.microsoft.com/fwlink/?LinkId=208745 |
| SharePoint Server | http://go.microsoft.com/fwlink/?LinkId=208746 |

    After you have made a backup of your SharePoint databases, mark the **I have made a backup of the SharePoint Content and SharePoint Configuration databases** option, then click **OK**.

4.  The **End-User License Agreement** window appears. Read and accept the terms and conditions, then select **I accept the terms in the License Agreement**, and click **Next**.

5.  The **Connection Information** window appears.
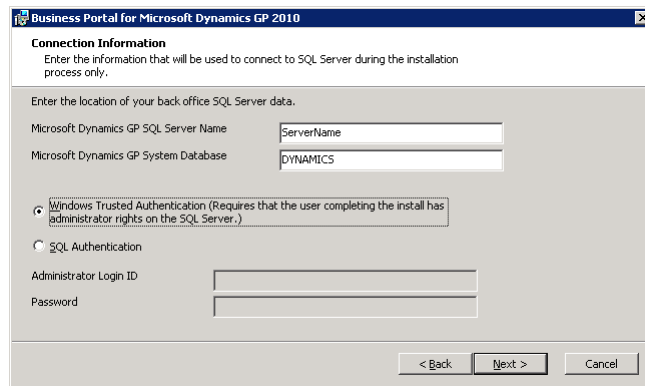
Enter the location of your Microsoft Dynamics GP SQL database.

| Field | What to do |
|---|---|
| SQL Server Name | Enter the name of the Microsoft Dynamics GP SQL Server. (If a named instance is being used, enter it in ServerName\Instance format.) |
| System Database | Enter **DYNAMICS**. |

You also must select the type of authentication that should be used when creating the SQL tables and objects that are used by Business Portal. These credentials are used *only during the installation process*.

•    If you select **Windows Trusted Authentication**, you don't need to enter any other information. Click **Next**.

•    If you select **SQL Authentication**, enter a SQL Server administrator ID and password. Click **Next**.

For more information about authentication methods, refer to *SQL Server authentication methods* on page 24.

6.    The **Select Features** window appears. Select the features to install.

The first time you run the installation wizard, the applications you have registered in Microsoft Dynamics GP will be selected automatically. For more information about installing these applications, refer to Chapter 10, "Additional applications."



When you click a button for a feature, a pop-up menu of options appears. Refer to the table for more information about each option.

| Option | What happens |
|---|---|
| Will be installed to the local hard drive | The selected feature will be installed on the local hard disk. (This option installs the feature, but not sub features.) |
| Entire feature will be installed to the local hard drive | Will install the feature and all of its sub features. |
| Entire feature will be unavailable | Will not install the selected feature or sub feature. |

Click **Disk Usage** to open the **Disk Space Requirements** window, where you can view the amount of available disk space, and the amount required for installation.

7.  Specify the folder where you want the Business Portal files installed. The default folder is C:\Program Files\Microsoft Dynamics\Business Portal. To select a different folder, click **Browse**.

    After you have specified the installation folder, click **Next**.

8.  The **Web Services Connection Information** window appears.



Enter the machine name and the port number for the Microsoft Dynamics GP web service.

Typically, 48620 is the port number of the web service. The port number 48620 is the default value that is used when the Dynamics GP service is installed. If this port value doesn't work to access the service, you will need to contact your administrator to find what port the Dynamics GP service is running on.

Click **Next**.

9.  The Web Site Configuration window appears.



Select the URL for an existing site collection where you want to install Business Portal. Be sure that the URL is in the default zone. Refer to the Alternate Access Mappings page in SharePoint Central 2010 Administration for the site URL information.

*If Microsoft Dynamics GP Workflow has been installed on this web server, do not select the web site where Workflow was installed. Business Portal and Workflow can't use the same web site.*

Click **Next**.

10. If you're installing Order Management, the eConnect COM User window appears.



Enter the account to use to run the eConnect service. The account you enter must be a member of the DYNGRP role in SQL Server for the system and company databases you'll use with Order Management.

Click **Next**.

11. The Business Portal SQL Configuration window appears.



Enter a new or existing SQL Server logon ID and password. Business Portal will use these credentials when accessing data from SQL Server. If you're installing Business Portal on multiple web servers, be sure that the same Business Portal logon ID and password are used for all web servers.

For more information, refer to *SQL Server logon IDs* on page 25.

Click **Next**.

12. The **Ready to Install** window appears. Click **Install**. The installation process will take some time to complete.

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

The Report Viewer Redistributable might be also installed with Business Portal.

When you've finished installing Business Portal, verify that the installation was successful. Refer to *Start Business Portal* on page 53 for information about starting Business Portal for the first time.

14.  We recommend creating an additional backup of the web.config file after installing Business Portal. The web.config file is located at C:\inetpub\wwwroot\wss\VirtualDirectories\*<port number>*, where *<port number>* is the port number of the IIS web site where you installed Business Portal.

15.  You can continue to configure Business Portal, if needed.

If you're installing Business Portal on multiple web servers, we recommend completing the setup and configuration of Business Portal on the first web server to be sure the installation was successful, and then installing Business Portal on subsequent web servers.

Refer to the table for additional installation tasks.

| Task | Reference |
|------|-----------|
| Set up reports, if you're using Business Portal with SharePoint Foundation. | Refer to Chapter 11, "Reports Catalog setup." |
| Make changes needed to use Business Portal with Terminal Services or Remote Desktop Services. | Refer to Chapter 12, "Terminal and Remote Desktop Services setup." |
| Set up employee workstations. | Refer to Chapter 13, "Client configuration." |

## Start Business Portal

Start Business Portal by entering the Business Portal URL in the address field of Internet Explorer®.

• If you installed Business Portal on the default web site, enter http://*ServerName*/BP in the address field.

• If you installed Business Portal on a port other than 80, enter http://*ServerName:PortNumber*/BP in the address field.

• If you are using managed paths, enter http://*ServerName*/*ManagedPath*/BP in the address field.

If you've configured your Business Portal to use Secure Sockets Layer (SSL), use "https" instead of "http" in the URL.

Depending on your Internet Explorer security settings, you may be required to log on. When you launch Business Portal for the first time, you might be prompted to install ActiveX® components that are needed to use certain MBF pages. The MBFWebBehaviors.cab contains the ActiveX components.

*If you are not using User Account Control (UAC), you may be asked to install the MBFWebBehaviors.cab multiple times. You can double-click the BusinessPortal-ActiveX.msi (Business Portal installation media\PreReqs\ActiveXControl) to install ActiveX components.*

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

For information about installing ActiveX components on workstations for members of the Users group, refer to *Install ActiveX controls on client workstations* on page 74. For information about using Group Policy or Systems Management Server (SMS) to deploy ActiveX components, refer to "Active X Components Install for Microsoft Business Portal," located at https://mbs.microsoft.com/customersource/support/downloads/servicepacks/bpgpslactivex_msi.htm?printpage=false&stext=active x.

# Chapter 10: Additional applications

During the Business Portal installation, you'll be able to select additional features and applications to install. Information about additional Business Portal components is divided into the following sections:

- *Business Portal additional applications*
- *Add or remove additional applications*

## Business Portal additional applications

The following applications are available during the Business Portal installation.

- Field Service Suite
- HRM Self Service Suite (HRM)
- Business Intelligence
- Order Management
- Project Time and Expense
- Requisition Management
- Benefit Self Service
- Certification, License, & Training Manager

You can also choose to install these components after Business Portal has been installed. For more information, refer to *Add or remove additional applications*.

## Add or remove additional applications

Use the installation wizard to add features or applications to your Business Portal installation or to remove them.

Before you can install additional Business Portal applications, you must register them in Microsoft Dynamics GP. Some applications may require certain back office modules to be registered, as well. For more information about entering registration keys, refer to your Microsoft Dynamics GP documentation.

*Most components require additional setup after they've been installed. For more information, refer to the documentation for each component that you install.*

You must uninstall Benefit Self Service and Certification, License & Training Manager before you uninstall Business Portal. (To uninstall, right-click their .msi files and select Uninstall.) Uninstalling Business Portal will not automatically uninstall Benefit Self Service or Certification, License & Training Manager and you won't be able to uninstall those applications after Business Portal is uninstalled.

1.  Start the installation wizard. You can use either of the following methods:

    •   From the Business Portal media on your web server computer, browse and double-click the **CDSetup.exe** file to open the main Business Portal installation window. Under **Install**, click **Business Portal for Microsoft Dynamics GP**.

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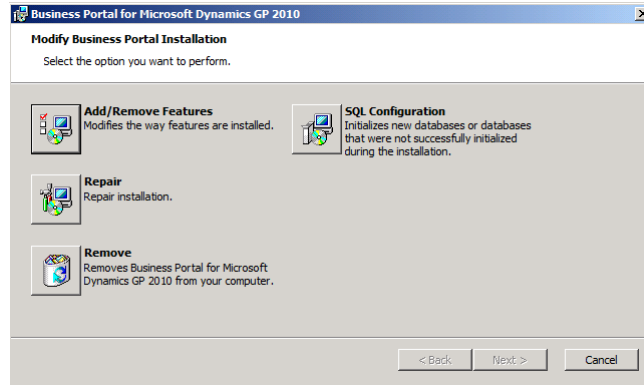


2.  Click **Add/Remove Features**.

3.  The **End-User License Agreement** window appears. Read and accept the terms and conditions, then select **I accept the terms in the License Agreement**, and click **Next**.

4.  The **Connection Information** window appears.
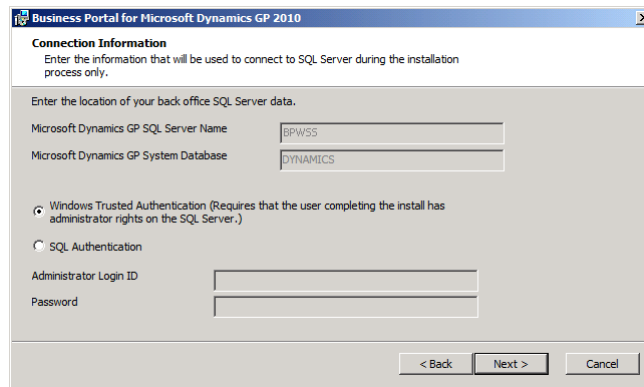
Be sure that the server name and system database are correct, and select the type of authentication that should be used when the Business Portal software accesses your SQL data.

- If you select **Windows Trusted Authentication**, you don't need to enter any other information. Click **Next**.

- If you select **SQL Authentication**, enter the SQL Server administrator's logon ID and password. Click **Next**.

5. The **Select Features** window appears.
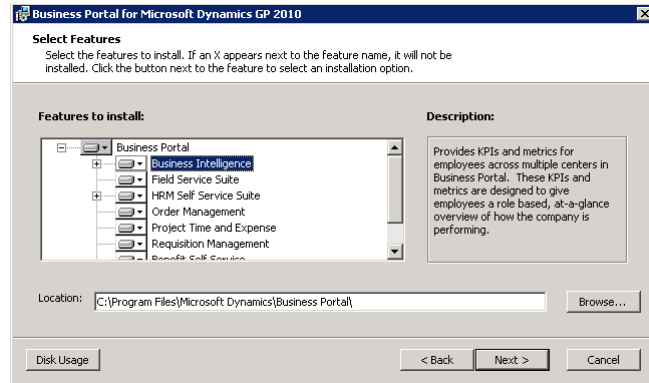


Select the features to install or uninstall. When you click a button for a feature, a pop-up menu of options appears. Refer to the table for more information about each option.

| Option | What happens |
|---|---|
| Will be installed to the local hard drive | The selected feature will be installed on the local hard disk. (This option installs the feature, but not sub features.) |
| Entire feature will be installed to the local hard drive | Will install the feature and all of its sub features. (You shouldn't use this option if any sub features have already been installed.) |
| Entire feature will be unavailable | Will remove the selected feature or sub feature. |

Click **Disk Usage** to open the **Disk Space Requirements** window, where you can view the amount of available disk space, and the amount required for installation.

Click **Next**.

6. If you're installing Order Management, the eConnect COM User window appears.



Enter the account to use to run the eConnect service. The account you enter must be a member of the DYNGRP role in SQL Server for the system and company databases you'll use with Order Management.

Click **Next**.

7. If you're removing components associated with SQL objects, the **Remove Options** window appears.



Select the option if you want to remove data for the feature. Your Microsoft Dynamics GP data will be unaffected.

*If you've installed a component on multiple web servers and are removing the component from only one of the servers, do not select the option to remove Business Portal data. If you do, the application will not function on the remaining web servers.*

Click **Next**.

8. The **Ready to Install** window appears. Click **Install**. The installation process may take several minutes to complete.

9.  The **Finish** window appears. Click **Finish**.

10. We recommend creating a backup of the web.config file after installing Business Portal applications. The web.config file is located at C:\inetpub\wwwroot \wss\VirtualDirectories\<*port number*>, where <*port number*> is the port number of the IIS web site where you installed Business Portal.

# Part 4:  Additional setup

This part of the documentation contains explains how to set up reports, Terminal Services or Remote Desktop Services, and client computers for Business Portal. The following information is included:

- Chapter 11, "Reports Catalog setup," includes information you can use to set up the reports you can view with Business Portal.

- Chapter 12, "Terminal and Remote Desktop Services setup," describes how to configure Business Portal to work with a Terminal Services server or Remote Desktop Services server.

- Chapter 13, "Client configuration," provides information about preparing client workstations to access Business Portal.

# Chapter 11: Reports Catalog setup

This chapter describes how to set up the system for publishing reports to the Business Portal Reports Catalog. The Reports Catalog enables Business Portal users to view Microsoft Dynamics GP reports.

The Reports Catalog is a file location on a server, plus a SQL table and business entity. Reports in the Reports Catalog are static—the data they show is current as of the date they were published. Use the Report Scheduler to specify how often each report is published.

For more information about the Reports Catalog and the Report Scheduler, refer to the Business Portal Administrator's Guide and the Report Scheduler manual, which is available with Microsoft Dynamics GP.

This information is divided into the following sections:

- *The shared folder for reports*
- *Share a reports folder*
- *Set up the Report Scheduler*
- *Change the account used to display reports*

## The shared folder for reports

When you install Business Portal, sample reports are installed in a shared folder (called SampleReports) on the web server. The reports are displayed in Business Portal pages by the FileServices component service, which runs under a local Windows account named FileServiceUser.

If you want to use the Report Scheduler to publish reports that can be viewed in Business Portal, we recommend setting up at least one new shared folder to make your reports more secure. (We don't recommend using the SampleReports folder.) You can set up shared folders on the web server, on the Microsoft Dynamics GP server, or on a file server on your network. You can set up a separate shared folder for each company. For more information, refer to

*For more information about setting up the Report Scheduler, refer to the Report Scheduler documentation, available with your Microsoft Dynamics GP online manuals.*

## Share a reports folder

You can set up shared reports folders on the web server, on the Microsoft Dynamics GP server, or on a file server on your network. You can set up a separate shared folder for each company. Use the following procedure to set up appropriate permissions for a shared reports folder.

1. Use Windows Explorer to create the new folder on the server. Your folder can have any name or be in any location, as long as it can be shared.

*To make your reports more secure, we recommend that you don't create the shared reports folder inside the folder where you installed the Business Portal program files.*

2. Right-click the reports folder, and choose **Sharing and Security** to open the *FolderName* Properties window, (where *FolderName* is the name of the shared folder).

3.  On the **Sharing** tab, click **Share this folder**, then click **Permissions**.

4.  Click **Add** to open the Select Users, Computers, or Groups window.

5.  Enter **FileServiceUser** if the shared reports folder is on the same server as Business Portal. If you prefer, you can use a domain account instead of the local FileServiceUser account.

    If the shared reports folder is not on the Business Portal web server, you *must* use a domain account to access the folder.

    For more information, refer to *Change the account used to display reports* on page 65.

6.  Click **OK** to save the information and close the Select Users, Computers, or Groups window.

7.  In the Permissions for *FolderName* window, be sure that FileServiceUser (or the account you created) has Read access. Be sure that each Microsoft Dynamics GP user who will be publishing reports has Read and Write access to the new folder.

*To make your data more secure, you should not give "Everyone" or "Authenticated Users" privileges on the folder.*

    Click **OK** to save the information and close the window.

8.  Click **OK** to close the *FolderName* Properties window.

9.  Follow the instructions in *Set up the Report Scheduler* on page 64 for next steps.

## Set up the Report Scheduler

After you've created a shared reports folder, you must set up the Report Scheduler by specifying shared folders in Microsoft Dynamics GP. You can specify separate shared folders for each company.

1.  In Microsoft Dynamics GP, open the Report Schedule window.
    **Microsoft Dynamics GP** > **Tools** > **Routines** > **Company** > **Report Schedule**

2.  Enter or select the new shared folder for the **Publish to Location**.

    The path you enter must be in UNC format, such as
    \\ServerName\ShareName.

3.  Click **Apply** and close the window.

*For information about the other options in the Report Schedule window, see the Report Scheduler help. (With the window open in Microsoft Dynamics GP, press **F1**.)*

## Change the account used to display reports

Use this procedure to set up your Business Portal system to access the shared reports folder using an account other than FileServiceUser.

1.  On the web server, open Component Services.
    **Start** > **Administrative Tools** > **Component Services**

2.  In the left pane, expand **Component Services** > **Computers** > **My Computer** > **COM+ Applications**.

3.  Right-click on **Microsoft.BusinessPortal.Reports.FileService** and select **Properties** to open the Microsoft.BusinessPortal.FileService Properties window.

4.  Click the **Identity** tab.

5.  In the **User** field, enter the account you want the COM+ application to use to access the shared reports folder. We recommend that this account be used *only* for the COM+ application.

6.  Enter and confirm the password for the account.

7.  Click **OK** to save your changes and close the window.

# Chapter 12: Terminal and Remote Desktop Services setup

After installing Business Portal on your web server, you can use the information in this chapter to set up access to Microsoft Dynamics GP windows through Terminal Services or Remote Desktop Services. This is useful for remote users or users who need access to Microsoft Dynamics GP information only occasionally.

The following sections are included:

- *Terminal Services and Remote Desktop Services server requirements*
- *Terminal Services for Business Portal setup checklist*
- *Remote Desktop Services for Business Portal setup checklist*
- *Configure the Terminal Services server for Business Portal*
- *Configure the Remote Desktop Services server for Business Portal*
- *Adding Microsoft Dynamics GP to an approved list*
- *Set up Terminal Services or Remote Desktop Server access in Business Portal*

## Terminal Services and Remote Desktop Services server requirements

Refer to the Microsoft Dynamics GP documentation web site (http://go.microsoft.com/fwlink/?LinkId=161197) to get the latest requirements for using Terminal Services or Remote Desktop Services with the Microsoft Dynamics GP application.

*To use Terminal Services with Windows Server 2008, install the Terminal Services server role and its role services using Server Manager. To use Remote Desktop Services with Windows Server 2008 R2, install the Remote Desktop Services Host role and its role services using Server Manager.*

## Terminal Services for Business Portal setup checklist

After you've installed Business Portal on a web server, you'll need to complete the following steps to open Microsoft Dynamics GP windows in Business Portal.

Your Terminal Services server must be running the Microsoft Dynamics GP back office application before it is added to the Business Portal configuration. For information about how to install and set up Terminal Services, refer to your Windows documentation.

Refer to the table for more information.

| Task | Reference |
|---|---|
| If you are using Windows Server 2008 and RemoteApp programs, Remote Desktop Connection (RDC) 6.0 and RDC 6.1 must be installed on your client computers. | RDC 6.0 and RDC 6.1 must be installed on your client computers to access Microsoft Dynamics GP using RemoteApp programs. A supported version of the RDC client is included with Windows Server 2008. To install RDC 6.0 or RDC 6.1, you can use Server Manager to add Desktop Experience as a feature. |
| Configure the Terminal Services server to work with Business Portal. | Refer to *Configure the Terminal Services server for Business Portal* on page 69 for more information. |

| Task | Reference |
|------|-----------|
| Use the RemoteApp Wizard to add Microsoft Dynamics GP to an approved list on the terminal server. | Refer to *Adding Microsoft Dynamics GP to an approved list* on page 70. |
| On the Terminal Services server, set up an ODBC data source for thin-client access to the Microsoft Dynamics GP application. | Refer to your Microsoft Dynamics GP documentation. |
| In Business Portal, enter the name of the Terminal Services server and the path to the Microsoft Dynamics GP application. | Refer to *Set up Terminal Services or Remote Desktop Server access in Business Portal* on page 71. |

If you're installing Business Portal on multiple web servers, you must install the Terminal Services Client on each of the web servers, but you need to enter the name of the Terminal Services computer in only one instance of Business Portal. (The information automatically is shared by the web servers.)

## Remote Desktop Services for Business Portal setup checklist

After you've installed Business Portal on a web server, you'll need to complete the following steps to open Microsoft Dynamics GP windows in Business Portal.

Remote Desktop Services server must be running the Microsoft Dynamics GP back office application before it is added to the Business Portal configuration. For information about how to install and set up Remote Desktop Services, refer to your Windows documentation.

Refer to the table for more information.

| Task | Reference |
|------|-----------|
| If you are using Windows Server 2008 R2 and RemoteApp programs, Remote Desktop Connection (RDC) 6.0 and RDC 6.1 must be installed on your client computers. | RDC 6.0 and RDC 6.1 must be installed on your client computers to access Microsoft Dynamics GP using RemoteApp programs. A supported version of the RDC client is included with Windows Server 2008. To install RDC 6.0 or RDC 6.1, you can use Server Manager to add Desktop Experience as a feature. |
| Configure the Remote Desktop Services to work with Business Portal. | Refer to *Configure the Remote Desktop Services server for Business Portal* on page 70 for more information. |
| Use the RemoteApp Wizard to add Microsoft Dynamics GP to an approved list on the remote desktop services server. | Refer to *Adding Microsoft Dynamics GP to an approved list* on page 70. |
| On the Remote Desktop Services server, set up an ODBC data source for thin-client access to the Microsoft Dynamics GP application. | Refer to your Microsoft Dynamics GP documentation. |

| Task | Reference |
|------|-----------|
| In Business Portal, enter the name of the Remote Desktop Services server and the path to the Microsoft Dynamics GP application. | Refer to *Set up Terminal Services or Remote Desktop Server access in Business Portal* on page 71. |

If you're installing Business Portal on multiple web servers, you must install the Remote Desktop Connection on each of the web servers, but you need to enter the name of the Terminal Services computer or Remote Desktop Services computer in only one instance of Business Portal. (The information automatically is shared by the web servers.)

Follow the steps here to install the Remote Desktop Services Host role on your GP Back-office server.

http://technet.microsoft.com/en-us/library/dd883275(WS.10).aspx

## Configure the Terminal Services server for Business Portal

To use thin-client access to open Microsoft Dynamics GP windows in Business Portal, you'll need to configure the Terminal Services server.

1.  Start the Terminal Services Configuration tool.
    **Start** > **Administrative Tools** > **Terminal Services Configuration**

    If you're using Windows Server 2008 R2, choose **Start** > **Administrative Tools** > **Terminal Services** > **Terminal Services Configuration**.

2.  Open the **RDP-Tcp Properties** window.
    Select **RDP-Tcp** in the right pane, then select **Action** > **Properties**.

3.  Click the **Sessions** tab.
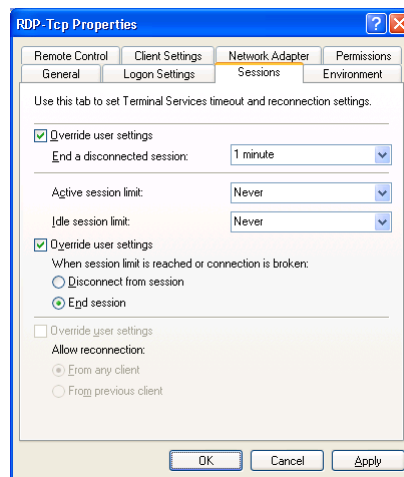


4.  Select the first **Override user settings** option, and choose **1 minute**.

5.  Select the second **Override user settings** option. Select **End session**.

6. Click **OK** to save your settings and close the window.

## Configure the Remote Desktop Services server for Business Portal

To use thin-client access to open Microsoft Dynamics GP windows in Business Portal, you'll need to configure the Remoter Desktop Services server.

1. Start the Remote Desktop Session Host Configuration tool.
   **Start** > **Administrative Tools** > **Remote Desktop Services** > **Remote Desktop Session Host Configuration**

2. Open the **RDP-Tcp Properties** window.
   Right-click **RDP-Tcp** in the right pane and then select **Properties**.
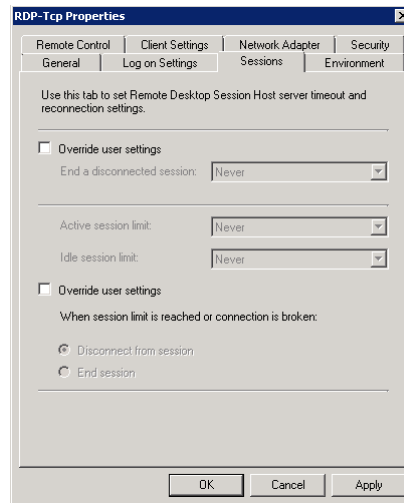
3. Click the **Sessions** tab.



4. Select the first **Override user settings** option, and choose **1 minute**.

5. Select the second **Override user settings** option. Select **End session**.

6. Click **OK** to save your settings and close the window.

## Adding Microsoft Dynamics GP to an approved list

Use the RemoteApp Wizard to add Microsoft Dynamics GP to an approved list on the terminal server or remote desktop server. The applications on the list are specified by the administrator. Client users can start only applications that are on the list.

1. Start the TS RemoteApp Manager.
   **Start** > **Run** > type **remoteprograms.msc** > click **OK**

2. In the right pane, click **Add RemoteApp Programs** to open the **RemoteApp Wizard** window.

3. Click **Next** to open the **Choose programs to add to the RemoteApp Programs list** window.

4.  Mark **GP**.

5.  Click **Properties** to open the RemoteApp Properties window.

6.  Mark **Allow any command-line arguments** and click **OK**.

7.  Click **Next** in the **Choose programs to add to the RemoteApp Programs list** window.

8.  Click **Finish** in the **Review Settings** window.

## Set up Terminal Services or Remote Desktop Server access in Business Portal

Use the E-mail and Terminal Services page or the E-mail and Remote Desktop Services page in Business Portal to select options for Microsoft Dynamics GP access. When you specify the initial program and working directory through this page, Microsoft Dynamics GP opens by default for only those users who access the server through Business Portal.

We don't recommend specifying the initial program and working directory through Windows Terminal Services or Remote Desktop Services; this opens Microsoft Dynamics GP by default for every user who logs on to the server.

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

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

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

4.  Type the path and filename of the Microsoft Dynamics GP application, which will start when a user logs on to WTS, using the following format:

    "C:\\*PathName*\dynamics.exe" "C:\\*PathName*\dynamics.set"

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

    If you are using Remote Desktop Services, the path is case sensitive. The path you enter here must exactly match the path in TS RemoteApp Manager. The following is an example of a path. (Make sure to include the quotation marks.)

    ```
    "C:\Program Files (x86)\Microsoft Dynamics\GP\Dynamics.exe" Dynamics.set
    ```

5.  Type the path to the working directory where Microsoft Dynamics GP should run, using the following format:

    C:\\*PathName*

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

6.  Click **Save**.

# Chapter 13: Client configuration

This chapter contains procedures you must perform on client workstations to prepare them to use Business Portal. The following sections are included:

- *Set browser settings for a workstation*
- *Install ActiveX controls on client workstations*
- *Pop-up blockers and Business Portal*
- *Install Microsoft Office XP Web Components*

## Set browser settings for a workstation

Be sure that the Internet Explorer options for employee workstations are set so content is refreshed. Also, Internet Explorer security should be set up so that ActiveX controls are allowed to run on the Business Portal web site. If ActiveX controls are not allowed to run, users won't be able to use result viewer web parts.

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

*For information about changes you can make to improve workstation performance, refer to the Business Portal Administrator's Guide.*

### To set browser settings in Internet Explorer 7.0, Internet Explorer 8.0, or Internet Explorer 9.0:

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

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

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

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

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

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

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

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

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

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

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

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

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

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

## Install ActiveX controls on client workstations

When users launch Business Portal for the first time on client workstations, they may be prompted to install ActiveX components that are needed to use certain Business Portal web parts.

To install ActiveX components, the user logged on to the workstation must have write access to the Downloaded Program Files folder (typically located in the Windows folder) and to the registry. On Windows XP computers, members of the Administrators and the Power Users groups typically have these rights. (The Users group typically has only read access in order to allow administrators to better control software installation.)

If your Business Portal users are in the Administrators or Power Users groups on their workstations, you don't need to take any action. The ActiveX controls will be installed automatically.

To install ActiveX controls for those in the Users group, or for those who do not have installation rights on their computers, a Windows Installer package file is available on the Business Portal installation media in the \PreReqs\ActiveXControl folder. If your users don't have installation rights on their computers, you can install the controls using a software distribution tool such as Systems Management Server.

If you can't install the ActiveX controls using the installation package, we recommend logging on to each workstation as a member of the Power Users or Administrators group, then launching Business Portal to download the ActiveX controls. Once a member of the Power Users group or the Administrators group has downloaded the components, those components will be available to members of the Users group.

## Pop-up blockers and Business Portal

Pop-up blocker software on client computers may interfere with some Business Portal pages. We recommend configuring pop-up blockers to allow pop-ups within the Business Portal URL. If your pop-up blocker doesn't provide this option, we recommend removing or disabling pop-up blocker software on Business Portal client workstations.

## Install Microsoft Office XP Web Components

In order to export information to Excel from a Business Portal client computer, Microsoft Office XP Web Components must be installed, regardless of the version of Office you're using.

The Office XP Web Components (owc10.exe) can be downloaded from the Microsoft Download Center (www.microsoft.com/downloads).

# Part 5:  Extranet deployment

This part of the documentation describes supported extranet configurations and provides recommended settings to run Business Portal in an extranet environment. The following information is discussed.

- Chapter 14, "Extranet environments," contains recommendations for setting up Business Portal in an extranet environment. Two scenarios are described: extranet access through a single Internet Security and Acceleration (ISA) server, and extranet access through back-to-back ISA servers.

- Chapter 15, "ISA Server configuration," lists the communication rules and policies that should be set up for Business Portal. The recommendations are for ISA Server. However, if you already have an extranet that doesn't use ISA Server, the rules and policies in this chapter can be applied on whatever hardware and software you are using.

# Chapter 14: Extranet environments

This chapter provides recommendations for deploying Business Portal in an extranet. An extranet, or perimeter network, is an extension of your company's intranet that provides limited access to authorized outside users.

The term "perimeter network" refers to a network that lies between the intranet and the Internet. It is a network that separates a trusted network (the intranet) from a network that is not trusted (the Internet). Perimeter networks are typically, but not always, physical networks. Perimeter networks are also known as screened subnets.

All of the configurations in this chapter use Microsoft Internet Security and Acceleration Server (ISA Server) to create a perimeter network. If your company has an existing perimeter network that doesn't use ISA Server, we recommend that you use hardware and software with similar functionality. In addition, you should set up the same communication rules and policies as recommended for ISA Server. For more information, refer to Chapter 15, "ISA Server configuration."

The information is divided into the following sections:

- *Extranet deployment overview*
- *Extranet access through a single ISA server*
- *Extranet access through back-to-back ISA servers*

## Extranet deployment overview

Deploy Business Portal in an extranet if employees will use home computers to access Business Portal through the Internet, or if external users, such as customers and vendors, will access Business Portal from their own networks.

Some Business Portal server configurations are not appropriate for extranet use. For more information about Business Portal configurations that can be deployed in an extranet, refer to Chapter 2, "Business Portal configurations."

*To help protect your data, we strongly recommend using Secure Sockets Layer (SSL) for your Business Portal web site if it is deployed externally.*

### Deployment scenarios

There are two basic extranet deployment scenarios for Business Portal.

**Tri-homed perimeter network**   In this scenario, a single ISA Server computer is used to communicate between your internal network and the Internet. This configuration is also known as a single-screened subnet. For more information, see *Extranet access through a single ISA server* on page 80.

**Back-to-back perimeter network**   In this scenario, back-to-back ISA Server computers are used to communicate between your internal network and the Internet. This configuration is also known as a dual-screened subnet. For more information, see *Extranet access through back-to-back ISA servers* on page 81.

### Extranet users

Business Portal users can be classified as either internal or external. Internal users are employees of your company. External users are people outside of your organization, such as your customers and vendors. Both types of users can access Business Portal through an extranet.

Once you've set up Business Portal in an extranet, you should create pages for external users such as customers. (Business Portal does not include pages for the BP Customer SharePoint group by default, unless you're using the Order Management application.) For information about creating a customer portal, refer to the Business Portal Administrator's Guide.

All Business Portal users—both internal and external—must have valid Windows domain accounts; Business Portal does not support anonymous users. For guidelines about setting up external users, refer to the Business Portal Administrator's Guide.

## Extranet access through a single ISA server

The following illustration shows how your network could be set up to provide access to Business Portal through a single ISA server. The ISA server in this scenario must have three network cards—one for the external network (Internet), one for the internal network (intranet), and one for the perimeter network. All of the computers in this scenario are on the same domain.
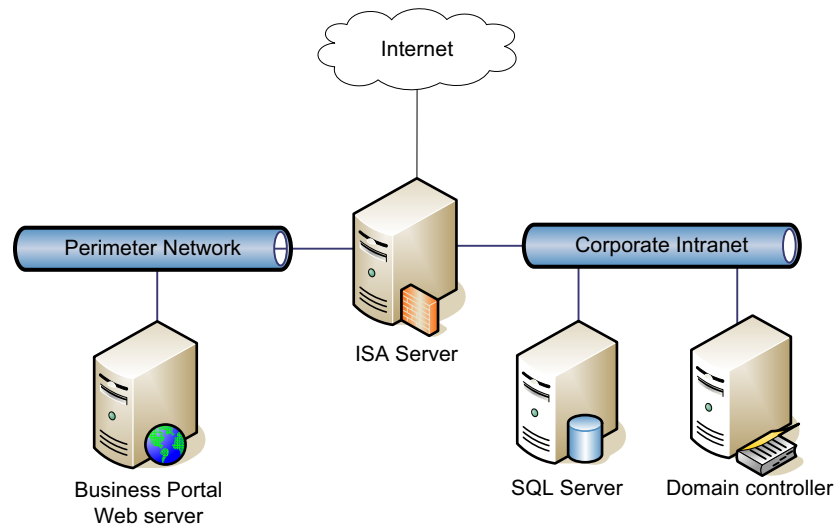


The primary risk with a single ISA server configuration is that it constitutes a single point of failure. If the ISA server is compromised, an intruder could gain access to your internal network.

In this configuration, you can deploy Business Portal in several ways. For example, you can deploy:

- One Business Portal server in the perimeter network for both internal and external access.

- One Business Portal server in the perimeter network for external access and one server in the intranet for internal access.

- Multiple Business Portal servers in the perimeter network for both internal and external access.

- Multiple Business Portal servers in the perimeter network for external access and multiple servers in the intranet for internal access.

You can use multiple server farms to separate functionality used by internal and external Business Portal users, if necessary. For more information, see *Multiple server farms configuration* on page 16.

For more information about the rules and policies for the ISA Server in this configuration, see *Rules and policies for a single ISA server* on page 83 and *Rules and policies for publishing a web server on a perimeter network* on page 86.

## Extranet access through back-to-back ISA servers

The following illustration shows how your network could be set up to provide access to Business Portal through back-to-back ISA servers. In this configuration, the perimeter network and the intranet are on separate domains.
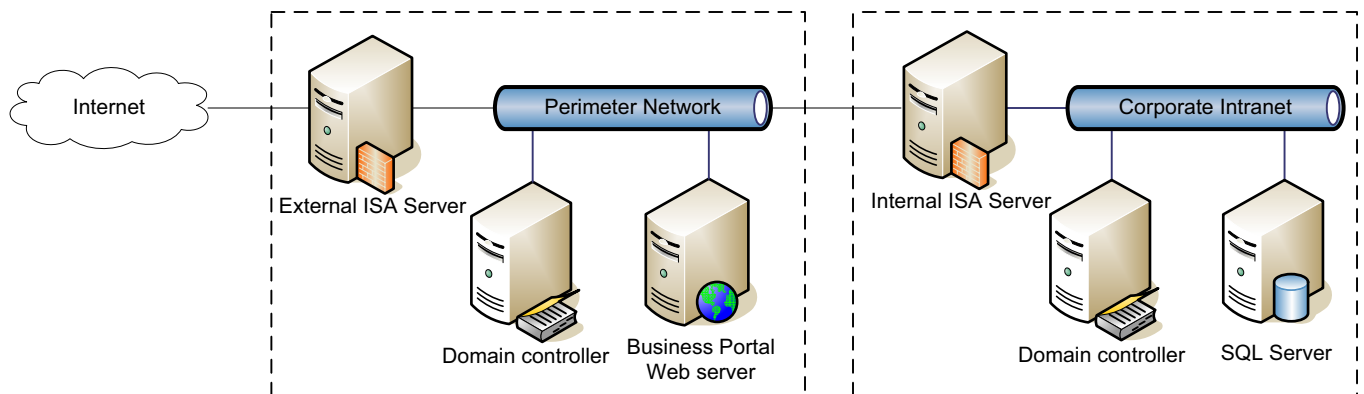


This scenario is typically considered more secure than the single ISA server scenario. If the external ISA server were compromised, the internal ISA server would still help protect your intranet. However, a higher cost is associated with this scenario because additional servers are needed. There is also additional setup complexity.

In this configuration, you can deploy Business Portal in several ways. For example, you can deploy:

- One Business Portal server in the perimeter network for both internal and external access.

- One Business Portal server in the perimeter network for external access and one in the intranet for internal access.

- Multiple Business Portal servers in the perimeter network for both internal and external access.

- Multiple Business Portal servers in the perimeter network for external access and multiple servers in the intranet for internal access.

You can use multiple server farms to separate functionality used by internal and external Business Portal users, if necessary. For more information, see *Multiple server farms configuration* on page 16.

In your implementation, a trust may be set up between the two domains, or the perimeter network could belong to the internal domain. Communication rules and policies between servers should be adjusted accordingly.

For more information about the rules and policies for back-to-back ISA servers, refer to *Rules and policies for back-to-back ISA servers* on page 84 and *Rules and policies for publishing a web server on a perimeter network* on page 86.

# Chapter 15: ISA Server configuration

Microsoft Internet Security and Acceleration (ISA) Server is a firewall, virtual private network (VPN), and web cache solution that simplifies network security and performance. You can give external clients limited access to your intranet through an ISA server.

ISA Server performs many of the same functions as a firewall in determining who should have access to certain pieces of information. ISA Server helps prevent disclosure of internal IP addresses, computer names, and domain names. ISA Server will allow only authorized traffic, and it will help detect and prevent intrusions such as hacking and viruses.

For more information about ISA Server, including a hardening guide, refer to the ISA Server home page on Microsoft's web site (www.microsoft.com/isaserver).

This chapter explains the ISA Server settings that are needed to run Business Portal in an extranet environment. Recommendations for a single ISA server and for back-to-back ISA servers are included.

You can set up ISA servers either before or after you have installed Business Portal.

The information is divided into the following sections:

- *Rules and policies for a single ISA server*
- *Rules and policies for back-to-back ISA servers*
- *Rules and policies for publishing a web server on a perimeter network*
- *Using a named instance of SQL Server in an extranet*

## Rules and policies for a single ISA server

You can specify how computers on each network communicate with each other by way of the ISA server. The table below defines the relationship rules and policies that are required to run Business Portal in an extranet environment with a single ISA server. For more information about this configuration, refer to *Extranet access through a single ISA server* on page 80.

| Type | Source | Destination | Port | Comments |
|------|--------|-------------|------|----------|
| Access rule | Business Portal web server | SQL server (Microsoft Dynamics GP) | 1433 | Could be a different port as defined for the SQL server. |
| Access rule | Business Portal web server | SQL server (SharePoint) | 1433 | Optional, if the SharePoint server is not the same as the Microsoft Dynamics GP server or the web server. Could be a different port as defined for the SQL server. |
| Access rule | Business Portal web server, ISA server | Domain controller | All outbound traffic | |
| Access rule | Domain controller | Business Portal web server, ISA server | All outbound traffic | |
| Access rule | Internal network | Business Portal web server | 443 | Internal client https access to Business Portal |
| Access rule | Internal network | Business Portal web server or perimeter network file server | 445 | Optional, for publishing reports to a shared folder. Could be limited to only the Microsoft Dynamics GP client publishing reports. |

| Type | Source | Destination | Port | Comments |
|------|--------|-------------|------|----------|
| Access rule | Business Portal web server | SMTP server | 25 | Optional, for sending e-mail from Business Portal or SharePoint. Required if using Electronic Document Delivery. |
| Access rule | Business Portal web server | Internal network file server | 445 | Optional, for publishing reports to a file share on the internal network. Do not allow inbound traffic from the Internet. |
| Publish rule | Internet | Business Portal web server | 443 | External client https access to Business Portal |
| Network rule | ISA server | All networks | n/a | Relation - Route |
| Network rule-Route | Internal network | Perimeter network | n/a | Relation - Route |
| Network rule-Route | Perimeter network | Internet | n/a | Relation - NAT |
| Network rule-Route | Perimeter network | Internal network | n/a | Relation - Route |

# Rules and policies for back-to-back ISA servers

The tables below define the relationship rules and policies that are required to run Business Portal in an extranet environment with back-to-back ISA servers. For more information about this extranet configuration, refer to *Extranet access through back-to-back ISA servers* on page 81.

- The following rules and policies assume that the perimeter network and the internal network are on separate domains. If the perimeter network is on the internal domain, you must open all ports between the web server and the intranet domain controller and between the ISA server and the intranet domain controller.

- The following rules and policies assume that the perimeter network's domain trusts the internal domain. If a trust is not set up between the two domains, no ports need to be open for traffic between the two domain controllers. (In this situation, a user on the intranet domain would be required to access Business Portal using an account that exists on the perimeter network domain.)

## External ISA Server rules

The external ISA Server handles communication between the perimeter network and the Internet. Create the following rules.

| Type | Source | Destination | Port | Comments |
|------|--------|-------------|------|----------|
| Access rule | Business Portal web server | SQL server (Microsoft Dynamics GP) | 1433 | Could be a different port as defined for the SQL server. |
| Access rule | Business Portal web server | SQL server (SharePoint) | 1433 | Optional, if the SharePoint server is not the same as the Microsoft Dynamics GP server or the web server. Could be a different port as defined for the SQL server. |
| Publish rule | Internet | Business Portal web server | 443 | External client https access to Business Portal |
| Network rule | ISA server | Internet, perimeter network | n/a | Relation - Route |
| Network rule - Route | Perimeter network | Internet | n/a | Relation - NAT |

## Internal ISA Server rules

The internal ISA Server handles communication between the perimeter network and your intranet. Create the following rules.

| Type | Source | Destination | Port | Comments |
|---|---|---|---|---|
| Access rule | Business Portal web server | SQL server (Microsoft Dynamics GP) | 1433 | Could be a different port as defined for the SQL server. |
| Access rule | Business Portal web server | SQL server (SharePoint) | 1433 | Optional, if the SharePoint server is not the same as the Microsoft Dynamics GP server or the web server. Could be a different port as defined for the SQL server. |
| Access rule | Internal network domain controller | Perimeter network domain controller | All outbound traffic | |
| Access rule | Perimeter network domain controller | Internal network domain controller | All outbound traffic | |
| Access rule | Internal network | Business Portal web server | 443 | Internal client https access to Business Portal. Optional if internal clients access Business Portal on the perimeter network. |
| Access rule | Internal network | Business Portal web server or perimeter network file server | 445 | Optional, for publishing reports to a shared folder. Could be limited to only the Microsoft Dynamics GP client publishing reports. |
| Access rule | Business Portal web server | SMTP server | 25 | Optional, for sending e-mail from Business Portal or SharePoint. Required if using Electronic Document Delivery. |
| Access rule | Business Portal web server | Internal network file server | 445 | Optional, if publishing reports to a file share on the internal network. Do not allow inbound traffic from the Internet. |
| Network rule | ISA server | Perimeter network, internal network | n/a | Relation - Route |
| Network rule - Route | Internal network | Perimeter network | n/a | Relation - Route |
| Network rule - Route | Perimeter network | Internal network | n/a | Relation - Route |

## Rules and policies for publishing a web server on a perimeter network

The following table provides information for publishing a secure web server on a perimeter network.

For more information about publishing a web server on a perimeter network using ISA Server, refer to Microsoft KnowledgeBase article 838242. (Go to support.microsoft.com and type **838242** in the **Search** box.)

| Publish a secure web server rule | Property | Setting |
|---|---|---|
| | Publishing mode | SSL bridging |
| | Rule action | Allow |
| | Bridging mode | Secure connection to clients |
| | Web site to publish | Business Portal web server name |
| | Public name details | External URL or public name |
| | User sets | Default |
| **Publish a secure web server properties** | From | Internet |
| | Traffic | Filter > Configure http<br>Verify normalization = false |
| | Link translation | *On an internal ISA server*: Replace absolute links in web pages = false<br>*On an external ISA server*: Replace absolute links in web pages = true |
| **Web listener properties** | Disable http | Enable http = false |
| | Enable SSL | Enable SSL = true<br>Select certificate |
| | Authentication | Integrated or Basic |

## Using a named instance of SQL Server in an extranet

If you install the SharePoint or Microsoft Dynamics GP databases on a named instance of SQL Server, additional setup steps are required.

1.  Set up an alias for the named instance using the Client Network Utility. Configure the alias to use the port assigned to the named instance of SQL Server.

    For more information about the Client Network Utility, see SQL Server Books Online.

2.  When setting up access rules from the web server to the SQL server, replace port 1433 with the port configured for the alias.

    For more information about the access rules needed to deploy Business Portal in an extranet, refer to *Rules and policies for a single ISA server* on page 83 and *Rules and policies for back-to-back ISA servers* on page 84.

3.  Create a DNS entry for the alias, or add an entry to the IIS server's hosts file.

4.  If Business Portal has already been installed, edit the SQL server name in the ~privatefiledbauthentication.config and BusinessFramework.config files using the format *AliasName,PortNumber*.

    These configuration files are located in the Business Portal bin folder. (The bin folder is located in C:\inetpub\wwwroot\wss\VirtualDirectories\*<port number>*, where *<port number>* is the port number of the IIS web site where Business Portal is installed.)

    If Business Portal has not yet been installed, enter the SQL server name using the format *AliasName,PortNumber* in the Connection Information window of the installation wizard. No further configuration is necessary.

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