Microsoft Dynamics® GP Release

Workflow Installation and Upgrade Guide

February 17, 2011

Contents

Introduction

Use this manual to install Workflow for Microsoft Dynamics® GP. Review the introductory information about the resources available to you, then use the *Installation checklist* on page 10 as your guide to installing Workflow. You also can use this manual to upgrade Workflow. To upgrade Worfklow, use the checklists in Chapter 14, "Upgrade checklists."

Check for current instructions

This information was current as of February 17, 2011. This manual may be updated as new information becomes available. Check the Microsoft Dynamics GP documentation Web site (http://go.microsoft.com/fwlink/?LinkId=161199) for the most current documentation.

This introduction is divided into the following sections:

- *What's in this manual*
- *Symbols and conventions*
- *Access Help in Microsoft Dynamics GP*
- *Access Help on the Workflow Web site*
- *Send us your documentation comments*

What's in this manual

This manual provides step-by-step instructions for installing Workflow for Microsoft Dynamics GP. It includes the following parts:

- Part 1, **Getting started**, provides an overview of the installation process and describes the supported deployment configurations.

- Part 2, **Back office server preparation**, describes how to configure Microsoft® SQL Server® and Microsoft Dynamics GP on your back office server.

- Part 3, **Web server preparation**, lists the prerequisite software you must install on your Web server and explains how to configure Microsoft Office SharePoint® Server 2007, Windows® SharePoint Services, SharePoint Server 2010, and SharePoint Foundation 2010.

- Part 4, **Workflow installation**, provides the steps you need to follow when running the Workflow installation wizard.

- Part 5, **Workflow upgrade**, describes the process when upgrading Workflow.

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.

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

Convention	Description
Install Workflow	Italicized type indicates the name of a section or procedure.
File > **Print**	The (>) symbol indicates a sequence of actions, such as clicking items on a menu or a toolbar or clicking buttons in a window. This example directs you to go to the **File** menu and click **Print**.
Bold	Bold type indicates the names of fields, tabs, menus, commands, and buttons, and text you should type.

Access Help in Microsoft Dynamics GP

The Microsoft Dynamics GP Help menu gives you access to user assistance resources on your computer, as well as on the Web. The following resources are available from the Help menu.

Contents

Opens the Help file for the active Microsoft Dynamics GP component, and displays the main "contents" topic. To browse a more detailed table of contents, click the **Contents** tab above the Help navigation pane. Items in the contents topic and tab are arranged by module. If the contents for the active component includes an "Additional Help files" topic, click the links to view separate Help files that describe additional components.

To find information in Help by using the index or full-text search, click the appropriate tab above the navigation pane, and type the keyword to find.

To save the link to a topic in the Help, select a topic and then select the **Favorites** tab. Click **Add**.

Index

Opens the Help file for the active Microsoft Dynamics GP component, with the **Index** tab active. To find information about a window that's not currently displayed, type the name of the window, and click **Display**.

About This Window

Displays overview information about the current window. To view related topics and descriptions of the fields, buttons, and menus for the window, choose the appropriate link in the topic. You also can press F1 to display Help about the current window.

Lookup

Opens a lookup window, if a window that you are viewing has a lookup window. For example, if the Checkbook Maintenance window is open, you can choose this item to open the Checkbooks lookup window.

Show Required Fields

Highlights fields that are required to have entries. Required fields must contain information before you can save the record and close the window. To change the way required fields are highlighted, click **Microsoft Dynamics GP menu** > **Tools** > **Setup** > **User Preferences** > **Display**, and specify a different color and type style.

Printable Manuals

Displays a list of manuals in Adobe Acrobat .pdf format, which you can print or view.

What's New

Provides information about enhancements that were added to Microsoft Dynamics GP since the last major release.

Microsoft Dynamics GP Online

Opens a Web page that provides links to a variety of Web-based user assistance resources. Access to some items requires registration for a paid support plan.

Customer Feedback Options

Provides information about how you can join the Customer Experience Improvement Program to improve the quality, reliability, and performance of Microsoft software and services.

Access Help on the Workflow Web site

When the Workflow system is installed, a Workflow Web site is created. This Web site is built on SharePoint and can be accessed with Microsoft Internet Explorer®.

When you click the Help icon on a Workflow Web 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.

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: Getting started

This part of the documentation provides an overview of the installation process and describes the supported deployment configurations. The following chapters are included:

- Chapter 1, "Installation overview," briefly describes the Workflow system and provides an installation checklist.

- Chapter 2, "Deployment configurations," illustrates the supported deployment configurations and provides links to system requirements information.

- Chapter 3, "Network requirements," contains information about the network requirements that must be in place before installing Workflow.

Chapter 1: Installation overview

This chapter briefly describes the Workflow system and provides an installation checklist.

The following sections are included:

- *What is Workflow?*
- *How users will interact with the Workflow system*
- *Installation of Workflow components*
- *Installation checklist*

What is Workflow?

Workflow is a system that you can install for use with Microsoft Dynamics GP. The Workflow system provides functionality you can use to create individual *workflows*, or approval processes.

A workflow is the approval process for a document, master record, or batch. A workflow defines how a document, master record, or batch "flows" through the system by showing who must approve it, and the conditions under which they must approve it.

For example, consider the following illustration of a purchase order approval workflow. This workflow shows who must approve purchase orders, and the conditions under which their approval is required. For example, suppose Sam submits a purchase order for $2,000. In this scenario, the purchase order must be approved by Frank. If Sam submits a purchase order for $8,000, it must be approved by both Frank and Sue.
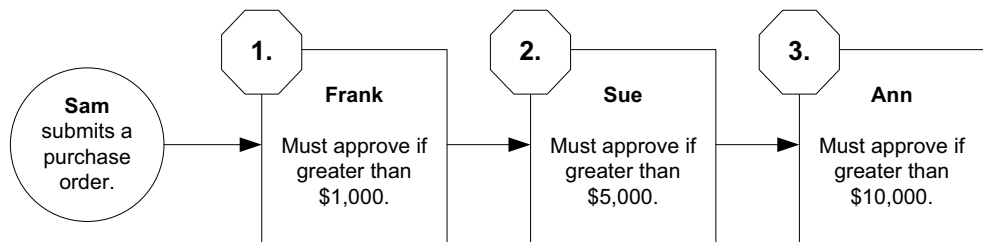
See the Workflow Administrator's Guide for more information about setting up and using the Workflow system. The Workflow Administrator's Guide is available on the Microsoft Dynamics GP installation media and on the Microsoft Dynamics GP documentation Web site (http://go.microsoft.com/fwlink/?LinkId=161199).

How users will interact with the Workflow system

Users can interact with the Workflow system through Microsoft Dynamics GP, SharePoint, and Microsoft Office Outlook®. For current system requirements for Microsoft Dynamics GP, see http://go.microsoft.com/fwlink/?LinkId=161197.

Microsoft Dynamics GP

Workflow functionality is available in many areas of Microsoft Dynamics GP. For example, the Purchase Order Entry window enables a user to submit purchase orders for approval. This window has a message bar and history pane. The message bar displays the document's status and has buttons for approving and rejecting the document. The history pane displays information about previous actions made to the document.

Message bar

History pane
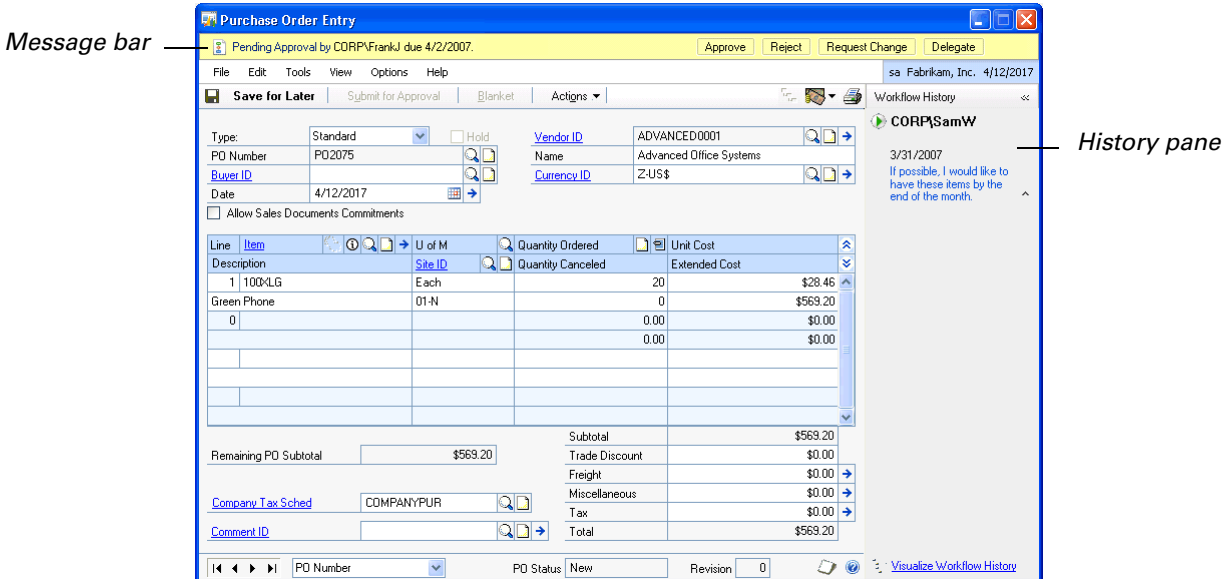
SharePoint

When the Workflow system is installed, a Workflow Web site is created. This Web site is built on Office SharePoint Server, Windows SharePoint Services, SharePoint Server or SharePoint Foundation and can be accessed using Internet Explorer. Workflow administrators and managers can use this Web site to set up the Workflow system, create individual workflows, and generate reports. Users can use this Web site to approve documents and batches that are assigned to them.

Workflow Web site —
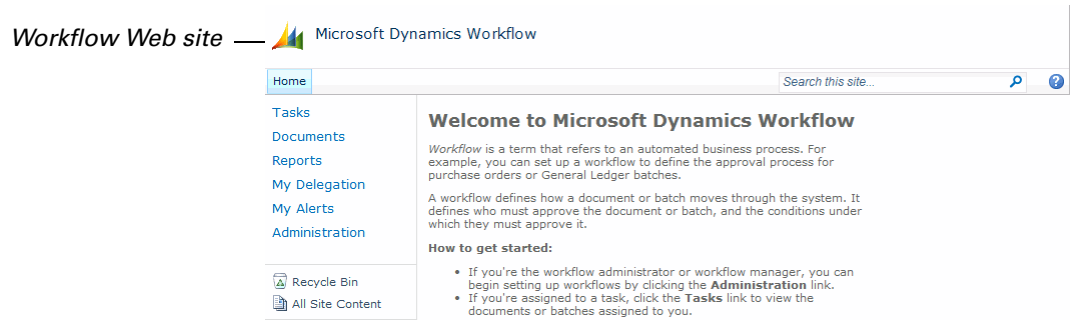
Outlook

When a document, master record, or batch is assigned to a user for approval, an e-mail message can be sent to the user. The e-mail message displays information about the document, master record, or batch and has an **Edit this Task** link. When the user clicks this link, a window appears where the user can approve or reject the document, master record, or batch.

*Click **Edit this Task** to approve or reject the document, master record, or batch.* —
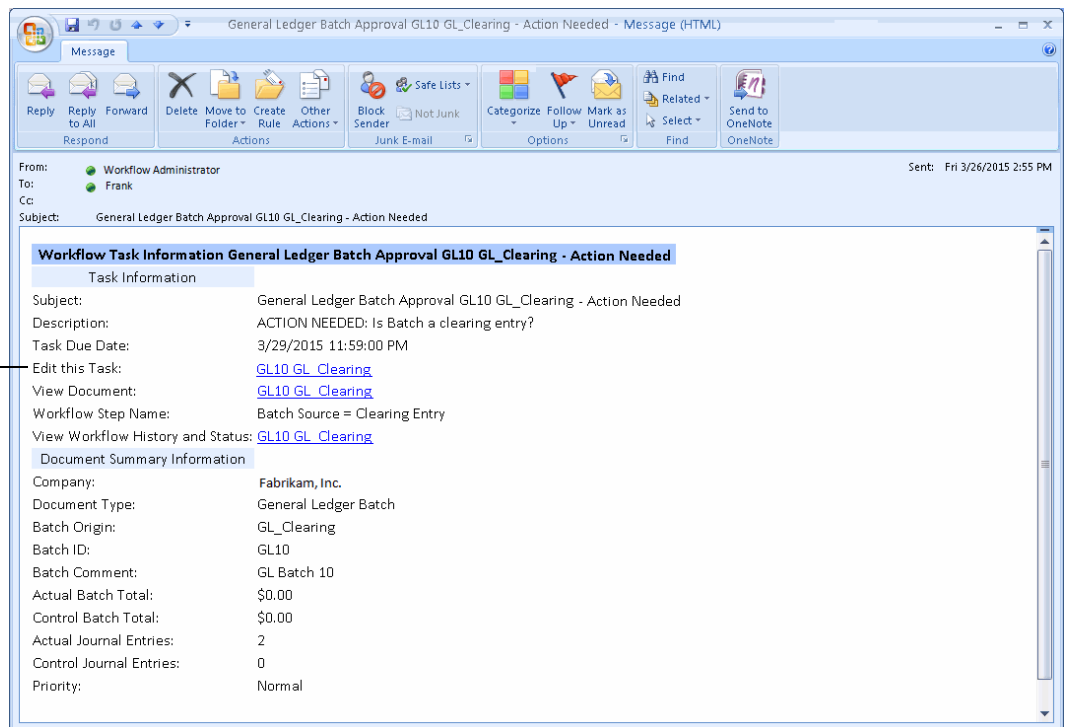
Installation of Workflow components

When you install or upgrade to Microsoft Dynamics GP Release, Workflow components are automatically installed on your Microsoft Dynamics GP server and client computers.

You'll need to install Workflow components on a Web server running Office SharePoint Server 2007, Windows SharePoint Services 3.0, SharePoint Server 2010, or SharePoint Foundation 2010. This manual provides instructions for installing Workflow components on the Web server.

Installation checklist

To install Workflow, complete the following tasks in the order shown.

Task	For more information, see...
1. Check for updated instructions. The information in this manual was current as of February 17, 2011. This manual may be updated as new information becomes available. Check for an updated version of this manual on the Microsoft Dynamics GP documentation Web site.	Microsoft Dynamics GP documentation Web site (http://go.microsoft.com/fwlink/?LinkId=161199)
2. Select a deployment configuration. Select whether to install Workflow in a single-server, separate Web server, or multiple Web server configuration.	Chapter 2, "Deployment configurations"
3. Be sure your computers meet requirements. Be sure your computers meet hardware and software requirements.	http://go.microsoft.com/fwlink/?LinkId=187656
4. Be sure your network meets requirements. Be sure your network meets specified requirements and that you're using the required network protocol.	Chapter 3, "Network requirements"
5. Install and configure SQL Server. Install and configure SQL Server on your back office server.	Chapter 4, "SQL Server configuration"
6. Install and configure Microsoft Dynamics GP. Install and configure Microsoft Dynamics GP on your back office server.	Chapter 5, "Microsoft Dynamics GP configuration"
7. Install required software on your Web server. Install prerequisite software on your Web server, such as Web Services for Microsoft Dynamics GP and SharePoint.	Chapter 6, "Prerequisite software"
8. Configure SharePoint. Configure Office SharePoint Server, Windows SharePoint Services, SharePoint Server, or SharePoint Foundation for use with Workflow.	Chapter 7, "Windows SharePoint Services configuration" Chapter 8, "Office SharePoint Server configuration" Chapter 10, "SharePoint Foundation configuration" Chapter 10, "SharePoint Foundation configuration"
9. Prepare for the Workflow installation. Verify that you have rights to run the Workflow installation wizard and verify that the required services are running.	Chapter 11, "Before you install"

Task	For more information, see...
10. Install Workflow on your Web server. Run the Workflow installation wizard on your Web server.	Chapter 12, "Installation"
11. Set up the Workflow system. Set up the Workflow system and create individual workflows. For instructions, see the Workflow Administrator's Guide, which is available on the Microsoft Dynamics GP installation media and on the Microsoft Dynamics GP documentation Web site.	Microsoft Dynamics GP documentation Web site (http://go.microsoft.com/fwlink/?LinkId=161199)

Chapter 2: Deployment configurations

The Workflow system can be deployed in three different configurations. The following sections describe the configurations and provide links to system requirements information.

- *Single-server configuration*
- *Separate Web server configuration*
- *Multiple Web server configuration*

Single-server configuration

In a single-server configuration, all the required server-side components (such as Microsoft Dynamics GP, Web Services for Microsoft Dynamics GP, SharePoint, and Workflow) are installed on one server.

⚠️ *This configuration is recommended for testing and demonstration purposes only. This configuration does not provide the best security or performance.*
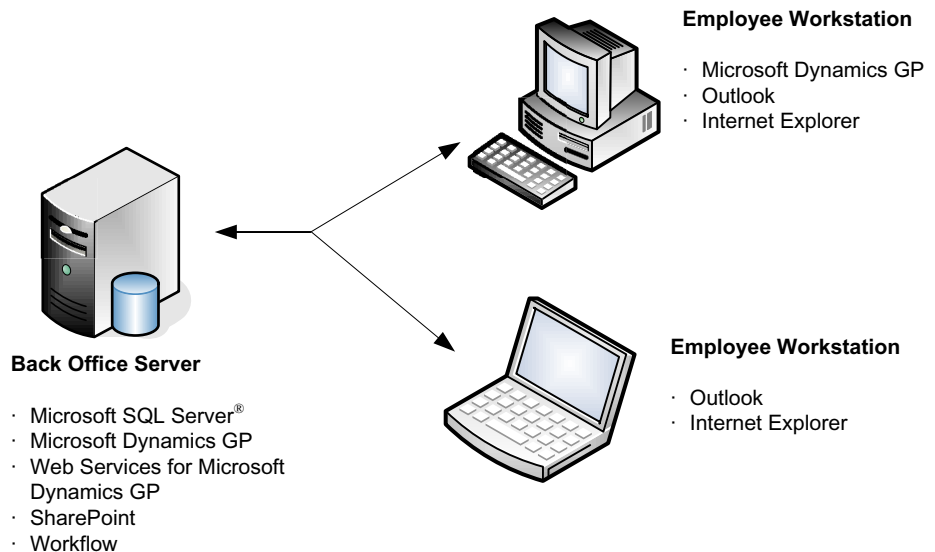
Employee Workstation

- · Microsoft Dynamics GP
- · Outlook
- · Internet Explorer

Back Office Server

- · Microsoft SQL Server®
- · Microsoft Dynamics GP
- · Web Services for Microsoft Dynamics GP
- · SharePoint
- · Workflow

Employee Workstation

- · Outlook
- · Internet Explorer

Before you install Workflow in this configuration, be sure the computers meet the system requirements listed at http://go.microsoft.com/fwlink/?LinkId=187656.

Separate Web server configuration

The separate Web server configuration consists of two servers. The back office server hosts your Microsoft Dynamics GP database and SharePoint database. The Web server hosts Web Services for Microsoft Dynamics GP, SharePoint Server, and Workflow.

This configuration provides better security and performance than the single-server configuration.
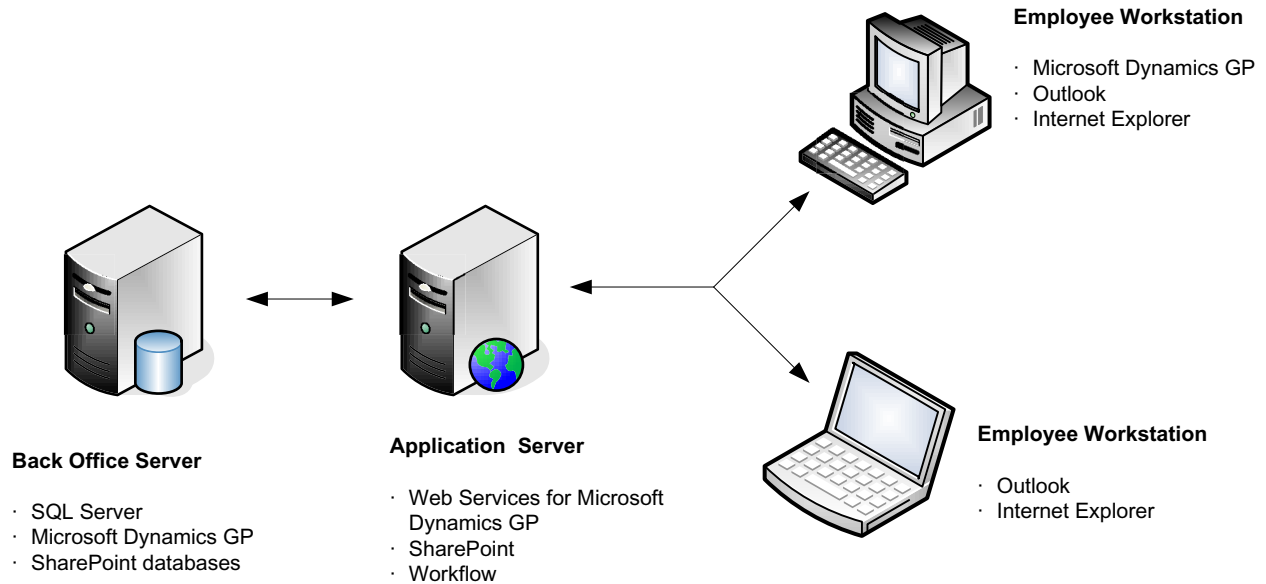
Employee Workstation

· Microsoft Dynamics GP
· Outlook
· Internet Explorer

Back Office Server

· SQL Server
· Microsoft Dynamics GP
· SharePoint databases

Application Server

· Web Services for Microsoft Dynamics GP
· SharePoint
· Workflow

Employee Workstation

· Outlook
· Internet Explorer

Before you install Workflow in this configuration, be sure the computers meet the system requirements listed at http://go.microsoft.com/fwlink/?LinkId=187656.

Multiple Web server configuration

The multiple Web server configuration consists of one back office server and two or more Web servers. The back office server hosts your Microsoft Dynamics GP and SharePoint databases. The Web servers host Web Services for Microsoft Dynamics GP, SharePoint, and Workflow.

Of the three configurations described in this chapter, the multiple Web server configuration provides the best security and performance.
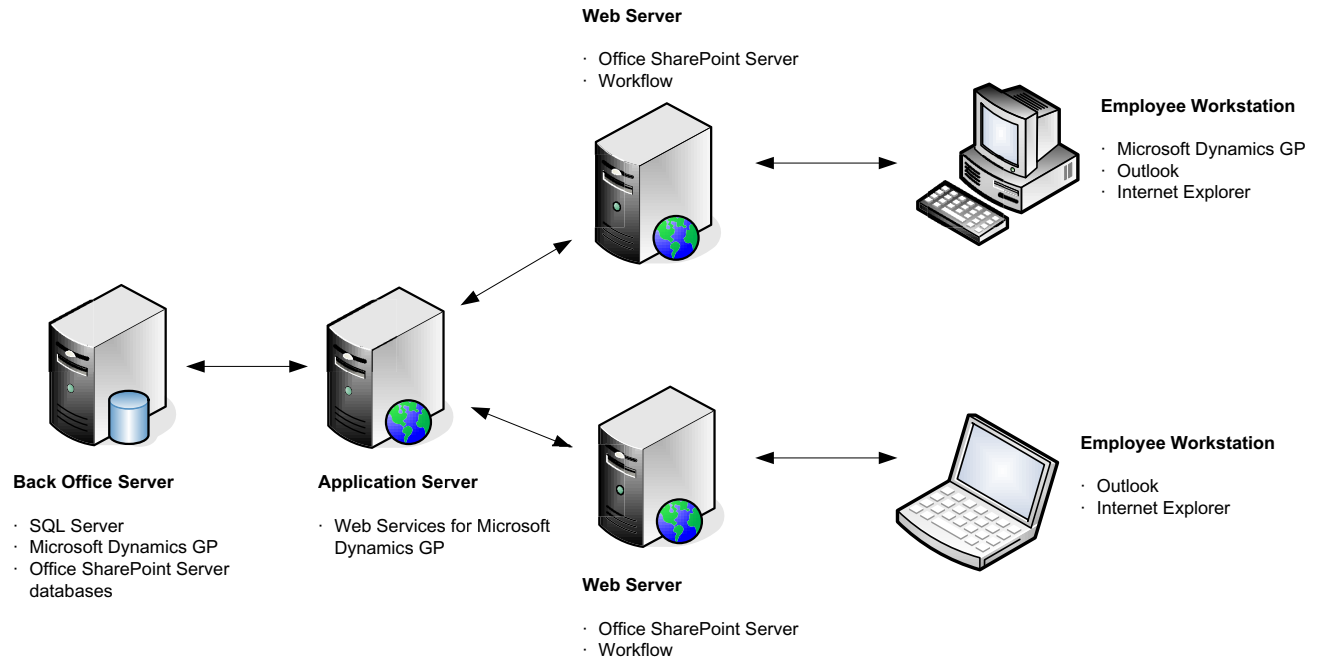
Web Server

· Office SharePoint Server
· Workflow

Employee Workstation

· Microsoft Dynamics GP
· Outlook
· Internet Explorer

Back Office Server

· SQL Server
· Microsoft Dynamics GP
· Office SharePoint Server
  databases

Application Server

· Web Services for Microsoft
  Dynamics GP

Web Server

· Office SharePoint Server
· Workflow

Employee Workstation

· Outlook
· Internet Explorer

Before you install Workflow in this configuration, be sure the computers meet the system requirements listed at http://go.microsoft.com/fwlink/?LinkId=187656.

Chapter 3:   Network requirements

This chapter contains information about the network requirements that must be in place before installing Workflow.

The following sections are included:

Network environment requirements

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

	Minimum	Recommended
Server-to-server	100 Mbps Ethernet	100 Mbps Ethernet
Server-to-client	10 Mbps Ethernet	100 Mbps Ethernet
Remote users (VPN)	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 Microsoft 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 Workflow, your Web server, back office server, and employee workstations must belong to a domain. In addition, all Workflow users 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.

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

PART 2: BACK OFFICE SERVER PREPARATION

Part 2: Back office server preparation

This part of the documentation helps you configure SQL Server and Microsoft Dynamics GP on your back office server. The following chapters are included:

- Chapter 4, "SQL Server configuration," lists the sort order and authentication methods that are supported.

- Chapter 5, "Microsoft Dynamics GP configuration," describes where you can find information about installing or upgrading to Microsoft Dynamics GP Release.

Chapter 4: SQL Server configuration

This chapter describes SQL Server concepts you should understand before installing Workflow.

The following sections are included:

- *Sort order*
- *Authentication methods*
- *Mixed-mode authentication*

Sort order

SQL Server will host your SharePoint databases. The SharePoint databases can't be installed on a SQL server that uses a binary sort order.

If your existing SQL server uses a binary sort order, you can create a new instance of SQL Server with sort order 52 (Dictionary Order, Case Insensitive) and install the SharePoint databases 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.

Authentication methods

During the Workflow installation, you'll need to select the authentication method you want to use when connecting to the SQL server that hosts your Microsoft Dynamics GP databases. There are two authentication methods:

Windows Trusted Authentication   If you select Windows Trusted Authentication, be sure that the user who's logged on to the computer where you're installing Workflow 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   If you select the SQL Authentication method, you must enter a SQL Server-specific logon ID and password during the Workflow installation. SQL Server verifies that the logon ID exists, and then permits access.

Mixed-mode authentication

The SQL Server that hosts your Microsoft Dynamics GP databases must be using mixed-mode authentication. Mixed-mode authentication allows you to use either Windows Trusted Authentication or SQL Authentication to access the SQL Server.

Use the following steps to configure SQL Server to use mixed-mode authentication.

To configure SQL Server 2005 to use mixed-mode authentication:

1. Open SQL Server Management Studio.
    Start > **All Programs** > **Microsoft SQL Server 2005** > **SQL Server Management Studio**

2. Enter connection information to connect to your Microsoft Dynamics GP SQL server. Click **Connect**.

3. Right-click the SQL server with your Microsoft Dynamics GP databases, and click **Properties**. The Server Properties window is displayed.

4. Select the **Security** page.

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

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

To configure SQL Server 2008 or SQL Server 2008 R2 to use mixed-mode authentication:

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

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

3. The **Server Properties** window is displayed. Select the **Security** page.

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

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

Chapter 5: Microsoft Dynamics GP configuration

Before you can install Workflow, you must install or upgrade to Microsoft Dynamics GP 2010. Use the following sections to learn more about installing and configuring Microsoft Dynamics GP.

- *Microsoft Dynamics GP installation and upgrade instructions*
- *Microsoft Dynamics GP Utilities*

Microsoft Dynamics GP installation and upgrade instructions

To install or upgrade to Microsoft Dynamics GP 2010, see the Microsoft Dynamics GP Installation Instructions or Upgrade Instructions manuals. These manuals are available on the Microsoft Dynamics GP documentation Web site (http://go.microsoft.com/fwlink/?LinkId=161199).

When you install or upgrade to Microsoft Dynamics GP 2010, Workflow components are automatically installed on your Microsoft Dynamics GP server and client computers.

Microsoft Dynamics GP Utilities

After installing Microsoft Dynamics GP, use Microsoft Dynamics GP Utilities to create your system and company databases. You must create the system database and at least one company database before installing Workflow.

For more information about using Microsoft Dynamics GP Utilities, see the Microsoft Dynamics GP Installation Instructions manual. This manual is available on the Microsoft Dynamics GP documentation Web site (http://go.microsoft.com/fwlink/?LinkId=161199).

Part 3: Web server preparation

This part of the documentation helps you prepare your Web server for the Workflow installation. The following chapters are included:

- Chapter 6, "Prerequisite software," lists the software that must be installed on your Web server before you can install Workflow.

- Chapter 7, "Windows SharePoint Services configuration," explains how to configure Windows SharePoint Services for use with Workflow.

- Chapter 8, "Office SharePoint Server configuration," explains how to configure Office SharePoint Server for use with Workflow.

- Chapter 9, "SharePoint Server configuration" explains how to configure SharePoint Server for use with Workflow.

- Chapter 10, "SharePoint Foundation configuration" explains how to configure SharePoint Foundation for use with Workflow.

Chapter 6: Prerequisite software

Before you can install Workflow, you must install other software on your Web server. The following sections describe these software prerequisites:

- *Server operating system*
- *Internet Information Services (IIS) and ASP.NET*
- *ASP.NET 2.0 Web service extensions*
- *Secure Sockets Layer (SSL)*
- *Web Services for Microsoft Dynamics GP*
- *SharePoint*

Server operating system

To install Workflow, your Web server must be running one of the following operating systems:

- Microsoft Windows Server® 2003
- Microsoft Windows Server 2003 R2
- Microsoft Windows Server 2008
- Microsoft Windows Server 2008 R2

For more information about supported operating systems, see the system requirements listed at http://go.microsoft.com/fwlink/?LinkId=187656.

Internet Information Services (IIS) and ASP.NET

Internet Information Services (IIS) and ASP.NET must be installed on the Web server on which you'll be installing Workflow. To install IIS and ASP.NET, complete the following steps for Windows Server 2003 or Windows Server 2008. If you are using Windows Server 2008, you can install IIS by adding the Web Server (IIS) server role in the Server Manager.

Windows Server 2003

1. In Control Panel, open **Add or Remove Programs**.

2. Click **Add/Remove Windows Components**. The Windows Components Wizard is displayed.

3. Select **Application Server** and click **Details**. The Application Server window is displayed.

4. Select the following check boxes:

   - **ASP.NET**
   - **Enable network COM+ access**
   - **Internet Information Services (IIS)**

5. Select **Internet Information Services (IIS)** and click **Details**. The Internet Information Services (IIS) window is displayed.

6. Select the **SMTP Service** check box. Click **OK** to close the Internet Information Services (IIS) window.

7. Click **OK** to close the Application Server window.

8. Click **Next** in the Windows Components Wizard window. When the installation process is complete, click **Finish**.

Windows Server 2008 or Windows Server 2008 R2

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.

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 Default Document Directory Browsing HTTP Errors
Application Development	ASP.NET NET Extensibility ISAPI Extensions ISAPI Filters Server Side Includes
Health and Diagnostics	HTTP Logging Request Monitor
Security	Basic Authentication Windows Authentication Digest Authentication Request Filtering
Performance	Static Content Compression
Management Tools	IIS Management Console IIS 6 Management Compatibility

7. Click **Next**.

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

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

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

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

12. In the list of available roles, select **Application Server**.

13. In the message dialog, click Add Required Features to add features required for the Web Server (IIS) role.

14. Click **Next** to continue.

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

16. 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

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

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

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

ASP.NET 2.0 Web service extensions

After you have installed Microsoft .NET Framework 2.0 and IIS, verify that ASP.NET 2.0 Web service extensions are allowed. Complete the following steps on your Web server.

1. Open Internet Information Services (IIS) Manager.
   Start > **Administrative Tools** > **Internet Information Services (IIS) Manager**

2. In the left pane of the console, click the plus sign (+) next to the name of your Web server.

3. Select the **Web Service Extensions** folder.

4. In the right pane of the console, verify that ASP.NET 2.0 has the Allowed status. If it does not, select **ASP.NET 2.0** and click **Allow**.

Secure Sockets Layer (SSL)

Secure Sockets Layer (SSL) is recommended, but not required, for the Workflow 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 implement SSL, you must install a certificate and a private key on your Web server. For more information about implementing SSL, refer to the IIS Operations Guide, available on Microsoft TechNet (http://technet.microsoft.com).

If you implement SSL, you must manually create a Web application for Workflow. For more information, see Create a Web application for Workflow (optional) on page 38.

Web Services for Microsoft Dynamics GP

Web Services for Microsoft Dynamics GP can be installed on a Web server or an application server in your network. As discussed in Chapter 2, "Deployment configurations," you can install Web Services for Microsoft Dynamics GP on the server you'll use for Workflow or on another server.

To install Web Services for Microsoft Dynamics GP, follow the instructions in the Web Services Installation and Administration Guide. This manual is available on the Microsoft Dynamics GP installation media.

SharePoint

You can install Workflow on Office SharePoint Server, Windows SharePoint Services, SharePoint Foundation, or on SharePoint Server. SharePoint must be installed on the Web server on which you'll be installing Workflow.

SharePoint	For information about installing and configuring
Office SharePoint Server	Chapter 8, "Office SharePoint Server configuration."
Windows SharePoint Services	Chapter 7, "Windows SharePoint Services configuration."
SharePoint Server	Chapter 9, "SharePoint Server configuration."
SharePoint Foundation	Chapter 10, "SharePoint Foundation configuration."

Chapter 7: Windows SharePoint Services configuration

This chapter explains how to install and configure Windows SharePoint Services for use with Workflow. If you're installing Workflow with Office SharePoint Server, skip this chapter and refer to Chapter 7, "SharePoint Server configuration."

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

This chapter contains the following sections:

- *User accounts for Windows SharePoint Services*
- *Install Windows SharePoint Services*
- *Create a Web application for Workflow (optional)*
- *Configure a Service Principal Name*

User accounts for Windows SharePoint Services

You must create the following domain user accounts for Windows SharePoint Services. Windows SharePoint Services uses these accounts to launch services, run processes, and connect to the SharePoint databases.

For more information about administrative and service accounts for Windows SharePoint Services, refer to the Windows SharePoint Services 3.0 Technical Library on Microsoft TechNet (technet.microsoft.com).

Domain user account	Description	Use this account when you...
User account 1	This account will be used in several ways: • It will be used to access data from the Windows SharePoint Service configuration database. • It will be used to run the Windows SharePoint Services Timer service. • It will act as the identity of the SharePoint Central Administration application pool.	*Run the SharePoint Products and Technologies Configuration Wizard* on page 32
User account 2	This account will act as the identity of the Workflow application pool.	*Create a Web application for Workflow (optional)* on page 33.

These accounts must be dedicated service accounts. These accounts must not be part of any workflow process. For example, do not use these accounts when specifying a Workflow administrator, manager, originator, or approver.

Install Windows SharePoint Services

Use the following steps to install Windows SharePoint Services on your Web server.

1. Download Windows SharePoint Services 3.0 from the Microsoft Download Center (www.microsoft.com/downloads). You should consider installing Windows SharePoint Service 3.0 with the latest service pack.

2. Select the **I accept the terms of this agreement** option and click **Continue**.

3. Click the **Advanced** installation option.

4. The **Server Type** tab is displayed. Select the **Web Front End** option.

5. Click the **Data Location** tab. Specify the folders where you want the Windows SharePoint Server files installed. You can accept the default locations, or click **Browse** to select different locations.

6. Click the **Feedback** tab. Indicate whether you want to participate in the Customer Experience Improvement Program.

7. Click **Install Now** to install Windows SharePoint Services.

8. When the installation is complete, the final window of the installation wizard is displayed. Select the **Run the SharePoint Products and Technologies Configuration Wizard now** check box. Click **Close**.

9. Follow the instructions in *Run the SharePoint Products and Technologies Configuration Wizard* to run the SharePoint Products and Technologies Configuration Wizard.

Run the SharePoint Products and Technologies Configuration Wizard

Use the following steps to run the SharePoint Products and Technologies Configuration Wizard.

1. If you just installed Windows SharePoint Services, the SharePoint Products and Technologies Configuration Wizard is displayed. If the wizard is not displayed, you can start the wizard by clicking **Start** > **Administrative Tools** > **SharePoint Products and Technologies Configuration Wizard**.

2. In the Welcome to SharePoint Products and Technologies window, click **Next**.

3. A dialog box may appear, indicating that services may need to be started or reset. Click **Yes** to continue.

4. The Connect to a Server Farm window is displayed. Click the **No, I want to create a new server farm** option. Click **Next**.

5. The Specify Configuration Database Settings window is displayed. Enter the following information.

Field	What to enter
Database server	Enter the name of the SQL server that will host the SharePoint configuration database.
Database name	Enter a name for the SharePoint configuration database, or accept the default name.
Username	Enter the name of the user account you created for "user account 1" in *User accounts for Windows SharePoint Services* on page 31.
Password	Enter the password for the user account you created for "user account 1" in *User accounts for Windows SharePoint Services* on page 31.

Click **Next**.

6.   The Configure SharePoint Central Administration Web Application window is
     displayed. If you want the SharePoint Central Administration Web site to use a
     particular port number, select the **Specify port number** check box and enter the
     port number.

7.   Choose either **NTLM** authentication or **Negotiate (Kerberos)** authentication.
     Unless you have a specific need for Kerberos authentication, you should choose
     NTLM authentication. For more information about running Windows
     SharePoint Services using Kerberos authentication, refer to Microsoft
     Knowledge Base Article number 832769. (Go to http://support.microsoft.com
     and search for article number 832769.)

     If you use Kerberos authentication, your domain administrator must configure
     a Service Principal Name (SPN) for the domain account that is acting as the
     identity of the application pool. For more information, see *Configure a Service
     Principal Name* on page 34.

     Click **Next**.

8.   The Completing the SharePoint Products and Technologies Configuration
     Wizard window is displayed. Review your configuration settings and click
     Next.

9.   When the configuration is complete, click **Finish** to close the wizard.

     Your Web browser will open and display the SharePoint Central Administration
     Web site. You'll use this site to complete many of the procedures in this chapter.

Create a Web application for Workflow (optional)

A Web application must be created to host the Workflow Web site. You can
manually create a Web application now, or you can have the Workflow installation
program create it for you.

If you want to the Workflow Web application to use Kerberos authentication, you
should manually create the Web application.

1.   Open SharePoint Central Administration.
     Start > **Administrative Tools** > **SharePoint Central 3.0 Administration**

2.   Click the **Application Management tab**.

3.   Under the **SharePoint Web Application Management** heading, click **Create or
     extend Web application**.

4.   Click **Create a new Web application**.

5. Indicate whether you want to use an existing IIS Web site, or create a new IIS Web site.

    • If you choose to use an existing IIS Web site, select the Web site you want to use.

    *If Business Portal for Microsoft Dynamics GP is installed on this Web server, **do not** select the IIS Web site Business Portal is installed to. Business Portal and Workflow can't use the same Web site.*

    • If you choose to create a new IIS Web site, enter a description for the Web site.

6. In the **Security Configuration** section, select security options for the Web application.

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

    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.

8. Select **Configurable** and enter the user account you created for SharePoint. (For more information about the user account, refer to *User accounts for Windows SharePoint Services* on page 31.) Be sure to enter the account in domain\username format.

9. 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

Configure a Service Principal Name

If the Workflow Web application was configured to use Kerberos authentication, your domain administrator must configure a Service Principal Name (SPN) for the domain account that is acting as the identity of the application pool. SPNs 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.

Use the Setspn.exe command-line tool to configure an SPN. You can get the tool by downloading Support Tools for Windows Server 2003 from the Microsoft Download Center (www.microsoft.com/downloads). 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**.

For information about using the Setspn.exe tool, refer to the Windows Server 2003 Technical Reference on Microsoft TechNet (technet.microsoft.com).

Chapter 8: Office SharePoint Server configuration

This chapter explains how to install and configure Office SharePoint Server for use with Workflow. If you're installing Workflow with Windows SharePoint Services, skip this chapter and refer to Chapter 7, "Windows SharePoint Services configuration."

This chapter only provides information about Office SharePoint Server as it relates to the Workflow installation. For complete information about Office SharePoint Server concepts and setup procedures, see the Office SharePoint Server documentation.

- *Create user accounts for Office SharePoint Server*
- *Install Office SharePoint Server*
- *Run the SharePoint Products and Technologies Configuration Wizard*
- *Install hotfixes*
- *Start services*
- *Create a Web application for Workflow (optional)*
- *Configure a Service Principal Name*
- *Define a managed path (optional)*

Create user accounts for Office SharePoint Server

You must create the following domain user accounts for Office SharePoint Server. Office SharePoint Server uses these accounts to launch services, run processes, and connect to the SharePoint databases.

For more information about administrative and service accounts for Office SharePoint Server, refer to the Office SharePoint Server Technical Library on Microsoft TechNet (http://technet.microsoft.com).

Domain user account	Description	Use this account when you...
User account 1	This account will be used in several ways: • It will be used to access data from the Office SharePoint Server configuration database. • It will be used to run the Windows SharePoint Services Timer service. • It will act as the identity of the SharePoint Central Administration application pool.	*Run the SharePoint Products and Technologies Configuration Wizard* on page 36
User account 2	This account will act as the identity of the Workflow application pool.	*Create a Web application for Workflow (optional)* on page 38

These accounts must be dedicated service accounts. These accounts must not be part of any workflow process. For example, do not use these accounts when specifying a Workflow administrator, manager, originator, or approver.

Install Office SharePoint Server

Use the following steps to install Office SharePoint Server on your Web server.

1. Insert the Office SharePoint Server DVD into your Web server computer. The Office SharePoint Server installation screen should appear. If the screen does not appear automatically, browse the DVD and double-click the **Setup.exe** file.

2. Mark the **I accept the terms of this agreement** option and click **Continue**.

3. Click the **Advanced** installation option.

4. The **Server Type** tab is displayed. Select the **Complete** option.

5. Click the **File Location** tab. Specify the folders where you want the Office SharePoint Server files installed. You can accept the default locations, or click **Browse** to select different locations.

6. Click the **Feedback** tab. Indicate whether you want to participate in the Customer Experience Improvement Program.

7. Click **Install Now** to install Office SharePoint Server.

8. When the installation is complete, the final window of the installation wizard is displayed. Select the **Run the SharePoint Products and Technologies Configuration Wizard now** check box. Click **Close**.

9. Follow the instructions in *Run the SharePoint Products and Technologies Configuration Wizard* on page 36 to run the SharePoint Products and Technologies Configuration Wizard.

Run the SharePoint Products and Technologies Configuration Wizard

Use the following steps to run the SharePoint Products and Technologies Configuration Wizard.

1. If you just installed Office SharePoint Server, the SharePoint Products and Technologies Configuration Wizard is displayed. If the wizard is not displayed, you can start the wizard by clicking **Start** > **Administrative Tools** > **SharePoint Products and Technologies Configuration Wizard**.

2. In the Welcome to SharePoint Products and Technologies window, click **Next**.

3. A dialog box may appear, indicating that services may need to be started or reset. Click **Yes** to continue.

4. The Connect to a Server Farm window is displayed. Click the **No, I want to create a new server farm** option. Click **Next**.

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5. The Specify Configuration Database Settings window is displayed. Enter the following information.

Field	What to enter
Database server	Enter the name of the SQL server that will host the SharePoint configuration database.
Database name	Enter a name for the SharePoint configuration database, or accept the default name.
Username	Enter the name of the user account you created for "user account 1" in *Create user accounts for Office SharePoint Server* on page 35.
Password	Enter the password for the user account you created for "user account 1" in *Create user accounts for Office SharePoint Server* on page 35.

Click **Next**.

6. The Configure SharePoint Central Administration Web Application window is displayed. If you want the SharePoint Central Administration Web site to use a particular port number, select the **Specify port number** check box and enter the port number.

7. Choose either **NTLM** authentication or **Negotiate (Kerberos)** authentication. Unless you have a specific need for Kerberos authentication, you should choose NTLM authentication. For more information about running Office SharePoint Server using Kerberos authentication, refer to Microsoft Knowledge Base Article number 832769. (Go to http://support.microsoft.com and search for article number 832769.)

If you use Kerberos authentication, your domain administrator must configure a Service Principal Name (SPN) for the domain account that is acting as the identity of the application pool. For more information, see *Configure a Service Principal Name* on page 39.

Click **Next**.

8. The Completing the SharePoint Products and Technologies Configuration Wizard window is displayed. Review your configuration settings and click **Next**.

9. When the configuration is complete, click **Finish** to close the wizard.

Your Web browser will open and display the SharePoint Central Administration Web site. You'll use this site to complete many of the procedures in this chapter.

Install hotfixes

Before installing Workflow, install the following hotfixes on the Web server running Office SharePoint Server.

Windows Workflow Foundation hotfix   This hotfix resolves issues regarding the escalation of tasks. To download and install this hotfix, go to the Microsoft Download Center (http://www.microsoft.com/downloads) and search for **KB932394**.

Office SharePoint Server hotfix   This hotfix resolves issues that occur when you submit multiple documents for approval from a list, or when you deactivate a workflow. For more information about this hotfix, go to the Microsoft Help and Support Web site (http://support.microsoft.com) and search for Knowledge Base article **934790**. To obtain this hotfix, contact Microsoft Customer Support Services. For a complete list of Microsoft Customer Support Services telephone numbers and information about support costs, go to http://support.microsoft.com/contactus/?ws=support.

Start services

After you have installed Office SharePoint Server and run the SharePoint Products and Technologies Configuration wizard, you must start Office SharePoint Server services. The services you need to start depend on your server topology and the server role you select.

1. Open SharePoint Central Administration.
    Start > **Administrative Tools** > **SharePoint 3.0 Central Administration**

2. Click the **Operations** tab.

3. Under the **Topology and Services** heading, click **Services on server**. The Services on Server: <Server Name> page is displayed.

4. Select a server role. For information about these roles, see the Office SharePoint Server documentation.

5. In the Services table, verify that the Windows SharePoint Services Web Application service has a status of Started. It it does not, click the **Start** link.

    Other services may be required, depending on the server role you selected. For more information about these services, see the Office SharePoint Server documentation.

Create a Web application for Workflow (optional)

A Web application must be created to host the Workflow Web site. You can manually create the Web application now, or you can have the Workflow installation program create it for you.

If you want the Workflow Web application to use Kerberos authentication, you should manually create the Web application.

If you have implemented SSL, you must manually create a Web application for Workflow.

1. Open SharePoint Central Administration.
   Start > **Administrative Tools** > **SharePoint 3.0 Central Administration**

2. Click the **Application Management** tab.

3. Under the **SharePoint Web Application Management** heading, click **Create or extend Web application**. The Create or Extend Web Application page is displayed.

4. Click **Create a new Web application**. The Create New Web Application page is displayed.

5. Indicate whether you want to use an existing IIS Web site, or create a new IIS Web site.

   • If you choose to use an existing IIS Web site, select the Web site you want to use.

   *If Business Portal for Microsoft Dynamics GP is installed on this Web server, **do not** select the IIS Web site Business Portal is installed to. Business Portal and Workflow can't use the same Web site.*

   • If you choose to create a new IIS Web site, enter a description for the Web site.

6. In the **Security Configuration** section, select security options for the Web application.

7. In the **Application Pool** section, select the **Create a new application pool** option and enter a name for the application pool. For example, you may want to name the application pool *Workflow.*

   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 Web application can't cause the other Web applications to fail.

8. Select the **Configurable** option and enter a domain user account name and password. The user account will act as the identity of this Web application's application pool. (You should enter the account you created for "user account 4" in *Create user accounts for Office SharePoint Server*.) Be sure to enter the account information in domain\username format.

9. 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.

Configure a Service Principal Name

If the Workflow Web application was configured to use Kerberos authentication, your domain administrator must configure a Service Principal Name (SPN) for the domain account that is acting as the identity of the application pool. SPNs 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.

Use the Setspn.exe command-line tool to configure an SPN. You can get the tool by downloading Support Tools for Windows Server 2003 from the Microsoft Download Center (http://www.microsoft.com/downloads).

For information about using the Setspn.exe tool, refer to the Windows Server 2003 Technical Reference on Microsoft TechNet (http://technet.microsoft.com).

Define a managed path (optional)

If you chose not to create a Web application for Workflow (as described in Create a Web application for Workflow (optional) on page 38), skip this section.

When running the Workflow installation wizard, you'll be asked to select a managed path. Managed paths specify which paths in the URL namespace of a Web application are managed by Windows SharePoint Services.

By default, the /sites managed path is selected in the Workflow installation wizard. This means that the default URL of the Workflow Web site is:

http://ServerName/sites/DynamicsGPWorkflow

If you want the Workflow Web site to use a different managed path, use the following steps to define the managed path. You'll then be able to select the managed path when running the Workflow installation wizard.

1. Open SharePoint Central Administration.
    Start > **Administrative Tools** > **SharePoint 3.0 Central Administration**

2. Click the **Application Management** tab.

3. Under the **SharePoint Web Application Management** heading, click **Define managed paths**. The Define Managed Paths page is displayed.

4. If the name of the Workflow Web application does not appear in the **Web Application** field, click the down arrow to change the Web application.

5. In the **Path** field, enter a name for the new managed path.

6. From the **Type** list, select one of the following:

    Wildcard Inclusion   Select this option if you want Windows SharePoint Services to manage all sites within this managed path.

    Explicit Inclusion   Select this option if you want Windows SharePoint Services to manage only the site that is specified in the path. Sites subordinate to the specified path will not be managed by Windows SharePoint Services.

7. Click **OK**.

Chapter 9: SharePoint Server configuration

This chapter explains how to install and configure SharePoint Server 2010, Enterprise Edition for use with Workflow. 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:

- *Create user accounts for SharePoint Server*
- *Install SharePoint Server*
- *Run the SharePoint Products Configuration Wizard*
- *Start services in SharePoint Server*
- *Create a web application for Workflow using SharePoint Server (optional)*
- *Configure a Service Principal Name*

Create user accounts for 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	This account will be used in several ways: • It will be used to access data from the SharePoint Server configuration database. • It will be used to run the SharePoint 2010 Timer service. • It will act as the identity of the SharePoint Central Administration application pool.	*Run the SharePoint Products Configuration Wizard* on page 42
User account 2	This account will act as the identity of the Workflow application pool.	*Create a web application for Workflow using SharePoint Server (optional)* on page 44

These accounts must be dedicated service accounts. These accounts must not be part of any workflow process. For example, do not use these accounts when specifying a Workflow administrator, manager, originator, or approver.

Install SharePoint Server

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

Use the following steps to install SharePoint Server on your Web server.

1. Insert the SharePoint Server DVD into your Web server computer. The SharePoint Server installation screen should appear. If the screen does not appear automatically, browse the DVD and double-click the **Setup.exe** file.

2. Click **Install software prerequisites** on the SharePoint Foundation 2010 Start page.

3. Click **Next** in the Microsoft SharePoint Products 2010 Preparation Tool. This tool installs and configures all the required prerequisites for SharePoint Foundation 2010.

4. Select the **I accept the terms of the License Agreement(s)** option and click **Next**.

    Depending on the prerequisites that are being installed, you may need to restart your computer.

5. Click **Finish** after the prerequisites have been installed.

    You may need to restart your computer.

6. Click **Install SharePoint Server** on the SharePoint Server 2010 Start page.

7. Enter the product key and click **Continue**.

8. Select the **I accept the terms of this agreement** option and click **Continue**.

9. Click **Server Farm**.

10. The **Server Type** tab is displayed. Select the **Complete** option.

11. Click the **Data Location** tab. Specify the folders where you want the SharePoint Foundation files installed. You can accept the default locations, or click **Browse** to select different locations.

12. Click **Install Now** to install SharePoint Server.

13. When the installation is complete, the final window of the installation wizard is displayed. Select the **Run the SharePoint Products Configuration Wizard now** check box. Click **Close**.

14. Follow the instructions in to run the SharePoint Products Configuration Wizard.

Run the SharePoint Products Configuration Wizard

Use the following steps to run the SharePoint Products Configuration Wizard. 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.

1. If you just installed SharePoint Server, the SharePoint Products Configuration wizard is displayed. If the wizard is not displayed, you can start the wizard by clicking **Start > All Programs** > **Microsoft SharePoint 2010 Products** > **SharePoint 2010 Products Configuration wizard**.

2. In the Welcome to SharePoint Products window, click **Next**.

3.   A dialog box may appear, indicating that services may need to be started or reset. Click **Yes** to continue.

4.   The Connect to a Server Farm window is displayed. Select the **Create a new server farm** option. Click **Next**.

5.   The Specify Configuration Database Settings window is displayed. Enter the following information.

Field	What to enter
Database server	Enter the name of the SQL server that will host the SharePoint configuration database.
Database name	Enter a name for the SharePoint configuration database, or accept the default name.
Username	Enter the name of the user account you created for "user account 1" in *Create user accounts for SharePoint Server* on page 41.
Password	Enter the password for the user account you created for "user account 1" in *Create user accounts for SharePoint Server* on page 41.

Click **Next**.

6.   In the Specify Farm Security Settings window is displayed. Enter a passphrase. Click **Next**.

7.   The Configure SharePoint Central Administration Web Application window is displayed. If you want the SharePoint Central Administration Web site to use a particular port number, select the **Specify port number** check box and enter the port number.

8.   Choose either **NTLM** authentication or **Negotiate (Kerberos)** authentication. Unless you have a specific need for Kerberos authentication, you should choose NTLM authentication. For more information about running SharePoint Server using Kerberos authentication, refer to Microsoft Knowledge Base Article number 832769. (Go to http://support.microsoft.com and search for article number 832769.)

If you use Kerberos authentication, your domain administrator must configure a Service Principal Name (SPN) for the domain account that is acting as the identity of the application pool. For more information, see *Configure a Service Principal Name* on page 45.

Click **Next**.

9.   The Completing the SharePoint Products Configuration Wizard window is displayed. Review your configuration settings and click **Next**.

10.   When the configuration is complete, click **Finish** to close the wizard.

Your Web browser will open and display the SharePoint Central Administration Web site. You'll use this site to complete many of the procedures in this chapter.

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 > **SharePoint 2010 Products** > **SharePoint Central Administration**

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

3. Start the required services for your configuration. For more information about these services, see the SharePoint Server documentation.

    You should verify that the Microsoft SharePoint Foundation Web Application service has a status of Started. It it does not, click the **Start** link.

Create a web application for Workflow using SharePoint Server (optional)

A web application must be created to host the Workflow web site. You can manually create a Web application now, or you can have the Workflow installation program create it for you.

If you want to the Workflow Web application to use Kerberos authentication, you should manually create the Web application.

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

To create a web application:

1. Open SharePoint Central Administration.
    Start > **All programs** > **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. Indicate whether you want to use an existing IIS Web site, or create a new IIS Web site.

    •   If you choose to use an existing IIS Web site, select the Web site you want to use.

*If Business Portal for Microsoft Dynamics GP is installed on this Web server, **do not** select the IIS Web site Business Portal is installed to. Business Portal and Workflow can't use the same Web site.*

- If you choose to create a new IIS Web site, enter a description for the Web site.

6. In the **Security Configuration** section, select security options for the Web application.

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

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.

8. Select **Configurable** and enter the user account you created for SharePoint. (For more information about the user account, refer to *Create user accounts for SharePoint Server* on page 41.) Be sure to enter the account in domain\username format.

9. 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

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

Configure a Service Principal Name

If the Workflow 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 R2 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 10: SharePoint Foundation configuration

This chapter explains how to install and configure SharePoint Foundation 2010 for use with Workflow. If you're installing Workflow with SharePoint Server 2010, skip this chapter and refer to Chapter 9, "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:

- *Create user accounts for SharePoint Foundation*
- *Install SharePoint Foundation*
- *Create a web application for Workflow using SharePoint Foundation (optional)*
- *Configure a Service Principal Name*

Create user accounts for 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).

Domain user account	Description	Use this account when you…
User account 1	This account will be used in several ways: • It will be used to access data from the SharePoint Foundation configuration database. • It will be used to run the SharePoint 2010 Timer service. • It will act as the identity of the SharePoint Central Administration application pool.	*Run the SharePoint Products Configuration wizard* on page 48
User account 2	This account will act as the identity of the Workflow application pool.	*Create a web application for Workflow using SharePoint Foundation (optional)* on page 50.

These accounts must be dedicated service accounts. These accounts must not be part of any workflow process. For example, do not use these accounts when specifying a Workflow administrator, manager, originator, or approver.

Install SharePoint Foundation

Use the following steps to install SharePoint Foundation on your web server.

1. 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.

2. Click **Install software prerequisites** on the SharePoint Foundation 2010 Start page.

3. Click Next in the Microsoft SharePoint Products Preparation Tool. This tool installs and configures all the required prerequisites for SharePoint Foundation 2010.

4. Select the **I accept the terms of this agreement** option and click **Continue**.

    Depending on the prerequisites that are being installed, you may need to restart your computer.

5. Click Finish after the prerequisites have been installed.

    You may need to restart your computer.

6. Click **Install SharePoint Foundation** on the SharePoint Foundation 2010 Start page.

7. Select the **I accept the terms of this agreement** option and click **Continue**.

8. Click **Server Farm**.

9. The **Server Type** tab is displayed. Select the **Complete** option.

10. Click the **Data Location** tab. Specify the folders where you want the SharePoint Foundation files installed. You can accept the default locations, or click **Browse** to select different locations.

11. Click **Install Now** to install SharePoint Foundation.

12. When the installation is complete, the final window of the installation wizard is displayed. Select the **Run the SharePoint Products Configuration Wizard now** check box. Click **Close**.

13. Follow the instructions in *Run the SharePoint Products Configuration wizard* on page 48 to run the SharePoint Products Configuration Wizard.

Run the SharePoint Products Configuration wizard

Use the following steps to run the SharePoint Products Configuration wizard.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.

1. If you just installed SharePoint Foundation, the SharePoint Products Configuration wizard is displayed. If the wizard is not displayed, you can start the wizard by clicking **Start > All Programs** > **Microsoft SharePoint 2010 Products** > **SharePoint 2010 Products Configuration wizard**.

2. In the Welcome to SharePoint Products window, click **Next**.

3. A dialog box may appear, indicating that services may need to be started or reset. Click **Yes** to continue.

4. The Connect to a Server Farm window is displayed. Select the **Create a new server farm** option. Click **Next**.

5. The Specify Configuration Database Settings window is displayed. Enter the following information.

Field	What to enter
Database server	Enter the name of the SQL server that will host the SharePoint configuration database.
Database name	Enter a name for the SharePoint configuration database, or accept the default name.
Username	Enter the name of the user account you created for "user account 1" in *Create user accounts for SharePoint Foundation* on page 47.
Password	Enter the password for the user account you created for "user account 1" in *Create user accounts for SharePoint Foundation* on page 47.

Click **Next**.

6. In the Specify Farm Security Settings window is displayed. Enter a passphrase. Click **Next**.

7. The Configure SharePoint Central Administration Web Application window is displayed. If you want the SharePoint Central Administration Web site to use a particular port number, select the **Specify port number** check box and enter the port number.

8. Choose either **NTLM** authentication or **Negotiate (Kerberos)** 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 number 832769. (Go to http://support.microsoft.com and search for article number 832769.)

    If you use Kerberos authentication, your domain administrator must configure a Service Principal Name (SPN) for the domain account that is acting as the identity of the application pool. For more information, see *Configure a Service Principal Name* on page 51.

    Click **Next**.

9. The Completing the SharePoint Products Configuration Wizard window is displayed. Review your configuration settings and click **Next**.

10. When the configuration is complete, click **Finish** to close the wizard.

Your Web browser will open and display the SharePoint Central Administration Web site. You'll use this site to complete many of the procedures in this chapter.

Create a web application for Workflow using SharePoint Foundation (optional)

A Web application must be created to host the Workflow Web site. You can manually create a Web application now, or you can have the Workflow installation program create it for you.

If you want to the Workflow Web application to use Kerberos authentication, you should manually create the Web application.

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

1. Open SharePoint Central Administration.
    Start > **All programs** > **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. Indicate whether you want to use an existing IIS Web site, or create a new IIS Web site.

    - If you choose to use an existing IIS Web site, select the Web site you want to use.

    ⚠ *If Business Portal for Microsoft Dynamics GP is installed on this Web server, **do not** select the IIS Web site Business Portal is installed to. Business Portal and Workflow can't use the same Web site.*

    - If you choose to create a new IIS Web site, enter a description for the Web site.

6. In the **Security Configuration** section, select security options for the Web application.

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

    💡 *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.*

8. Select **Configurable** and enter the user account you created for SharePoint. (For more information about the user account, refer to *Create user accounts for SharePoint Foundation* on page 47.) Be sure to enter the account in domain\username format.

9.   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

10. On the Application Created page, 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 R2 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**.

For information about using the Setspn.exe tool, refer to the Windows Server 2008 Technical Reference on Microsoft TechNet (technet.microsoft.com).

Part 4: Workflow installation

This part of the documentation explains how to run the Workflow installation wizard. The following chapters are included:

- Chapter 11, "Before you install," explains the user rights you must have to run the Workflow installation wizard. Information on how to start the required services is also included.

- Chapter 12, "Installation," provides step-by-step instructions for running the Workflow installation wizard.

- Chapter 13, "Maintenance," explains how to repair Workflow files and remove Workflow from your Web server.

Chapter 11: Before you install

Before you start the Workflow installation wizard, complete the following tasks:

- *Verify that you have access rights to install*
- *Start services*

Verify that you have access rights to install

To run the Workflow installation wizard, you must be logged on to the Web server computer as a domain user with the following access rights.

Administrator rights on the server Your domain user account must be a member of the Administrators group on the Web server where Workflow will be installed.

Administrator rights for SQL Server During the installation, you will be prompted to enter SQL Server connection information.

- If you want to connect to SQL Server using Windows Trusted Authentication, you must log on to the Web server with a Windows logon ID that has administrative rights to SQL Server.

- If you want to connect to SQL Server using SQL Authentication, you'll need to enter a SQL Server administrator logon ID and password during the installation.

Administrator of the Dynamics Security Admin Service You must be an administrator of the Dynamics Security Admin Service.

Start services

To run the Workflow installation wizard, the following services must be running for SharePoint Foundation and SharePoint Server:

- SharePoint 2010 Administration
- SharePoint 2010 Timer

The following services must be running for Windows SharePoint Services and Office SharePoint Server:

- Windows SharePoint Services Administration
- Windows SharePoint Services Timer

To start a service, complete the following steps:

1. Open the Services window.
    Start > **Administrative Tools** > **Services**

2. Right-click the service and choose **Properties**. The <Service Name> Properties window is displayed.

3.   From the **Startup type** list, select **Automatic**. Click **OK**.

4.   If the service does not have a status of Started, right-click the service and choose **Start**.

Chapter 12: Installation

This chapter contains the procedures you'll need to follow to run the Workflow installation wizard and verify the installation.

The following sections are included:

- *Install Workflow*
- *Verify the installation*
- *Configure outgoing e-mail settings*
- *Configure alternate access mappings*
- *Set up the Workflow system*

Install Workflow

Use the following steps to install Workflow on your Web server. As the user installing Workflow, you will become the first Workflow administrator.

1. From the Microsoft Dynamics GP Release installation media on your Web server computer, double-click the Setup.exe file to open the Microsoft Dynamics GP installation window.

2. Click Workflow, and then click Install.

   *You must install Workflow by running **Setup.exe** on the installation media.*

3. In the License Agreement window, read the terms and conditions. Then, select **I accept the terms in the License Agreement**. Click **Next**.

4. The SQL Connection Information window appears.

Enter the name of the server containing your Microsoft Dynamics GP databases.

Select the type of authentication that should be used when creating the SQL tables and objects used by Workflow. 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 login ID and password. Click **Next**.

5. The Web Service URLs window appears.

Enter the following information.

- The name of the computer you want to install Web Services.

- The port number used in the URL for the Dynamics GP Web service. The port number is the port the Web site is using. Typically, the port number is 48620.

- The port number used in the URL for the Microsoft Dynamics Security Admin Service. The port number is the port the Web site is using. Typically, the port number is 48621.

Click **Next**.

6. The Web Site window appears.

Select the IIS Web site you want to use for Workflow.

- If the IIS Web site you select has not been extended as a SharePoint Server Web application, the installation program will extend it for you.

- If the IIS Web site you select has already been extended as a Web application, you can select the managed path you want to use for Workflow. For more information about managed paths, see *Define a managed path (optional)* on page 40.

⚠ *If Business Portal for Microsoft Dynamics GP is installed on this Web server, **do not** select the IIS Web site Business Portal is installed to. Business Portal and Workflow can't use the same Web site.*

If you're installing Workflow on multiple Web servers, you must select the same IIS Web site on each server.

Click **Next**.

7. If the IIS Web site you selected has not been extended as a Web application, the **Application User Account** window appears.

Enter the following information.

Field	What to enter
Domain	Enter the name of your domain.
Username	Enter the name of the domain user account that will act as the identity of the Workflow application pool. Typically, this account is "User account 2" that you created in *User accounts for Windows SharePoint Services* on page 31, *Create user accounts for Office SharePoint Server* on page 35, *Create user accounts for SharePoint Server* on page 41, or *Create user accounts for SharePoint Foundation* on page 47
Password	Enter the password for the domain user account.

Click **Next**.

8. The Install Program window appears.

Click **Install** to install Workflow.

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

Verify the installation

After the Workflow installation is complete, verify that you can access the Workflow Web site.

1. Open your Web browser.

2. Enter the address of the Workflow Web site. The default address of the Workflow Web site is:

    http://*ServerName:PortNumber*/sites/DynamicsGPWorkflow

    ServerName is the name of the Web server on which Workflow is installed. *PortNumber* is the port the Web site is using.

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

Configure outgoing e-mail settings

You can configure the Workflow system so that users receive e-mail alert messages when tasks are assigned to them, or when documents or batches they've submitted have completed approval processes.

Use the following steps to specify the e-mail address that will be used as the **From** address on the alert messages.

SharePoint Foundation and SharePoint Server:

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

2. Click **System Settings**.

3. Under the **E-Mail and Text Messages (SMS)** heading, click **Configure outgoing e-mail settings**. The Web Application Outgoing E-Mail Settings page is displayed.

4. In the **Outbound SMTP server** field, enter the name of your Web server.

5. In the **From address** and **Reply-to address** fields, enter valid e-mail addresses.

6. From the **Character set** list, select the character set appropriate for your language. For more information, refer to the SharePoint documentation.

7. Click **OK**.

Windows SharePoint Services and Office SharePoint Server:

1. Open SharePoint Central Administration.
    Start > **Administrative Tools** > **SharePoint 3.0 Central Administration**

2. Click the **Application Management** tab.

3. Under the **SharePoint Web Application Management** heading, click **Web application outgoing e-mail settings**. The Web Application Outgoing E-Mail Settings page is displayed.

4. If the name of the Workflow Web application does not appear in the **Web Application** field, click the down arrow to change the Web application.

5. In the **Outbound SMTP server** field, enter the name of your Web server.

6. In the **From address** and **Reply-to address** fields, enter valid e-mail addresses.

7. From the **Character set** list, select the character set appropriate for your language. For more information, refer to the SharePoint documentation.

8. Click **OK**.

Configure alternate access mappings

If you want to install Workflow on additional Web servers, you must configure *alternate access mappings*. Alternate access mappings enable multiple Web applications (on multiple Web servers) to be mapped to a single URL.

For example, assume that you installed Workflow on a server named WorkflowServer1. Now assume you would like to install Workflow on an additional Web server, WorkflowServer 2.

Before you install Workflow on workflowserver 2, you must go to the Alternate Access Mappings page in SharePoint Central Administration. You must add an internal URL that maps the Workflow Web application on workflowserver2 to the URL used by the Workflow Web application on workflowserver1.

This internal URL maps the Workflow Web application on workflowserver2 to the URL used by the Workflow Web application on workflowserver1.

To add an internal URL using SharePoint Foundation or SharePoint Server, complete the following steps.

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

2. Click **Application Management**.

3. Under the **Web Applications** heading, click **Configure alternate access mappings**. The Alternate Access Mappings page is displayed.

4. Click **Add Internal URLs**. The Add Internal URLs page is displayed.

5. If the name of the Workflow Web application does not appear in the **Alternate Access Mapping Collection** field, click the down arrow to change the Web application.

6. In the **URL protocol, host and port** field, enter the URL the Workflow Web application should be mapped to.

7. Select a zone. For more information on zones, see the SharePoint documentation.

8. Click **Save**.

To add an internal URL using Windows SharePoint Services or Office SharePoint Server, complete the following steps.

1. Open SharePoint Central Administration.
    Start > **Administrative Tools** > **SharePoint 3.0 Central Administration**

2. Click the **Operations** tab.

3. Under the **Global Configuration** heading, click **Alternate access mappings**. The Alternate Access Mappings page is displayed.

4. Click **Add Internal URLs**. The Add Internal URLs page is displayed.

5. If the name of the Workflow Web application does not appear in the **Alternate Access Mapping Collection** field, click the down arrow to change the Web application.

6. In the **URL protocol, host and port** field, enter the URL the Workflow Web application should be mapped to.

7. Select a zone. For more information on zones, see the SharePoint documentation.

8. Click **Save**.

Set up the Workflow system

After you have installed Workflow and verified that you can access the Workflow Web site, you can begin setting up the Workflow system. Follow the instructions in the Workflow Administrator's Guide. This manual is available on the Microsoft Dynamics GP installation media and Microsoft Dynamics GP documentation Web site (http://go.microsoft.com/fwlink/?LinkId=161199).

Chapter 13:   Maintenance

The following sections explain how to repair Workflow files and remove Workflow from your Web server.

- *Repair Workflow files*
- *Remove Workflow*

Repair Workflow files

Use the following steps to repair the Workflow files installed on your Web server.

1. In Control Panel, open **Add or Remove Programs**, Programs and Features

2. Select **Microsoft Dynamics GP Workflow**. Click **Change**.

3. The Modify Installation window appears. Click **Repair**.

4. The SQL Connection Information window appears.
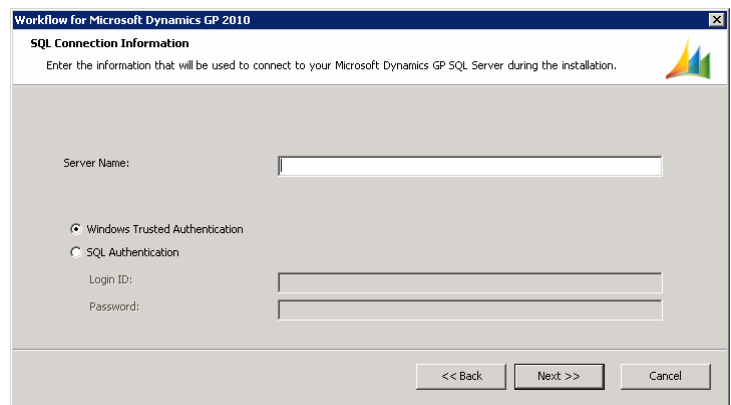
Enter the name of the server containing your Microsoft Dynamics GP databases.

Select the type of authentication that should be used when creating the SQL tables and objects used by Workflow. 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 login ID and password. Click **Next**.

5. The Web Service URLs window appears. Verify the machine name and port numbers and then click **Next**.

6. The Ready to Repair window appears. Click **Repair**.

7. The Installation Complete window appears. Click **Finish**.

Remove Workflow

Use the following steps to remove Workflow from your Web server.

1. In Control Panel, open **Add or Remove Programs**.

2. Select **Microsoft Dynamics GP Workflow**. Click **Change**.

3. The Modify Installation window appears. Click **Remove**.

4. The Ready to Remove window appears. Indicate whether you want to remove the Workflow site collection.

    •   If you're moving Workflow from one Web server to another Web server, do not remove the Workflow site collection.

    •   If you've installed Workflow on multiple Web servers and are removing Workflow from one of them, do not remove the Workflow site collection. If you do, the Workflow installations on the remaining Web servers will not work.

5. Click **Remove** to remove Workflow.

6. The Remove Complete window appears. Click **Finish**.

Part 5: Workflow upgrade

This part of the documentation contains information about upgrading to Workflow for Microsoft Dynamics GP 2010. The following chapters are included:

- Chapter 14, "Upgrade checklists," provides checklists for you to follow when you upgrade.

- Chapter 15, "Before you upgrade," contains information about the steps you should take to prepare your system before you upgrade to Workflow for Microsoft Dynamics GP 2010.

- Chapter 16, "Upgrade Workflow," provides instructions for upgrading to Workflow for Microsoft Dynamics GP 2010.

- Chapter 17, "After you upgrade," contains information about the steps you should take after you upgrade Workflow for Microsoft Dynamics GP 2010.

Chapter 14: Upgrade checklists

You can upgrade Workflow from the following

Upgrade from	Upgrade to
Workflow for Microsoft Dynamics GP Release 10.0 with Service Pack 4 on Office SharePoint Server	Workflow for Microsoft Dynamics GP 2010 on Office SharePoint Server
Workflow for Microsoft Dynamics GP 2010 on Office SharePoint Server	Workflow for Microsoft Dynamics GP 2010 on SharePoint Server 2010
Workflow for Microsoft Dynamics GP 2010 on Windows SharePoint Services	Workflow for Microsoft Dynamics GP 2010 on Office SharePoint Server

For an overview of the new features in Workflow, refer to the What's New documentation, available in the Documentation folder on the Microsoft Dynamics GP installation media.

This information is divided into the following sections:

- *Checklist 1: Workflow for Microsoft Dynamics GP Release 10.0 with Service Pack 4 on Office SharePoint Server to Workflow for Microsoft Dynamics GP 2010 on Office SharePoint Server*
- *Checklist 2: Workflow for Microsoft Dynamics GP 2010 on Office SharePoint Server to Workflow for Microsoft Dynamics GP 2010 on SharePoint Server 2010*
- *Checklist 3: Workflow for Microsoft Dynamics GP 2010 on Windows SharePoint Services to Workflow for Microsoft Dynamics GP 2010 on Office SharePoint Server*

Checklist 1: Workflow for Microsoft Dynamics GP Release 10.0 with Service Pack 4 on Office SharePoint Server to Workflow for Microsoft Dynamics GP 2010 on Office SharePoint Server

Use this checklist as your guide to upgrading to Workflow.

Task		For more information, see
1. Prepare for the upgrade.	Check for new information relating to the upgrade since the release of this document.	Microsoft Dynamics GP documentation web site: http://go.microsoft.com/fwlink/?LinkId=161199
	View the Readme file and make note of the items that pertain to your Workflow system.	\\Media\Documentation\GPReadme.chm
	Upgrade your hardware and software, if necessary.	System requirements on the Web: http://go.microsoft.com/fwlink/?LinkID=161197
	Approve or reject workflow items in process.	*Documents and batches that are in process during a workflow* on page 69.
	Back up your Microsoft Dynamics GP databases and perform table maintenance.	*Prepare Microsoft Dynamics GP databases for an upgrade* on page 70.
2. Upgrade Microsoft Dynamics GP.	Upgrade to Microsoft Dynamics GP 2010.	Microsoft Dynamics GP Upgrade Guide
3. Upgrade Web Services for Microsoft Dynamics GP.	Upgrade to Web Services for Microsoft Dynamics GP 2010.	Web Services Installation and Administration Guide
4. Upgrade Workflow.	Upgrade to Workflow for Microsoft Dynamics GP 2010.	*Upgrade Workflow* on page 71.
5. Perform post-upgrade procedures, if necessary.	Learn about additional tasks you may have to perform after the upgrade.	Chapter 7, "After you upgrade."

Checklist 2: Workflow for Microsoft Dynamics GP 2010 on Office SharePoint Server to Workflow for Microsoft Dynamics GP 2010 on SharePoint Server 2010

Use this checklist as your guide to upgrading to Workflow.

Task		For more information, see
1. Prepare for the upgrade.	Upgrade your hardware and software.	System requirements on the Web: http://go.microsoft.com/fwlink/?LinkID=161197
	Back up your Microsoft Dynamics GP databases and perform table maintenance.	*Prepare Microsoft Dynamics GP databases for an upgrade* on page 70.
2. Upgrade to SharePoint Server 2010, Enterprise Edition.	Attach databases to upgrade the content for your environment.	*Upgrade to SharePoint Server 2010* on page 36. Checklist for database attach upgrade SharePoint Server 2010 (http://go.microsoft.com/fwlink/?LinkId=199941) Attach databases and upgrade to SharePoint Server 2010 (http://go.microsoft.com/fwlink/?LinkId=199940)
3. Upgrade Web Services for Microsoft Dynamics GP.	Upgrade to the 64-bit Web Services for Microsoft Dynamics GP 2010.	Web Services Installation and Administration Guide
4. Perform post-upgrade procedures, if necessary.	Learn about additional tasks you may have to perform after the upgrade.	Chapter 17, "After you upgrade."

Checklist 3: Workflow for Microsoft Dynamics GP 2010 on Windows SharePoint Services to Workflow for Microsoft Dynamics GP 2010 on Office SharePoint Server

Use this checklist as your guide to upgrading to Workflow.

Task		For more information, see
1. Prepare for the upgrade.	Back up your Microsoft Dynamics GP databases and perform table maintenance.	*Prepare Microsoft Dynamics GP databases for an upgrade* on page 70.
2. Upgrade Windows SharePoint Services.	Install Office SharePoint Server	*Install Office SharePoint Server* on page 36
	Run the SharePoint Products and Technologies Configuration wizard.	*Run the SharePoint Products and Technologies Configuration Wizard* on page 36
	Install the following hotfixes on the Web server running Office SharePoint Server.	*Install hotfixes* on page 38
3. Upgrade Web Services for Microsoft Dynamics GP.	Upgrade to the 64-bit Web Services for Microsoft Dynamics GP 2010.	Web Services Installation and Administration Guide
4. Perform post-upgrade procedures, if necessary.	Learn about additional tasks you may have to perform after the upgrade.	Chapter 17, "After you upgrade."

Chapter 15: Before you upgrade

This chapter provides information about tasks you must complete before you upgrade to Workflow for Microsoft Dynamics GP 2010. This information is divided into the following sections:

- *System requirement changes*
- *Documents and batches that are in process during a workflow*
- *Prepare Microsoft Dynamics GP databases for an upgrade*

System requirement changes

The following system requirements have changed since the previous release of Workflow. For complete system requirements, refer to http://go.microsoft.com/fwlink/?LinkID=161197.

- This release of Workflow is compatible only with Microsoft Dynamics GP 2010. You must upgrade to Microsoft Dynamics GP 2010 before you can upgrade Workflow.

- Microsoft Windows 7 Professional Edition and Ultimate Edition are additional supported client operating systems.

- Internet Explorer 8.0 is supported, but not required.

Documents and batches that are in process during a workflow

Documents and batches that are in process during a workflow cannot be upgraded to Workflow for Microsoft Dynamics GP 2010. A document or batch must be either approved or rejected before you can upgrade. This includes documents and batches that are in the workflow process for integrating products. If the approval process cannot be completed for a document or batch, you must reject it. After you upgrade to Workflow for Microsoft Dynamics GP 2010, you can modify the document or batch that you have rejected and then resubmit it.

To successfully upgrade Workflow, you must complete the following tasks:

- Ask your users to stop submitting new documents and batches.

- Print the Active Tasks report to display a list of active tasks and the approvers they are assigned to.

- Approve or reject document or batch that are in process. You will have to resubmit documents and batches that have a status of Pending Changes. This includes documents and batches that are in the workflow process for integrating products.

  Documents and batches that are in process have the following statuses.

  Submitted
  Pending Approval
  Pending Changes

Prepare Microsoft Dynamics GP databases for an upgrade

Before you upgrade Workflow, we recommend making a backup of your Microsoft SQL Server databases and performing table maintenance procedures.

If you performed table maintenance procedures before you upgraded Microsoft Dynamics GP, you don't need to do so again before upgrading Workflow. However, we recommend that you make another backup of your Microsoft Dynamics GP databases before you upgrade Workflow.

Back up Microsoft Dynamics GP and SharePoint data

You should make at least one complete backup of your Microsoft Dynamics GP databases before upgrading. It's a good idea to make a backup before completing table maintenance procedures, in case you encounter any problems in that process.

You should back up SharePoint content and configuration databases at the same time as you back up your Microsoft Dynamics GP databases.

For more information about backing up databases in SQL Server, refer to SQL Server Books Online.

Table maintenance

For your SQL database, you should run the following database maintenance routine against the DYNAMICS database and all company databases in Microsoft SQL Server Management Studio. The database maintenance routine will help to ensure that your table structure is ready to be upgraded if there are no errors indicated.

DBCC CHECKDB (Database Name)

If you prefer to perform table maintenance only on the tables that have changed, lists of tables that have changed from previous releases are available on the Microsoft Dynamics GP Release media as part of the Software Developers' Kit (SDK).

It's a good idea to make a second backup after performing table maintenance, but before upgrading to Microsoft Dynamics GP Release. That way, if you encounter unexpected problems while upgrading, you won't have to repeat the table maintenance step.

Chapter 16: Upgrade Workflow

This chapter contains the procedures to upgrade to Workflow for Microsoft Dynamics GP 2010 in the order they must be performed. Before you upgrade Workflow, be sure to review the information in Chapter 15, "Before you upgrade."

This information is divided into the following sections:

- *Upgrade Workflow prerequisites*
- *Upgrade Workflow*

Upgrade Workflow prerequisites

You need to upgrade the following prerequisites.

Microsoft Dynamics GP You must upgrade Microsoft Dynamics GP to Microsoft Dynamics GP 2010 before upgrading Workflow. Microsoft Dynamics GP can be installed from the Microsoft Dynamics GP installation media.

For more information, refer to the Microsoft Dynamics GP Upgrade Guide located at the Microsoft Dynamics GP documentation resources web site (http://go.microsoft.com/fwlink/?LinkId=161199)

Web Services for Microsoft Dynamics GP You must upgrade Web Services for Microsoft Dynamics GP to Web Services for Microsoft Dynamics GP 2010 before upgrading Workflow. Web Services for Microsoft Dynamics GP 2010 can be installed from the Microsoft Dynamics GP 2010 installation media.

For more information, refer to the Microsoft Dynamics GP Web Services Installation and Administration Guide located at the Microsoft Dynamics GP documentation resources web site (http://go.microsoft.com/fwlink/?LinkId=161199).

Upgrade Workflow

Use the following steps to upgrade Workflow.

1. From the Microsoft Dynamics GP Release installation media on your Web server computer, double-click the Setup.exe file to open the Microsoft Dynamics GP installation window.

2. Click Workflow, and then click Install.

   *You must run the **Setup.exe** on the installation media.*

3. In the License Agreement window, read the terms and conditions. Then, select **I accept the terms in the License Agreement**. Click **Next**.

4. The SQL Connection Information window appears.

Enter the name of the server containing your Microsoft Dynamics GP databases.

Select the type of authentication that should be used when creating the SQL tables and objects used by Workflow. 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 login ID and password. Click **Next**.

5. The Web Service URLs window appears.

Enter the following information.

• The name of the computer where Web Services is installed.

• The port number used in the URL for the Dynamics GP Web service. Typically, the port number is 48620. You can use the DynamicsGP.config file to view the port number of the Dynamics GP Web service. This file is typically found in this location:

C:\Program Files\Microsoft Dynamics\GPWebServices\ServiceConfigs\

- The port number used in the URL for the Dynamics Security Admin Service. Typically, the port number is 48621. You can use the DynamicsSecurityAdmin.config file to view the port number of the Dynamics Security Admin Service. This file is typically found at this location:

  C:\Program Files\Microsoft Dynamics\GPWebServices\ServiceConfigs\

  Click **Next**.

6. The Upgrade window appears.

   Click **Upgrade** to upgrade Workflow.

7. The Upgrade Complete window appears. Click **Finish**.

Chapter 17: After you upgrade

We recommend that you complete the steps in this chapter after you upgrade Workflow.

This chapter contains the following sections:

- *Verify the upgrade*
- *Resubmit documents and batches*

Verify the upgrade

After the Workflow upgrade is complete, verify that you can access the Workflow Web site.

1. Open your Web browser.

2. Enter the address of the Workflow Web site. The default address of the Workflow Web site is:

   http://*ServerName:PortNumber*/sites/DynamicsGPWorkflow

   ServerName is the name of the Web server on which Workflow is installed. *PortNumber* is the port the Web site is using.

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

Resubmit documents and batches

Before upgrading to Workflow for Microsoft Dynamics GP 2010, you approved or rejected documents and batches that were in process during a workflow, including documents and batches that were in the workflow process for integrating products. After the upgrade, you can modify the documents or batches that you have rejected and then resubmit them.

For more information about modifying and resubmitting documents and batches, refer to the Workflow Administrator's Guide and the documentation for a specific module (http://go.microsoft.com/fwlink/?LinkId=161199).

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