



Business Portal for Microsoft Dynamics® GP 2010

Upgrade Guide

Release 5.0

December 1, 2010

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Introduction

Use this manual to upgrade to Business Portal for Microsoft Dynamics® GP 2010 (internal version number 5.0). You can upgrade from the following Business Portal releases:

- Business Portal 3.0
- Business Portal 3.0 with Service Pack 1
- Business Portal 4.0
- Business Portal 4.0 with Service Pack 2

You must upgrade to Microsoft Dynamics GP 2010 before you can upgrade Business Portal. Business Portal 5.0 is supported only on 32-bit versions of Windows and SharePoint.

Check for updated instructions

This information was current as of December 1, 2010. The documentation may be updated as new information becomes available. Check the Microsoft Dynamics GP documentation web site (<http://go.microsoft.com/fwlink/?LinkId=163279>) for the most current documentation.

This introduction is divided into the following sections:

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

What's in this manual

This manual provides step-by-step instructions for upgrading and configuring Business Portal. It includes the following chapters:

- [Chapter 1, "Upgrade overview,"](#) provides an overview of the upgrade process.
- [Chapter 2, "Before you upgrade,"](#) explains steps you should take to prepare for the Business Portal upgrade.
- [Chapter 3, "Upgrade SharePoint,"](#) describes the procedure for upgrading Windows SharePoint® Services. You must upgrade Windows SharePoint Services before you upgrade Business Portal.
- [Chapter 4, "Upgrading from Business Portal 3.0,"](#) describes the procedure for upgrading Business Portal. You also can migrate customizations made in the previous release of Business Portal, if necessary.
- [Chapter 6, "After you upgrade,"](#) explains steps you may need to take after upgrading Business Portal.

Symbols and conventions

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

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

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

Convention	Description
<i>Upgrade Business Portal</i>	Italicized type indicates the name of a section or procedure.
File > Print	The (>) symbol indicates a sequence of actions, such as choosing items from a menu, toolbar, or palette. This example directs you to go to the File menu and click Print .
Bold	Bold type indicates navigation, tab names, menus, commands, buttons, field names, keywords, and functions.
<i>Business Data Catalog is available only if you're using Business Portal with Office SharePoint Server 2007, Enterprise Edition</i>	Margin notes indicate when a topic applies only if you're using a specific product or technology.

Additional resources

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

Manuals

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

After you've upgraded Business Portal, you can find links to these manuals and other printable Business Portal documentation in the Documentation Resources web part on the Administration Resources page. (On the top-level Business Portal site, click **Administration**.)

Business Portal Installation Guide The Installation Guide (BusinessPortalInstallation.pdf) provides step-by-step instructions for installing Business Portal.

Business Portal Administrator's Guide The Administrator's Guide (BusinessPortalAdminGuide.pdf) explains how to set up and configure Business Portal.

Business Portal User's Guide The User's Guide (BusinessPortalUsersGuide.pdf) helps users complete day-to-day tasks in Business Portal.

Application manuals User and Administrator manuals for each application installed in Business Portal are available in the Documentation folder.

Help

Help is available by clicking the Help icon button, located in the upper-right corner of any page. The help that is displayed depends on whether you open help from a Business Portal page or a SharePoint page.

Business Portal help When you click the Help icon button on a Business Portal page, the relevant help topic for that page is displayed. You can use the search field on the help page to search for information. You also can click the Home icon button to browse the contents of the help.

Windows SharePoint Services help Many of the features included in Business Portal—such as document libraries, lists, announcements, links, and alerts—are provided by Windows SharePoint Services. General information about these features is provided in the Administering Business Portal help. For more detailed information, refer to the Windows SharePoint Services help, which can be accessed by clicking the Help icon button in the upper-right corner of any Windows SharePoint Services page. If you're using Office SharePoint Server 2007 or Microsoft SharePoint Server 2010, additional help related to the SharePoint Server features also will be available.

Technical support

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

Send us your documentation comments

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

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

Chapter 1: Upgrade overview

This chapter contains an overview of the Business Portal upgrade process. You can upgrade from the following releases:

Checklist	Upgrade from	Upgrade to
<u>Checklist 1: Business Portal 3.0 on Windows SharePoint Services 2.0 to Business Portal 5.0 on Windows SharePoint Services 3.0</u>	Business Portal 3.0 on Windows SharePoint Services 2.0 Business Portal 3.0 with Service Pack 1 on Windows SharePoint Services 2.0	Business Portal 5.0 on Windows SharePoint Services 3.0
<u>Checklist 2: Business Portal 4.0 on Windows SharePoint Services 3.0 to Business Portal 5.0 on Windows SharePoint Services 3.0</u>	Business Portal 4.0 on Windows SharePoint Services 3.0	Business Portal 5.0 on Windows SharePoint Services 3.0
	Business Portal 4.0 with Service Pack 2 on Windows SharePoint Services 3.0	
<u>Checklist 3: Business Portal 3.0 on Windows SharePoint Services 2.0 to Business Portal 5.0 on Office SharePoint Server, Enterprise Edition</u>	Business Portal 3.0 on Windows SharePoint Services 2.0 Business Portal 3.0 with Service Pack 1 on Windows SharePoint Services 2.0	Business Portal 5.0 on Microsoft Office SharePoint Server, Enterprise Edition
<u>Checklist 4: Business Portal 4.0 on Windows SharePoint Services 3.0 to Business Portal 5.0 on Office SharePoint Server, Enterprise Edition</u>	Business Portal 4.0 on Windows SharePoint Services 3.0	Business Portal 5.0 on Microsoft Office SharePoint Server, Enterprise Edition
	Business Portal 4.0 with Service Pack 2 on Windows SharePoint Services 3.0	
<u>Checklist 5: Business Portal 4.0 on Office SharePoint Server, Enterprise Edition to Business Portal 5.0 on Office SharePoint Server, Enterprise Edition</u>	Business Portal 4.0 on Microsoft Office SharePoint Server, Enterprise Edition Business Portal 4.0 with Service Pack 2 on Microsoft Office SharePoint Server, Enterprise Edition	Business Portal 5.0 on Microsoft Office SharePoint Server, Enterprise Edition
<u>Checklist 6: Business Portal 5.0 on Windows SharePoint Services 3.0 to Business Portal 5.0 on Office SharePoint Server, Enterprise Edition</u>	Business Portal 5.0 on Windows SharePoint Services 3.0	Business Portal 5.0 on Microsoft Office SharePoint Server, Enterprise Edition



For an overview of the new features in Business Portal, refer to the *What's New* documentation, available in the *Documentation* folder on the Business Portal installation media.

This information is divided into the following sections:

- [Upgrade process](#)
- [Checklist 1: Business Portal 3.0 on Windows SharePoint Services 2.0 to Business Portal 5.0 on Windows SharePoint Services 3.0](#)
- [Checklist 2: Business Portal 4.0 on Windows SharePoint Services 3.0 to Business Portal 5.0 on Windows SharePoint Services 3.0](#)
- [Checklist 3: Business Portal 3.0 on Windows SharePoint Services 2.0 to Business Portal 5.0 on Office SharePoint Server, Enterprise Edition](#)
- [Checklist 4: Business Portal 4.0 on Windows SharePoint Services 3.0 to Business Portal 5.0 on Office SharePoint Server, Enterprise Edition](#)
- [Checklist 5: Business Portal 4.0 on Office SharePoint Server, Enterprise Edition to Business Portal 5.0 on Office SharePoint Server, Enterprise Edition](#)
- [Checklist 6: Business Portal 5.0 on Windows SharePoint Services 3.0 to Business Portal 5.0 on Office SharePoint Server, Enterprise Edition](#)
- [System requirement changes](#)
- [Windows SharePoint Services vs. Office SharePoint Server](#)
- [Business Portal changes you should be aware of](#)

Upgrade process

Upgrading to Business Portal for Microsoft Dynamics GP 2010 is a complex process.

From Business Portal 3.0

If you have customizations, you must first upgrade to Windows SharePoint Services 3.0 or Office SharePoint Server 2007. If you do not have customizations, you can uninstall Windows SharePoint Services 2.0 and install a new version of SharePoint.

Because Business Portal has changed significantly with this release, not all customizations will be upgraded automatically. To retain customizations, you must run a migration utility to analyze the customizations you made to the previous release of Business Portal. Next, you must uninstall your current installation of Business Portal. Then, you can install Business Portal for Microsoft Dynamics GP 2010. After you've installed the new release of Business Portal, you must run the utility again to move customizations to the new release.



*To retain your data for use in Business Portal 5.0, uninstall Business Portal 3.0 so that only program files are removed. When you uninstall, in the Remove Options window, **do not** select the option to remove SQL objects and data. Your data will remain available for use in Business Portal 5.0.*

Running the migration utility is an optional step in the upgrade process. You may choose to re-create your customizations manually in the new release of Business Portal. For more information about which customizations can be migrated, see [How customizations are upgraded or migrated](#) on page 23.

The following illustration shows the major steps in the upgrade process for upgrading from Business Portal 3.0 to Business Portal for Business Portal for Microsoft Dynamics GP 2010.



From Business Portal 4.0

If you are keeping your current SharePoint solution, you must uninstall your current installation of Business Portal. Then, you can install Business Portal for Microsoft Dynamics GP 2010.

If you are going to upgrade to Office SharePoint Server 2007, you must uninstall your current installation of Business Portal. After you uninstall Business Portal, install Office SharePoint Server 2007 and run the SharePoint Products and Technologies Configuration Wizard. Then, you can install Business Portal for Microsoft Dynamics GP 2010.

Checklist 1: Business Portal 3.0 on Windows SharePoint Services 2.0 to Business Portal 5.0 on Windows SharePoint Services 3.0

Use this checklist as your guide to upgrading to a new release of Business Portal.

Upgrading from		
Business Portal 3.0 on Windows SharePoint Services 2.0		
Business Portal 3.0 with Service Pack 1 on Windows SharePoint Services 2.0		
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=163279
	View the Readme file and make note of the items that pertain to your Business Portal system.	\\media\Documentation\Readme.rtf
	Upgrade your hardware and software, if necessary.	System requirements on the Web: http://go.microsoft.com/fwlink/?LinkID=161197
	Identify the account used to access the shared reports folder.	Verify the account used to display reports in Reports Catalog on page 15.
	Approve open workflow items.	Approve all open workflow items on page 15.
	Back up your Microsoft Dynamics GP databases and perform table maintenance.	Prepare Microsoft Dynamics GP databases for an upgrade on page 16.
2. Upgrade Windows SharePoint Services. If you have no customizations, you can uninstall Windows SharePoint Services and install the newer version.	Choose a Windows SharePoint Services upgrade approach.	Determine the type of Windows SharePoint Services upgrade to perform on page 19.
	Perform Windows SharePoint Services pre-upgrade procedures.	Prepare to upgrade Windows SharePoint Services on page 20.
	Run the Windows SharePoint Services upgrade script.	Run the Windows SharePoint Services upgrade script on page 20.
	Upgrade Windows SharePoint Services.	Upgrade to Windows SharePoint Services 3.0 on page 21.
3. Upgrade Microsoft Dynamics GP.	Upgrade to Microsoft Dynamics GP 2010.	Microsoft Dynamics GP Upgrade Guide
5. Upgrade Business Portal and migrate customizations.	Install the Business Portal migration utility.	Download and install the Business Portal migration utility on page 24.
	Analyze customizations in the previous release of Business Portal.	Analyze customizations on page 25.
	Uninstall the previous release of Business Portal.	Uninstall the previous release of Business Portal on page 26.
	Create a web site for the new release of Business Portal.	Create a new web application and site collection on page 27.
	Install Business Portal for Microsoft Dynamics GP 2010.	Install Business Portal for Microsoft Dynamics GP 2010 on page 28.
	Perform pre-migration steps.	Prepare for the migration on page 29.
Migrate customizations.	Migrate customizations on page 29.	
6. Perform post-upgrade procedures, if necessary.	Learn about additional tasks you may have to perform after the upgrade.	Chapter 6. "After you upgrade."

Checklist 2: Business Portal 4.0 on Windows SharePoint Services 3.0 to Business Portal 5.0 on Windows SharePoint Services 3.0

Use this checklist as your guide to upgrading to a new release of Business Portal.

Upgrading from		
Business Portal 4.0 on Windows SharePoint Services 3.0		
Business Portal 4.0 with Service Pack 1 on Windows SharePoint Services 3.0		
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=163279
	View the Readme file and make note of the items that pertain to your Business Portal system.	\\media\Documentation\Readme.rtf
	Upgrade your hardware and software, if necessary.	System requirements on the Web: http://go.microsoft.com/fwlink/?LinkID=161197
	Identify the account used to access the shared reports folder.	<i>Verify the account used to display reports in Reports Catalog</i> on page 15.
	Approve open workflow items.	<i>Approve all open workflow items</i> on page 15.
	Back up your Microsoft Dynamics GP databases and perform table maintenance.	<i>Prepare Microsoft Dynamics GP databases for an upgrade</i> on page 16.
2. Upgrade Microsoft Dynamics GP.	Upgrade to Microsoft Dynamics GP 2010.	Microsoft Dynamics GP Upgrade Guide
4. Upgrade Business Portal.	Uninstall the previous release of Business Portal.	<i>Uninstall the previous release of Business Portal</i> on page 26.
	Install Business Portal for Microsoft Dynamics GP 2010.	<i>Install Business Portal for Microsoft Dynamics GP 2010</i> on page 28.
5. Perform post-upgrade procedures, if necessary.	Learn about additional tasks you may have to perform after the upgrade.	<i>Chapter 6, "After you upgrade."</i>

Checklist 3: Business Portal 3.0 on Windows SharePoint Services 2.0 to Business Portal 5.0 on Office SharePoint Server, Enterprise Edition

Use this checklist as your guide to upgrading to a new release of Business Portal.

Upgrading from		
Business Portal 3.0 on Windows SharePoint Services 2.0		
Business Portal 3.0 with Service Pack 1 on Windows SharePoint Services 2.0		
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=163279
	View the Readme file and make note of the items that pertain to your Business Portal system.	\\media\Documentation\Readme.rtf
	Upgrade your hardware and software, if necessary.	System requirements on the Web: http://go.microsoft.com/fwlink/?LinkID=161197
	Identify the account used to access the shared reports folder.	Verify the account used to display reports in Reports Catalog on page 15.
	Approve open workflow items.	Approve all open workflow items on page 15.
	Back up your Microsoft Dynamics GP databases and perform table maintenance.	Prepare Microsoft Dynamics GP databases for an upgrade on page 16.
2. Upgrade Windows SharePoint Services. If you have no customizations, you can uninstall Windows SharePoint Services and install the newer version.	Choose a Windows SharePoint Services upgrade approach.	Determine the type of Windows SharePoint Services upgrade to perform on page 19.
	Perform Windows SharePoint Services pre-upgrade procedures.	Prepare to upgrade Windows SharePoint Services on page 20.
	Run the Windows SharePoint Services upgrade script.	Run the Windows SharePoint Services upgrade script on page 20.
	Upgrade to Windows SharePoint Services 3.0.	Upgrade to Windows SharePoint Services 3.0 on page 21.
	Install Office SharePoint Server 2007.	Migrate to Office SharePoint Server 2007 on page 21.
	Run the SharePoint Products and Technologies Configuration Wizard.	Migrate to Office SharePoint Server 2007 on page 21.
	Migrate to Office SharePoint Server 2007.	Migrate to Office SharePoint Server 2007 on page 21.
3. Upgrade Microsoft Dynamics GP.	Upgrade to Microsoft Dynamics GP 2010.	Microsoft Dynamics GP Upgrade Guide
4. Install or upgrade Web Services for Microsoft Dynamics GP, if necessary.	Upgrade to Web Services for Microsoft Dynamics GP 2010.	Web Services Installation and Administration Guide
5. Upgrade Business Portal and migrate customizations.	Install the Business Portal migration utility.	Download and install the Business Portal migration utility on page 24.
	Analyze customizations in the previous release of Business Portal.	Analyze customizations on page 25.
	Uninstall the previous release of Business Portal.	Uninstall the previous release of Business Portal on page 26.
	Create a web site for the new release of Business Portal.	Create a new web application and site collection on page 27.
	Install Business Portal for Microsoft Dynamics GP 2010.	Install Business Portal for Microsoft Dynamics GP 2010 on page 28.
	Perform pre-migration steps.	Prepare for the migration on page 29.
	Migrate customizations.	Migrate customizations on page 29.
6. Perform post-upgrade procedures, if necessary.	Learn about additional tasks you may have to perform after the upgrade.	Chapter 6, "After you upgrade."

Checklist 4: Business Portal 4.0 on Windows SharePoint Services 3.0 to Business Portal 5.0 on Office SharePoint Server, Enterprise Edition

Use this checklist as your guide to upgrading to a new release of Business Portal.

Upgrading from		
Business Portal 4.0 on Windows SharePoint Services 3.0		
Business Portal 4.0 with Service Pack 1 on Windows SharePoint Services 3.0		
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=163279
	View the Readme file and make note of the items that pertain to your Business Portal system.	\\media\Documentation\Readme.rtf
	Upgrade your hardware and software, if necessary.	System requirements on the Web: http://go.microsoft.com/fwlink/?LinkID=161197
	Identify the account used to access the shared reports folder.	Verify the account used to display reports in Reports Catalog on page 15.
	Approve open workflow items.	Approve all open workflow items on page 15.
	Back up your Microsoft Dynamics GP databases and perform table maintenance.	Prepare Microsoft Dynamics GP databases for an upgrade on page 16.
2. Install Office SharePoint Server. If you have no customizations, you can uninstall Windows SharePoint Services and install Office SharePoint Server.	Install Office SharePoint Server 2007.	Migrate to Office SharePoint Server 2007 on page 21.
	Run the SharePoint Products and Technologies Configuration Wizard.	Migrate to Office SharePoint Server 2007 on page 21.
	Migrate to Office SharePoint Server 2007.	Migrate to Office SharePoint Server 2007 on page 21.
3. Upgrade Microsoft Dynamics GP.	Upgrade to Microsoft Dynamics GP 2010.	Microsoft Dynamics GP Upgrade Guide
4. Install or upgrade Web Services for Microsoft Dynamics GP, if necessary.	Upgrade to Web Services for Microsoft Dynamics GP 2010.	Web Services Installation and Administration Guide
5. Upgrade Business Portal.	Uninstall the previous release of Business Portal.	Uninstall the previous release of Business Portal on page 26.
	Install Business Portal for Microsoft Dynamics GP 2010.	Install Business Portal for Microsoft Dynamics GP 2010 on page 28.
6. Perform post-upgrade procedures, if necessary.	Learn about additional tasks you may have to perform after the upgrade.	Chapter 6, "After you upgrade."

Checklist 5: Business Portal 4.0 on Office SharePoint Server, Enterprise Edition to Business Portal 5.0 on Office SharePoint Server, Enterprise Edition

Use this checklist as your guide to upgrading to a new release of Business Portal.

Upgrading from		
Business Portal 4.0 on Office SharePoint Server, Enterprise Edition		
Business Portal 4.0 with Service Pack 1 on Office SharePoint Server, Enterprise Edition		
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=163279
	View the Readme file and make note of the items that pertain to your Business Portal system.	\\media\Documentation\Readme.rtf
	Upgrade your hardware and software, if necessary.	System requirements on the Web: http://go.microsoft.com/fwlink/?LinkID=161197
	Identify the account used to access the shared reports folder.	Verify the account used to display reports in Reports Catalog on page 15.
	Approve open workflow items.	Approve all open workflow items on page 15.
	Back up your Microsoft Dynamics GP databases and perform table maintenance.	Prepare Microsoft Dynamics GP databases for an upgrade on page 16.
2. Upgrade Microsoft Dynamics GP.	Upgrade to Microsoft Dynamics GP 2010.	Microsoft Dynamics GP Upgrade Guide
3. Install or upgrade Web Services for Microsoft Dynamics GP, if necessary.	Upgrade to Web Services for Microsoft Dynamics GP 2010.	Web Services Installation and Administration Guide
4. Upgrade Business Portal.	Uninstall the previous release of Business Portal.	Uninstall the previous release of Business Portal on page 26.
	Install Business Portal for Microsoft Dynamics GP 2010.	Install Business Portal for Microsoft Dynamics GP 2010 on page 28.
5. Perform post-upgrade procedures, if necessary.	Learn about additional tasks you may have to perform after the upgrade.	Chapter 6, "After you upgrade."

Checklist 6: Business Portal 5.0 on Windows SharePoint Services 3.0 to Business Portal 5.0 on Office SharePoint Server, Enterprise Edition

Use this checklist as your guide to upgrading to a new release of Business Portal.

Upgrade from		
Business Portal 5.0 on Windows SharePoint Services 3.0		
Task		For more information, see
Upgrade Windows SharePoint Services.	Install Office SharePoint Server 2007.	Migrate to Office SharePoint Server 2007 on page 21.
	Run the SharePoint Products and Technologies Configuration Wizard.	Migrate to Office SharePoint Server 2007 on page 21.
	Migrate to Office SharePoint Server 2007.	Migrate to Office SharePoint Server 2007 on page 21.

System requirement changes

The following system requirements have changed since the previous release of Business Portal.

- This release of Business Portal is compatible only with Microsoft Dynamics GP 2010. You must upgrade to Microsoft Dynamics GP 2010 before you can upgrade Business Portal.
- You must install Business Portal for Microsoft Dynamics GP 2010 on Windows SharePoint Services 3.0 or on Office SharePoint Server 2007.
- Microsoft Windows 7 Professional Edition and Ultimate Edition are additional supported client operating systems.
- Internet Explorer[®] 8.0 is supported, but not required.

For complete system requirements, refer to <http://go.microsoft.com/fwlink/?LinkID=161197>.

Windows SharePoint Services vs. Office SharePoint Server

You can install Business Portal for Microsoft Dynamics GP 2010 on either Windows SharePoint Services or Office SharePoint Server, Enterprise Edition.

Office SharePoint Server uses Windows SharePoint Services technology. Any features available in Windows SharePoint Services are also available in Office SharePoint Server. However, Office SharePoint Server offers additional features. For example, Office SharePoint Server uses the same search technology as Windows SharePoint Services, but includes the ability to search for data in business applications, such as Microsoft Dynamics GP.

If you install on Office SharePoint Server, Enterprise Edition, additional Business Portal and SharePoint features are available. The additional features include:

Search The Search feature integrates Web Services for Microsoft Dynamics GP with the Office SharePoint Server Business Data Catalog, which enables you to search for Microsoft Dynamics GP data, along with content from your SharePoint sites.

List pages List pages use the Business Data Catalog integration with the Microsoft Dynamics GP web service to display information from Microsoft Dynamics GP.

Report Center The Office SharePoint Server, Enterprise Edition, version of Business Portal uses the Report Center site for publishing Microsoft Dynamics GP reports. The Report Center site provides the flexibility to publish other types of reports, such as Management Reporter for Microsoft Dynamics ERP reports or reports from applications like Microsoft Excel[®]. Using SharePoint features, users can receive alerts when new reports are added to the Report Center, create document workspaces to collaborate on reports, set up workflows to review reports, and even access reports offline.

Field Service Suite The Field Service Suite application is available only if you're using Business Portal with Office SharePoint Server. Use this application to allow your customers to enter, view, and update service requests and return requests.

For more information about Search, list pages, and the Report Center, see the Business Portal Administrator's Guide.

Business Portal changes you should be aware of

The following settings will be overwritten during the upgrade. We recommend that you write down any changes you made before upgrading so that you can re-create them after the upgrade.

Modifications to document workflow

If you're using Human Resources Management (HRM) Self Service Suite, and you have made changes to a document's workflow (on the Business Processes page), those changes will be overwritten during the upgrade. For more information, see the "Workflow Modifications" chapter in the HRM Self Service Suite Administrator's Guide.

Modifications to cascading style sheets

If you have made changes to default Business Portal style sheets, your changes will be lost. During an upgrade, the style sheets will be returned to their original state; you will need to re-create your changes.

Modifications to navigation and security

Most changes to pages, web parts, lists, and libraries can be migrated after installing the new release of Business Portal. However, navigation modifications must be re-created. In addition, some security settings will be upgraded, but others will not. For example, MBF role assignments and data permissions will be upgraded, but page permissions must be re-created. For more information, see [How customizations are upgraded or migrated](#) on page 23.

Modifications to the Executive Center

The Executive Center in Business Portal for Microsoft Dynamics GP 2010 displays new Key Performance Indicators (KPIs) and metrics created using Microsoft SQL Server Reporting Services 2008. If you have used KPIs in a previous release of Business Portal and upgrade to Business Portal for Microsoft Dynamics GP 2010, you can still access KPI web parts and your existing KPIs.

Modifications to document delivery

Electronic Document Delivery has been removed for Business Portal for Microsoft Dynamics GP 2010. You can use the e-mail functionality in Microsoft Dynamics GP to send documents in e-mail to your customers and vendors.

Chapter 2: Before you upgrade

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

- [Verify the account used to display reports in Reports Catalog](#)
- [Approve all open workflow items](#)
- [Prepare Microsoft Dynamics GP databases for an upgrade](#)
- [Back up SharePoint databases](#)

Verify the account used to display reports in Reports Catalog

Reports Catalog is available only if you're using Business Portal with Windows SharePoint Services.

If you're using Reports Catalog, use the following procedure to identify which account is used by the FileService application, which is used to display reports. During the upgrade, the account is reset to FileServiceUser. If the FileService application in your system is set up to use a different account, you must set it up again after the upgrade.

For more information about the user account for reports, refer to the Business Portal Installation Guide.

1. On the web server, open Component Services.
Start > Administrative Tools > Component Services
2. In the left pane, expand **Component Services > Computers > My Computer > COM+ Applications**.
3. Right-click **Microsoft.BusinessPortal.Reports.FileService** and select **Properties** to open the Microsoft.BusinessPortal.FileService Properties window.
4. Click the **Identity** tab. If FileServiceUser is listed in the **User** field, no further action is necessary.

If an account other than FileServiceUser is listed in the **User** field, note this information. You must enter this user account again after the upgrade.

5. Click **OK** to close the window.

Approve all open workflow items

If you are using the HRM Self Service Suite, you *must* approve all open workflow items—for example, timecards that have been submitted but not yet approved—before you upgrade. To prevent documents from becoming corrupted, you must complete the following tasks:

- Ask your users to stop submitting new workflow items, such as timecards, vacation requests, and employee profile changes.

- Use the Business Processes page (**Site Settings > Application Settings > Workflow > Business Processes**) to prevent users from submitting new documents for approval. For each document listed in the Business Process List web part, click the **Options** tab and select **Suspend creation of new process instances**.
- Use the Process Log page (**Site Settings > Application Settings > Workflow > Process Log**) to view the workflow items (documents) that are still in process. You can notify the users who still have open workflow items, or you can terminate the workflow item yourself. For more information about the Process Log page, see the HRM Self Service Suite Administrator's Guide.

Prepare Microsoft Dynamics GP databases for an upgrade

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

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

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

Back up Microsoft Dynamics GP 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.

Table maintenance

We recommend that you perform table maintenance procedures for all tables. For your SQL databases, you should perform the following procedures:

- Update statistics to reconfigure table keys.
- Recompile stored procedures to adapt stored procedures to tables with significant increases or decreases in data.
- Execute the following database maintenance routines against the databases in Query Analyzer. These database maintenance routines will ensure that your table structure is ready to be updated if there are no errors indicated.

```
DBCC CHECKDB
```

```
DBCC CHECKCATALOG
```

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

Back up SharePoint databases

Be sure to back up the the following SharePoint database before upgrading Business Portal:

- Content (WSS_Content) — the content database that stores the web application that Business Portal is installed to
- Configuration (SharePoint_Config)

Chapter 3: Upgrade SharePoint

This chapter contains information about upgrading to Windows SharePoint Services 3.0 or Office SharePoint Server 2007.

If you are upgrading from Business Portal 3.0 and have customizations, you must upgrade to Windows SharePoint Services 3.0 before upgrading Business Portal to the current release. After you've upgraded to Windows SharePoint Services 3.0, you can migrate to Office SharePoint Server 2007, if necessary.

If you are upgrading from Business Portal 3.0 and do not have customizations, you can uninstall Windows SharePoint Services 2.0 and install Windows SharePoint Services 3.0 or Office SharePoint Server 2007 before upgrading Business Portal to the current release.

If you are upgrading from Business Portal 4.0 on Windows SharePoint Services 3.0, you can upgrade to Office SharePoint Server 2007 during the Business Portal upgrade to the current release. Or, you can migrate to Office SharePoint Server 2007 after upgrading to the current Business Portal release.

This information is divided into the following sections:

- [*Determine the type of Windows SharePoint Services upgrade to perform*](#)
- [*Prepare to upgrade Windows SharePoint Services*](#)
- [*Run the Windows SharePoint Services upgrade script*](#)
- [*Upgrade to Windows SharePoint Services 3.0*](#)
- [*Migrate to Office SharePoint Server 2007*](#)

Determine the type of Windows SharePoint Services upgrade to perform

Before you start the upgrade process, you must choose the approach you will take to upgrading Windows SharePoint Services.

Upgrade type	Description	Level of difficulty	Best for
In-place upgrade	Upgrades the content and configuration data in place, at one time. Updates existing databases and servers using existing hardware.	The easiest approach.	Single server or small server farm.
Gradual upgrade	Installs the new release side-by-side with the previous release. The server administrator determines which site collections to upgrade and when to upgrade them. Enables a more granular approach; uses existing hardware.	A more complex and resource-intensive approach.	Medium or large server farms with many sites for which you must limit downtime.
Database migration	Enables moving to a new farm or new hardware. Requires the server administrator to install the new release on a separate farm or separate hardware, and then manually migrate the databases into the new environment.	A complex process that requires many manual steps and a higher risk of error.	Those who are moving to new hardware or a new architecture.

Refer to the Windows SharePoint Services 3.0 Technical Library on Microsoft TechNet (technet.microsoft.com) for more information about Windows SharePoint Services upgrade approaches.

Prepare to upgrade Windows SharePoint Services

Before upgrading Windows SharePoint Services, you must perform the following pre-upgrade procedures.

- If you have not already applied Service Pack 2 to your Windows SharePoint Services 2.0 environment, you must do so before upgrading.
- Install prerequisites. The web server and application server computers must be running Microsoft Windows Server® 2003 with Service Pack 1, and must have Microsoft .NET Framework 3.0 and Microsoft ASP.NET 2.0.
- To ensure that you can recover your existing environment in case something goes wrong during the upgrade process, you must back up all of the databases that are used by Windows SharePoint Services before you run the upgrade process.
- Use the pre-upgrade scan tool to scan your sites, and then fix any errors. If you have not successfully run this tool and you run the SharePoint Products and Technologies Configuration wizard, the wizard will exit and prompt you to run the tool. You can download the SharePoint Products and Technologies Utility: Upgrade Pre-scan Tool from the Microsoft Download Center (www.microsoft.com/downloads).
- If you are performing a gradual upgrade, you must have two separate domain names for your existing sites and your upgraded sites.

Refer to the Windows SharePoint Services 3.0 Technical Library on Microsoft TechNet (technet.microsoft.com) for more information about pre-upgrade procedures.

Run the Windows SharePoint Services upgrade script

Before you install or upgrade to Windows SharePoint Services 3.0, you must run an upgrade script.

Windows SharePoint Services 2.0 and Windows SharePoint Services 3.0 use different versions of ASP.NET. Running the upgrade script makes the previous version of Windows SharePoint Services compatible with the new version of ASP.NET. For more information about this problem and its resolution, see Microsoft Knowledge Base article 894903. (Go to support.microsoft.com and type 894903 in the Search box.)

Use the following procedure to run the upgrade script.

1. Open a Command Prompt window.
2. Change the working directory to `\Program Files\Common Files\Microsoft Shared\Web Server Extensions\60\Bin`.

3. Type and run the following command:

```
stsadm -o upgrade -forceupgrade -url http://VirtualServerURL
```

For more information about using the stsadm.exe command-line tool, refer to the Windows SharePoint Services 2.0 Administrator's Guide.

Upgrade to Windows SharePoint Services 3.0

You must upgrade to Windows SharePoint Services 3.0 before upgrading Business Portal. After you've upgraded to Windows SharePoint Services 3.0, you can migrate to Office SharePoint Server 2007, if necessary.

You can download Windows SharePoint Services 3.0 from the Microsoft Download Center (www.microsoft.com/downloads).

If you're performing a gradual upgrade or a database migration of Windows SharePoint Services, be sure to upgrade the site collection where Business Portal or 3.0 is installed before performing Business Portal upgrade procedures. For more information about upgrade types, see [Determine the type of Windows SharePoint Services upgrade to perform](#) on page 19.

For detailed information about upgrading Windows SharePoint Services, refer to the Windows SharePoint Services Technical Library on Microsoft TechNet (technet.microsoft.com).

Migrate to Office SharePoint Server 2007

If you want to use Office SharePoint Server in your configuration, you must purchase it separately.

Business Portal 3.0 If you have been using Microsoft Windows SharePoint Services 2.0 and have decided that you need the functionality of Office SharePoint Server, you must first upgrade to Windows SharePoint Services 3.0. Then you can install Office SharePoint Server over Windows SharePoint Services and perform the additional configuration needed for Office SharePoint Server.

Refer to the Office SharePoint Server 2007 Technical Library on Microsoft TechNet (technet.microsoft.com) for information about migrating. Refer to the Business Portal Installation Guide for information about configuring Office SharePoint Server for Business Portal.

Business Portal 4.0 You can install Office SharePoint Server over Windows SharePoint Services and perform the additional configuration needed for Office SharePoint Server.

Refer to the Office SharePoint Server 2007 Technical Library on Microsoft TechNet (technet.microsoft.com) for information about migrating. Refer to the Business Portal Installation Guide for information about configuring Office SharePoint Server for Business Portal.

Business Portal 5.0 If you migrate to Office SharePoint Server after installing Business Portal 5.0, additional setup is required. For more information, see the Business Portal Implementation Guide (<http://go.microsoft.com/fwlink/?LinkID=190897>).

Chapter 4: Upgrading from Business Portal 3.0

This chapter contains the procedures to upgrade to Business Portal for Microsoft Dynamics GP 2010, in the order they must be performed if you are upgrading from Business Portal 3.0. Before you upgrade Business Portal, be sure to perform the procedures and review the information in [Chapter 2, “Before you upgrade,”](#) and [Chapter 3, “Upgrade SharePoint.”](#)

This information is divided into the following sections:

- [*How customizations are upgraded or migrated*](#)
- [*Download and install the Business Portal migration utility*](#)
- [*Analyze customizations*](#)
- [*Uninstall the previous release of Business Portal*](#)
- [*Create a new web application and site collection*](#)
- [*Install Business Portal for Microsoft Dynamics GP 2010*](#)
- [*Prepare for the migration*](#)
- [*Migrate customizations*](#)

How customizations are upgraded or migrated

After you’ve upgraded to Windows SharePoint Services 3.0, you can run the Business Portal Migration Utility to analyze which of your Windows SharePoint Services customizations can be migrated. After you have run the analysis, you can upgrade Business Portal and then run the migration utility to move your customizations to the new release.

Running the migration utility is optional. If you choose not to run the utility, upgrading Business Portal will upgrade some of your data, but none of your SharePoint changes will be migrated.

Items that will be upgraded

You don’t need to use the migration utility for changes to Microsoft Business Framework (MBF) data. The following MBF items will be upgraded automatically when you install Business Portal for Microsoft Dynamics GP 2010.

- Roles and role assignments
- Users
- Data permissions and data permission assignments
- Queries

For more information about MBF, refer to the Business Portal Administrator’s Guide.

Items that can be migrated

You can use the migration utility to migrate the following items.

- New web parts
- Modifications to default web parts, including titles, query associations, number of rows returned, and publish/subscribe settings
- New pages
- SharePoint lists and libraries that don't contain folders

Only items from the Business Portal site collection (<ServerName:Port>/sites/businessportal) will be migrated. If you have created additional subsites in the Business Portal site collection, the pages and lists from those sites can't be migrated.

If you've modified a default Business Portal page, that modification will be migrated to the corresponding page in the new release of Business Portal. If you've created new pages, lists, and libraries, you can select the sites to move them to. To migrate new pages and lists to a new Business Portal subsite, you must create that new subsite before performing the migration.

Items that won't be upgraded or migrated

The following items can't be moved to the new release of Business Portal, either through the upgrade or through the migration utility.

- Pages that were not created through Business Portal
- Modifications to default web part sizes and positions
- SharePoint lists and libraries that contain folders
- SharePoint surveys
- SharePoint discussion boards
- SharePoint galleries
- Navigation changes
- Page security
- Evidence items from the Microsoft Office Solution Accelerator for Sarbanes-Oxley

Download and install the Business Portal migration utility

Before you can run the migration utility, you must download it and install it on the computer where you are performing the Business Portal upgrade.



If you don't want to migrate changes to Windows SharePoint Services items such as pages, web parts, lists, and libraries, you don't need to use the migration utility. For more information, see [How customizations are upgraded or migrated](#) on page 23.

1. Download the migration utility from CustomerSource.
2. Double-click the Microsoft_DynamicsGP11_BPMigrationUtility_x86_en-us.msi file.
3. The **End-User License Agreement** window appears. Read and accept the terms and conditions, then select **I accept the terms in the License Agreement**, and click **Next**.

4. The **Ready to Install** window appears. Click **Install**.
5. The **Finish** window appears. Click **Finish**.

Analyze customizations

Use the migration utility to view customizations to your previous Business Portal installation. You can also use the utility to select which customizations to move to the new release of Business Portal.



If you don't want to migrate changes to Windows SharePoint Services items such as pages, web parts, lists, and libraries, you don't need to use the migration utility. For more information, see [How customizations are upgraded or migrated](#) on page 23.

The user running the migration utility must have the following permissions:

- Business Portal administrator
- Administrator of the site collection where Business Portal is installed
- Administrator of the web server computer

The user running the migration utility must be the same user who ran the SharePoint Products and Technologies Configuration wizard during the Windows SharePoint Services upgrade.

Analyzing customizations

1. Start the migration utility.
Start > Programs > Business Portal Migration Utility > Business Portal Migration Utility
2. The Welcome window appears. Select **Analyze**, then click **Next**. When the analysis is complete, you can close the command prompt window.
3. The View window appears, where you can view the results of the analysis.

The results are saved to the Analysis.xml file, located in the Migration\Data folder in the Business Portal bin folder. (The bin folder is located in the directory specified by the IIS virtual server set up for the Business Portal. If Business Portal was installed on the Default Web Site, the bin folder is located in C:\Inetpub\wwwroot.)

Excluding items from analysis

In certain situations, the analysis may encounter an unexpected error and stop processing. You must exclude the item causing the error so the analysis can continue.

1. Determine which item is causing the error. You can view error information in the analysis command window or in the AnalysisLog-<date>_<time> file, located in the Migration\Data folder in the Business Portal bin folder.

The bin folder is located in the directory specified by the IIS virtual server set up for the Business Portal. (If Business Portal was installed on the Default Web Site, the bin folder is located in C:\Inetpub\wwwroot.)

2. Create a backup copy of the Microsoft.BusinessPortal.Migration.Analyze.exe.config file located in the bin folder.

3. Open the configuration file using a text editor, such as Notepad.
4. Add pages to the **<CustomExcludedPages>** section in the following format:

```
<add key="CustomExcludedPages" value="PageName1.aspx,PageName2.aspx"/>
```

Add lists to the **<CustomExcludedLists>** section in the following format:

```
<add key="CustomExcludedLists" value="ListName1,ListName2"/>
```

5. Save and close the configuration file.
6. Run the analysis again.

Uninstall the previous release of Business Portal

Use the installation wizard to remove Release 3.0 of Business Portal or Business Portal 3.0 with Service Pack 1 from your computer.

If there are applications, such as Requisition Management, that you no longer want to use, you must uninstall them before removing Business Portal.

Uninstallation known issue

You may encounter errors from the following programs when uninstalling Business Portal:

- Microsoft.BusinessPortal.Install.DocumentLibraryCreator.exe
- Microsoft.BusinessPortal.Install.BPPageLibraryPageManager.exe

You can disregard these errors.

Uninstalling Business Portal

1. Open the Add or Remove Programs control panel, and select Microsoft Dynamics GP Business Portal. Click **Change** to open the Modify Business Portal Installation window.
2. Click **Remove**.
3. The Remove Options window appears. *Do not* select the option to remove SQL objects and data.



If you remove SQL objects and data, your MBF data, such as roles, users, and data permissions, will be lost. In addition, you will not be able to migrate your SharePoint customizations to the new release of Business Portal.

Click **Next**.

4. The Verify Microsoft Dynamics GP Business Portal Removal window appears.

Click **Back** to review or change your options for removing Business Portal.

Click **Remove** to remove Business Portal from your computer.

5. After processing is finished, the final window appears. Click **Finish** to close the wizard.

Create a new web application and site collection

If you are upgrading from Business Portal 3.0, Business Portal for Microsoft Dynamics GP 2010 must be installed to a new web application and site collection. You can't install it on the site where the previous release of Business Portal was installed.

If the previous release of Business Portal was installed on the Default Web Site and you want to install the new release on port 80, you must delete the Default Web Site through SharePoint Central Administration. Then you can create a new SharePoint web application that uses port 80.

For more information about web applications and site collections, refer to the Windows SharePoint Services 3.0 Technical Library on Microsoft TechNet (technet.microsoft.com).



If you are upgrading from Business Portal 4.0, you don't need to complete this procedure. You should use the same site collection that you used for the previous release.

Creating a web application

1. Open SharePoint Central Administration.
Start > Administrative Tools > SharePoint Central Administration
2. Click **Application Management**.
3. Under the **SharePoint Web Application Management** heading, click **Create or extend Web application**.
4. Click **Create a new Web application**.
5. Select an IIS web site and security configuration.
6. In the **Application Pool** section, click **Create a new application pool** and enter a name (we recommend calling the new application pool *BusinessPortal*).



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

7. Click **Configurable** and enter a domain account. Be sure to enter the account in domain\username format.
8. Verify that the database name and other information on the page is correct and click **OK**. When the process is complete, the Application Created page is displayed.
9. On the Application Created page, click **Create Site Collection**.

Creating a site collection

1. If you're not already on the Create Site Collection page, go to SharePoint Central Administration and click **Application Management**. Under the **SharePoint Site Management** heading, click **Create site collection**.
2. Select the web application you just created.

3. Enter a title and description for the site collection.
4. Specify the URL for the site collection, if necessary.



Be sure that the URL does not contain spaces.

5. Select a site template. If you're using Windows SharePoint Services, select the **Team Site** site template. If you're using Office SharePoint Server, select the **Collaboration Portal** site template.
6. Specify a site collection administrator.
7. Click **OK**.

Install Business Portal for Microsoft Dynamics GP 2010

You must upgrade Microsoft Dynamics GP to Release 2010 before installing Business Portal.

If an application, such as Requisition Management, was installed with the previous release of Business Portal, be sure that the application is selected as a feature to install when you upgrade. If there are applications you no longer want to use, you must uninstall them before upgrading.

You can install new applications, if you register them in Microsoft Dynamics GP before you upgrade. Some applications also require features to be installed in Microsoft Dynamics GP. For more information about entering registration keys, refer to your Microsoft Dynamics GP documentation. For the installation requirements of specific Business Portal applications, see the documentation for the applications that you want to install.

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

- A member of the Administrators group on the web server where Business Portal is being uninstalled and reinstalled.
- The administrator of the site collection where Business Portal is being installed.
- Administrator rights to the SQL server where Microsoft Dynamics GP information is stored, if you're using Windows Trusted Authentication for the Business Portal installation.
- Access to the Microsoft Dynamics GP web service, if you're installing Business Portal on Office SharePoint Server. If you're not already in a web service role, we recommend using the BDC Administrator role.

For detailed information about installing Business Portal, see the Business Portal Installation Guide.

Prepare for the migration

The migration utility was installed in the Business Portal bin folder. Whether you created a new site or installed Business Portal on a new IIS server, the bin folder location for the Business Portal web site has changed from previous releases. You must complete the following steps before performing the migration.



If you don't want to migrate changes to items, such as pages, web parts, lists, and libraries, in Windows SharePoint Services, you don't need to use the migration utility. For more information, see [How customizations are upgraded or migrated](#) on page 23.

1. Use **Add or Remove Programs** in the Windows Control Panel to uninstall the migration utility from the server where you performed the analysis.
2. Install the migration utility on the server where the new Business Portal web site resides. (This may be the same server as in the previous step.)

For information about installing the utility, see [Download and install the Business Portal migration utility](#) on page 24.

3. Copy the contents of the Migration folder from the old bin folder to the new bin folder.

In the previous release of Business Portal, the bin folder was located in the directory specified by the IIS virtual server set up for the Business Portal. (If Business Portal was installed on the Default Web Site, the bin folder is located at C:\Inetpub\wwwroot.)

In the new release of Business Portal, the bin folder is located at C:\inetpub\wwwroot\wss\VirtualDirectories\<port number>, where <port number> is the port number of the IIS web site where Business Portal is installed.

Migrate customizations

After you've upgraded Windows SharePoint Services and installed Business Portal for Microsoft Dynamics GP 2010, you can use the migration utility to migrate your customizations.



If you don't want to migrate changes to items, such as pages, web parts, lists, and libraries, in Windows SharePoint Services, you don't need to use the migration utility. For more information, see [How customizations are upgraded or migrated](#) on page 23.

Migration known issues

- When a list is being migrated, a temporary list is created on the top-level site in the Business Portal site collection. If a list or library that you created has the same name as a list that already exists on the top-level site, your version of the list or library will not be migrated. To migrate your lists and libraries, you must first delete the list with the same name from the top-level site collection.

- Result viewer web parts that use the standard method of publishing and subscribing (rather than an alternative method) will be disconnected from one another after migration. You must manually set up the connection between these web parts.
- If a KPI web part fails to migrate, we recommend running the migration again with only that web part selected. The KPI web part should then migrate successfully.

Migrating customizations

To migrate customizations, Business Portal for Microsoft Dynamics GP 2010 must be installed. The user running the migration utility must be the administrator of the site collection where Business Portal is installed and the administrator of the web server computer.

The user running the migration utility must be the same user who ran the SharePoint Products and Technologies Configuration wizard during the Windows SharePoint Services upgrade.

1. Start the migration utility.
Start > Programs > Microsoft Dynamics > Business Portal Migration Utility
2. The Welcome window appears. Select **Migrate**, then click **Next**.
3. The View Migration Results window appears.
4. For new pages, SharePoint lists, or SharePoint libraries, use the **Site** field to select the Business Portal site to move the page, list, or library to.

By default, permissions for lists and libraries are inherited from the parent site. To make security administration easier, be sure to select a site that has the appropriate permissions for the list or library.

5. For new pages, use the **Library** field to select a library within the site where the page will be stored.

By default, permissions for pages are inherited from the parent list or library. To make security administration easier, be sure to select a library that has the appropriate permissions for the page.

6. Select the **Migrate** check box for each customized element to migrate to the new release of Business Portal.
7. To save your changes and migrate at a later time, click **Save**. To begin migrating your changes, click **Migrate**.
8. When the migration is complete, you can close the command prompt window. The View Migration Results window appears.

The **Status** column shows the migration status of each item. If there is no information in the status column, the migration has not been run, and there are no issues that could interfere with migration. Status icons are shown in the following table:

Icon	Result
	Failed. The migration was attempted, but failed for this component.
	Warning. The migration has not been attempted, but there is an issue that could prevent migration.
	Success. The migration was successful.

Migration results are saved to the Analysis.xml file, located in the Migration\Data folder in the Business Portal bin folder. (The bin folder is located in the directory specified by the IIS virtual server set up for the Business Portal. If Business Portal was installed on the Default Web Site, the bin folder is located at C:\Inetpub\wwwroot.)



In certain situations, the migration may encounter an unexpected error and stop processing. You can view error information in the MigrateLog-`<date>_<time>` file, located in the Migration\Data folder in the Business Portal bin folder. If you are unable to fix the problem, you must clear the check box for the item causing the error and restart the migration.

Chapter 5: Upgrading from Business Portal 4.0

This chapter contains the procedures to upgrade to Business Portal for Microsoft Dynamics GP 2010 from Business Portal 4.0. Before you upgrade Business Portal, be sure to perform the procedures and review the information in [Chapter 2, “Before you upgrade.”](#) and [Chapter 3, “Upgrade SharePoint.”](#)

This information is divided into the following sections:

- [Uninstall the previous release of Business Portal](#)
- [Install Business Portal for Microsoft Dynamics GP 2010](#)

Uninstall the previous release of Business Portal

Use the installation wizard to remove Release 4.0 of Business Portal or Business Portal 4.0 with Service Pack 2 from your computer.

If there are applications, such as Requisition Management, that you no longer want to use, you must uninstall them before removing Business Portal.

Uninstallation known issue

You may encounter errors from the following programs when uninstalling Business Portal:

- Microsoft.BusinessPortal.Install.DocumentLibraryCreator.exe
- Microsoft.BusinessPortal.Install.BPPageLibraryPageManager.exe

You can disregard these errors.

Uninstalling Business Portal

1. Open the Add or Remove Programs control panel, and select Microsoft Dynamics GP Business Portal. Click **Change** to open the Modify Business Portal Installation window.
2. Click **Remove**.
3. The Remove Options window appears. *Do not* select the option to remove SQL objects and data.



If you remove SQL objects and data, your MBF data, such as roles, users, and data permissions, will be lost. In addition, you will not be able to migrate your SharePoint customizations to the new release of Business Portal.

Click **Next**.

4. The Verify Microsoft Dynamics GP Business Portal Removal window appears.
Click **Back** to review or change your options for removing Business Portal.
Click **Remove** to remove Business Portal from your computer.
5. After processing is finished, the final window appears. Click **Finish** to close the wizard.

Install Business Portal for Microsoft Dynamics GP 2010

You must upgrade Microsoft Dynamics GP to Release 2010 before installing Business Portal.

If an application, such as Requisition Management, was installed with the previous release of Business Portal, be sure that the application is selected as a feature to install when you upgrade. If there are applications you no longer want to use, you must uninstall them before upgrading.

You can install new applications, if you register them in Microsoft Dynamics GP before you upgrade. Some applications also require features to be installed in Microsoft Dynamics GP. For more information about entering registration keys, refer to your Microsoft Dynamics GP documentation. For the installation requirements of specific Business Portal applications, see the documentation for the applications that you want to install.

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

- A member of the Administrators group on the web server where Business Portal is being uninstalled and reinstalled.
- The administrator of the site collection where Business Portal is being installed.
- Administrator rights to the SQL server where Microsoft Dynamics GP information is stored, if you're using Windows Trusted Authentication for the Business Portal installation.
- Access to the Microsoft Dynamics GP web service, if you're installing Business Portal on Office SharePoint Server. If you're not already in a web service role, we recommend using the BDC Administrator role.

For detailed information about installing Business Portal, see the Business Portal Installation Guide.

Chapter 6: After you upgrade

This chapter provides information about tasks you may need to complete after you upgrade to Business Portal for Microsoft Dynamics GP 2010.

This information is divided into the following sections:

- [Re-create security settings](#)
- [Re-create list web parts](#)
- [Upgrading Search for Business Portal 5.0](#)
- [Use the Report Center site in place of Reports Catalog](#)
- [Change the account used to display reports in Reports Catalog](#)
- [Set up and assign pay schedules](#)
- [Salesperson data access](#)
- [Delete temporary Internet files on client computers](#)

Re-create security settings

There are two types of information to secure in Business Portal: back office data and SharePoint content.

Security for data is set up using the Microsoft Business Framework (MBF) and Web Services for Microsoft Dynamics GP. Security for Business Portal sites and pages, along with SharePoint content, such as document libraries and announcements, is set up using Windows SharePoint Services. (In previous releases of Business Portal, page security was handled using MBF.)

In Business Portal for Microsoft Dynamics GP 2010, MBF roles, web service roles, and SharePoint groups are *not* synchronized automatically. You must set up page security and data security separately.



For more information about security in Business Portal for Microsoft Dynamics GP 2010, see the Business Portal Administrator's Guide.

Adding users to security groups

Your existing MBF roles, users, data permissions, role assignments, and data permission assignments were upgraded automatically when you installed Business Portal for Microsoft Dynamics GP 2010. However, if you're using Business Portal with Office SharePoint Server, you must add users to web service roles.

Many SharePoint groups were created by default when you installed the new release of Business Portal. To give users access to pages, you must add your users to these SharePoint groups.

The Microsoft Dynamics Security Synchronization Utility, a Microsoft Management Console snap-in, enables you to synchronize role membership between applications. Because MBF security was preserved during the Business Portal upgrade, you can begin setting up security by synchronizing MBF role membership with default Business Portal SharePoint groups.

If you have created custom MBF roles, you may need to create custom SharePoint groups that correspond to those roles for page security. If you create the custom groups before you synchronize, you can synchronize them along with the default roles and groups.



The Security Synchronization Utility is available as a download on CustomerSource (<https://mbs.microsoft.com/customersource>). For more information, refer to the documentation provided with the utility.

Re-creating page permissions

Page security changed significantly in Business Portal 4.0. If you are upgrading from Business Portal 3.0, you must re-create the page permissions that you made in Business Portal 3.0. You shouldn't have to re-create page permissions if you are upgrading from Business Portal 4.0.

To help you re-create page security settings, you can download the Business Portal Permissions Report from CustomerSource. This report lists MBF roles and page permissions from the previous release of Business Portal. Because MBF security tables were preserved during the upgrade, you can run the report either before or after installing the new release of Business Portal.

In addition, you can download a spreadsheet that lists the default permissions for every page in the new version of Business Portal.

Use these two tools, along with the Security Synchronization Utility, to re-create your page permissions in the new release of Business Portal.

Verifying security on migrated libraries and pages

If you created new pages and document libraries and moved them using the migration utility, you should make sure that security is set appropriately in the new installation of Business Portal. By default, permissions for pages are inherited from the parent library and permissions for libraries are inherited from the parent site.

- To verify security on a document library, go to the site for the library and click **View All Site Content** in the Quick Launch. Click the name of the document library that you want to verify security for. Click **Settings > Document Library Settings**. Under **Permissions and Management**, click **Permissions for this document library**. The users and SharePoint groups with access to the library are listed.
- To verify security on a specific page, go to the site for the page and click **View All Site Content** in the Quick Launch. Click the name of the document library that the page is stored in. Click the drop-down arrow for the page, and click **Manage Permissions**. The users and SharePoint groups with access to the page are listed.

Re-create list web parts

If you used the migration utility, placeholder web parts will appear in place of list web parts on migrated pages. List web parts must be re-created.

1. On a page with a placeholder web part, click **Site Actions > Edit Page**. The page will switch to edit mode.
2. In the web part zone where you want to add the web part, click **Add a Web Part**.
3. In the **Lists and Libraries** section of the Add Web Parts dialog box, select the list that you are creating a web part for.



For modified lists, the phrase “from migration” was appended to the list name during migration. For lists that you created, the names didn’t change.

4. Click **Add** to add the web part to the page.
5. To delete the placeholder web part, click **Edit > Delete** in its web part menu.
6. Exit edit mode.

Upgrading Search for Business Portal 5.0

Search functionality is available only if you’re using Business Portal with Office SharePoint Server, Enterprise Edition.

The Search feature uses the Business Data Catalog, SharePoint Search Engine, and the Microsoft Dynamics GP web service to allow users to locate Microsoft Dynamics GP data, in addition to content stored on SharePoint sites. After you upgrade to Business Portal 5.0, you must complete the following tasks to upgrade Search.

Export resources

If you have customized permission, properties, or localized names, you must export the resource information. You must do this for each company that you are using Search for.

1. On the Business Portal web server, open SharePoint Central Administration by choosing **Start > Administrative Tools > SharePoint 3.0 Central Administration**.
2. In the Quick Launch, click the name of the Shared Service Provider used for Business Portal.
3. On the Shared Services Administration site home page, in the Business Data Catalog section, click **View applications**.
4. On the Business Data Catalog Applications page, in the Applications list, click the name of the application.
5. On the View Application: Application page, in the Application Information section, click **Export Application Definition**.
6. In the File Type section, select the type of application definition to export.
7. In the Resources to export section, select the resources to export.

8. Click **Export**.
9. In the File Download dialog, click **Save** and select a location to save the application definition.
10. Click **Save**.

Use the Microsoft Dynamics GP Search Setup wizard

You'll use the Microsoft Dynamics GP Search Setup wizard to inactivate companies to remove all previous search data. Then, you'll activate companies for Search.

1. Start the Microsoft Dynamics GP Search Setup wizard. (On a Business Portal web server, go to **Start > Administrative Tools > Microsoft Dynamics GP Search Setup**.)
2. Click **Inactivate All** to inactive search for all companies.
3. Click **Activate** to set up search for the companies. You can use the wizard to specify which companies to activate Search for and select which entities and fields to include in searches. You'll also select a default crawl schedule. For more information, refer to the Business Portal Administrator's Guide.
4. Close the Microsoft Dynamics GP Search Setup wizard and return to SharePoint Central Administration.

Import resources

After the companies are activated to use Search, you'll import resource information for those companies.

1. Return to SharePoint Central Administration.
2. In the Quick Launch, click the name of the Shared Service Provider used for Business Portal.
3. On the Shared Services Administration site home page, in the Business Data Catalog section, click **Import application definition**.
4. On the Import Application Definition page, in the Application Definition section, enter the location of the application definition.
5. In the File Type section, select the type of application definition to import.
6. In the Resources to import section, select the resources to import.
7. Click **Import**.

Use the Report Center site in place of Reports Catalog

The Report Center site is available only if you're using Business Portal with Office SharePoint Server, Enterprise Edition.

Reports Catalog is not available if you're using Business Portal with Office SharePoint Server. If you previously used Reports Catalog to publish your Microsoft Dynamics GP reports in Business Portal, we recommend publishing your reports to the Report Center site instead.

The Report Center is a site in Office SharePoint Server, Enterprise Edition, that serves as a central location to manage business-critical information sources, such as reports, spreadsheets, and SQL Reporting Services data connections. When you install Business Portal, additional report libraries are created on this Report Center site for Microsoft Dynamics GP reports.

For more information about using the Report Center site with Business Portal, see the Business Portal Administrator's Guide.

Move existing report files

You can upload existing report files from your shared reports folder to the Report Center site using standard SharePoint functionality.

Uploading files to report libraries works just like uploading files to any other SharePoint document library. You can also use document library features to control how documents are viewed, tracked, managed, and created. You can track versions, including how many and which type of versions, and you can limit who can see documents before they are approved.

For more information about uploading and managing files, see the SharePoint documentation.



Manually uploading a report to the Report Center site does not change how it is automatically published. To change the location that reports are published to, use the Report Scheduler.

Publish new reports to the Report Center site

Just like Reports Catalog, reports can be published automatically to the Report Center site using the Microsoft Dynamics GP Report Scheduler.

Users who have a Microsoft Dynamics GP user ID can create, schedule, and publish new reports and assign those reports to Report Center site libraries using Report Scheduler. You can access Report Scheduler by choosing **Microsoft Dynamics GP > Tools > Routines > Company > Report Schedule** in Microsoft Dynamics GP.

For more information about using Report Scheduler with Office SharePoint Server, refer to the Report Scheduler documentation.

Change the account used to display reports in Reports Catalog

Reports Catalog is available only if you're using Business Portal with Windows SharePoint Services.

If you're using Reports Catalog, the account used to display reports is reset to FileServiceUser during the upgrade. If the FileService application in your system is set up to use a different account, you must set it up again after the upgrade using this procedure.

For more information about sharing a reports folder, refer to the Business Portal Installation Guide.

1. On the web server, open Component Services.
Start > Administrative Tools > Component Services
2. In the left pane, expand **Component Services > Computers > My Computer > COM+ Applications**.
3. Right-click on **Microsoft.BusinessPortal.Reports.FileService** and select **Properties** to open the Microsoft.BusinessPortal.FileService Properties window.
4. Click the **Identity** tab.
5. In the **User** field, enter the account that you want the COM+ application to use to access the shared reports folder.
6. Enter and confirm the password for the account.
7. Click **OK** to close the window.

Set up and assign pay schedules

In previous releases of Business Portal, the pay schedules that were defined in Human Resources automatically appeared in Business Portal when both **Human Resources** and **Payroll** were marked in the **Back Office Settings** web part. This web part has been removed, and back office registration now determines whether pay schedules from Human Resources are used.

If you're using Human Resources Management Self Service Suite, and both the Human Resources and Payroll back office modules are registered—and both were marked in the **Back Office Settings** web part—you must set up and assign new pay schedules in Business Portal.

For more information, see the “Pay Schedules” chapter in the Human Resources Management Self Service Suite Administrator’s Guide.

Salesperson data access

Some data permissions have been removed from the Salesperson MBF role in order to improve security. To make the information available again, you must use new row-level restrictions we've provided.

Default data permission changes

The following default data permissions have been removed from the Salesperson MBF role:

- Salesperson Summary – All
- Salesperson Period Summary – All
- Receivables Commission – All
- Receivables Commission History - All

Default query changes

Because data permissions were removed, information from the following default queries is no longer available to users in the Salesperson MBF role.

- My Sales
- Salesperson Commissions
- Salesperson Summary
- Top Salespeople YTD
- Total Commissions by Salesperson YTD
- Salesperson Period Summary
- Salesperson Commission Detail
- Top Salesperson Current Period

In addition, salesperson fields are no longer available in queries that use the Receivables Commission History entity.

New row-level restrictions

To make information from the Salesperson Summary, Salesperson Period Summary, Receivables Commission, and Receivables Commission History entities available, we recommend creating new data permissions for these entities using the corresponding row-level restriction policies.

When a row-level restriction is used with a data permission, the Salesperson ID associated with a user determines which data is displayed. Row-level restriction policies for these entities are provided by default.

After you've created new data permissions, you must create new queries to display this information.

For more information about row-level restrictions, data permissions, and queries, see the Business Portal Administrator's Guide.

Delete temporary Internet files on client computers

Some Business Portal pages are cached by Internet Explorer for 30 days. After an upgrade, these temporary files need to be deleted so that new versions will be displayed, instead. If the temporary files are not deleted, errors may occur when users attempt to access certain cached pages.

Temporary Internet Explorer files are saved for each user on a single computer. If multiple users share a single client workstation, temporary files will need to be deleted with each of the users logged on to the workstation.

To delete temporary Internet files in Internet Explorer 7.0 or Internet Explorer 8.0:

1. Start Internet Explorer and open the Internet Options window.
Tools > Internet Options
2. Click the **General** tab. Under **Browsing history**, click **Delete**.

3. The Delete Browsing History window is displayed. Under **Temporary Internet Files**, click **Delete files**.

Deleting files may take some time, depending on the number of temporary files on your computer.

4. Click **Close** to close the Delete Browsing History window and click **OK** to close the Internet Options window.