



## **Course 80240A:**

# **Using Microsoft SharePoint Technology with Microsoft Dynamics GP 2010**

Length: 3 Day(s)  
Published: November 29, 2010(In development)  
Language(s): English  
Audience(s): IT Professionals  
Level: 200  
Technology: Microsoft Dynamics GP 2010  
Type: Course  
Delivery Method: Instructor-led (classroom)

### **About this Course**

This three-day instructor-led course provides students with the knowledge and skills to set up and work with Microsoft SharePoint Technologies for Microsoft Dynamics GP 2010.

### **Audience Profile**

This course is intended for customers and partners wanting to learn the basic features and functionality of using Microsoft SharePoint technologies and Microsoft Dynamics GP 2010. Training is recommended for anyone who plans to implement, use, maintain, consult, or support features associated with Microsoft SharePoint technologies and Microsoft Dynamics GP 2010.

### **At Course Completion**

After completing this course, students will be able to:

- Install and configure Workflow for Microsoft Dynamics GP
- Implement and maintain the Workflow system
- Configure the setup of Business Portal to meet specific business needs
- Create Business Portal roles, add users to roles, and modify roles
- Deploy pre-built SQL Server Reporting Services reports for Microsoft Dynamics GP
- Create and administer Key Performance Indicators (KPIs) and Dashboards in the Executive Center

## **Course Outline**

### **Module 1: Introduction**

This module provides a general overview of the features and benefits of using Microsoft SharePoint technologies and Microsoft Dynamics GP 2010 in an integrated environment.

#### **Lessons**

- Workflow ? Features and Benefits
- Business Portal ? Features and Benefits
- Executive Center and Reporting ? Features and Benefits
- External Lists ? Features and Benefits
- SharePoint Designer ? Features and Benefits
- InfoPath Forms Services ? Features and Benefits

After completing this module, students will be able to:

- Identify the features and benefits of using Microsoft SharePoint technologies with Microsoft Dynamics GP 2010
- Identify the components available

### **Module 2: Workflow Administration**

This module discusses the setup, administration, and use of the Workflow product for Microsoft Dynamics GP 2010. The module also provides a checklist of steps to perform when installing Workflow for Microsoft Dynamics GP 2010, in addition to the relationships between workflow steps and configuration settings and actions that can be performed on the various types of workflows.

#### **Lessons**

- Workflow Architecture and Deployment
- Install Workflow
- Interacting with the Workflow System
- Workflow Participants
- Workflow Setup
- Creating Workflows
- Workflow Steps
- Security
- Out-of-the-Box Workflows

### **Lab : Creating Workflows**

- Create a Workflow

### **Lab : Configure Security**

- Add new user to Microsoft Dynamics GP security role
- Add the user as a workflow originator

### **Lab : Create Purchase Order Workflow Steps**

- Create three new workflow steps for the Purchase Order workflow
- Assign approvers to the workflow steps
- Declare workflow conditions

After completing this module, students will be able to:

- Set up and maintain a Workflow implementation.
- Create and maintain Workflow hierarchies.
- Submit and act upon assigned workflow tasks.

### **Module 3: Workflow Administration**

This module provides students with the necessary skillsets to install Business Portal and then run it in a live environment. It also provides the students with the knowledge to add and configure Business Portal users in a live environment.

#### **Lessons**

- Hardware Configuration
- Network Environment and System Requirements
- Web Server Setup
- SharePoint Configuration
- Prepare to Install
- Install Business Portal
- Modify or Remove Business Portal
- Client Configuration
- Manage Page Security
- Pre-Configuration Considerations
- Configure Business Portal
- Manage Microsoft Business Framework Users
- Manage Microsoft Business Framework Roles
- Manage SharePoint Groups and Permissions
- Manage Web Services for Microsoft Dynamics GP Users
- Security Synchronization Utility

### **Lab : Add a New User to MBF**

- Add users to the Microsoft Business Framework Roles

### **Lab : Add a New User to SharePoint**

- Grant new users access to the appropriate SharePoint pages

### **Lab : Add a New User to Web Services**

- Provide users access to the appropriate Web Services roles

After completing this module, students will be able to:

- Properly prepare the server farm for a Business Portal deployment
- Install, modify, and uninstall Business Portal from the SharePoint Server Farm
- Configure security in Business Portal to grant users to the appropriate areas

## **Module 4: Executive Center and Reporting**

This module examines Key Performance Indicators and Dashboards, which are components of the Executive Center that assist in providing access to business-critical information. It will also look at using SQL Server Reporting Services 2008 reports and other reporting that is available in the Executive Center.

### **Lessons**

- Executive Center Site
- Microsoft SQL Server Reporting Services
- Installation of Microsoft SQL Server Reporting Services
- Microsoft Excel and Excel Reports
- Drill-Through to Microsoft Dynamics GP
- Reporting
- Reports Catalog
- Report Center

### **Lab : Install the SQL Server Reporting Services Wizard**

- Install the SQL Server Reporting Services Wizard for Microsoft Dynamics GP

### **Lab : Run the SQL Server Reporting Services Wizard**

- Deploy the SQL Server Reporting Services reports for Microsoft Dynamics GP to the SRS website

### **Lab : Install the Business Intelligence Components for Business Portal**

- Modify the Business Portal installation to include the Business Intelligence components

### **Lab : Deploy KPIs to the Executive Center**

- Add web parts to the Executive Center
- Add SQL Server Reporting Services KPIs to the Executive Center

After completing this module, students will be able to:

- Install and configure the SQL Server Reporting Services Wizard
- Create and modify Dashboard pages
- Add Key Performance Indicators to Dashboard and Executive Center Pages

### **Module 5: External Lists**

This module introduces the technology behind External Lists and their use and creation using the advanced capabilities of the SharePoint 2010 web interface, and explores the External Lists that come with Microsoft Dynamics Business Portal 5.1.

#### **Lessons**

- Business Connectivity Services
- External Content Types
- External Lists
- Microsoft Dynamics GP 2010 External Lists
- SharePoint Server Features

### **Lab : Add an External List and Create a View**

- Add an External List to the SharePoint Site
- Create a view of the External List data

### **Lab : Update Microsoft Dynamics GP 2010 Data Using an External List**

- Update data within Microsoft Dynamics GP by using an External List in SharePoint

After completing this module, students will be able to:

- Explain the concepts of BCS, External Content Types, and External Lists
- Create and modify External Lists and Views
- Edit external data using External Lists

## **Module 6: SharePoint Designer 2010**

This module introduces students to SharePoint Designer 2010 and then uses Designer to create and manipulate External Content, External Lists, Views, and Workflows.

### **Lessons**

- SharePoint Designer 2010 Overview
- Working with External Content Types and External Lists
- Editing External Lists and Views
- Creating external data sources and External Content Types and Lists
- Synchronizing External Data Using Outlook 2010
- Using External Data in Standard SharePoint Lists
- SharePoint Workflow Overview
- Creating, Editing, and Publishing Workflows Using Designer

### **Lab : Customize External Lists**

- Customize the External List view with some additional branding

### **Lab : Create an External List**

- Create a list in SharePoint to display the salespeople from Microsoft Dynamics GP

### **Lab : Synchronize with Microsoft Outlook**

- Synchronize the salesperson External List with Microsoft Outlook

### **Lab : Create a Task List**

- Create a task list for customer tasks

### **Lab : Create a Workflow**

- Create a Workflow using SharePoint Designer
- Design workflow to automatically generate an email message

After completing this module, students will be able to:

- Explain how to use SharePoint Designer and navigate through site objects
- Modify and create External Lists, views, and associated web pages
- Create external data sources and external data operations
- Synchronize external data using Microsoft Outlook
- Use external data in other SharePoint lists
- Discuss the principles of workflows and using Designer to create, edit, and publish them

## **Module 7: Advanced Topics**

This module introduces students to advanced features available with SharePoint Server and Office.

### **Lessons**

- SharePoint Server Edition Comparison
- SharePoint Server and Office
- InfoPath and InfoPath Services
- SharePoint Workspace
- Access and Access Services

After completing this module, students will be able to:

- Understand the differences between SharePoint Server editions
- Create an InfoPath form for an External List
- Synchronize SharePoint data using SharePoint Workspace
- Create a web application using Access and Access Services
- Use Access to create hybrid applications