Microsoft Dynamics® AX 2009

Configuring Enterprise Portal and Role Centers with SQL Server Reporting

White Paper

This document contains checklists and information to help administrators set up and configure Microsoft Dynamics AX 2009 Enterprise Portal and Role Centers with Microsoft SQL Server® Reporting Services® and Microsoft SQL Server Analysis Services®.

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Microsoft Dynamics®

Table of Contents

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Introduction

Microsoft Dynamics AX provides a set of Web modules giving you access to Microsoft Dynamics AX data and allowing you to participate in business processes by using Web-based Microsoft Dynamics AX forms. These Web modules are collectively called Enterprise Portal. Enterprise Portal is built on Microsoft Windows® SharePoint® Services or Microsoft Office® SharePoint Server.

Microsoft Dynamics AX administrators can configure Enterprise Portal to display a role-tailored home page called a Role Center. Role Centers provide overviews of information that pertains to users' job functions in the business or organization, including work lists, activities, common links, and key business intelligence information, such as Microsoft SQL Server Reporting Services reports or Microsoft SQL Server Analysis Services reports.

Before users can view SQL Server reports in Role Center pages, the administrator must perform a variety of setup and configuration tasks. This document provides checklists to help administrators understand which setup and configuration tasks need to be completed and where to view the procedures that describe how to complete each task.

Before you begin

Download the Microsoft Dynamics AX 2009 [Installation Guide](). This white paper references procedures contained in that guide.

Server configuration

You can set up and configure the following applications on a single server or multiple servers, depending on the needs of your business or organization. If you install SQL Reporting Services, SQL Analysis Services, and Enterprise Portal on a single server, you do not have to configure Kerberos authentication. (Kerberos authentication is discussed in the final section of this paper.) Regardless of the server configuration you choose, we recommend that you set up and configure SQL Server Reporting Services and/or SQL Server Analysis Services before you set up and configure the Enterprise Portal Web server.

Set up and configure SQL Server Reporting Services

This checklist can help you set up and configure SQL Server Reporting Services so that users can view Reporting Services reports in Enterprise Portal Role Center pages.

Procedure	Where to locate procedure information
☐ Install prerequisites on the report server	Microsoft Dynamics AX 2009 Installation Guide > Install required components > Reporting extensions
☐ Configure Reporting Services	Microsoft Dynamics AX 2009 Installation Guide > Install required components > Reporting extensions
☐ Update the Reporting Services configuration file	Microsoft Dynamics AX 2009 Installation Guide > Install required components > Reporting extensions
☐ Install the reporting extensions	Microsoft Dynamics AX 2009 Installation Guide > Install required components > Reporting extensions
☐ Deploy reports	Microsoft Dynamics AX 2009 Installation Guide > Install required components > Reporting extensions
☐ Register your Reporting Services server	Help icon in the Microsoft Dynamics AX client > System and Application Setup > Business intelligence and reporting setup > SQL Server Reporting Services reports

Procedure	Where to locate procedure information
☐ Specify the default Reporting Services server	Help icon in the Microsoft Dynamics AX client > System and Application Setup > Business intelligence and reporting setup > SQL Server Reporting Services reports
☐ Create report perspectives	Help icon in the Microsoft Dynamics AX client > System and Application Setup > Business intelligence and reporting setup > SQL Server Reporting Services reports
☐ Generate and publish report models	Help icon in the Microsoft Dynamics AX client > System and Application Setup > Business intelligence and reporting setup > SQL Server Reporting Services reports
☐ Configure security settings for reports	Help icon in the Microsoft Dynamics AX client > System and Application Setup > Business intelligence and reporting setup > SQL Server Reporting Services reports

Set up and configure SQL Server Analysis Services

This checklist can help you set up and configure SQL Server Analysis Services so that users can view Online Analytical Processing (OLAP) reports in Enterprise Portal Role Center pages.

Procedure	Where to locate procedure information
☐ Install prerequisites on the OLAP server	Microsoft Dynamics AX 2009 Installation Guide > Install required components > Analysis extensions
☐ Install Analysis Management Objects on client computers	Microsoft Dynamics AX 2009 Installation Guide > Install required components > Analysis extensions
☐ Install the analysis extensions	Microsoft Dynamics AX 2009 Installation Guide > Install required components > Analysis extensions
☐ Configure Analysis Services	Microsoft Dynamics AX 2009 Installation Guide > Install required components > Analysis extensions
☐ Configure the default cubes	See the Configuring the Default OLAP Cubes whitepaper
☐ Update cubes with exchange rate information	Help icon in the Microsoft Dynamics AX client > System and Application Setup > Business intelligence and reporting setup > SQL Server Analysis Services cubes
☐ Process cubes	Help icon in the Microsoft Dynamics AX client > System and Application Setup > Business intelligence and reporting setup > SQL Server Analysis Services cubes
☐ Configure proactive caching to refresh cube data	Help icon in the Microsoft Dynamics AX client > System and Application Setup > Business intelligence and reporting setup > SQL Server Analysis Services cubes
☐ Configure security settings for cubes	Help icon in the Microsoft Dynamics AX client > System and Application Setup > Business intelligence and reporting setup > SQL Server Analysis Services cubes

Set up and configure Enterprise Portal and Role Centers

This checklist can help you set up and configure Enterprise Portal and Role Centers.

Procedure	Where to locate procedure information
☐ Install prerequisites for Enterprise Portal and Role Centers	Microsoft Dynamics AX 2009 Installation Guide > Install required components > Enterprise Portal and Role Centers
☐ Install Enterprise Portal and Role Centers on Windows SharePoint Services – or – ☐ Install Enterprise Portal and Role Centers on Office SharePoint Server	Microsoft Dynamics AX 2009 Installation Guide > Install required components > Enterprise Portal and Role Centers
☐ Configure Enterprise Portal	Help icon in the Microsoft Dynamics AX client > Enterprise Portal Administration
☐ Configure Enterprise Portal security	Help icon in the Microsoft Dynamics AX client > Enterprise Portal Administration
☐ Add the Enterprise Portal Web site to the list of Trusted Sites in Microsoft Internet Explorer on all Enterprise Portal client computers	Internet Explorer > Tools > Internet Options > Security
☐ Deploy ODC files	Microsoft Dynamics AX 2009 Installation Guide > Install required components > Enterprise Portal and Role Centers

Deploy Role Centers

This checklist can help you deploy Role Centers.

Procedure	Where to locate procedure information
☐ Deploy Role Centers	Help icon in the Microsoft Dynamics AX client > System and Application Setup > System Setup > Setting up and maintaining Role Centers
☐ Manage user profiles for Role Centers	Help icon in the Microsoft Dynamics AX client > System and Application Setup > System Setup > Setting up and maintaining Role Centers
☐ Manage Role Center Web Parts	Help icon in the Microsoft Dynamics AX client > System and Application Setup > System Setup > Setting up and maintaining Role Centers

About setting up and configuring Kerberos authentication

Kerberos is a network authentication protocol. The Kerberos protocol forces a client and server to verify each other's identity. Kerberos authentication must be used in Microsoft Dynamics AX environments where Enterprise Portal is installed on a server other than the server running Reporting Services and/or Analysis Services. For more information about setting up and configuring Kerberos authentication, see the Configure Kerberos Authentication with Microsoft Dynamics AX Enterprise Portal white paper. This white paper is available on PartnerSource and on the Using Microsoft Dynamics AX 2009 Web site.

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