



Business Portal for Microsoft Dynamics® GP 2013

Upgrade Guide

Release 6.1

February 11, 2014

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Introduction

Use this manual to upgrade to Business Portal for Microsoft Dynamics GP 2013 (internal version number 6.1). You can upgrade from the following Business Portal releases:

- Business Portal 5.0 (5.0.3118.0)
- Business Portal 5.1 with Service Pack 3 (5.1.3400.1088)
- Business Portal 6.0 with Service Pack 3 (6.0.1053.0)

You must upgrade to Microsoft Dynamics GP 2013 Service Pack 2 before you can upgrade Business Portal. You also must install or upgrade Web Services for Microsoft Dynamics GP. This component is required to integrate Microsoft Dynamics GP data into Business Connectivity Services in Microsoft SharePoint 2013. Web Services for Microsoft Dynamics GP must be installed as a single tenant installation. Business Portal 6.1 is supported only on 64-bit versions of Windows and SharePoint.

Check for updated instructions

This information was current as of February 11, 2014. The documentation may be updated as new information becomes available. Check the Microsoft Dynamics GP documentation web site (<http://go.microsoft.com/fwlink/?LinkId=391056>) 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 to Microsoft SharePoint Foundation 2013 or Microsoft SharePoint Server 2013, Enterprise Edition. You must upgrade SharePoint before you upgrade Business Portal.
- [Chapter 4, "Upgrading from Business Portal,"](#) describes the procedure for upgrading Business Portal.
- [Chapter 5, "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>Reports Catalog is available only if you're using Business Portal with SharePoint Foundation 2010.</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.

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.

SharePoint help Many of the features included in Business Portal—such as document libraries, lists, announcements, links, and alerts—are provided by SharePoint. General information about these features is provided in the Administering Business Portal help. For more detailed information, refer to the SharePoint help, which can be accessed by clicking the Help icon button in the upper-right corner of any SharePoint page.

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. Review the [Upgrade process](#) on page 5 for the Business Portal releases you can upgrade from.



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](#)
- [Upgrade checklists for Business Portal 5.0](#)
- [Upgrade checklists for Business Portal 5.1](#)
- [Upgrade checklists for Business Portal 6.0](#)
- [System requirement changes](#)
- [Capacity planning](#)
- [Business Portal changes you should be aware of](#)

Upgrade process

Upgrading to Business Portal for Microsoft Dynamics GP 2013 is a multiple step process that can include upgrading SharePoint as well as Business Portal. The steps you follow depend on the version of Business Portal and SharePoint you are upgrading from and the version of SharePoint you are upgrading to. Use the information in this section to identify the version of Business Portal you are upgrading from and then review the upgrade process specific to that version.

From Business Portal 5.0

If you are currently using Windows SharePoint Services 3.0 with SP2 and want to use SharePoint 2013, you must first upgrade to SharePoint Foundation 2010 or SharePoint Server 2010, Enterprise Edition. After upgrading to Microsoft Dynamics GP 2013 SP2 and Web Services for Microsoft Dynamics GP 2013 SP2, you can upgrade to SharePoint 2013. Then, you must uninstall your current installation of Business Portal from your 32-bit operating system and install Business Portal 6.1 for Microsoft Dynamics GP 2013.

If you are currently using Microsoft Office SharePoint Server, Enterprise Edition with SP2 and want to use SharePoint Server 2013, Enterprise Edition, you must upgrade to SharePoint Server 2010 first. After upgrading to Microsoft Dynamics GP 2013 SP2 and Web Services for Microsoft Dynamics GP 2013 SP2, you can upgrade to SharePoint 2013. Next, you must uninstall your current installation of Business Portal and then install Business Portal for Microsoft Dynamics GP 2013.

Refer to the following checklists and the releases you can upgrade from Business Portal 5.0.

Checklist	Upgrade from	Upgrade to
<u>Checklist 1: Business Portal 5.0 on Windows SharePoint Services 3.0 with SP2 to Business Portal 6.1 on SharePoint Foundation 2013</u>	Business Portal 5.0 on Windows SharePoint Services 3.0 with SP2	Business Portal 6.1 on SharePoint Foundation 2013
<u>Checklist 2: Business Portal 5.0 on Windows SharePoint Services 3.0 with SP2 to Business Portal 6.1 on SharePoint Server 2013, Enterprise Edition</u>	Business Portal 5.0 on Windows SharePoint Services 3.0 with SP2	Business Portal 6.1 on SharePoint Server 2013
<u>Checklist 3: Business Portal 5.0 on Office SharePoint Server, Enterprise Edition with SP2 to Business Portal 6.1 on SharePoint Server 2013, Enterprise Edition</u>	Business Portal 5.0 on Microsoft Office SharePoint Server, Enterprise Edition with SP2	Business Portal 6.1 on SharePoint Server 2013

From Business Portal 5.1

If you are currently using SharePoint Foundation 2010 and want to use SharePoint 2013, you must first upgrade to SharePoint Foundation 2013 or SharePoint Server 2013, Enterprise Edition. Then, you must uninstall your current installation of Business Portal and then install Business Portal 6.1 for Microsoft Dynamics GP 2013.

If you are currently using SharePoint Server 2010, Enterprise Edition and want to use SharePoint Server 2013, Enterprise Edition, you must first upgrade to SharePoint Foundation 2013. Then, you must uninstall your current installation of Business Portal and then install Business Portal 6.1 for Microsoft Dynamics GP 2013.

Refer to the following checklists and the releases you can upgrade from Business Portal 5.1.

Checklist	Upgrade from	Upgrade to
<u>Checklist 4: Business Portal 5.1 on SharePoint Foundation 2010 to Business Portal 6.1 on SharePoint Foundation 2013</u>	Business Portal 5.1 on SharePoint Foundation 2010	Business Portal 6.1 on SharePoint Foundation 2013
<u>Checklist 5: Business Portal 5.1 on SharePoint Foundation 2010 to Business Portal 6.1 on SharePoint Server 2013, Enterprise Edition</u>	Business Portal 5.1 on SharePoint Foundation 2010	Business Portal 6.1 on SharePoint Server 2013
<u>Checklist 6: Business Portal 5.1 on SharePoint Server 2010, Enterprise Edition to Business Portal 6.1 on SharePoint Server 2013, Enterprise Edition</u>	Business Portal 5.1 on SharePoint Server 2010	Business Portal 6.1 on SharePoint Server 2013

From Business Portal 6.0

If you are currently using SharePoint Foundation 2010 and want to use SharePoint 2013, you must first upgrade to SharePoint Foundation 2013 or SharePoint Server 2013, Enterprise Edition. Then, you must uninstall your current installation of Business Portal and then install Business Portal 6.1 for Microsoft Dynamics GP 2013.

If you are currently using SharePoint Server 2010, Enterprise Edition and want to use SharePoint Server 2013, Enterprise Edition, you must first upgrade to SharePoint Foundation 2013. Then, you must uninstall your current installation of Business Portal and then install Business Portal 6.1 for Microsoft Dynamics GP 2013.

Refer to the following checklists and the releases you can upgrade from Business Portal 6.0.

Checklist	Upgrade from	Upgrade to
Checklist 5: Business Portal 5.1 on SharePoint Foundation 2010 to Business Portal 6.1 on SharePoint Server 2013, Enterprise Edition	Business Portal 6.0 on SharePoint Foundation 2010	Business Portal 6.1 on SharePoint Foundation 2013
Checklist 8: Business Portal 6.0 on SharePoint Foundation 2010 to Business Portal 6.1 on SharePoint Server 2013, Enterprise Edition	Business Portal 6.0 on SharePoint Foundation 2010	Business Portal 6.1 on SharePoint Server 2013
Checklist 9: Business Portal 6.0 on SharePoint Server 2010, Enterprise Edition to Business Portal 6.1 on SharePoint Server 2013, Enterprise Edition	Business Portal 6.0 on SharePoint Server 2010	Business Portal 6.1 on SharePoint Server 2013

Upgrade checklists for Business Portal 5.0

Use one of the following checklists to upgrade Business Portal 5.0 with customizations to Business Portal 6.1.

- [Checklist 1: Business Portal 5.0 on Windows SharePoint Services 3.0 with SP2 to Business Portal 6.1 on SharePoint Foundation 2013](#) on page 7
- [Checklist 2: Business Portal 5.0 on Windows SharePoint Services 3.0 with SP2 to Business Portal 6.1 on SharePoint Server 2013, Enterprise Edition](#) on page 8
- [Checklist 3: Business Portal 5.0 on Office SharePoint Server, Enterprise Edition with SP2 to Business Portal 6.1 on SharePoint Server 2013, Enterprise Edition](#) on page 9

Checklist 1: Business Portal 5.0 on Windows SharePoint Services 3.0 with SP2 to Business Portal 6.1 on SharePoint Foundation 2013

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 with SP2		
Task		For more information, see
1. Upgrade to SharePoint Foundation 2010.	Attach databases to upgrade the content for your environment. Note: You can disregard the Business Portal feature errors because the Business Portal features are upgraded during the Business Portal upgrade.	Upgrade to SharePoint Foundation 2010 on page 23. Checklist for database attach upgrade SharePoint Foundation 2010 (http://go.microsoft.com/fwlink/?LinkId=199939) Attach databases and upgrade to SharePoint Foundation 2010 (http://go.microsoft.com/fwlink/?LinkID=199602)
2. Upgrade Microsoft Dynamics GP.	Upgrade to Microsoft Dynamics GP 2013 SP2.	Microsoft Dynamics GP Upgrade Guide
3. Install or upgrade Web Services for Microsoft Dynamics GP, if necessary.	Install or upgrade to Web Services for Microsoft Dynamics GP 2013 SP2. Note: Web Services for Microsoft Dynamics GP must be installed as a single tenant installation.	Web Services Installation and Administration Guide
4. Back up your SharePoint databases.	Make a back up of the SharePoint Content database and the SharePoint Configuration database.	Back up SharePoint databases on page 21.

Upgrade from		
Business Portal 5.0 on Windows SharePoint Services 3.0 with SP2		
Task	For more information, see	
5. Upgrade to SharePoint Foundation 2013.	Attach databases to upgrade the content for your environment. Note: You can disregard the Business Portal feature errors because the Business Portal features are upgraded during the Business Portal upgrade.	Upgrade to SharePoint 2013 on page 24. Checklist for database attach upgrade SharePoint 2013 (http://go.microsoft.com/fwlink/?LinkId=391877)
6. Upgrade Business Portal.	Uninstall the previous release of Business Portal from your 32-bit operating system.	Uninstall the previous release of Business Portal on page 27.
	Install Business Portal 6.1 for Microsoft Dynamics GP 2013.	Install Business Portal 6.1 for Microsoft Dynamics GP 2013 Service Pack 2 on page 28.

Checklist 2: Business Portal 5.0 on Windows SharePoint Services 3.0 with SP2 to Business Portal 6.1 on SharePoint Server 2013, 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 with SP2		
Task	For more information, see	
1. Upgrade to SharePoint Server 2010.	Attach databases to upgrade the content for your environment. Note: You can disregard the Business Portal feature errors because the Business Portal features are upgraded during the Business Portal upgrade.	Upgrade to SharePoint Server 2010 on page 24 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)
2. Upgrade Microsoft Dynamics GP.	Upgrade to Microsoft Dynamics GP 2013 SP2.	Microsoft Dynamics GP Upgrade Guide
3. Install or upgrade Web Services for Microsoft Dynamics GP, if necessary.	Install or upgrade to Web Services for Microsoft Dynamics GP 2013 SP2. Note: Web Services for Microsoft Dynamics GP must be installed as a single tenant installation.	Web Services Installation and Administration Guide
4. Back up your SharePoint databases.	Make a back up of the SharePoint Content database and the SharePoint Configuration database.	Back up SharePoint databases on page 21.
5. Upgrade to SharePoint Server 2013.	Attach databases to upgrade the content for your environment. Note: You can disregard the Business Portal feature errors because the Business Portal features are upgraded during the Business Portal upgrade.	Upgrade to SharePoint 2013 on page 24. Checklist for database attach upgrade SharePoint 2013 (http://go.microsoft.com/fwlink/?LinkId=391877)
6. Upgrade Business Portal.	Uninstall the previous release of Business Portal from your 32-bit operating system.	Uninstall the previous release of Business Portal on page 27.
	Install Business Portal 6.1 for Microsoft Dynamics GP 2013.	Install Business Portal 6.1 for Microsoft Dynamics GP 2013 Service Pack 2 on page 28.

Checklist 3: Business Portal 5.0 on Office SharePoint Server, Enterprise Edition with SP2 to Business Portal 6.1 on SharePoint Server 2013, Enterprise Edition

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

Upgrade from		
Business Portal 5.0 on Office SharePoint Server with SP2		
Task		For more information, see
1. Upgrade to SharePoint Server 2010.	Attach databases to upgrade the content for your environment. Note: You can disregard the Business Portal feature errors because the Business Portal features are upgraded during the Business Portal upgrade.	Upgrade to SharePoint Server 2010 on page 24 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)
2. Upgrade Microsoft Dynamics GP.	Upgrade to Microsoft Dynamics GP 2013 SP2.	Microsoft Dynamics GP Upgrade Guide
3. Install or upgrade Web Services for Microsoft Dynamics GP, if necessary.	Install or upgrade to Web Services for Microsoft Dynamics GP 2013 SP2. Note: Web Services for Microsoft Dynamics GP must be installed as a single tenant installation.	Web Services Installation and Administration Guide
4. Back up your SharePoint databases.	Make a back up of the SharePoint Content database and the SharePoint Configuration database.	Back up SharePoint databases on page 21.
5. Upgrade to SharePoint Server 2013.	Attach databases to upgrade the content for your environment. Note: You can disregard the Business Portal feature errors because the Business Portal features are upgraded during the Business Portal upgrade.	Upgrade to SharePoint 2013 on page 24. Checklist for database attach upgrade SharePoint 2013 (http://go.microsoft.com/fwlink/?LinkId=391877)
6. Upgrade Business Portal.	Uninstall the previous release of Business Portal from your 32-bit operating system.	Uninstall the previous release of Business Portal on page 27.
	Install Business Portal 6.1 for Microsoft Dynamics GP 2013.	Install Business Portal 6.1 for Microsoft Dynamics GP 2013 Service Pack 2 on page 28.

Upgrade checklists for Business Portal 5.1

Use one of the following checklists to upgrade Business Portal 5.1 with customizations to Business Portal 6.1.

- [Checklist 4: Business Portal 5.1 on SharePoint Foundation 2010 to Business Portal 6.1 on SharePoint Foundation 2013](#) on page 10
- [Checklist 5: Business Portal 5.1 on SharePoint Foundation 2010 to Business Portal 6.1 on SharePoint Server 2013, Enterprise Edition](#) on page 11
- [Checklist 6: Business Portal 5.1 on SharePoint Server 2010, Enterprise Edition to Business Portal 6.1 on SharePoint Server 2013, Enterprise Edition](#) on page 12

Checklist 4: Business Portal 5.1 on SharePoint Foundation 2010 to Business Portal 6.1 on SharePoint Foundation 2013

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

Upgrade from		
Business Portal 5.1 with SP3 on SharePoint Foundation 2010		
Task		For more information, see
1. Upgrade to SharePoint Foundation 2013.	Attach databases to upgrade the content for your environment. Note: You can disregard the Business Portal feature errors because the Business Portal features are upgraded during the Business Portal upgrade.	Upgrade to SharePoint 2013 on page 24 Checklist for database attach upgrade SharePoint 2013 (http://go.microsoft.com/fwlink/?LinkId=391877)
2. Upgrade Microsoft Dynamics GP.	Upgrade to Microsoft Dynamics GP 2013 SP2.	Microsoft Dynamics GP Upgrade Guide
3. Install or upgrade Web Services for Microsoft Dynamics GP, if necessary.	Install or upgrade to Web Services for Microsoft Dynamics GP 2013 SP2. Note: Web Services for Microsoft Dynamics GP must be installed as a single tenant installation.	Web Services Installation and Administration Guide
4. Back up your SharePoint databases.	Make a back up of the SharePoint Content database and the SharePoint Configuration database.	Back up SharePoint databases on page 21.
5. Upgrade Business Portal.	Uninstall the previous release of Business Portal.	Uninstall the previous release of Business Portal on page 27.
	Install Business Portal 6.1 for Microsoft Dynamics GP 2013.	Install Business Portal 6.1 for Microsoft Dynamics GP 2013 Service Pack 2 on page 28.

Checklist 5: Business Portal 5.1 on SharePoint Foundation 2010 to Business Portal 6.1 on SharePoint Server 2013, Enterprise Edition

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

Upgrade from		
Business Portal 5.1 with SP3 on SharePoint Foundation 2010		
Task		For more information, see
1. Upgrade to SharePoint Server 2013.	Attach databases to upgrade the content for your environment. Note: You can disregard the Business Portal feature errors because the Business Portal features are upgraded during the Business Portal upgrade.	Upgrade to SharePoint 2013 on page 24 Checklist for database attach upgrade SharePoint 2013 (http://go.microsoft.com/fwlink/?LinkId=391877)
2. Upgrade Microsoft Dynamics GP.	Upgrade to Microsoft Dynamics GP 2013 SP2.	Microsoft Dynamics GP Upgrade Guide
3. Install or upgrade Web Services for Microsoft Dynamics GP, if necessary.	Install or upgrade to Web Services for Microsoft Dynamics GP 2013 SP2. Note: Web Services for Microsoft Dynamics GP must be installed as a single tenant installation.	Web Services Installation and Administration Guide
4. Back up your SharePoint databases.	Make a back up of the SharePoint Content database and the SharePoint Configuration database.	Back up SharePoint databases on page 21.
5. Upgrade Business Portal.	Uninstall the previous release of Business Portal.	Uninstall the previous release of Business Portal on page 27.
	Install Business Portal 6.1 for Microsoft Dynamics GP 2013.	Install Business Portal 6.1 for Microsoft Dynamics GP 2013 Service Pack 2 on page 28.

Checklist 6: Business Portal 5.1 on SharePoint Server 2010, Enterprise Edition to Business Portal 6.1 on SharePoint Server 2013, Enterprise Edition

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

Upgrade from		
Business Portal 5.1 with SP3 on SharePoint Server 2010, Enterprise Edition		
Task		For more information, see
1. Upgrade to SharePoint Server 2013.	Attach databases to upgrade the content for your environment. Note: You can disregard the Business Portal feature errors because the Business Portal features are upgraded during the Business Portal upgrade.	Upgrade to SharePoint 2013 on page 24 Checklist for database attach upgrade SharePoint 2013 (http://go.microsoft.com/fwlink/?LinkId=391877)
2. Upgrade Microsoft Dynamics GP.	Upgrade to Microsoft Dynamics GP 2013 SP2.	Microsoft Dynamics GP Upgrade Guide
3. Install or upgrade Web Services for Microsoft Dynamics GP, if necessary.	Install or upgrade to Web Services for Microsoft Dynamics GP 2013 SP2. Note: Web Services for Microsoft Dynamics GP must be installed as a single tenant installation.	Web Services Installation and Administration Guide
4. Back up your SharePoint databases.	Make a back up of the SharePoint Content database and the SharePoint Configuration database.	Back up SharePoint databases on page 21.
5. Upgrade Business Portal.	Uninstall the previous release of Business Portal.	Uninstall the previous release of Business Portal on page 27.
	Install Business Portal 6.1 for Microsoft Dynamics GP 2013.	Install Business Portal 6.1 for Microsoft Dynamics GP 2013 Service Pack 2 on page 28.

Upgrade checklists for Business Portal 6.0

Use one of the following checklists to upgrade Business Portal 6.0 with customizations to Business Portal 6.1.

- [Checklist 4: Business Portal 5.1 on SharePoint Foundation 2010 to Business Portal 6.1 on SharePoint Foundation 2013](#) on page 10
- [Checklist 5: Business Portal 5.1 on SharePoint Foundation 2010 to Business Portal 6.1 on SharePoint Server 2013, Enterprise Edition](#) on page 11
- [Checklist 6: Business Portal 5.1 on SharePoint Server 2010, Enterprise Edition to Business Portal 6.1 on SharePoint Server 2013, Enterprise Edition](#) on page 12

Checklist 7: Business Portal 6.0 on SharePoint Foundation 2010 to Business Portal 6.1 on SharePoint Foundation 2013

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

Upgrade from		
Business Portal 6.0 on SharePoint Foundation 2010		
Task		For more information, see
1. Upgrade to SharePoint Server 2013.	Attach databases to upgrade the content for your environment. Note: You can disregard the Business Portal feature errors because the Business Portal features are upgraded during the Business Portal upgrade.	Upgrade to SharePoint 2013 on page 24 Checklist for database attach upgrade SharePoint 2013 (http://go.microsoft.com/fwlink/?LinkId=391877)
2. Upgrade Microsoft Dynamics GP.	Upgrade to Microsoft Dynamics GP 2013 SP2.	Microsoft Dynamics GP Upgrade Guide
3. Install or upgrade Web Services for Microsoft Dynamics GP, if necessary.	Install or upgrade to Web Services for Microsoft Dynamics GP 2013 SP2. Note: Web Services for Microsoft Dynamics GP must be installed as a single tenant installation.	Web Services Installation and Administration Guide
4. Back up your SharePoint databases.	Make a back up of the SharePoint Content database and the SharePoint Configuration database.	Back up SharePoint databases on page 21.
5. Upgrade Business Portal.	Uninstall the previous release of Business Portal.	Uninstall the previous release of Business Portal on page 27.
	Install Business Portal 6.1 for Microsoft Dynamics GP 2013.	Install Business Portal 6.1 for Microsoft Dynamics GP 2013 Service Pack 2 on page 28.

Checklist 8: Business Portal 6.0 on SharePoint Foundation 2010 to Business Portal 6.1 on SharePoint Server 2013, Enterprise Edition

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

Upgrade from		
Business Portal 6.0 on SharePoint Foundation 2010		
Task		For more information, see
1. Upgrade to SharePoint Server 2013.	Attach databases to upgrade the content for your environment. Note: You can disregard the Business Portal feature errors because the Business Portal features are upgraded during the Business Portal upgrade.	Upgrade to SharePoint 2013 on page 24 Checklist for database attach upgrade SharePoint 2013 (http://go.microsoft.com/fwlink/?LinkId=391877)
2. Upgrade Microsoft Dynamics GP.	Upgrade to Microsoft Dynamics GP 2013 SP2.	Microsoft Dynamics GP Upgrade Guide
3. Install or upgrade Web Services for Microsoft Dynamics GP, if necessary.	Install or upgrade to Web Services for Microsoft Dynamics GP 2013. Note: Web Services for Microsoft Dynamics GP SP2 must be installed as a single tenant installation.	Web Services Installation and Administration Guide
4. Back up your SharePoint databases.	Make a back up of the SharePoint Content database and the SharePoint Configuration database.	Back up SharePoint databases on page 21.
5. Upgrade Business Portal.	Uninstall the previous release of Business Portal.	Uninstall the previous release of Business Portal on page 27.
	Install Business Portal 6.1 for Microsoft Dynamics GP 2013.	Install Business Portal 6.1 for Microsoft Dynamics GP 2013 Service Pack 2 on page 28.

Checklist 9: Business Portal 6.0 on SharePoint Server 2010, Enterprise Edition to Business Portal 6.1 on SharePoint Server 2013, Enterprise Edition

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

Upgrade from		
Business Portal 6.0 on SharePoint Server 2013, Enterprise Edition		
Task		For more information, see
1. Upgrade to SharePoint Server 2013.	Attach databases to upgrade the content for your environment. Note: You can disregard the Business Portal feature errors because the Business Portal features are upgraded during the Business Portal upgrade.	Upgrade to SharePoint 2013 on page 24 Checklist for database attach upgrade SharePoint 2013 (http://go.microsoft.com/fwlink/?LinkId=391877)
2. Upgrade Microsoft Dynamics GP.	Upgrade to Microsoft Dynamics GP 2013 SP2.	Microsoft Dynamics GP Upgrade Guide
3. Install or upgrade Web Services for Microsoft Dynamics GP, if necessary.	Install or upgrade to Web Services for Microsoft Dynamics GP 2013 SP2. Note: Web Services for Microsoft Dynamics GP must be installed as a single tenant installation.	Web Services Installation and Administration Guide
4. Back up your SharePoint databases.	Make a back up of the SharePoint Content database and the SharePoint Configuration database.	Back up SharePoint databases on page 21.
5. Upgrade Business Portal.	Uninstall the previous release of Business Portal.	Uninstall the previous release of Business Portal on page 27.
	Install Business Portal 6.1 for Microsoft Dynamics GP 2013.	Install Business Portal 6.1 for Microsoft Dynamics GP 2013 Service Pack 2 on page 28.

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 2013. You must upgrade to Microsoft Dynamics GP 2013 before you can upgrade Business Portal.
- You must install Business Portal 6.1 on SharePoint Foundation 2010 or on SharePoint Server 2010, Enterprise Edition.
- Microsoft Windows 8 Pro Edition and Enterprise Edition are additional supported client operating systems.
- Internet Explorer 10.0 is supported, but not required.
- Business Portal 6.1 is only compatible with 64-bit operating systems.
- The Business Portal pages are best viewed on screens with resolutions of 1280 x 1024.

For complete system requirements, refer to <http://go.microsoft.com/fwlink/?LinkID=294321>.

Capacity planning

Capacity planning is the process of matching usage on a web site to the minimum server hardware required to support the load. For any successful Business Portal deployment, consider:

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

For detailed capacity planning information for SharePoint 2013, see the “Capacity management and sizing in SharePoint Server 2013” topic or the “Performance and capacity test results and recommendations (SharePoint Foundation 2013)” in the SharePoint Products Technical Library on Microsoft TechNet (technet.microsoft.com).

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

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 39.

Modifications to the Executive Center

The Executive Center in Business Portal for Microsoft Dynamics GP 2013 displays new Key Performance Indicators (KPIs) and metrics created using Microsoft SQL Server Reporting Services 2008 or later. If you have used KPIs in a previous release of Business Portal and upgrade to Business Portal for Microsoft Dynamics GP 2013, 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 2013. You can use the e-mail functionality in Microsoft Dynamics GP to send documents in e-mail to your customers and vendors.

Modifications to Report Center

The GP Reports Center site is created when installing Business Portal on SharePoint Foundation 2010 and SharePoint Server 2010. The GP Reports center has libraries and folders for managing Microsoft Dynamics GP reports. The GP Reports center has default security groups and permissions for managing access to the reports. If you are upgrading from the previous version of Business Portal with Microsoft Office SharePoint Server 2007, the reports in the Reports Center are moved to the GP Reports center.

Modifications to web parts

Pages using Business Data Catalog web parts have been removed and replaced with pages that use External Lists. Customizations on the pages using Business Data Catalog web parts will be lost. The following pages are removed.

Site	Financial Center
Page Library	Financial Center Pages
Pages	Posting Account List
	Fixed Allocation Account List
	Variable Allocation Account List
	Unit Account List
	Payable Invoice List.aspx
	Payable Finance Charge List.aspx
	Payable Miscellaneous Charge List.aspx
	Payable Return List.aspx
	Payable Credit Memo List.aspx
	Receivable Invoice List.aspx
	Receivable Debit Memo List.aspx
	Receivable Service Repair List.aspx
	Receivable Finance Charge List.aspx
	Receivable Warranty List.aspx
Receivable Return List.aspx	
Receivable Credit Memo List.aspx	
Site	Inventory Center
Page Library	Inventory Center Pages
Pages	Sales Item List.aspx
	Kit Item List.aspx
	Fee Item List.aspx
	Service Item List.aspx
Site	Project Center
Page Library	Project Time and Expense Pages
Site	Project Center
Page Library	Project Time and Expense Pages

Site	Financial Center
Pages	Project List.asp
	Project Contract List.aspx
	Project Expense Report List.aspx
	Project Timesheet List.aspx
Page Library	Purchasing Center Pages
Pages	Vendor List
	Purchase Order List
Site	Sales Center
Page Library	Sales Center Pages
Pages	Sales Backorder List.aspx
Pages	Customer List.aspx
	Sales Fulfillment Order List.aspx
	Sales Invoice List.aspx
	Sales Order List.aspx
Pages	Salesperson List.aspx
	Sales Quote List.aspx
	Sales Return List.aspx
	Territories List.aspx
Page Library	Salesperson Dashboard Pages
Pages	Customer Balances
	Customer Documents
	Sales and Commissions
Page Library	Sales Manager Dashboard Pages
Pages	Customer Balances
	Customer Documents
	Sales and Commissions

Chapter 2: Before you upgrade

This chapter provides information about tasks you must complete before you upgrade to Business Portal for Microsoft Dynamics GP 2013. 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 SharePoint Foundation 2013.

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

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

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

SharePoint	Link
SharePoint Foundation 2010	http://go.microsoft.com/fwlink/?LinkId=208745
SharePoint Server 2010	http://go.microsoft.com/fwlink/?LinkId=208746
SharePoint 2013	http://go.microsoft.com/fwlink/?LinkId=391483

Chapter 3: Upgrade SharePoint

This chapter contains information about upgrading to SharePoint Foundation 2013 or SharePoint Server 2013, Enterprise Edition.

This information is divided into the following sections:

- [Upgrade types](#)
- [Upgrade to SharePoint Foundation 2010](#)
- [Upgrade to SharePoint Server 2010](#)
- [Upgrade to SharePoint 2013](#)

Upgrade types

You can upgrade your current version of SharePoint to SharePoint Foundation 2013 or SharePoint Server 2013, Enterprise Edition by upgrading in-place or attaching databases. When you upgrade SharePoint in-place, all the SharePoint sites are upgraded on the same hardware. When you attach databases, you can move your content to a new farm or to new hardware. The configuration settings are not upgraded.

Because Business Portal 6.1 requires a 64-bit operating system, we recommend that you attach databases to upgrade the content for your environment. During a database attach upgrade, you detach all the content databases from an existing farm and then attach the databases to a new server farm installation. When you attach the databases to the new server farm, the upgrade process runs and upgrades the data in place.

Upgrade to SharePoint Foundation 2010

If you are upgrading from Business Portal 5.0 on Windows SharePoint Services 3.0 with SP2, you must upgrade to SharePoint Foundation 2010 before upgrading Business Portal 6.1. After you've upgraded to SharePoint Foundation 2010, you can migrate to SharePoint Server 2010, Enterprise Edition, if necessary.

When you attach the databases to the new server farm, you will encounter Business Portal feature errors because the upgrade process cannot find the Business Portal features. You can disregard these errors. The Business Portal features are upgraded during the Business Portal upgrade.

You can download SharePoint Foundation 2010, Enterprise Edition, from the Microsoft Download Center (www.microsoft.com/downloads).

For detailed information about upgrading SharePoint, refer to the following topics in the SharePoint Products Technical Library on Microsoft TechNet.

Topic	Description
Checklist for database attach upgrade (SharePoint Foundation 2010) http://go.microsoft.com/fwlink/?LinkId=199939	A checklist for the steps necessary to prepare for attaching databases, to perform the upgrade, and to perform post-upgrade steps.
Attach databases and upgrade to SharePoint Foundation 2010 http://go.microsoft.com/fwlink/?LinkID=199602	An article that has information and procedures for attaching databases and upgrading to SharePoint Foundation 2010.

Upgrade to SharePoint Server 2010

If you are using Office SharePoint Server with SP2, Enterprise Edition, you must upgrade to SharePoint Server 2010, Enterprise Edition, before upgrading Business Portal.

When you attach the databases to the new server farm, you will encounter Business Portal feature errors because the upgrade process cannot find the Business Portal features. You can disregard these errors. The Business Portal features are upgraded during the Business Portal upgrade.

For detailed information upgrading SharePoint, refer to the following topics in the SharePoint Products Technical Library on Microsoft TechNet.

Topic	Description
Checklist for database attach upgrade (SharePoint Server 2010) http://go.microsoft.com/fwlink/?LinkId=199941	A checklist for the steps necessary to prepare for attaching databases, to perform the upgrade, and to perform post-upgrade steps.
Attach databases and upgrade to SharePoint Server 2010 http://go.microsoft.com/fwlink/?LinkId=199940	An article that has information and procedures for attaching databases and upgrading to SharePoint Foundation 2010.

If you want to use SharePoint Server 2010, Enterprise Edition, in your configuration, you must purchase it separately.

Upgrade to SharePoint 2013

If you are using SharePoint Foundation 2010 or SharePoint Server 2010, Enterprise Edition, Enterprise Edition, you must upgrade to SharePoint Server 2013 before upgrading Business Portal.

When you attach the databases to the new server farm, you will encounter Business Portal feature errors because the upgrade process cannot find the Business Portal features. You can disregard these errors. The Business Portal features are upgraded during the Business Portal upgrade.

For detailed information upgrading SharePoint, refer to the following topics in the SharePoint Products Technical Library on Microsoft TechNet.

Topic	Description
Upgrading to SharePoint Server 2013 http://go.microsoft.com/fwlink/?LinkId=199612	A guide to help you plan for and perform an upgrade from SharePoint Server 2010 to SharePoint Server 2013.
Checklist for database attach upgrade SharePoint 2013 (http://go.microsoft.com/fwlink/?LinkId=391877)	A checklist for the steps necessary to prepare for attaching databases, to perform the upgrade, and to perform post-upgrade steps.

If you want to use SharePoint Server 2013, Enterprise Edition, in your configuration, you must purchase it separately.

Chapter 4: Upgrading from Business Portal

This chapter contains the procedures to upgrade to Business Portal 6.1 for Microsoft Dynamics GP 2013 from Business Portal 5.0, 5.1, or 6.1. 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 6.1 for Microsoft Dynamics GP 2013 Service Pack 2](#)

Uninstall the previous release of Business Portal

Use the installation wizard to remove Business Portal 5.0, Business Portal 5.1, or Business Portal 6.0 with Service Pack 3 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 Programs and Features 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 6.1 for Microsoft Dynamics GP 2013 Service Pack 2

You must upgrade Microsoft Dynamics GP to Microsoft Dynamics GP 2013 Service Pack 2 or later before installing Business Portal. You also must install or upgrade Web Services for Microsoft Dynamics GP. This component is required to integrate Microsoft Dynamics GP data into Business Connectivity Services in SharePoint. Web Services for Microsoft Dynamics GP must be installed as a single tenant installation.

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 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 5: After you upgrade

This chapter provides information about tasks you may need to complete after you upgrade to Business Portal for Microsoft Dynamics GP 2013.

This information is divided into the following sections:

- [Re-create security settings](#)
- [Use the GP Reports 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 2013, 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 2013, 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 2013. However, if you're using Business Portal with 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.

Use the GP Reports Center site in place of Reports Catalog

Reports Catalog is not available if you're using Business Portal with SharePoint Server 2013. If you previously used Reports Catalog to publish your Microsoft Dynamics GP reports in Business Portal, we recommend publishing your reports to the GP Reports Center site instead.

The GP Reports Center is a site 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 GP Reports Center site for Microsoft Dynamics GP reports.

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

Re-create security

If you granted specific users or additional groups access to any of the folders, documents, or page libraries under the Reports Center, those security changes are not migrated to the new GP Reports Center. Any users that have been added to the BP security groups for the Reports Center will continue to be in those groups and will have the same access in the new GP Reports Center after the upgrade.

Move existing report files

You can upload existing report files from your shared reports folder to the GP Reports 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 GP Reports 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 GP Reports Center site

Just like Reports Catalog, reports can be published automatically to the GP Reports 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 GP Reports Center site libraries using Report Scheduler. You can access Report Scheduler by choosing **Administration > Routines > Company > Report Schedule** in Microsoft Dynamics GP.

Change the account used to display reports in Reports Catalog

Reports Catalog is available only if you're using Business Portal with SharePoint Foundation 2013.

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:

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.

