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Welcome to Dynamics GP!

10/31/2018 • 2 minutes to read

Dynamics GP is a business management solution for small and mid-sized organizations that automates and streamlines business processes and helps you manage your business. Dynamics GP has a long history, and you can find information about functionality on the installation media for your version of Dynamics GP and on the [Dynamics GP Support and Services Blog](#). We have started moving some of the existing content to the Docs.microsoft.com site, and we will be adding more content here at the new location in the future.

The PDF files that you may have seen for earlier versions of Dynamics GP contains symbols to indicate notes, tips, and warnings, for example. Here on the Docs.microsoft.com site, such visual alerts are provided in other ways. So if you're looking for a lightbulb, then this is now a note, and warning triangles are replaced by warnings.

Additional resources

A number of resources are available to help in addition to this library.

Blog

Go to our [Dynamics GP Support and Services](#) blog and learn more about recent updates and tips and tricks.

Resource Page

The following page shows a list of resources that can help you find the information that you need:

<https://mbs.microsoft.com/customersource/northamerica/GP/learning/documentation/system-requirements/dynamicsgpresource>

The page will be updated going forward as new links become available, while some of the target pages will be added to the Docs.microsoft.com site.

Knowledge Base

Available at <https://mbs.microsoft.com/customersource/>, the knowledge base provides you with instant access to the same database our support engineers use. You can find answers to common questions, along with technical tips and performance recommendations.

eSupport

Available at <https://mbs.microsoft.com/support>, you can find different ways to get support, including requests that can be handled with e-mail. On average, the response time is nearly twice as fast as telephone support. That's a big benefit during the critical year-end season.

Community

Available at <https://community.dynamics.com/gp/>, the Dynamics GP community is where you can start a year-end discussion with other members of the Microsoft customer community, for example. This database provides you with the opportunity to exchange information with other customers, which is perfect for providing tips and answers to year-end questions.

Dynamics GP support team

We have specialized support teams focused on providing service and support to Dynamics GP customers. If you have questions, dial toll free 888-GPS-SUPP (888-477-7877). Enter your 10-digit authorization code.

Send us your suggestions

We welcome comments regarding the usefulness of the Dynamics GP. If you have specific suggestions or encounter problems, let us know on the [Product Idea for Microsoft Dynamics](#) site. By offering any suggestions to

Microsoft, you give Microsoft full permission to use them freely.

An email address was available in previous versions to provide an option for contacting us about the documentation. Both adocs@microsoft.com and bizdoc@microsoft.com have been decommissioned.

Contributions to the Dynamics GP content

We welcome contributions to the Dynamics GP content. You can find the source files in GitHub at <https://github.com/MicrosoftDocs/msftdynamicsgpdocs/>, and the ReadMe.md file in the root of the repo contains tips and tricks for working with the content. If you want to add a new article, then the repo contains a template.md file that can help you get started.

See Also

[Microsoft Dynamics GP Developer Documentation](#)

Introduction

10/18/2018 • 2 minutes to read

The What's New section is your guide to enhancements in Dynamics GP. We add tax updates as required and other enhancements based on feedback we receive from customers, as well as on market research. Your willingness to help us build better products makes this a more complete solution for small and medium-sized businesses, putting you in a better position to manage your organization successfully.

Some enhancements described in this documentation are optional and can be purchased through your Microsoft partner. If you currently have a license for one of these modules and have an active enhancement program, you automatically will receive the enhancements contained in that module.

What's New in Dynamics GP 2018 R2

10/18/2018 • 22 minutes to read

This chapter lists enhancements to Dynamics GP for the Dynamics GP 2018 R2 release. The Dynamics GP 2018 R2 release enhances specific areas of the product.

Financial enhancements

A number of updates have been made to the finance area in Dynamics GP.

Monthly recurring batches

With the release of Dynamics GP 2018 R2, users can specify if a monthly or bi-monthly recurring batch must end on the last day of the month in Payables, Receivables, and Inventory Management. When marked, it will automatically set the posting date to the last day of the month. So, if the batch is posted the next posting date would be set to May 31. This is great because before (and without the box checked) it would default the posting date to May 30.

Three windows have been changed to accommodate the new monthly and bi-monthly recurring batch functionality:

- Receivables Batch Entry
- Payables Batch Entry
- Inventory Batch Entry

A new field, **Use last day of the month** has been added underneath the **Frequency** field in all three windows. The **Use last day of the month** option is available only when the **Frequency** field has been set to **Monthly** or **Bi-Monthly**. When the **Use last day of the month** option is marked for a monthly recurring batch, the **Posting Date** will be the last day of each month (EOM). When the **Use last day of the month** option is marked for a bi-monthly recurring batch, the **Posting Date** will be the last day of every other month (EOM).

Control	Actual
Transactions	
Batch Total	

To open these windows, on the Microsoft Dynamics GP menu, point to **Transactions**, choose the relevant area, and then click **Batches**. For Receivables choose Receivables Batches.

NOTE

In earlier versions of Dynamics GP, the next posting date associated with a monthly batch frequency defaulted to 30 days from the previous posting date. Similarly, the next posting date associated with a bi-monthly batch frequency defaults to 60 days from the previous posting date.

IMPORTANT

The first time a user enters transactions associated with a batch marked to **Use the last day of the month**, the **Document Date** field for those transactions will default to the value of the **GP User Date** (shown in the lower left hand corner of Dynamics GP). As such, if users want the document date to match the posting date, they must update the **Document Date** field accordingly in the **Transaction Entry** window. For every recurrence after the first posting, Dynamics GP will automatically update the transaction document dates to match the posting date that is associated with the recurring batch.

Exclude items on the HITB report with zero quantity or value

Additional options are added to the **Historical Inventory Trial Balance** report so that you can exclude items with zero quantity or zero value.

The screenshot shows the 'Inventory Activity Report Options - GPDAT (sa)' window. The 'Option:' dropdown is set to 'Include'. The 'Report' is 'Historical IV Trial Balance'. The 'Sort By' is 'Item Number' and 'Print' is 'Detail'. The 'Use:' radio buttons are set to 'GL Posting Date'. The 'Sites:' radio buttons are set to 'All'. The 'Include:' checkboxes for 'Items With Zero Quantity' and 'Items With Zero Value' are both checked. The 'Ranges:' section shows 'Item Num' as the range. The 'From:' and 'To:' fields are empty. The 'Restriction' section is expanded, showing options like 'Landed Cost Revaluation', 'Purchase Price Revaluation', etc. The 'Include Items With Zero Quantity: Yes' and 'Include Items With Zero Value: Yes' options are circled in red. The 'Historical Inventory Trial Balance Detail' report is visible in the background, showing 'Dextordinary Inc. Inventory Control' and 'Use: GL Posting Date'.

To select these options in the **Inventory Activity Reporting Options** window, go to the **Reports** menu, point to **Inventory**, choose **Activity**, and then choose the New or Modify button. In this window, you will see two new options which can be selected individually or both at the same time as described in the following table:

OPTION	DESCRIPTION
Items With Zero Quantity	Selecting this option will include inventory items on the Historical Inventory Trial Balance even if they have 0 quantity. If this option is not marked, then inventory items that do not have quantity will not be printed on the report.

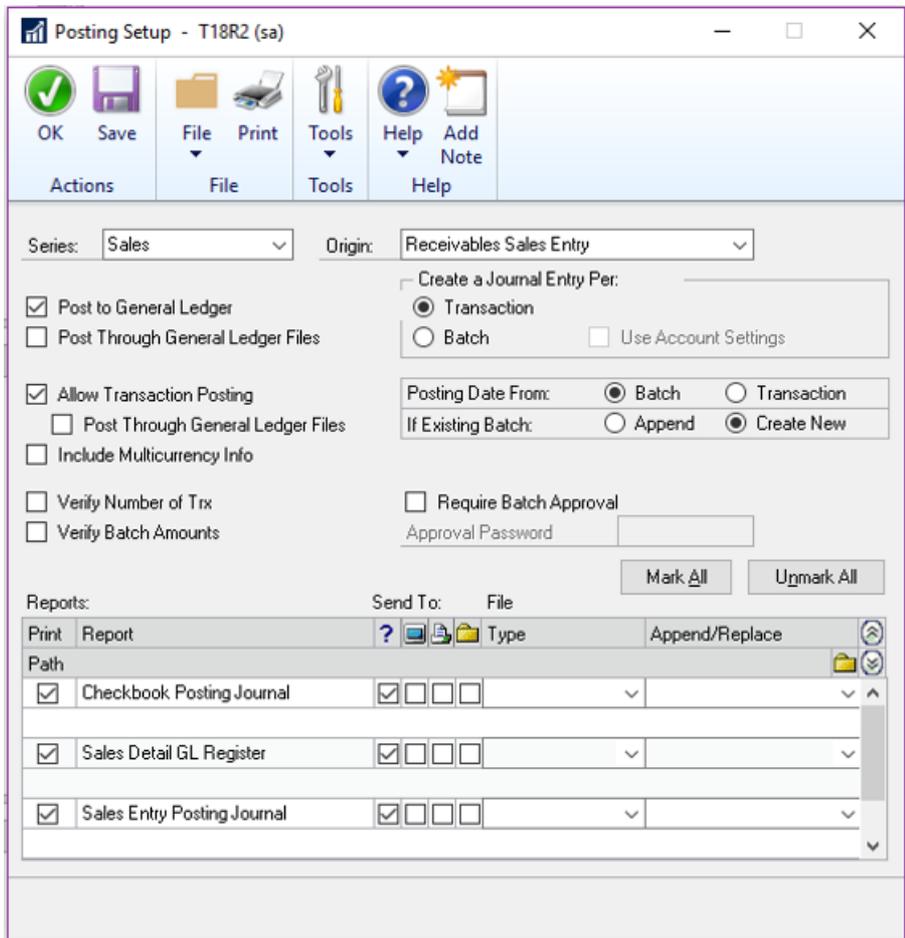
OPTION	DESCRIPTION
Items With Zero Value	Selecting this option will include inventory items on the Historical Inventory Trial Balance even if they have 0 value. If this option is not marked, then inventory items that do not have value will not be printed on the report.

NOTE

Item with 0 quantity and 0 value that do not have any transaction history in the SEE30303 (Inventory Transaction History Detail) table will not be included on the report regardless of selection.

Transaction level post through G/L

Users can now post through the general ledger at the transaction level in several windows. A new option has been added to **Posting Setup** to allow transactions to post through the general ledger if marked to post through.



Duplicate check numbers

You can now prevent or enable the use of duplicate check numbers for more than just Payables Checks by setting or clearing the **Duplicate Check Numbers** field in the **Checkbook Maintenance** window. If the field is cleared, then Dynamics GP will prevent users from using a duplicate check number in the **Bank Transaction Entry**, **Miscellaneous Checks**, and **Payroll Manual Check-Adjustment Entry** windows.

If the check number has already been used, the user will receive the following error: "This check number has been used". The user will have to enter an unused check number to successfully post the transaction.

Don't display inactive checkbooks in lookup

Users can choose to exclude inactive checkbooks in the **Checkbooks Lookup** window with this new feature in Dynamics GP 2018 R2. We are simplifying the default checkbook on batches and making the lookup easier with an option to not see inactive checkbooks.

The new action is added as a view in the **Checkbooks Lookup** window. To exclude inactive checkbook IDs, choose the black drop-down arrow next to **View**, and then choose **Exclude Inactive Checkbooks**. To save as the default view, simply choose **Set as Default View** in the same list. The **Checkbooks Lookup** window can be accessed from any window in Dynamics GP that has a **Checkbook ID** field with a magnifying glass next to it.

The **Default View** field in the ASIEXP99 table (DYNAMICS database) will be set to 2 when **Exclude Inactive Checkbooks** is the default view. There are no changes to table structure with this new functionality.

Bulk update master records as inactive from navigation lists

In Dynamics GP 2018 R2, users can inactivate and reactivate master records for accounts, checkbooks, customers, sales people, vendors, employees, and items from Navigation Lists. Additionally, users can inactivate one employee at a time from navigation lists.

The **Inactivate** option becomes available when the user has selected one or more master records on the navigation list. The **Reactivate** option becomes available when the user has selected one or more inactive master records on the navigation list. If a master record is marked as inactive, a visual indicator shows to the right of the **Select** checkbox on the navigation list to indicate that the record is inactive.

For each of the different types of master records, Dynamics GP checks that the record meets the relevant criteria to be marked as inactive. The **Inactivate** option follows existing rules and logic in Dynamics GP for each master record type. Users will be notified if the change succeeded or failed through the yellow status bar at the top of the list. If the record could not be marked as inactive or reactivated, users can print a **Status Message Detail** report to get more information around why the change failed.

Options with the names **Inactivate** and **Reactivate** have been added to the **Modify** section of the **Accounts**

Navigation List, Checkbooks Navigation List, Customers Navigation List, Salespeople Navigation List, Vendors Navigation List, Items Navigation List, and Employees Navigation List windows.

Additionally, vendors can be marked as **Temporary** in the **Vendors Navigation List** window and a different visual indicator shows to the right of the *Select* checkbox.

NOTE

Employees must be inactivated/reactivated one at a time. If more than one Employee ID is selected, the **Inactivate** and **Reactivate** options are grayed out. When a user clicks the **Inactivate** or **Reactivate** option, the **Employee Maintenance** window will automatically open.

Purchasing enhancements

A number of updates have been made to the purchasing area in Dynamics GP.

Checkbook ID defaults on computer check batch

The Checkbook ID defaults in when you create a check batch in the **Select Payments** window, **Edit Payment Batch** window and **Batch Entry** window when computer check is the origin. Set up the default in the **Payables Management Setup** window.

The image shows two overlapping windows from the Dynamics GP software. The background window is 'Payables Management Setup - GPDAT (sa)'. It features a menu bar with 'OK', 'Cancel', 'File', 'Print', 'Tools', 'Help', and 'Add'. Below the menu is a table for 'Aging Periods' with columns for 'From', 'To', and 'Docu'. The 'Apply By' section has radio buttons for 'Document Date' (selected) and 'Due Date'. A 'Defaults' section includes fields for 'Default Summary View', 'Checkbook ID' (set to 'FIRST BANK'), 'Check Format', 'Sort Checks By', and 'List Documents on Remittance'. The foreground window is 'Payables Batch Entry - GPDAT (sa)'. It has a similar menu bar. The 'Batch ID' is 'MONTHLY' and 'Origin' is 'Computer Check'. The 'Payment Method' is 'Check'. 'Frequency' is 'Single Use' and 'Posting Date' is '01/15/2018'. 'Check Date' is also '01/15/2018'. 'Checkbook ID' is 'FIRST BANK' and 'Currency ID' is 'USA'. A table at the bottom shows 'Batch Total' with 'Control' and 'Actual' columns, both showing '\$0.00'. There are also fields for 'User ID', 'Approval Date', and an 'Approved' checkbox.

Allow partial purchase on a purchase requisition from a purchase order

When you create a purchase order, you can now enter a quantity that is less than the total quantity requested. This is also possible if you create a purchase order from one or more requisitions.

When you create a purchase order from one or more purchase requisitions, you now have the option to purchase a quantity less than what was initially requested in the **Purchase Order Preview** window. The remaining quantity on the requisition will then be canceled.

For example, if you have a quantity of 70 of the item *128 SDRAM* on a requisition, but you only want to purchase

35 items, you can now adjust that quantity in the **Purchase Order Preview** window. When you adjust the **Qty To Purchase** field to 35, you receive a warning that the remaining quantity ordered will be canceled. When the purchase order is generated, the purchase requisition will move to history if all lines on the requisition have been fully or partially ordered with the remaining quantity on the partially ordered lines canceled.

If you drill back on the transaction in the **Purchase Requisition Inquiry** zoom, there will be a red icon as a visual indicator to show that the quantity was only partially ordered.

NOTE

Historic purchase requisitions will have a status of **Partially Purchased** to reflect that part of the original quantity on the requisition was canceled during the purchase process. By clicking on the link button next to **Quantity Ordered**, you can see the partial quantity that is on the purchase order and the quantity not purchased what was canceled.

Add vendor document number to Purchasing All-in-One View

The vendor's document number now shows in the **Purchasing All-in-One Document View**. With the release of Microsoft Dynamics GP 2018 R2, users can now view the **Applied-To Document Number** that is associated with payments, credit memos, and returns in the **Purchasing All-In-One View** window. The all-in-one view is great for viewing related documents but most times the vendor document number is the one known, not the document number. Therefore, it has been added in the payments and credit documents columns for easy reference.

To open the **Purchasing All-In-One View** window, in the Dynamics GP menu, point to **Inquiry**, choose **Purchasing**, and choose **Purchasing All-In-One View**. To view the document number of an invoice, finance charge, or miscellaneous change, simply click the black arrow in the lower right-hand corner of the payment, return, or credit memo to expand the view.

Purchasing All-in-One View - GPDAT (sa)

Vendor: 10(61) Vendor Name: ACS Hydraulics

Purchase Orders	Invoices	Payments	Credit Documents
<p>Order by PO Date ↑ ↓</p> <p>\$49.28 <input type="checkbox"/></p> <p>PO Num: PO000000000000028</p> <p>PO Date: 09/29/1999</p> <p>Closed</p>	<p>Order by Invoice Date ↑ ↓</p> <p>\$46.82 <input type="checkbox"/></p> <p>Voucher No. 000000000000003</p> <p>Document Date: 10/05/1999</p> <p>Doc. No. Z00005</p>	<p>Order by Doc Date ↑ ↓</p> <p>\$35.00 <input type="checkbox"/></p> <p>Pmt No: 0000000000000002</p> <p>Date: 09/13/1999</p> <p>Doc No: CM000000000000002</p> <p>Payment Method: Check</p> <p>Checkbook ID: FIRST BANK</p> <p>Checkbook Name: First Bank System</p> <p>Terms Disc Taken: \$0.00</p> <p>Credit Card ID:</p> <p>Check Name:</p> <p>Applied Amount: \$35.00</p> <p>Void Date: 00/00/0000</p> <p>Applied to: 0000000000000013, 0000000000000041</p> <p>Doc No: 1004</p> <p>Prepayment Purchase Order</p>	<p>Order by Doc Date ↓ ↓</p> <p>\$50.00 <input type="checkbox"/></p> <p>Voucher No. 0000000000000999</p> <p>Date: 08/15/1999</p> <p>Doc. No. 4124</p> <p>Void Date: 00/00/0000</p> <p>Currency: USA</p> <p>Applied Amount: \$0.00</p> <p>1099 Amount: \$50.00</p> <p>Applied to: 0000000000000998</p> <p>Doc No: 12902</p>

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Send a purchase order using another template

A new option to send a purchase order as an email using the format "Other format" has been added to the **Purchase Order Entry** and **Purchase Order Inquiry Zoom** windows. This means that users can choose if they want to email the Blank Paper or the Other form. This can be useful if you are using different purchase order formats depending on the type of vendor that the purchase order is being emailed to.

After selecting a purchase order format, you can click the Send button at the bottom of the window. The vendor's email address and the message ID entered on the purchase order transaction will be used and the email will be sent in the format selected.

NOTE

Email functionality is dependent on Word Templates being enabled and properly configured in your company.

Warning when the vendor is on hold

If you are entering a payables transaction for a vendor that is marked as on hold, you now get a visual indicator. This is similar to the customer hold status that was implemented in an earlier version of Dynamics GP. Additionally, Dynamics GP throws a warning message when a user attempts to enter a transaction when the vendor is on hold.

The screenshot displays the Microsoft Dynamics GP interface. The main window is titled "Vendor Inquiry - T8R2B (sa)". It shows a vendor record for "ASSOCIAT0001" (Associated Insurance Inc.) with a status of "Active". A secondary window, "Payables Transaction Entry - T8R2B (sa)", is open, showing fields for Voucher No. (0000000000000459), Document Type (Invoice), and Doc. Date (4/12/2027). A warning dialog box from Microsoft Dynamics GP is overlaid on the Payables Transaction Entry window, with the message: "Vendor ASSOCIAT0001 is currently on hold. Do you want to continue?". The dialog box has "Yes" and "No" buttons.

You can see the vendor hold status in the following pages:

- Vendor Inquiry
- Transactions by Vendor
- Purchasing All-in-One Viewer
- Payables Transaction Entry Zoom

In these windows, a red dot now displays next to the vendor name or ID if the vendor is on hold.

Sales enhancements

A number of updates have been made to the sales area in Dynamics GP.

Retain Ship-To-Address Name with Customer Modifier

In Dynamics GP 2018 R2, the **Ship-To-Address Name** value is retained when a customer is modified with the **Customer Combiner and Modifier Utility**. To open the **Customer Combiner and Modifier Utility**, in the Dynamics GP menu, choose **Tools**, point to **Utilities**, choose **Sales**, and then choose **Customer Combiner and Modifier**.

The **Ship-To-Address Name** field is shown in the **Customer Address Maintenance** window. To open the **Customer Address Maintenance** window, in the Dynamics GP menu, choose **Cards**, point to **Sales**, and then choose **Addresses**.

New SmartList for deposits associated with unposted sales transactions

In Dynamics GP 2018 R2, users can easily view deposit amounts associated with unposted sales invoices and orders through the new **Deposits on Unposted Sales Transactions** SmartList. This SmartList is a new option under Sales Transactions so you can quickly see customers that have put a deposit on a sales transaction, but the sales transaction hasn't been posted. No more searching through the sales records to see the deposits, now you have a new SmartList to view the details. This new default SmartList is filtered to look at Sales Order WORK transactions (SOP10100) with a **Deposit Received** amount (DEPRECD field) greater than zero.

Additional sort options in Sales Order Processing Item Inquiry

In the **Sales Order Processing Item Inquiry** window, a new field with sort options has been added to the window so that you can change the display within the scrolling window. The sort options include Item Number, Document Number, Document Type, Document Date, and Customer ID. Item Number will be the default sort when the window is opened.

Sales Order Transaction Navigation List-Print Document option for Functional or Originating Currency

With Dynamics GP 2018 R2, there is a new option when printing documents from the **Sales Order Transactions Navigation List** window that allows you to choose if you want to print the document in the Originating or Functional currency. In the **Currency to Print** field, a new option for **Functional** lets you print the invoice in the company's currency. The default currency is still *Originating* but now you have the option to print in *Functional* currency from the navigation list. After you mark a document or documents on the **Sales Order Transactions Navigation List** window, you can select the **Print Documents** action dropdown on the Action Pane. In this window you will see a new option labeled **Currency To Print**.

Print and email sales documents at the same time

We have added the ability to both print and email sales documents at the same time in three areas. This feature will be useful in allowing you to print and email sales invoices all in one process. Previously you would have been required to print the document or range of documents, and then once that process was completed, you would have to go back into the window, mark the documents again and email the documents.

NOTE

Email functionality is dependent on Word Templates being enabled and properly configured in your company.

In the **Sales Document Print Options** and **Print Sales Document** windows, new fields specify if you want to print or email the document. In the **Sales Order Transactions Navigation List** window, when you choose the action to send a transaction in email, you can now choose to print a copy.

Email customer statements

In the **Customer Maintenance** window, you can now email statements with the click of a button. A new email button can be found on the Menu bar of the **Customer Maintenance** window.

When you click the email button, Dynamics GP will email a customer statement to the customer that you have selected in the window. The settings from your 'BLANK FORM' statement ID will be used for this functionality. If a Statement ID of 'BLANK FORM' does not already exist in your company, then Dynamics GP will create a new Statement ID with the name 'BLANK FORM' with the following settings:

FIELD	VALUE
Date to Print	End of Month
Form	On Blank Paper Print
For	All Options Marked

NOTE

Email functionality is dependent on Word Templates being enabled and properly configured in your company.

Human resources & payroll enhancements

A number of updates have been made to the HR and payroll areas in Dynamics GP.

Payroll check register FICA totals

The report has employee and employer FICA amounts and a total for both. The following FICA totals have been added to the **Payroll Check Register** report: FICA Medicare = Employee FICA Medicare total + Employer FICA Medicare total
FICA Social Security = Employee Social Security total + Employer Social Security total

In earlier versions of Dynamics GP, the **Employee Medicare** and **Employer Medicare** values were totaled separately. Additionally, the **Employee Social Security** and **Employer Social Security** values were totaled separately.

Changes to Payroll Check Register Report

Two new calculated fields added to the **Payroll Check Register** report to accommodate the ability to view these totals: **FICA Med Total Owed**, **FICA Soc Total Owed**. The **Payroll Check Register** report can be printed after checks are 'calculated' (pre-posting report), and/or during the Payroll Computer Check posting process.

NOTE

If you are printing a modified version of this report, you may not see the new fields, you will need to set your security back to the original report to see this new feature.

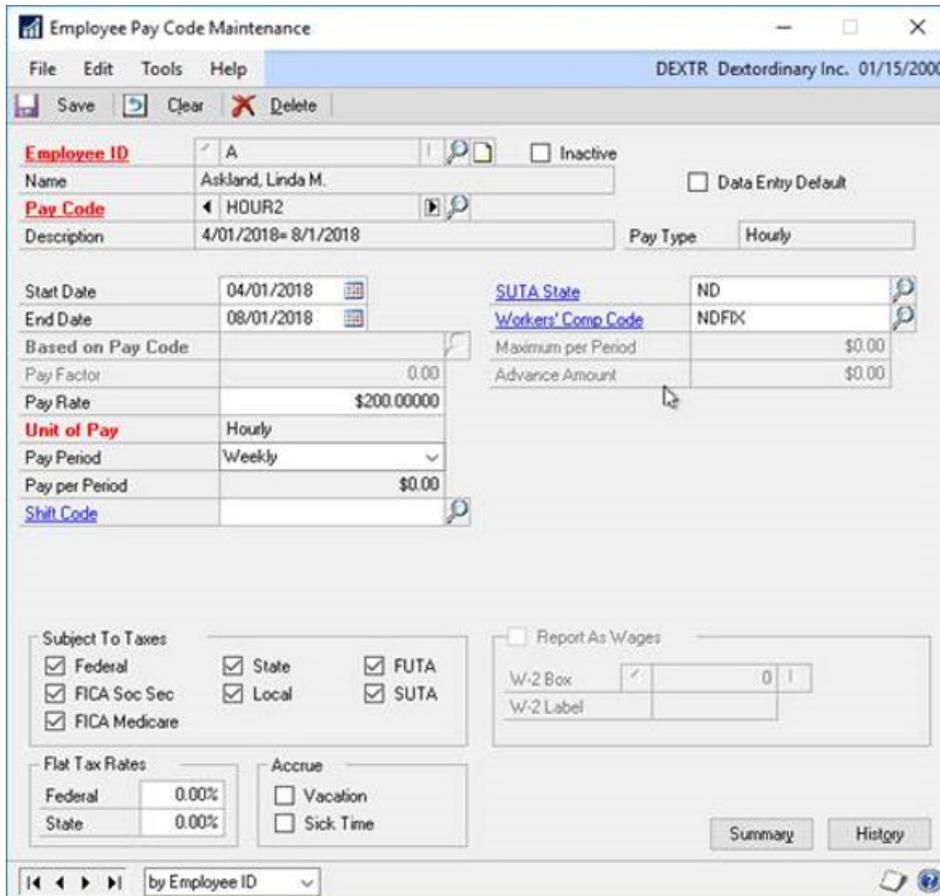
Start and end dates for pay codes

With the release of Dynamics GP 2018 R2, users can assign a start date and/or an end date to pay codes in the **Employee Maintenance** window. This functionality is similar to the start/end dates that are already used for benefits and deductions in the Payroll module. This new feature will allow users to setup new pay codes without having to worry about when to start using them, or when to inactivate those they no longer wish to use. This will

be very useful to you when you are activating a new hire and terminating an existing salary employee.

NOTE

In earlier versions of Dynamics GP, it was not possible to restrict whether a pay code is included in a pay run via start and/or end dates. Instead, users would generally 'inactivate' a pay code (most often a salary type pay code) to ensure it's not included in a pay run.



The **Start Date** and **End Date** fields are not required in the **Employee Pay Code Maintenance** window. The following table describes the effect of the settings of these fields:

SETTINGS	EFFECT
Both the Start Date and End Date fields are empty	There are no date restrictions for the pay code, and Dynamics GP will treat the pay code as it did in earlier versions.
Start Date is set	Dynamics GP will check if the Start Date field in the Employee Pay Code Maintenance window falls on or after the date in the Pay Period From Date field in the Build Payroll Checks window.
End Date is set	Dynamics GP will check if the End Date field in the Employee Pay Code Maintenance window falls on or before the date in the Pay Period To Date field in the Build Payroll Checks window.

SETTINGS	EFFECT
Both the Start Date and End Date fields are set	Dynamics GP will check if the Start Date field in the Employee Pay Code Maintenance window falls on or after the date in the Pay Period From Date field in the Build Payroll Checks window, and if the End Date field in the Employee Pay Code Maintenance window falls on or before the date in the Pay Period To Date field in the Build Payroll Checks window.

The **Payroll Transaction Entry** window has been updated to accommodate the new start and end dates for pay codes. When a user enters transactions for a pay code, and the **Pay Period From** and **Pay Period To** dates do not fall on or between the pay code start/end dates, the pay code will not be available in the **Pay Code Lookup** window. Also, Dynamics GP will generate the following error message: "The transaction is outside of the pay code start/end date" when either the user manually enters the pay code in the **Code** field, or the user edits an existing transaction, and the pay code start/end dates do not fall on or between the pay code start/end dates.

The **Payroll Build Checks** window has been updated to accommodate the new start and end dates for pay codes. Dynamics GP compares the pay code start and end dates from the **Employee Pay Code Maintenance** window to the pay period from/to dates in the **Build Payroll Checks** window to determine whether pay code transactions should be included in the pay run. For automatic pay types, when the start/end dates in the **Employee Pay Code Maintenance** window do not fall on or between the pay period from/to dates in the **Build Payroll Checks** window, Dynamics GP will not include the pay code for that specific employee in the pay run. For pay codes entered as transactions as part of a batch, when a pay code transaction in a batch has a start/end date in the **Employee Pay Code Maintenance** window that does not fall on or between the pay period from/to dates in the **Build Payroll Checks** window, Dynamics GP will throw the following warning on the **Build Checks** report: "The transaction is outside of the pay code start/end date". The transaction for that pay code/employee will not be included in the rest of the pay run.

The batch will remain available after the pay run has been posted. The pay code transactions not included in the pay run will remain in the batch until they are successfully posted.

Shared maximums for benefits and deductions

It is now possible to assign a shared calendar year maximum for groups of benefits and/or groups of deductions. This will be a huge benefit to your organization for employees who may contribute to two 401K plans.

A new window has been added to accommodate the new deduction and benefit shared maximum functionality, the **Ded/Ben Shared Limit** window.

NOTE

When a deduction/benefit group code is saved in the **Ded/Ben Shared Limit Setup** window, the shared yearly maximum will be applied to all employees who are assigned to those deductions. Each deduction or benefit can be assigned to one group code.

All deductions/benefits under the selected column will be subject to the shared calendar year maximum.

If an employee is assigned only one or some of the deductions/benefits under the selected column, they will still be subject to the shared calendar year maximum assigned in the **Ded/Ben Shared Limit Setup** window.

All deductions included in the pay run will show on the **Build Checks** report, which hasn't changed.

Also, when the pay run is run as *Calculated*, and the **Calendar Year Maximum** has been met for a group of deductions during the pay run, Dynamics GP will try to take the full deduction amount(s) for all TSA deductions first (those deductions with more TSA's get priority). Next, Dynamics GP will try to take the full deduction amount(s) for sequenced deductions. Finally, Dynamics GP will try to take the full deduction amount(s) for non-sequenced/non-TSA deductions (alphanumerically).

When the pay run is run as *Calculated*, and the **Calendar Year Maximum** has been met for a group of benefits during the pay run, Dynamics GP will first try to take the full benefit amount for taxable benefits alphanumerically, and then try to take the full benefit amount for non-taxable benefits alphanumerically.

Workflow

Dynamics GP 2018 R2 includes a new **Sales Transaction Approval** workflow where you can create approvals based on several conditions such as whether a customer credit limit is exceeded on the transaction or not. Not only can you set workflow approval on customer credit limits, but you can set workflow approvals on all transaction types in Sales Transaction Entry. We added a new email message to work with sales transactions, just like the other workflow types. Workflow history is displayed in inquiry windows too.

The default WF ASSIGN SOP APPROVAL* email message for the **Sales Transaction Approval** workflow will have the option to add many customer and transaction related fields, such as the customer credit limit information so that you can write in the email if the customer credit limit has been exceeded. This way there is high visibility for the approver when they receive the E-Mail notification to approve the transaction. The wording and fields on the email Message ID can also be customized to your preference.

The workflow history for the **Sales Transactions Approval** workflow is also displayed on inquiry windows and navigation lists.

System enhancements

A number of general enhancements have been made in this release.

Password maximum length

In Dynamics GP 2018 R2, the maximum length for a user's password is increased to 21 characters, from the previous 15 characters. This is very similar to other Microsoft products, example Microsoft SQL Server.

This will allow more complexity with Dynamics GP user passwords with the added characters being allowed, to add more security to your Dynamics GP environment.

Password expiration notification

Dynamics GP 2018 R2 now provides users with a notification 7 days in advance of their login password expiring. This allows users to proactively update their passwords before the expiration date specified in the password policy configured by the system administrator.

Hide Business Analyzer in navigation lists for all users and all lists

System administrators can now turn off Business Analyzer for the Home Page and/or navigation lists at the system level in the **System Preferences** window. These are global settings to make it easier to turn off the feature if companies are not using Business Analyzer.

Individual users can still choose to turn on Business Analyzer using customization options to display Business Analyzer on their Home Page or in navigation list pages. This is managed in the **Customize Home Page** window and in the Show/Hide menu for navigation list pages, respectively.

SmartList Designer favorites display in navigation lists

SmartList Favorites created via SmartList Designer will now appear in the SmartList Favorites navigation lists.

Intelligent Edge - Intelligent Cloud Insights

With the release of Dynamics GP 2018 R2, you will notice a new tab on your home page: **Intelligent Cloud Insights**. Essentially, you can connect your Dynamics GP to a Dynamics 365 Business Central cloud tenant that you can synchronize data to. This enables cloud scenarios for your Dynamics GP that will then show in the **Intelligent Cloud Insights** tab with insights from machine learning and other cloud scenarios.

When you upgrade to GP 2018 R2 with an existing install, the users' Home Page tab will default as usual, but you will see a new tab called **Intelligent Cloud Insights**. If you do a new install of Dynamics GP 2018 R2, the Home Page will default to the **Intelligent Cloud Insights** tab.

For more information, see [Frequently Asked Questions about Connecting to the Intelligent Cloud](#) in the docs for Dynamics 365 Business Central.

What's New in Dynamics GP 2018

10/18/2018 • 8 minutes to read

This chapter lists enhancements to Dynamics GP for the GP 2018 release. The Dynamics GP 2018 release enhances specific areas of the product, while also expanding existing functionality, notably in the document attachment and workflow areas. The user experience has also been enhanced to make finding the information you use to make business decisions faster and easier.

Platform and system-wide enhancements

Login remembered when working in System Manager

Now you'll only need to enter the system password once during an active session when working in multiple system windows. Previously, users were prompted to log in multiple times when accessing different system windows.

Comprehensive document attachment

This release broadens the availability of the document attachment capability to additional master record windows, inquiries and transaction entry windows. The option to attach new documents in Inquiry windows is also included. Document attachment is available from the ribbon in additional transaction entry windows, as shown in the following illustration.

Document Type: Sales / Invoices		Batch ID	RM BATCH
Number	SALES00000001001	Document Date	5/9/2017
Description			
Customer ID	AARONFIT0001	Currency ID	Z-US\$
Name	Aaron Fitz Electrical	Payment Terms	Net 30
Address ID	PRIMARY	Shipping Method	LOCAL DELIVERY
Salesperson ID	PAUL W.	Tax Schedule ID	USASTCITY-6*
Territory ID	TERRITORY 1	P.O. Number	
Cost	\$0.00	Cash	\$0.00
Sales	\$50.00	Check	\$0.00
Trade Discount	\$0.00	Credit Card	\$0.00
Freight	\$0.00	Terms Disc Taken	\$0.00
Miscellaneous	\$0.00	On Account	\$53.50
Tax	\$3.50		
Total	\$53.50		

In some master record windows, documents are attached using a button next to the record ID fields, as shown in the following illustration.

Employee Inquiry - T18 (sa)

Employee ID:

 Class ID:
 Active

Last Name	Ackerman		Address	987 Willow Ave	
First	Pilar				
Middle					
Soc Sec Number	917-23-9833		City	Winnetka	
Department	SPTS		State	IL	
Position	CSP		ZIP Code	98272	Country USA
Work Hours per Year	2080		Phone 1	(312) 555-0115 Ext. 0000	
Calc Minimum Wage	No		Phone 2	(312) 555-0150 Ext. 0000	
Employment Type	Full Time Regular		Phone 3	(312) 555-0151 Ext. 0000	
Gender	Female		Start Date	8/3/2013	
Ethnic Origin	White		Birth Date	11/24/1988	
Last Rev. Date			Date Inactivated		
Spouse			Reason		
Transaction Entry Defaults:			Secondary Status		
State of Residence	IL		Federal Filing Status		
Local Tax Code			Number of Exemptions	1	
			Additional Withholding	\$0.00	
			Estimated Withholding	\$0.00	

Similar buttons have been added to additional master record windows.

Employee Maintenance - T18 (sa)

Save Clear Delete Write Letters Go To File Print Tools Help Add Note

Employee ID: ACKE0001 Class ID: SUPP Inactive

Last Name: Ackerman
 First: Pilar
 Middle:
 Suffix:
 Soc Sec Number: 917-23-9833

Address ID: PRIMARY
 Address: 987 Willow Ave
 City: Winnetka
 State: IL
 ZIP Code: 98272 County:
 Country: USA
 Phone 1: (312) 555-0115 Ext. 0000
 Phone 2: (312) 555-0150 Ext. 0000
 Phone 3: (312) 555-0151 Ext. 0000

Seniority Date: 0/0/0000
 Hire Date: 8/3/2013
 Adjusted Hire Date: 8/3/2013
 Last Day Worked:
 Date Inactivated: 0/0/0000
 Reason:
 Secondary Status:
 SUTA State: IL
 Workers' Comp: ILWC01

Employment Type: Full Time Regular

Division: MAIN
 Department: SPTS
 Position: CSP
 Location: PRIMARY
 Supervisor: SUPMGR

Additional Positions Human Resources Address Additional Information Vac/Sick Project

by Employee ID

Document attachment has been added to the following windows for GP 2018.

TRANSACTION ENTRY WINDOWS
General Ledger Transaction Entry
Receivables Transaction Entry
Asset General Information (FA)
INQUIRY WINDOWS
Employee Inquiry
I-9 Form
Customer Inquiry
Vendor Inquiry
Project Inquiry
PA Project Inquiry

Workflow 4.0

The capabilities of workflow have been extended in the GP 2018. In addition to new workflows, including general

ledger account approvals and purchase order invoice approval, you can copy a step within a workflow, and send reminder email messages from workflow.

Reminder emails

This enhancement lets you set a reminder time period on the workflow that's used to notify users if they haven't reacted to their assigned workflow task within the specified time frame.

Copy workflow step

This enhancement adds efficiency to the process of setting up workflows by enabling you to copy steps within a workflow, renaming the step and including substeps to a workflow.

Reporting for workflow

A new workflow history report has been added for GP 2018. The report can be filtered by workflow type, workflow approvers, workflow status, and by the approval date. The option to include workflow comments on the report is also available.

Additional fields are available for Payables transaction workflow

Additional fields have been added to the Payables transaction workflow. To use the new fields, mark the Extended fields list option in the Work Maintenance window, and then select the fields you want to use in the Workflow Condition Editor. The new fields include:

- Vendor account
- Comment 1
- Comment 2
- Vendor class ID
- Payment priority

Additional messages are available for purchase order workflow

This enhancement lets you add account descriptions to workflow message that are distributed via email for Purchase order workflows and purchase requisition workflows.

Bank used for EFT added to vendor approval workflow

Additional information is now included in the Vendor approval workflow that shows the bank that the vendor uses for electronic funds transfers (EFT). To use the new field, mark it in the Extended fields list option in the Work Maintenance window, and then add it to the workflow in the Workflow Condition Editor. These extended fields are all the EFT banking fields that can be set up on the vendor for EFT information. They include the country, bank name, bank account, and SWIFT code.

New workflows for new accounts, receipt transactions, and purchasing invoices

New workflows have been added to control the addition of general ledger accounts, purchase receipt transactions and purchasing invoices. The workflow for general ledger accounts can be initiated from any area of the system for any new accounts, or for any accounts that are in a workflow state, for example when an account has been edited, but not yet approved.

User experience enhancements

A number of enhancements improve the experience of working with Dynamics GP. The following subsections describe those enhancements.

Additional sorting options added

A number of enhancements have been added to GP 2018 that make it easier and faster to find information. The new sorting options can be displayed in either ascending or descending order.

WINDOW	NEW SORTING OPTIONS
Receivables Transaction Inquiry – Customer	
Receivables Transaction Inquiry – Document	By type < /br> By document number < /br> By document amount < /br> By amount remaining < /br> Document date
Payables Transaction Inquiry – Vendor	
Payables Transaction Inquiry – Document	By document number < /br> By type < /br> By original amount < /br> By unapplied amount < /br> By document date
Bank Reconciliation window	By payment amount < /br> By deposit amount

Unique passwords can be entered for individual SmartList favorites

Users now have the option to assign a unique password to SmartList favorites. The password restricts the users who can modify the favorite to only those that know the password. In previous versions, anyone who knew the system password could modify the favorite.

A shortcut to SmartList has been added to the web client

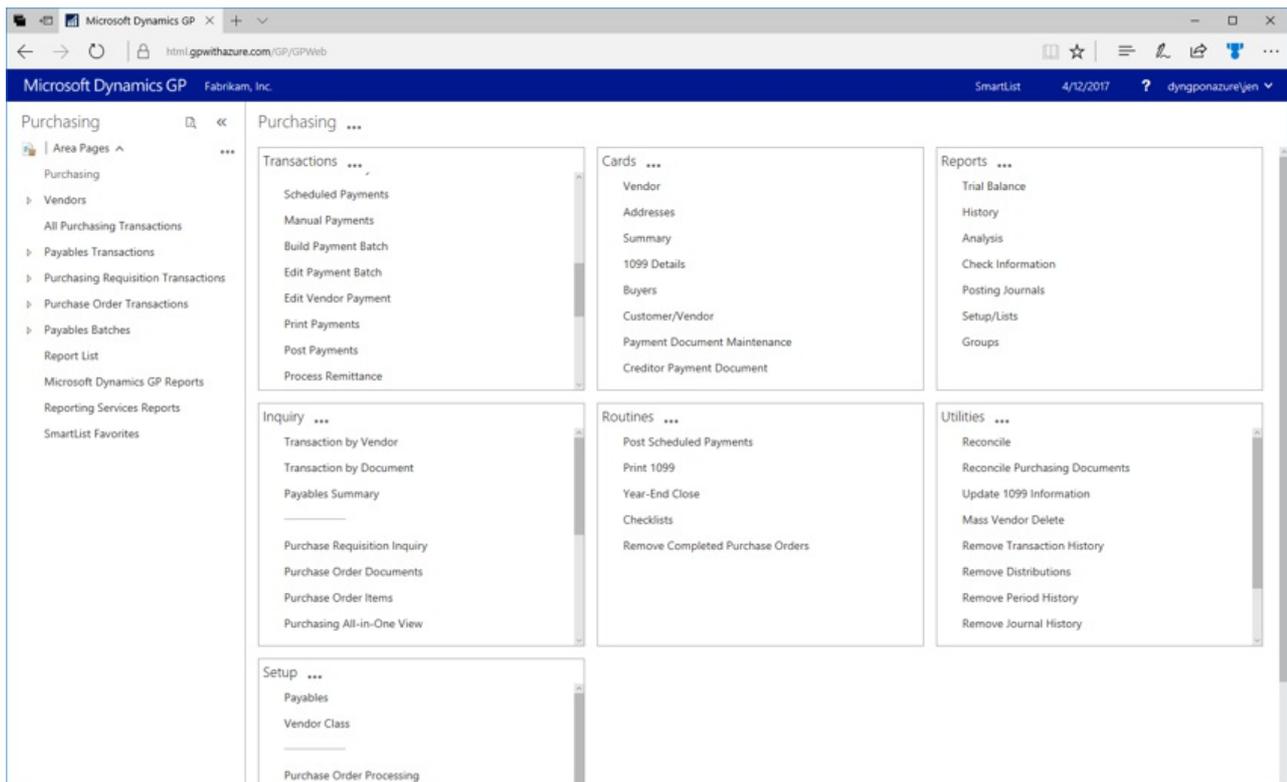
Now you can navigate to SmartList directly from the web client, making access to SmartList inquiries and reports faster and easier.

Auto-complete now included in the web client

Functionality that recognizes partial entries in fields is now part of the web client, as it has been in the desktop client.

One-click navigation to SmartList from web client

A shortcut has been added to the banner in web client windows, allowing one-click navigation to SmartList – for those who have been granted access to SmartList. User whose permissions do not include SmartList won't see the shortcut.



Additional enhancements to the user experience include:

- Help icons have been updated to link to online support documents.
- Option to maximize the Bank reconciliation window in the web client

BI enhancements

The GP OData service has been updated to include paging and filtering, as well as adding support for OData version 4.

Along with the enhancements that are included in GP 2018, we are pleased to announce an upcoming GP Content pack that will be based on the GP 2018 OData service.

Financials enhancements

Print a single statement from Customer Maintenance

Now you can print a statement for a single customer, from the Customer Inquiry window for that customer. The statement will use the statement format that's assigned in the Receivables Setup window.

One payment per invoice set or one payment per-vendor

Now you can choose to make payments on individual invoices, or to choose a single payment per vendor. The choice of payment options is made in the Vendor Maintenance window. The default setting is to generate a single payment per vendor when you build payment batches using the Build Payment Batch window.

Save select payment settings

An option that allows you to save the settings used to build a payments batch has been added to the Payment Option ID field in the Build Payment Batch window.

Copy user access across dimensions in Analytical Accounting

In the User Access to Trx Dimensions window, you can specify which users have access to dimensions and copy the user access settings from one user and apply them another one.

Payables checks windows renamed to reflect alternate payment options

Payables Management Checks windows have been renamed to reflect the ability to payments through credit cards, electronic funds transfers, or potentially other methods.

Distribution and supply chain enhancements

Purchase order generation list opens with newest POs

When you create purchase orders from the Purchase Orders Preview window using the Generate button, the new purchase orders can be displayed in the purchase order transactions list. When you use the Generate button, the PO Navigation List will automatically open with the newly generated purchase orders displayed.

PO information displayed for requisition originator

When a purchase order is created from a requisition, the PO information is displayed on the requisition list so that the requisition originator can be aware that the items on the requisition have been ordered. The enhancement also displays the PO Number on the Procurement role center.

Print purchase requisition

Now you can print a purchase requisition report from the Requisition Entry and from the Requisition List windows.

Display Hold status in the sales transaction entry

Now you can display a Hold status, on transactions that have that status, from the Sales Transaction Entry and Sales Transaction Inquiry Zoom windows. An icon will display and can be selected to zoom to the sales process

Hold window.

Human Resources and Payroll enhancements

Roll down payroll setup options from setup to inactive records

Now you have an option to roll down changes to inactive employee records. The options that are included in this feature include: changes to

- Pay codes
- Deductions
- Benefits
- Shift codes

Turn off garnishment reports in posting setup

Additional control over printing garnishment reports has been added to the Posting Setup in Payroll. You can select whether to print garnishment detail or summary reports when you complete a pay run. The default setting is to allow users the option to print garnishment reports when you complete a pay run.

Change the department code in all data tables

Now you can allow users to modify an existing department code and the changes will automatically update all the tables that contain that department code, including History tables.

Restrict inactive deduction and benefit codes in lookup windows

This enhancement lets you restrict the inactive records in lookup windows on a per user basis. You can restrict both company benefits and deductions, as well as employee benefits and deductions.

Advanced wellness and health insurance integration

This enhancement lets you track employee actions that contribute to lower insurance premiums, such as refraining from smoking or maintaining membership in a gym or health club.

See Also

[What's New](#)

What's new in Dynamics GP 2016 R2

10/15/2018 • 5 minutes to read

The following sections describe enhancements included in Dynamics GP 2016 R2.

Business Intelligence changes

SmartList favorite protection

Greater control over changes to SmartList favorites is now available by requiring a password to modify a favorite. When users try to modify a SmartList favorite they will be prompted to enter a password.

SmartList Designer SmartLists available in Advanced Lookups

Users can now assign SmartList Designer List favorites to Advanced Lookup windows. Favorites now can be assigned to all lookup windows.

Support secure connection to Management Reporter service

Enable users to connect to Management Reporter (MR) service using a more secure `https://` connection. Currently, the MR Services only supports `http://`. This enhancement was added in response to feedback from customers who requested a more secure connection when rendering their financial data. This functionality became available with Management Reporter cumulative update 16.

Power BI on Web Client Home page

Power BI reports are now available on the web client home page if Dynamics GP must be registered with Power BI App Registration Tool or with Azure Management Portal. With this enhancement, you can make critical business information more readily available than it was previously.

System-wide enhancements

Indicate the name of person editing a batch in the message "Batch is being edited by another user"

There is now greater visibility for showing which specific users are editing batches. If you try to edit a batch that another user is already working with, that user's ID appears in the message appears. Previously, the message only indicated that 'another user' was editing the batch.

Financial enhancements

Distribution Line Display opens expanded

The General Ledger Transaction Entry and Journal Entry Inquiry windows will default the scrolling window expanded or collapsed based on the previous display state. This allows users to display distribution information in more detail by default. The same functionality has been added to the Payables Transaction Entry Distribution and Sales Transaction Distribution Entry windows and the corresponding inquiry windows. The distribution scrolling window will open expanded or collapsed based on the previous display state. This is a per user, per form automatic setting.

Credit Limit Warning Calculation for unposted Credit Documents

The credit limit warning calculation now considers when a cash receipt is entered and is applied against an outstanding invoice. In the credit limit calculation, we track a customer's remaining credit limit by looking at invoices that are already posted. We also look at any unposted transactions that would increase or decrease that customer's balance. The unposted cash receipt is kind of a special case, when it is applied, it automatically adjusts the customer's remaining balance by the applied amount. Our calculation now considers whether the unposted

cash receipt is applied.

POP to FA Link to Include Taxes

The option is added to include the tax amount in the cost basis of an asset when posting POP through to FA. When using the "by Receipt Line" option for posting, the tax amount calculated for the receipt line is capitalized with the extended cost. When using the "by Account" option, the amount posted to the tax account for the receipt is capitalized with the amounts posted to other accounts set up as Fixed Assets purchasing posting accounts.

Link credit card invoices to original invoices

When a credit card payment is entered for an invoice the transaction description is now updated with a vendor ID and document number on the credit card vendor invoice to easily trace back to the originating voucher. The GL for Payables reconcile process has been modified to link the credit card payment and credit card vendor invoice to GL entries with Matched Transactions.

Add Bank Rec history table and do transaction history removal.

A new process for Reconciled Transaction maintenance in Routines has been added that moves reconciled transactions to Bank Reconciliation history tables. With the transactions moved to history, the bank reconciliation process performance will improve. When removing history, the process also removes any moved or reconciled transactions.

Save Fixed Asset ID with suffix

When setting up a fixed asset, a suffix for the fixed asset, other than 1, can be entered and saved. This enhancement can help you group assets and components.

SafePay file displays Check Name from the Check

The SafePay file uses the vendor's name that's printed on the check when the payment was made, rather than using the default name from the Vendor Maintenance window. While checks can be printed that include vendor names that are different name from the vendor name in Vendor Maintenance. It is important to use the name that was printed on the check as part of the SafePay file because that is the name that the bank uses when the check is presented for payment.

Distribution enhancements

Display Tax Percent for Historical Transactions

When drilling into the sales transaction tax details, the tax percent used at time of transaction displays instead of the percent that is set up on the tax detail maintenance window.

Cancel PO when linked to a Requisition

You can now cancel a purchase order line quantity when it is linked to a purchase requisition. This functionality is available in Purchase Order Entry and in Edit Purchase Orders window. After entering the quantity canceled a warning message is given but you can continue with transaction. The linked icon has also been updated to reflect quantities that cannot be fulfilled if a purchase order has been updated, such as cancelling quantities.

Human Resources and Payroll enhancements

Track history on Termination / Rehire Dates

A new Employment History option will now track the date that an employee was hired and the date when their employment concluded. The dates are Hire Date, Adjusted Hire Date, Date Inactivated, Last Day Worked and Termination Date. This information is saved each time one of these date fields is updated.

Allow payroll user to print using self-service W2 report

Now the payroll administrator, can print W2 information for employees using the same self-service report that employees use. This eliminates the need for preprinted forms because there is a new form type option available for printing W-2s that prints W-2 information in the correct format with current labels.

Project Accounting enhancements

PA Timesheet Status Report

A new report is available for Project Time Entry (PTE) timesheet approvers that will print the status of all timesheets. The report includes the option to sort the report by the approval status, or by the approver. This report provides visibility into all timesheets, including timesheets that are missing but that were expected to have been entered.

PA Line Item Distributions added for all transaction entry windows in Project Accounting

All Project Accounting transaction entry windows have a new window for Line Distributions. This allows you to enter distributions on a per line item basis. Distributions for projects are no longer allowed at the summary level. This will enable the PA Trial Balance report to print the correct distributions for any accounts that were changed during transaction entry.

See Also

[What's New](#)

What's new in Dynamics GP 2016

10/18/2018 • 11 minutes to read

The following sections describe enhancements included in Dynamics GP 2016.

System-wide changes

Web Client enhancements

The user interface for the Dynamics GP Web Client has been refreshed to provide a more updated appearance. The banner in space now enables users to log in and log out, as well as indicating what company they're logged into number of enhancements to the user experience.

Support for additional browsers and mobile devices

Web Client now includes support for multiple devices, including iPad and Android tablets, as well as using multiple web browsers. The supported browsers include:

- Internet Explorer
- Microsoft Edge
- Safari
- Chrome

Open Web Client windows using search

A new search feature let you locate and open windows through search. The new search feature also works with applications that integrate with the Web Client.

Ability to scan multiple pages

When you're using the scan function that's part of the Document Attachment feature, you now can scan more than one page at a time if you're using a document feeder. Previously Document Attachment could scan only one page at a time. With GP 2016 we will have the ability to use the Document Attachment scanning functionality to scan in multiple pages (instead of one at a time). Supported scanners need to use WIA (Windows Image Acquisition) technology, along with a document feeder. The scanning process creates files in .TIF format.

Word templates for batch approval workflow

Workflow batch approvals now have a default Word template for the edit list for the following batches in the following areas:

- General Ledger
- Payables
- Receivables

The edit lists can be emailed to an approver to provide complete information about the transactions in the batches before approving the workflow step.

Workflow condition management

New options are available for automatically processing workflows when something in the workflow doesn't meet specified conditions. If a condition is not met, the workflow can continue to the next step or it can be rejected.

Prior to this change, you could specify conditions under which action is required for a step in a workflow. If the

condition set for a step wasn't met, the step would not be run, nor would any subsequent steps be run. If there were no parallel steps running, then the workflow would end at the step where the condition was not met, and the step status was set to No Action Needed.

With this enhancement, two additional options will be added letting you select the action that occurs when a condition isn't met. The first is to continue to the next step in the workflow. Rather than stopping the workflow completely if a condition isn't met, the step that doesn't meet the condition won't be completed, but the workflow moves to the next step in the sequence. This allows you to create workflows that contain steps that are completed only if specific conditions, but that don't stop the workflow if the conditions aren't met.

The second option is to reject the workflow if the condition for the step is not met. This allows the user to set up a workflow that automatically rejects documents based on specific conditions, rather than having a user manually review and reject the document.

Workflow reassignment notifications

Now you can configure a workflow to automatically notify a new approver when they need to act on a workflow that's in process. Notifications can be sent to a new approver for who was delegated to the workflow, who is part of an escalation process, or who is an alternate approver.

Configurable OData Service points added

Now you can define end-points for an OData Service, which allows Dynamics GP data to be read by any tool that supports OData feeds. The open data protocol, typically referred to as OData, defines a data model and a protocol that can let any client access information that's exposed by any data source.

OData Service deployment enhancements

OData Service is now available with Dynamics GP as a separate install. You can access the installation option under the Additional Products selection in the Dynamics GP installation program. The service is available for single-tenant implementations only.

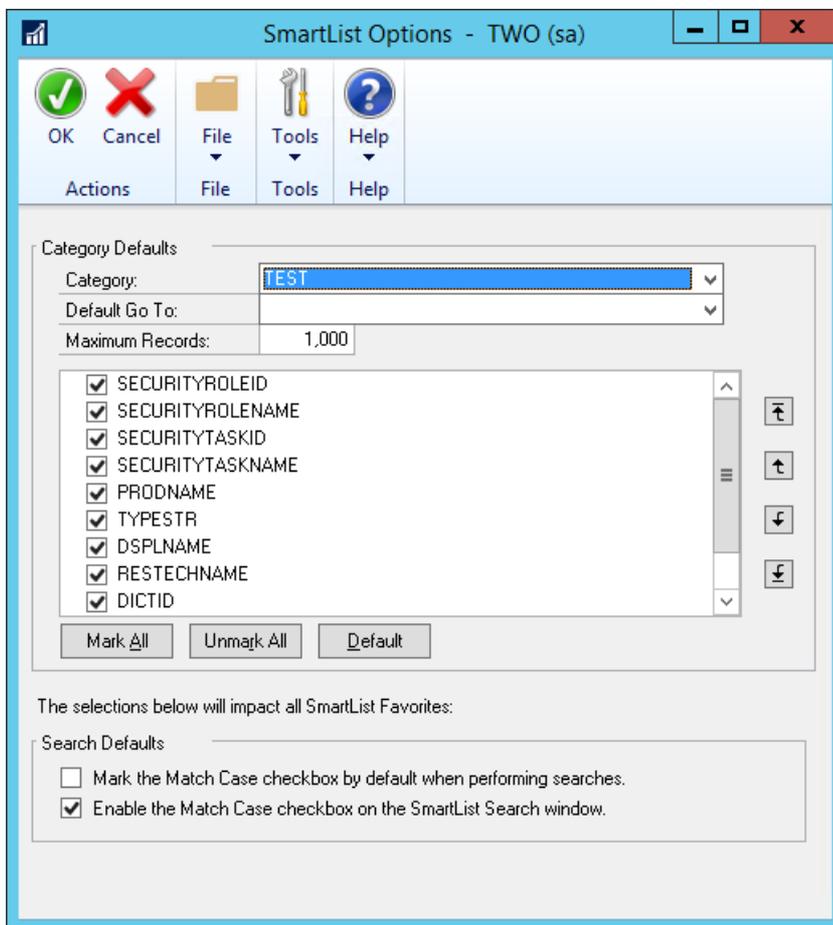
Business Intelligence enhancements

Import and export SmartLists from SmartList Designer

Now you can export and import SmartList definitions that have been created with SmartList Designer from one install to another. This is handy for partners who create SmartLists for one customer, then import them into an implementation for another customer. Customers can use the same functionality to export and import SmartLists across sites or divisions.

SmartLists created in SmartList Designer have default columns defined in the SmartList Options window

All the columns that are included in new SmartLists that are created in the SmartList Designer will be displayed in the SmartList Options window by default. From the Options window, you can include or exclude columns from the default view. You can also change order in which the columns display.



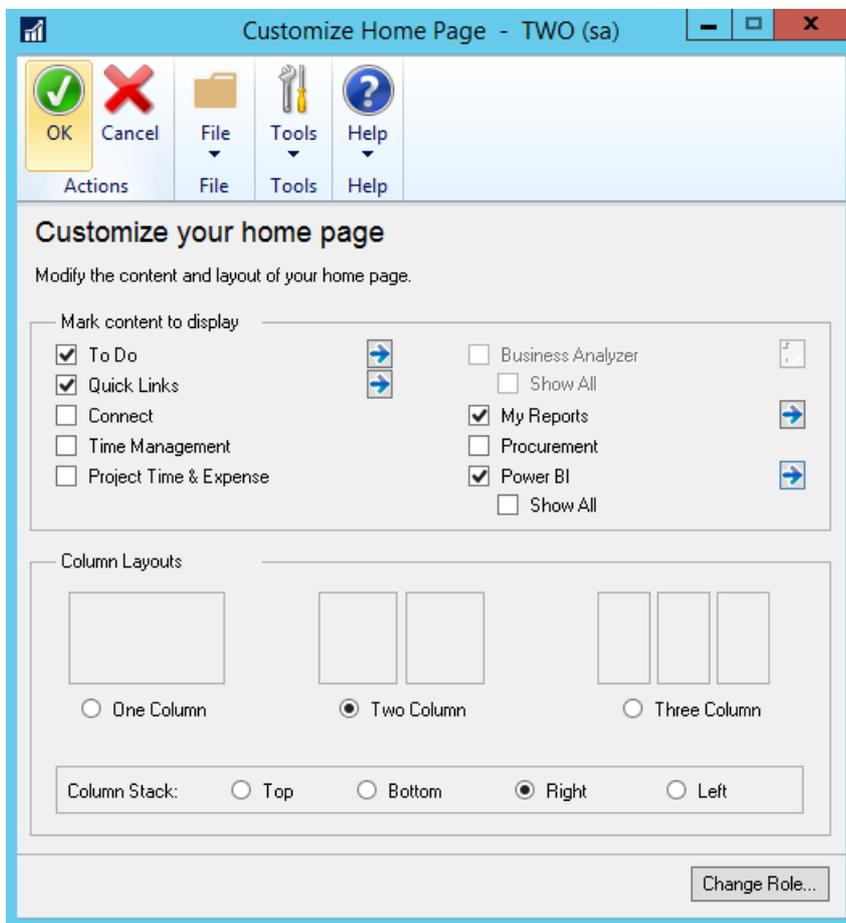
Prior to this change, new SmartLists could not have default columns defined in the SmartList Options window.

Export numbers to Excel, formatted as numbers

When a report is exported to Excel, numbers will now be formatted as numbers. Prior to this change, numbers were formatted as text in Dynamics GP reports that were exported to Excel.

Power BI reports can be added to home pages

A new web part has been added to Home Pages that allow users to easily add Power BI Reports to their workspace. To display a report, check the Power BI box, and then click the blue arrow to go into the Power BI Details window. This window will show you the available reports that you can add to your Home Page.



Once you've added reports you will have a Power BI section added to the home page. You can scroll through the available reports here. You can expand the size of the window to be larger or smaller as needed. Clicking on a report will launch the report in your browser, as long as Pop-up blocker is disabled. You can't modify the reports within the Power BI window on the GP Home Page.

Create SmartList from the Favorite using SmartList Designer

You can create a new SmartList from a favorite using SmartList Designer. And you can do so without having to remove extra columns from the default SmartList. Currently when you create a copy of a SmartList it takes the default SmartList and uses that to make the new one. With this enhancement, you can create a copy from a favorite which has different columns (usually less) than the default

Financial enhancements

Budget import exception report

When you import a budget from Excel, an exception report will list accounts that aren't set up in General Ledger, as well as any duplicates that are found in the import file. You can use Transaction Entry windows to edit the transactions to use existing accounts, or create the accounts that are listed on the exception report.

Scotia Bank EFT format added as a default EFT file format

The electronic file format used by the Canada-based Scotia Bank is now one of the default EFT formats available in Dynamics GP. Default formats are available for use in electronic transactions for both sales and purchases.

Analytical Accounting user access settings

The process for giving users access to Analytical Accounting transaction dimension codes is now more efficient. You can use the User Access to Trx Dimension Codes window, in Analytical Accounting, to grant this access to multiple users. Prior to this change, access to transaction dimension codes was granted one user at a time.

Payables batch credit card payment option

An option has been added that enables payables computer check batches to be paid using a credit card. The

payment will create an invoice for the credit card vendor and a remittance form will print that list the invoices that were paid with that credit card transaction. A new Card Name field has been added to the Payables Batch Entry window to use a credit card as the payment method for a specific batch. A credit card record must be set up in the Credit Card Setup window. You can use either bank card or a credit card, but the invoice will be created for the credit card vendor only if that vendor is assigned to the credit card.

Edit attachments that flow to transactions

You can edit information in attachments that included on transactions through the document attachment function. This feature allows you to edit the attachment properties of a document that flowed from a master record. For example, in the case where information flowed from customer to a sales quote, you might then want to send it to the customer via email. Now you can mark the email checkbox to help automate that task.

In addition, you can manage how information flows to transactions using options that have been added as part of this enhancement. From the Document Attachment Management window, you can open the Attachment Properties window. The option allows you to define and choose whether or not information can flow into document attachments, and whether or not attachments can be sent via email.

Deposit cash receipts batches automatically

When you mark the option to automatically post cash deposits, and you post a batch that includes cash receipts from Receivables Management, a single deposit will be created that includes all the cash receipts in the batch. This batch post happens wherever you batch-post something that has cash received, such as cash receipts, receivables transactions, or sales transactions.

If you post receivables transactions at the transaction level, each cash receipt will result in a separate deposit being created and posted.

Distribution enhancements

All-in-one document view for sales and inventory transactions

A new window, Purchasing All-in-One View, was added for GP 2015 R2 that let you view all related documents for a single purchasing transaction in the same window. For GP 2016, similar functionality has been added for sales documents. You can open the Sales All-in-One View window while viewing a customer record in master record windows, such as the Customer Maintenance window, most Inquiry windows, navigation lists, as well as from the Dynamics GP home page. The most recent documents display in the window by default. To see the next set of five transactions, use the navigation buttons under each column.

The Inventory All-in-One View window displays inventory increase and decrease transactions and is accessible from the Item Maintenance window, as well as most item inquiry windows, navigation lists, and the Inventory home page.

Prepay purchase order total

Now you can pay the total amount of a purchase order with a prepayment. The prepayment includes taxes, freight, and miscellaneous charges, as well as total of all the line items. Prior to this enhancement, prepayments could not exceed the subtotal amount of the purchase order.

Project Accounting enhancements

Project expenses – document attachments

Documents such as receipts now can be attached to employee expense transactions from the PTE Employee Expense Entry window. This enhancement uses the Document Attachment functionality that lets header and line attachments, such as invoices or receipts, to be added to an employee expense. You can also see these attachments in Payables Management after the expense transaction has been posted to that module.

Project Accounting fields in Purchase Requisition Entry

Two new fields have been added to the Purchase Requisition Entry window that shows the project number and cost category for each line on a purchase requisition. The project-related information is also included on the purchase order that's created after the requisition is approved. You're not required to enter information in the new fields, so if your organization approves purchase requisitions through a workflow process, that process won't be affected by this enhancement.

Add Unit Cost field in PTE Employee Expense window

A field has been added to the Project Time and Expense window (PTE Employee Expense entry) that you can use to view and edit expense transactions. Other fields in this window are renamed to make window easier to use.

- The Item field is renamed to Cost Category ID.
- The Billing field is renamed to Bill Type
- The Amount field is renamed to Purchases

The new fields include the Unit Cost and U of M fields.

Project Time Entry reports added

Two new Project Time Entry reports have been added for GP 2016. The PTE Timesheet Edit List is printed from the PTE Timesheet Entry window. The PTE Expense Report Edit List is printed from the PTE Expense Report Entry window.

Payroll enhancements

Inactive pay codes lookup option

There is now an option to exclude inactive pay codes from lookup windows throughout Payroll. A drop-down list in the Pay Codes window to select all pay codes to include in lookup windows, or to exclude the inactive codes. The option is available for Employee Pay Codes and Pay Codes lookup windows.

Enhanced Payroll posting accounts setup

Now you can see all posting accounts in a navigation list and filter and sort accounts using the functionality that's typically available for navigation lists. You also can export the accounts to Excel, edit them there, and then import them. On the import, an exception report will print when there are any duplicate accounts, missing accounts or when there are payroll data or other issues that cause the record import to fail.

See Also

[What's New](#)

What's new in Dynamics GP 2015

10/18/2018 • 20 minutes to read

This section describes enhancements that were added to the product since the release of Dynamics GP 2015. Some enhancements described in this documentation are optional and can be purchased through your Microsoft partner. If you currently have a license for one of these modules and have an active enhancement program, you automatically will receive the enhancements contained in that module.

Workflow enhancements

Workflow – Payables Transaction Approval

A new workflow type for Payables Transaction approval in Workflow Maintenance is now available. When you set up and mark this workflow active, the Payables Transaction Approval workflow type will allow you to submit and approve transactions in the Payables Transaction Entry window. Approval is also available through the email notification and the navigation lists. The PM Batch Approval workflow type is still available as well. If the PM Batch Approval workflow type and the Payables Transaction Approval workflow type are both Active the batch origin of Payables Trx Entry is not available for batch approval.

The Payables Transaction Entry window is the primary window for the Payables Transaction Approval workflow type. As soon as the data is entered or modified in the window, you can view the InfoBar, showing the status of the workflow. The Payables Transaction Entry window has Workflow action added to the ribbon.

The workflow process to follow is similar to the other workflow processes available in Dynamics GP.

You can define messages that can be sent out for workflow activities that are specific to the Payables Transaction Approval workflow type using the Message Setup window.

To approve a single transaction in the Payables Transaction Entry window, add the transaction to a batch and then follow the workflow process to Submit and approve.

Workflow – Document Attachment

When a document has been added to a transaction or record using the Dynamics GP Document Attachment feature, these attachments can now be sent with the workflow task notification email. This feature is available for PM Batch Approval, Purchase Order Approval, Purchase Requisition Approval, Vendor Approval, and Payables Transaction Approval. For example, you can now enter a payables invoice, scan it and attach the record from the vendor, and then submit the invoice for approval. When the approver receives the email, they will get the invoice information and the attachment will show the scanned invoice from the vendor.

A new checkbox is added in the Workflow Maintenance window for the specified workflow types, which when selected will allow you to send the document attachment documents for Workflow Assignment type messages.

The prerequisites to make this checkbox available are:

- The Allow Document Attachments checkbox must be marked in the Document Attachment Setup window (Administration – Setup – Company – Document Attachment Setup).
- The Send Message checkbox above it in the Workflow Maintenance window is marked.

You can now email Document Attachment documents when the messages are sent through workflow. All attachments will be sent in the order they are attached. Attachments from the header will be first, then attachments from line items.

You can view the status of the document attached in the Document Attachment Status Inquiry window (Document

Attach >> Attach (Document Attachment Management) >> Line expansion next to Date). A new status called Workflow Message has been added.

Platform enhancements

Service Based Architecture

Service Based Architecture (SBA) is a functionality delivered as a service call over https that adheres to the pattern of Service Oriented Architecture. Service Oriented Architecture (SOA) is a software design and software architecture design pattern based on distinct pieces of software providing application functionality as services to other applications. In layman's terms, it is a service that exposes functionality in Dynamics GP that can be accessed using a URI (Uniform Resource Identifier). This allows a user to access the modules in Dynamics GP.

Currently, the Timecard functionality in HR and Payroll in Dynamics GP is also available on SBA which allows it to integrate with the Time Management App. The user who wants to use the Time Management App needs to be granted access to the SBA objects in the Security Task Setup window.

SBAs allow you to log into the ERP modules through an app, which seamlessly integrates the data flow between them. The app may be installed on any platform.

The following SBA objects are added to facilitate the Timecard Management Application integration into Dynamics GP 2015 R2:

OBJECTS	MODULE IN WHICH THE OBJECT IS ADDED
ServiceGetHRAttendanceInfo	Human Resources
ServiceGetTimeCodesListAll	Human Resources
ServiceGetWorkflowListAll	System
ServiceGetWorkflowListByType	System
ServiceCreateTimeCard	Payroll
ServiceCreateTimeCardLines	Payroll
ServiceDeleteTimeCardLine	Payroll
ServiceGetActiveTimeCardList	Payroll
ServiceGetApprovedTimeCardList	Payroll
ServiceGetEmployeeDetails	Payroll
ServiceGetPayCodesListAll	Payroll
ServiceGetPayScheduleAll	Payroll
ServiceGetRestrictionCode	Payroll
ServiceGetSubmittedTimeCardList	Payroll
ServiceGetTimeCard	Payroll

OBJECTS	MODULE IN WHICH THE OBJECT IS ADDED
ServiceRecallTimeCard	Payroll
ServiceSubmitTimeCard	Payroll
ServiceUpdateTimeCardLine	Payroll
ServiceGetHRAttendanceInfo	Human Resources
ServiceGetTimeCodesListAll	Human Resources
ServiceGetWorkflowListAll	System

Scriptable Provisioning & Management

To deliver Dynamics GP as a cloud offering, you must be able to centralize and automate the provisioning and management of the application. A number of new cmdlets have been added to the Dynamics GP PowerShell module, which make automated provisioning easier. The additions include cmdlets for installing the runtime and other components, creating the GP system and company databases, and adding tenants along, among others. Automating these tasks speeds up delivery and minimizes human involvement, reducing cost and the possibility of human error. View the PowerShell Users Guide for a complete list of the available cmdlets.

Reporting enhancements

Display Debits before Credits

In the Dynamics GP 2015 R2, the Debit column is moved to display before the Credit column by default in account transaction reporting options in which the Credit column previously displayed before the Debit column. This applies to SmartLists and excel Reports and the associated data connection, as well as the database tables and views on which the reports are based.

Default SmartList Visibility

When creating a new SmartList Favorite, system administrators now have the option to select a default value for to whom the SmartList Favorite will be visible, including the following options: System, Company, User Class, and User ID. System is the default option selected for the visibility. By adding this option to select a default value for the Default SmartList Visibility drop-down list, system administrators can select to whom new SmartList Favorites, by default, will be visible, and make them visible by default only to the user creating the Favorite. This will help reduce clutter in other users' SmartList Favorites and allow administrators to more easily manage and clean up the lists.

Follow these steps to define the default selection for visibility to users.

1. Open the System Preferences window. Administration >> Setup >> System >> System Preferences.
2. In the Default SmartList Visibility drop-down, select the option to default in the Visible To drop-down list when adding a new SmartList Favorite.

Workflow SmartList Designer Create View Approval

You can now define workflow for creating views within a SQL database. Within SmartList Designer you can send a SmartList through workflow to create a SQL view based on the SmartList query. The SmartLists with the workflow status of Completed can then be used to publish refreshable Excel reports. The views which are created can also be used outside of SmartList Designer and Dynamics GP 2015 R2 for other reporting needs. The primary purpose of the workflow type is to define the user(s) that can create the view within the SQL database. Only specific users have access to create objects within the SQL database and creating a workflow will allow those users insight into the views needed to be created. You must have setup one active workflow in order for the SQL view to go through

the approval process. Set up SmartList workflows from the Administration series within the Workflow Maintenance window.

Historical Received Not Invoiced Report

The Historical Received Not Invoiced report (SRS) is a report that details the Purchase Orders and Receipts and Invoices that have been matched against the Purchase Orders. This report will be created using SQL Reporting Services Report Builder 3.0. You can specify a cutoff date based on transaction date or GL Post Date to use the report for Historical purposes. This new report will be different in the fact that it will look at each document and the date (transaction or GL Post Date) to determine if the transaction should print on the report. If the date falls within the cutoff date the user entered, the transaction will print on the report. This report will allow users to see what was received into inventory but not invoiced yet as of a specific date. This report will be a new report separate of the received not invoiced report.

Mask Employee Social Security Number on Reports

You have the ability to mask the employee's Social Security Number on specific payroll reports that you generate. Access the Report Masking window (HR & Payroll > Setup > Payroll > SSN Mask) and mark the checkbox next to each report you want to apply the mask to and select OK. When the selected report is generated, the Social Security Number value will appear as XXX-XX-XXXX on the report.

Analytical Accounting Transaction Lists

The SmartLists and Excel Reports for Analytical Accounting (AA) transaction information now include more of the data that is tracked by AA. The SmartLists and Excel Reports are also modified to display each AA dimension as a column in the list, rather than having a single column for all AA dimensions. For example, the below SmartList shows how the list would display for a company tracking Cost Center and Project as AA transaction dimensions. You can summarize and work with the data in Excel using pivot table functionality.

Year	Journal Entry	GL Posting Date	Transaction Source	Account Number	Cost Center	Project	Debit Amount	Credit Amount
2014	154	1/1/2014	GLTRX00000004	000-4130-00	ADMIN	SUPPLIES	\$ 0.00	\$ 3000.00
2014	154	1/1/2014	GLTRX00000004	300-5130-00	ADMIN	MORALE	\$ 90.00	\$ 0.00
2014	1660	4/1/2014	GLTRX00000033	100-5150-00	R&D	LAB	\$ 50.69	\$ 0.00
2014	1660	4/1/2014	GLTRX00000033	100-5170-00	IT	NETWORK	\$ 11.52	\$ 0.00
2014	1660	4/1/2014	GLTRX00000033	200-5170-00	FACILITIES	MAINTENANCE	\$ 49.26	\$ 0.00
2014	1660	4/1/2014	GLTRX00000033	000-5100-00	FACILITIES	BUILDING 3	\$ 887.50	\$ 0.00
2014	546	1/31/2014	GLTRX00000006	300-6530-00	R&D	SUPPLIES	\$ 1000.12	\$ 0.00
2014	1709	6/1/2014	GLTRX00000035	000-5100-00	ADMIN	SUPPLIES	\$ 719.13	\$ 0.00
2014	1709	6/1/2014	GLTRX00000035	200-5170-00	ADMIN	MORALE	\$ 44.27	\$ 0.00
2014	1709	6/1/2014	GLTRX00000035	100-5170-00	MARKETING	EVENTS	\$ 10.35	\$ 0.00
2014	1709	6/1/2014	GLTRX00000035	100-5150-00	IT	SERVER	\$ 50.44	\$ 0.00
2014	535	1/31/2014	GLTRX00000006	000-4710-00	IT	DESKTOPS	\$ 699.72	\$ 0.00
2014	613	1/31/2014	GLTRX00000006	000-6750-00	R&D	LAB	\$ 10500.00	\$ 0.00
2014	232	1/1/2014	GLTRX00000004	000-4110-01	ADMIN	SUPPLIES	\$ 0.00	\$ 11255.41
2014	232	1/1/2014	GLTRX00000004	000-4510-01	MARKETING	TV	\$ 5637.83	\$ 0.00
2014	232	1/1/2014	GLTRX00000004	300-5130-00	MARKETING	TV	\$ 337.66	\$ 0.00
2014	1664	5/1/2014	GLTRX00000034	100-5150-00	ADMIN	SUPPLIES	\$ 51.33	\$ 0.00

1000 AA Open Transactions Completed First 1000 records where Cost Center is not equal to .

Combine General Ledger Inquiry

In Dynamics GP 2015 R2 in General Ledger, you can view open and historical information in the same window for Summary Inquiry, Detail Inquiry and for Account Summary. Any Go Tos or drill backs will now go to the single window instead of the user picking open or history.

Summary Inquiry

Clear View Print Help Add Note

Account: 000 - 1100 - 00
Description: Cash - Operating Account
Year: 2017

Period	Debit	Credit	Net Change	Period Balance
Beginning Balance	\$0.00	\$0.00	\$0.00	
Period 1	\$0.00	\$0.00	\$0.00	
Period 2	\$56,583.42	\$2,994.59	\$53,588.83	
Period 3	\$33,422.79	\$96,695.26	(\$63,272.47)	
Period 4	\$185,709.22	\$12,945.09	\$172,764.13	
Period 5	\$0.00	\$50.00	(\$50.00)	
Period 6	\$0.00	\$0.00	\$0.00	
Period 7	\$0.00	\$0.00	\$0.00	\$163,030.49
Period 8	\$0.00	\$0.00	\$0.00	\$163,030.49
Period 9	\$0.00	\$0.00	\$0.00	\$163,030.49
Period 10	\$0.00	\$0.00	\$0.00	\$163,030.49
Period 11	\$0.00	\$0.00	\$0.00	\$163,030.49
Period 12	\$0.00	\$0.00	\$0.00	\$163,030.49
Totals	\$275,715.43	\$112,684.94	\$163,030.49	\$163,030.49

by Account Type

Purchasing and sales enhancements

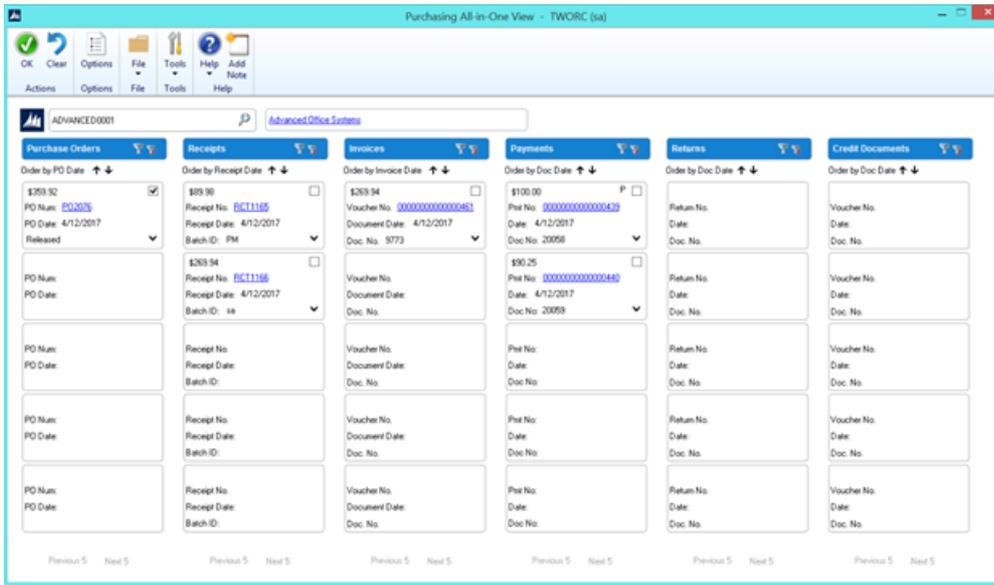
Purchasing all-in-one view

A Purchasing All-in-One View window is now available for locating vendor records and displaying related purchasing documents in the same window. For example, suppose a vendor calls asking about a specific payment. You can use the Purchasing All-in-One View window to select that vendor and then view all documents related to the payment, such as the PO, receipt, invoice, credits, miscellaneous charges and finance charges, and payment to assist you in responding to your vendor's inquiries.

You can access the Purchasing All-in-One View window from the following windows and navigation lists:

- Your home page
- Vendor Maintenance
- Purchase Order Processing Document Inquiry
- Vendor Inquiry
- Payables Transaction Inquiry - Vendor
- Payables Transaction Inquiry – Document
- Purchase Order Processing Document Inquiry
- Purchase Order Processing Item Inquiry
- Navigation Lists and any views of these lists
- Vendors
- All Purchasing Transactions
- Payables Transactions
- Purchase Order Transactions

The icon for the Purchasing All-in-One View window is available only if a single record is selected in the navigation list. The data that's displayed in the Purchasing All-in-One View window depends on your selection in the navigation list. For example, if you select only a vendor record in the navigation list, the vendor ID and name information are displayed in the Purchasing All-in-One View window. If you select a transaction in the navigation list, the vendor ID, name and transaction information are displayed.



When you open the Purchasing All-in-One View window from Purchasing >> Inquiry >> All-in-One View, or Home >> Quick Links >> All-in-One View, the window opens without any data. You can specify the vendor and the details of the information to display in the window. Mark the checkbox in the upper right corner of the document to display only the related documents.

The Options button allows you to select which columns and document types to display in the window. For example, if you don't use Purchase Orders, clear the Purchase Orders selection and the first column displays receipts. The Credit Documents column marked to display by default, but with this column marked, up to six columns of data can be shown. You can view the last five transactions by document date, arranged by the newest to the oldest in each column. Use the sort order (v or ^) buttons to change the order for transaction information. You can view the next set of transactions by clicking Next 5.

Each section displays a summary of the transactions that you select to display in columns in the window. Click the down arrow (v) icon to view the details and return to the summary display by clicking the up arrow (^) icon. The filters provided in the section's heading open a pop-up window that lets you apply additional filters, as well as search for a specific transaction. The clear filters icon will reset the filters back to the default selection.

Automatically Deposit Cash Receipts

You can now opt to have cash receipts entered in Receivables Management directly update the checkbook balance without the need to manually post the cash receipt deposit in Bank Reconciliation. To select the option, mark the "Automatically post cash receipt deposits" checkbox in the Company Setup Options window. When this option is marked, cash receipts entered in Cash Receipt Entry, Receivables Transaction Entry, Sales Transaction Entry, and Invoice Entry and on return documents in Payables Transaction Entry will be deposited automatically in the checkbook, updating the checkbook balance.

The option to automatically post cash receipts was earlier available only to those customers who had Analytical Accounting installed. This option is now available to all customers.

Date effective tax rates

The ability to enter the tax rates in advance for transactions, and calculate the taxes based on the rates specified for a date range, has been added to the main dictionary. This functionality includes the ability to recalculate taxes for saved transactions by modifying the tax rates that are used based on the latest tax rates, which are specified by tax authorities. You can mass modify the tax rates, and regenerate the taxes for the saved transaction batches.

Follow these steps to create the set up for the date effective tax.

1. Open the Company Setup Options window.
2. Dynamics GP >> Tools >> Set up >> Company >> Company >> Options
3. In the Company Setup Options window, mark the Enable Tax Date checkbox, to allow you to use the tax date option for calculating the tax rate for the transaction based on Tax date.
4. Mark the Use Date-effective Tax checkbox. Select the option to calculate the tax. The option that you select here is used for updating the taxes for saved transactions within the tax effective date range. Transactions that are corrected will be based on the date you select here. You can select the Document date, or Posting date or the Tax date to calculate the tax.

WARNING

Select posting date if you want to calculate tax based on the posting date that you specify. Select Tax date if you want to calculate tax based on the tax date that you specify. Select Document date if you want to calculate tax based on the document date that you specify.

You must set up the date range for the specified Tax ID for GP 2015, to calculate the tax amount or percentage for the transaction. Follow these steps to create the date range for the tax ID.

1. Open the Date Effective Tax Rates window.
2. Dynamics GP >> Tools >> Set up >> Company >> Tax Details >> Select the tax ID in the Tax Detail ID field to set up the date range for >> Date effective Tax Rates.
3. Specify the date range for the specified tax amount or percentage.

You can mass modify the tax percentage of multiple tax IDs. You can choose to modify the tax percentage or amount for the taxes detail or the tax type based on date range, or for the tax without any specifying any date range, or both. Follow these steps to mass modify the tax percentage.

1. Open the Mass Modify Taxes window. Dynamics GP >> Tools >> Utilities >> Company >> Mass Modify Tax Percentage
2. Select the option to modify the tax percentage. You can choose:
 - Date effective Tax – To update the dates specified in the date range, and the percentage that you have specified in the Date effective Tax rates window.
 - Tax details – To update the tax percentage that you have specified in the Tax Detail Maintenance window.
 - Both – To update the tax percentage that you have specified in the Date effective Tax rates window, and in the Tax Detail Maintenance window.
3. Click Insert to view the list of the tax IDs listed for the modification.

WARNING

Within the specified Tax IDs, if you do not want to modify any Tax ID, you can select the Tax ID record, and click Remove.

4. Click Modify to modify the listed Tax IDs based on your specifications.

You can also regenerate taxes for the transaction batches with the updated tax percentage. You can regenerate taxes for all the saved transactions of all the modules (except GL) or the selected module, only if you mark the use date effective tax in the Company Setup Options window. You can specify the modules and the batches for which you

want the taxes to be regenerated or regenerate the taxes for all the batches in all the modules (except GL) at one time. Follow these steps to regenerate the taxes for the saved batch transactions.

1. Open the Regenerate Taxes window. Dynamics GP >> Tools >> Company >> Utilities >> Regenerate Taxes
2. Select the module to regenerate the updated tax for the batches. You can choose All to update the tax for the saved batch transactions in all the modules (except GL). Or, you can choose the module to update the tax for the saved batch transactions in the selected module.
3. If you choose a particular module to update the batch transactions, specify the batches in the batch range fields.
4. Click Insert to view the list of the batches that will be updated with the modified tax percentage.

WARNING

You can select a batch ID record and click Remove, to prevent updating the transactions with the modified tax percentage.

5. Click Process to recalculate the tax for the transaction in the module and batch specified.

Important

1. The tax calculation of a transaction will be overridden if there is a date effective tax rate that exist for any tax detail.
2. If the tax calculation routine does not find the rate for a particular date range, then the percentage in the tax detail maintenance will be taken.
3. For the receiving transaction entry, only shipment/Invoice will be considered for date effective tax calculation.
4. For the returns transaction entry, only return with credit and inventory with credit type of transactions will be considered for date effective tax calculation.
5. You can regenerate taxes for transactions when workflow is active for the Receivables Management Batch Approval, Payables Management Transaction and Payables Management Batch Approval. For the transactions with the status Pending, Approved, and Rejected, you will be notified with a message for the workflow. If you continue, the workflow status of the transactions is reset.

Sales Visual Customer over Credit limit function

The credit limit functionality has been enhanced in this release. Where you could require a password when entering a line item on a sales document for a customer that has exceeded their credit limit, now you can also cause a message to be displayed, alerting the salesperson that their customer has exceeded their credit limit sooner in the process of entering the sales transaction. You can also cause a visual indicator to display when a customer has exceeded their credit limit. This display helps you identify customers that have exceeded their credit limit when viewing inquiries or saved transactions.

Follow these steps to set up these options in Receivables Management:

1. Click Sales >> Setup >> Receivables.
2. In the Options section, mark the Display Over Credit Icon checkbox.
3. Mark the Warn if Customer Over Credit checkbox.

WARNING

Though you set up these options in Receivable Management, the warning is displayed in all the modules for all the transactions of the customer who exceeds the credit limit.

Enable Email on All Purchase Orders and Sales orders

Additional email enhancements have been added for Dynamics GP 2015 R2. The application now includes the ability to email all document format types (Short, Long, or Other) for all Purchase Order and Sales Order documents.

A template must exist for the document you wish to email and it must be assigned to a customer or vendor, or be set as the default template for a particular company.

VAT Tax Routine

A new routine called VAT Tax Routine is added in Dynamics GP 2015 R2 which will look for any cash receipt overpayments that have been posted and applied to invoices where the discount was not taken but VAT tax was calculated on the original invoice. This routine will print the list of the customers who have not used the discount so that debit memos can be entered to adjust the payments they've made. The debit memos, however, must be created manually to adjust the unapplied amount from the cash receipt.

Select the Calculate Terms Discount Before Taxes checkbox in the Company Setup Options window to calculate the VAT tax for the payments made after the discount period. You can print the report before running the routine process or run the routine to update the tax details and then print the report.

You can use the Process and Print Report option to run the routine, update the tax details and print the report. Using this report, you can create debit memos towards the customers to offset the payments.

Other enhancements

Self Service User Type

A Self Service user type is added in the Dynamics GP 2015 R2 release. This user type will enable users that require very limited access to the system, the ability to perform tasks such as entering payroll time, entering project time and expenses, or creating a requisition.

Follow these steps to assign the Self-service user type to a user.

1. Click Administration >> Setup >> User.
2. Select the user ID of the user that you want to assign the self-service user type.
3. In the User Type field, select the self-service option. This option is displayed only if you have the Self Service license.

The following table describes the action that follows when you assign a user with self-service user type:

USER	SELF-SERVICE USER TYPE ASSIGNMENT POSSIBLE	MESSAGE DISPLAYED
POWERUSER	No	This user has been assigned access to the "POWERUSER" security role and cannot be defined as a Self Service Type. Please review the security that has been setup for this user

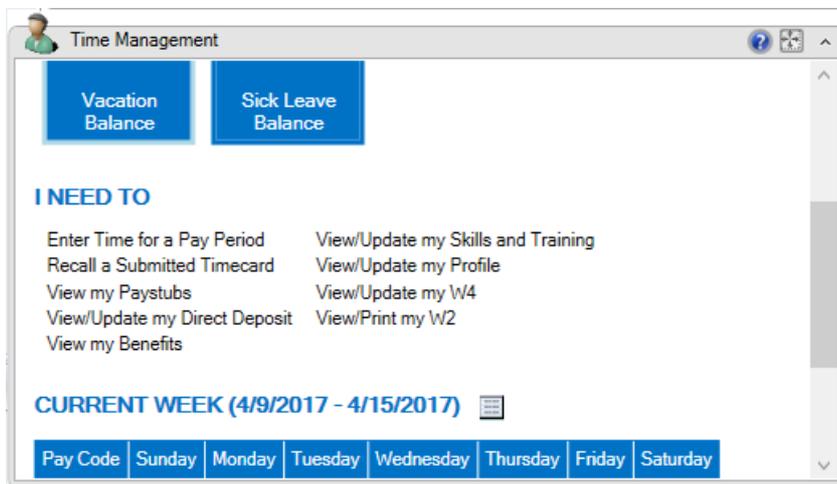
USER	SELF-SERVICE USER TYPE ASSIGNMENT POSSIBLE	MESSAGE DISPLAYED
Existing User	Yes	Setting this user to Self Service type will restrict the user to employee self-service tasks
New User	Yes	None

WARNING

When an existing user type is changed from self-service to Full or Limited user types, you will get a message to review the security set up for the user.

Employee Self Service – W2

Employees can now view and print their own W2. With Dynamics GP 2015 R2, this functionality is now available as part of Time Management self-service.



Time Management App

The Time Management App is available for download from the Windows Store, Google Play Store, or Apple Store. With this app, users can enter timecards within different companies that they access to within Dynamics GP 2015 R2. Within the navigation bar, users can see the companies that they have access to. The summary panel displays the pay codes, balances and active pay periods of the selected company.

Before you can use this app to create, view, modify, and/or submit timecards, you must configure your Dynamics GP 2015 R2 environment to integrate with the app.

If the accrue type is Payroll, the app allows you to enter time codes against vacation or sick time paycodes.

If the accrue type is HR, the app allows you to enter time against Time Codes that are setup as Benefit Time Types. A calendar within the app allows you to see what pay periods are active and shows you which codes and dates a user has entered time off against.

See Also

[What's New](#)

Installation checklist

10/18/2018 • 5 minutes to read

This section provides an overview of information you'll need during the installation process. It contains tips on gathering information and a checklist to guide you through installing Dynamics GP. Next to each step is a reference to where you can find more detailed information.

Dynamics GP checklist

Use this checklist as your guide to installing and setting up Dynamics GP

STEP	FOR MORE INFORMATION, SEE
1. Plan the security of your system.	Download the SecurityPlanning.pdf, titled Planning for Security, from the Download Center by expanding the Details option.
2. Refer to the this content for new or updated information relating to the installation. You also can use CustomerSource for additional information.	https://docs.microsoft.com/en-us/dynamics-gp/
3. View the Readme file and make a note of the items that pertain to you.	\\Media\GreatPlains\Documentation\GPReadme.chm
4. Obtain your need registration keys for Dynamics GP.	Contact your Dynamics GP partner before going to CustomerSource/My Account for registration keys for Dynamics GP. https://mbs.microsoft.com/customersource My Account
5. Verify system requirements.	System Requirements
6. Install a networking protocol.	Network Requirements
7. Install and set up Microsoft SQL Server.	Note: Make sure that you install Microsoft SharePoint if you want to use SharePoint Integrated Mode when deploying SQL Server Reporting Services reports.
8. Configure SQL Server Reporting Services.	This step is required if you didn't configure SQL Server Reporting Services 2012 in Native mode when installing SQL Server and you want to deploy SQL Server Reporting Services reports for Dynamics GP. If you installed SQL Server Reporting Services 2012 in SharePoint Integrated mode, use the SharePoint Central Administration to complete the configuration.
9. Design the account framework.	Account framework
10. Install Dynamics GP Tenant Services.	This step is required if you want to host Dynamics GP for multiple, unrelated organizations. Tenant Services Installation and Administration Guide
11. Install the data server and initial client.	Install Dynamics GP on the first computer

STEP	FOR MORE INFORMATION, SEE
12. Be sure to download and install the latest Dynamics GP update.	Dynamics GP Downloads
13. Set up the account framework and Dynamics GP system data tables.	Account framework
14. Create your first company.	Adding a company using Dynamics GP Utilities
15. Install additional components.	Installing an additional component
16. Set up your company.	System Setup instructions (Help >> Contents >> select Setting up the system)
17. Install Dynamics GP applications on clients.	Creating an installation package Installing Dynamics GP on additional computers Synchronizing a client's account framework Installing additional components
18. Identify the sources of any errors.	Knowledge Base on CustomerSource

Reviewing the Readme file

To view additional information that was not available when this manual was written, use the Readme file on the Dynamics GP media. Be sure to review the Readme file (GPReadme.chm) before installing Dynamics GP. You can view the Readme by double-clicking the file in \Media\GreatPlains\Documentation\GPReadme.chm.

Troubleshooting resources

To obtain access to information when you encounter a problem, you can use the following troubleshooting resources.

Documentation and resources on the web

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

Dynamics GP documentation

If you've installed Dynamics GP, you can use help to access context-sensitive assistance about windows. You can choose Help >> About This Window or press F1 to access help for the window you're currently viewing. Use the Search tab to find more information about alert messages and procedures.

You can choose Help >> Printable Manuals to find a printable version of procedural or overview information for specific modules.

To view and download documentation, visit the [Documentation Resources for Dynamics GP](#) page.

CustomerSource

CustomerSource is a Web site for registered Dynamics GP customers. CustomerSource is available 24 hours a day. You must have a user name and password to enter the site. You can access [CustomerSource](#) with your Internet browser.

From the CustomerSource start page, select the Support option. From the Support page, you can look for information on your own or you can use e-mail to send a question to the Dynamics GP Technical Support team.

You'll find links to Support Hot Topics and Knowledge Base—the best source of information for error messages,

troubleshooting guides, workarounds, and answers to common Report Writer questions. You'll also find links for automated fixes, hardware compatibility, and downloads. Use the New Support Request link to contact Dynamics GP Technical Support electronically. You also can view recent support requests for yourself and your company.

Microsoft SQL Server troubleshooting resources

Go to [the section for SQL here on the Docs.microsoft.com site](#) and find guidance for troubleshooting SQL error messages and other issues related to SQL. Microsoft's web site, www.microsoft.com, is also a good source of information for issues related to SQL or your operating system. You also can download Microsoft SQL Server Management Studio and SQL Server Books Online for Microsoft SQL Server Express Edition.

NOTE

SQL-related error messages appear as DBMS errors in Dynamics GP. Always use the SQL Server Books Online to troubleshoot DBMS errors. Choose the Search tab and enter the error number, then choose List Topics.

Before you call support

If you are experiencing a problem when installing Dynamics GP, have the answers ready to the following questions to help your support specialist narrow down the source of the problem you've experiencing.

- What is the exact error message?
- When did the error first occur?
- What task were you attempting to perform at the time the error message was displayed?
- Has the task been completed successfully in the past?
- What is the name of the window you are you working in?
- What have you done so far to attempt to fix the problem?
- If you are using more than one company, does the problem occur in another company?
- Does the problem occur on another workstation?
- What versions of software are you using?

Verify the version numbers for Dynamics GP, your Microsoft SQL Server, and Microsoft Windows. Also note updates applied to each product.

- Are you using an integrating product with Dynamics GP?
- Does the problem occur for the sa or system administrator user?
- Does the problem occur at the database server?
- If you use Windows Server 2008 Terminal Server, or Remote Desktop Services, does the same issue happen at the Terminal Server?

System requirements

10/18/2018 • 6 minutes to read

This chapter contains a list of the prerequisites for Dynamics GP, as well as the disk space requirements for SQL Server.

Prerequisites

The following components also must be installed before you can install Dynamics GP.

- Microsoft Windows Installer 4.5
- Microsoft .NET Framework 3.5
- Microsoft .NET Framework 4.6
- Visual C++ 2015 Runtime Libraries (x64)
- Visual C++ 2015 Runtime Libraries (x86)
- Visual Basic for Applications Core
- Microsoft SQL Server Native Client 10.0
- Dexterity Shared Components 18.0
- Microsoft Application Error Reporting 11.0
- Open XML SDK 2.0 for Microsoft Office
- Microsoft Lync 2010 SDK Runtime

If one of these components isn't installed on your computer when you attempt to install Dynamics GP using the installation media, the Dynamics GP Bootstrapper Setup window opens. This window shows which components need to be installed. Click Install to install the missing component or components. After all the components are installed, the installation of Dynamics GP continues.

Home page prerequisites

To display metrics and reports in the Business Analyzer area on your home page, install and set up Microsoft SQL Server 2012 Reporting Services or SQL Server 2014 Reporting Services to use with Dynamics GP. For more information about installing and setting up Reporting Services for use with Dynamics GP, go to the [Dynamics GP documentation resource website](#) for the most current documentation.

Word templates prerequisites

Predefined Word templates for document types such as sales quotes and purchase orders are provided for you with Dynamics GP. The templates are based on standard reports in Dynamics GP. You also can create your own template or create a template from an existing template.

The following components are required to modify templates.

- Microsoft Word 2013 or later to make layout changes such as changing the font size
- Dynamics GP Add-in for Microsoft Word to add fields and data sources to the template

- Visual Studio Tools for Office Runtime 2.0 or later—Visual Studio Tools for Office Runtime 3.0 is installed with Dynamics GP Add-in for Microsoft Word

You can install Dynamics GP Add-in for Microsoft Word from the Dynamics GP installation media. Double-click the Setup.exe file and then click Dynamics GP Add-in for Microsoft Word.

Be sure that the Open XML SDK 2.0 for Microsoft Office (installed as a Dynamics GP prerequisite) is installed before you use Word Templates for Dynamics GP.

Email requirements

By using the email functionality in Dynamics GP, you can embed documents into the body of the email or send documents as attachments. You can send a single document, batches of documents, or send multiple documents from sales and purchasing transaction lists. When setting up the email functionality, you can select which documents you can send and which customers and vendors should receive their documents in email. If you are using Word templates for Dynamics GP, you can send predefined or customized forms.

Review the following requirements.

- You can send documents by email if you're using a MAPI-compliant e-mail service or Exchange 2007 Service Pack 1 or greater with Exchange Web Services.
- If you are using Exchange 2007 Service Pack 1 or greater with Exchange Web Services, the Autodiscover service must be enabled to connect to the Exchange server.
- The email functionality in Dynamics GP supports the following document types. Depending on the document type and the email service, Microsoft Word 2013 or later and Word templates for Dynamics GP are required.

FILE FORMAT	WORD	WORD TEMPLATES	WEB CLIENT
XPS	Required for MAPI	Enabled	Not available
PDF	Required for MAPI	Enabled	Not available
DOCX	Not required	Enabled	Available*
HTML	Not required	Not required	Available*

*E-mail for Dynamics GP Web Client will only be available if Exchange is your server type in the System Preferences window.

- Before you can send documents as DOCX, PDF, or XPS attachments, the Word template for the document must be enabled in the Template Configuration Manager window.
- The email functionality is supported on the 32-bit edition of Microsoft Office.
- The email functionality is supported on the 64-bit edition of Microsoft Office if you are using Exchange 2007 Service Pack 1 or greater with Exchange Web Services and Exchange is your server type in the System Preferences window.

Depending on the file format you choose to send your documents in email, your customers and vendors must be using the following components to view their documents.

FILE FORMAT	COMPONENT
XPS	Microsoft XPS Viewer
PDF	Adobe Reader
DOCX	Microsoft Word Viewer
HTML*	Internet Explorer 8 or later
If you are using Dynamics GP Web Client only, your customers and vendors must be using HTML to view their documents.	

SQL Server Reporting Services requirements

Before you deploy Dynamics GP Reporting Services reports, you must install and configure SQL Server Reporting Services, and then set up security for SQL Server Reporting Services reports.

Modify the Report Server web.config file

To deploy the SQL Server Reporting Services reports, you must modify the Report Server web.config file for the timeout execution and the maximum request length. If you don't update the Report Server web.config file for the timeout execution, you might receive an error that states that the operation has timed out. If you don't update the Report Server web.config file for the maximum request length, you will receive an error that the deployment has exceeded the maximum request length allowed by the target server.

NOTE

You must be an administrator to modify the Report Server web.config file.

To modify the Report Server Web.config file:

1. Create a backup copy of the web.config file located in the ReportServer folder. (The ReportServer folder is located in C:\Program Files\Microsoft SQL Server\MS SQL SERVER\Reporting Services\Report Server where Reporting Services is installed.)
2. Open the Report Server web.config file using a text editor, such as Notepad.
3. Search for `<httpRuntime executionTimeout="9000" />`.
4. In that line, change `executionTimeout="9000"` to `executionTimeout="19000"` and add the value `maxRequestLength="20960"`.

```
(<httpRuntime executionTimeout="19000" maxRequestLength="20960"/>
```

5. Save and close the Report Server web.config file.

Dynamics GP CRM requirements

You must be using SQL Server 2012 R2 Reporting Services or SQL Server 2014 Reporting Services and Microsoft Dynamics CRM 2011 or later to deploy SQL Server Reporting Services reports and metrics that include CRM data. Microsoft Dynamics CRM supports only the native mode of deployment of SQL Server Reporting Services.

You must install the Microsoft Dynamics CRM Reporting Extensions on the Dynamics GP report server to render reports. Before you render a SQL Server Reporting Services report with CRM data, be sure to start the Microsoft

Dynamics CRM application to initialize data.

Supported system requirements

For detailed system requirements for Dynamics GP, see [System requirements for Dynamics GP 2016](#). The system requirements include supported databases and operating systems, hardware recommendations, client requirements, and Terminal Server requirements.

Recommended system requirements depend on the number of users and transactions. If there will be many users performing concurrent tasks, such as depreciation, posting, or heavy reporting, enhancing your hardware and system software improves performance.

About remote access

You can use Windows Server 2012 Terminal Services, Windows Server 2012 R2 Remote Desktop Services, and Windows Server 2012 Remote Desktop Services. Citrix Xenapps can also be used with most database configurations to provide remote access to Dynamics GP in a Wide Area Network (WAN) environment.

For more information about system requirements see <https://go.microsoft.com/fwlink/?LinkId=521785>. You also should refer to the documentation provided by Citrix for more information.

Network configuration

10/18/2018 • 2 minutes to read

This chapter contains information about network configuration that must be in place before installing Dynamics GP.

Domain

To use Dynamics GP, your Web server, back office server, Remote Desktop Services (if applicable), and client workstations must belong to a domain.

A domain is a group of computers that are part of a network and share a common directory database. A domain is administered as a unit with common rules and procedures. Each domain has a unique name.

Network protocol tuning

To optimize your network for Microsoft SQL Server and Dynamics GP, refer to the following guidelines.

- Limit the network to one protocol. (TCP/IP is required.)
- Remove unused network protocols.
- Use 1 GB Ethernet for optimal performance. For more information, see [System requirements](#).
- Use switches rather than hubs, if optimal performance is required.

TCP/IP

Transport Control Protocol/Internet Protocol (TCP/IP) is required for Dynamics GP.

If you're using TCP/IP, review the information in this section to be sure that the network is set up properly. Then use your networking protocol documentation to install and test the protocol on all clients and servers before you install Dynamics GP.

IP addresses

Each computer that you use with Dynamics GP must have a unique IP number (Internet Protocol address) associated with it. For more information about IP addresses, consult your network administrator or refer to your networking protocol software documentation.

TCP/IP name resolution

You should use some type of name resolution in your network, so that each computer is identified by a unique host name. Name resolution is a method of identifying each computer and can be accomplished by having a specific server act as a domain name server or putting a hosts file on each client and server.

For more information about name resolution using either a domain name server or hosts files, consult your network administrator or refer to your networking protocol software documentation.

Testing TCP/IP connectivity

To test connectivity between clients and servers, use an application distributed with most TCP/IP packages called ping. The ping application will attempt to send a network message or set of messages to a designated computer and inform you whether the message arrived at that computer. Be sure you ping the host name and the ID address of every computer in your system before installing Dynamics GP.

Microsoft SQL Server configuration

10/18/2018 • 13 minutes to read

This chapter guides you through the Microsoft SQL Server 2012 and the Microsoft SQL Server 2012 Express Installation and setup process for Dynamics GP. It's important that you install and set up Microsoft SQL Server according to these instructions.

If you've already installed and set up SQL Server using different options, you may have to change those options. Changing options after they've been set sometimes involves reinstalling SQL Server.

This chapter contains the following sections:

- [SAN and NAS disk support](#)
- [Selecting a SQL Server collation](#)
- [Understanding sorting options](#)
- [Installing Microsoft SQL Server 2012](#)
- [Installing Microsoft SQL Server 2012 Express Edition](#)
- [Setting up an ODBC data source using the SQL Native Client driver](#)
- [SQL Server Agent](#)
- [Enabling Delete PJournal job](#)

SAN and NAS disk support

Because Dynamics GP relies on SQL Server to maintain databases and make databases available, there are guidelines you must follow when configuring SQL Server disk support.

We recommend that you use a Storage Area Network (SAN) or locally attached disk to store your Microsoft SQL Server database files because this configuration optimizes SQL Server performance. By default, use of network database files stored on a networked server or Network Attached Storage (NAS) is not enabled for SQL Server. However, you can configure SQL Server to store a database on a networked server or NAS storage server. Servers used for this purpose must meet SQL Server requirements for data write ordering and write-through guarantees.

If you are using Microsoft SQL Server Express Edition, SAN and NAS disk support isn't typically used.

For more information, see Microsoft Knowledge Base article, "Description of support for network database files in SQL Server," (go to <https://support.microsoft.com> and search for the article) or contact the SQL Server Support Team.

Selecting a SQL Server collation

A SQL Server collation—a set of rules that determines how character data is sorted and compared—includes character set, sort order, and locale-specific settings. See your SQL Server 2012 documentation for more information about collation settings.

The SQL Server collation you select determines how information is presented in response to SQL queries and affects the performance of the system.

The code page for character data is defined by the Windows locale selected when the operating system was

installed. The code page contains the valid set of characters in your SQL Server database. A character set consists of 256 uppercase and lowercase letters, numbers, and symbols. The first 128 characters are the same for all character sets. The supported character set in the United States is the 1252/ ISO character set.

It is important to select the correct collation for Dynamics GP when you're installing SQL Server. Using SQL Server collations that include Binary (sort order 50) or Dictionary Order, Case-Insensitive (sort order 52) sorting is required for Dynamics GP. To change these settings later, you must reinstall SQL Server and Dynamics GP.

NOTE

You should check the compatibility of all the products you have that will use SQL Server before deciding on the collation option.

Understanding sorting options

Using SQL Server collations that include Binary (sort order 50) or Dictionary Order, Case-Insensitive (sort order 52) sorting is required.

Binary sort order assigns characters numeric values of 0 through 255. Dictionary Order, Case-Insensitive (DOCI) sort order makes no distinction between uppercase and lowercase characters. DOCI is the most common sort order.

The following table shows the differences between Dictionary Order, Case- Insensitive and Binary.

SORT ORDER	TECHNICAL NAME	SORTING RESULT
Dictionary Order, Case- Insensitive	SQL_Latin1_General_CP1_CI_AS	McMaster MMCompanyName Zebra
Binary	Latin1_General	MMCompanyName Zebra

Installing Microsoft SQL Server 2012

We recommend that you follow the instructions in this section if you have not yet installed Microsoft SQL Server 2012. For information about upgrading SQL Server, see the SQL Server installation documentation. (In the window that appears when you insert the SQL Server DVD, select Browse Setup/Upgrade Help.)

NOTE

With SQL Server 2012, you can have multiple instances of SQL Server on the same physical server. We recommend that you have a dedicated a server. See your SQL Server 2012 documentation for more information about multiple instances.

To install Microsoft SQL Server 2012:

1. Insert the SQL Server 2012 installation media. The main SQL Server installation screen should appear. If you do not see this screen, browse the media and double-click the Setup.exe file.
2. After the SQL Server Installation Center appears, click Installation in the left pane. Then, click New SQL Server stand-alone installation or add features to an existing installation.
3. Your computer is scanned for conditions that may stop installation. To proceed with the installation, click OK in the Setup Support Rules window.
4. In the Product Key window, enter the product key. Click Next.
5. Mark the option to accept the terms of the license terms and then click Next.

6. SQL Server setup files are installed on your computer. To proceed with the installation, click Next in the Setup Support Rules window.
7. In the Setup Role window, select SQL Server Feature Installation, and click Next.
8. In the Feature Selection window, select the features you want to use and specify the location to install SQL Server 2012. You should install at least the following features to use Dynamics GP.
 - Database Engine Services
 - Client Tools Connectivity
 - Client Tools Backwards Compatibility
 - Documentation Components
 - Management Tools – Basic

NOTE

Select Reporting Services – Native or Reporting Services – SharePoint to use SQL Server Reporting Services reports, display SQL Server Reporting Services metrics on your home page in Dynamics GP, and display SQL Server Reporting Services reports in Microsoft Dynamics Business Analyzer. If you have marked Reporting Services – SharePoint, be sure to mark Reporting Services Add-in for SharePoint Products as well. For more information about installing and setting up SQL Server Reporting Services for use with Dynamics GP see the [Documentation and resources for Dynamics GP](#) site for the most current documentation.

Click Next.

9. Your computer is scanned again for conditions that may stop installation. To proceed with the installation, click Next in the Installation Rules window.
10. In the Instance Configuration window, select a default or named instance for your installation.
 - To install a new default instance (the primary instance on the computer), select Default instance and click Next. There can be only one default instance.
 - To install a named instance, select Named instance and then enter a unique instance name. Click Next.
 - If a default or named instance is already installed, select the existing instance for your installation and click Next. The instance upgrades and you will have the option to install additional components.

For information about using instances of SQL Server, see your SQL Server documentation. We recommend that you have a dedicated server.

11. The required disk space is calculated. Click Next.
12. In the Services Accounts tab, we recommend that you use the same account for each service and automatically start services.
13. In the Collation tab, click the Customize button for the Database Engine.
14. In the Customize the SQL Server 2012 Database Engine Collation window, you can select Binary or Dictionary Order, Case-Insensitive as the sorting option. For more information, see [Selecting a SQL Server collation](#).

WARNING

Check the compatibility of all the products, such as Business Portal for Dynamics GP and Workflow, you have that will use SQL Server before deciding on the collation option.

Binary To use Binary sorting, use the Windows Collation designator and sort order option and make the following selections in the window.

Customize the SQL Server 2012 Database Engine Collation

Select the collation you would like to use:

Windows collation designator and sort order

Collation designator: Latin1_General

Binary Binary-code point

Case-sensitive Kana-sensitive

Accent-sensitive Width-sensitive

Supplementary characters

SQL collation, used for backwards compatibility

SQL_Hungarian_CP1250_CS_AS
SQL_Icelandic_Pref_CP1_CI_AS
SQL_Latin1_General_CP1_CI_AI
SQL_Latin1_General_CP1_CI_AS
SQL_Latin1_General_CP1_CS_AS

Collation description:
Latin1-General, case-insensitive, accent-sensitive, kanatype-insensitive, width-insensitive for Unicode Data, SQL Server Sort Order 52 on Code Page 1252 for non-Unicode Data

OK Cancel

Dictionary Order, Case-Insensitive To use Dictionary Order, Case-Insensitive sorting, choose SQL collation, used for backwards compatibility option and make the following selections in the window.

Customize the SQL Server 2012 Database Engine Collation

Select the collation you would like to use:

Windows collation designator and sort order

Collation designator: Latin1_General

Binary Binary-code point

Case-sensitive Kana-sensitive

Accent-sensitive Width-sensitive

Supplementary characters

SQL collation, used for backwards compatibility

SQL_Hungarian_CP1250_CS_AS
SQL_Icelandic_Pref_CP1_CI_AS
SQL_Latin1_General_CP1_CI_AI
SQL_Latin1_General_CP1_CI_AS
SQL_Latin1_General_CP1_CS_AS

Collation description:
Latin1-General, case-insensitive, accent-sensitive, kanatype-insensitive, width-insensitive for Unicode Data, SQL Server Sort Order 52 on Code Page 1252 for non-Unicode Data

OK Cancel

Click OK after you make your selections, and then click Next.

15. In the Database Engine Configuration window, select Mixed Mode as the authentication mode in the Server Configuration tab. Mixed Mode is required by Dynamics GP.

With Mixed Mode, users can connect using Windows Authentication or SQL Server Authentication. You must enter and confirm the system administrator password when you select Mixed Mode. You'll use this is

the password to log in to Dynamics GP Utilities as the system administrator.

You must specify at least one system administrator. To add the account, click Add Current User to add accounts to the list of system administrators.

Click Next.

16. If you selected to install Reporting Services, use the Reporting Services Configuration page to specify the type of Reporting Services installation to create. Click Next.
17. In the Error Reporting window, select to allow error reporting. Click Next.
18. Your computer is scanned again for conditions that may stop installation. To proceed with the installation, click Next in the Installation Configuration Rules window.
19. In the Ready to Install window, review the list of components that will be installed and click Install.
20. The Installation Progress window appears, allowing you to view the status of the installation. Click Next after the installation is completed.
21. In the Complete window, click Close to exit the installation wizard.
22. Restart the computer if you are instructed to do so.
23. Install the current SQL Server 2012 service pack. See the [Microsoft Download Center](#) for the latest service pack information.

Installing Microsoft SQL Server 2012 Express Edition

Microsoft SQL Server 2012 Express Edition has a maximum database size of 10 GB. You can download Microsoft SQL Server 2012 Express from www.microsoft.com. Be sure to download SQL Server 2012 Express with data management tools. You can download SQL Server 2012 Books Online for SQL Server Express from www.microsoft.com.

Use the information in this section to install Microsoft SQL Server 2012 Express on your computer.

To install Microsoft SQL Server 2012 Express Edition:

1. Download SQL Server 2012 Express with data management tools.
2. A dialog window appears, showing the progress of the files being extracted.
3. After the files have been extracted, the SQL Server Installation Center appears.
4. Click New installation or add features to an existing installation.
5. Mark the option to accept the terms of the License Agreement and then click Next.
6. The Setup Support Rules window appears while your computer is scanned again for conditions that may stop installation.
7. In the Feature Selection window, select the features you want to use and specify the location to install SQL Server 2012 Express. Click Next.
8. In the Instance Configuration window, select a default or named instance for your installation.
 - To install a new default instance (the primary instance on the computer), select Default instance and click Next. There can be only one default instance.
 - To install a named instance, select Named instance and then enter a unique instance name. Click Next.
 - If a default or named instance is already installed, select the existing instance for your installation and

click Next. The instance upgrades and you will have the option to install additional components.

For information about using instances of SQL Server, see your SQL Server documentation. We recommend that you have a dedicated server.

9. In the Services Accounts tab, we recommend that you use the same account for each service and automatically start services. Click Use the same account for all SQL Service services to open a window where you can enter a user name and password. Click OK to return to the Server Configuration window.
10. In the Account Provisioning tab, select Mixed Mode as the authentication mode. Mixed Mode is required by Dynamics GP.

With Mixed Mode, users can connect using Windows Authentication or SQL Server Authentication. You must enter and confirm the system administrator password when you select Mixed Mode. You'll use this as the password to log in to Dynamics GP Utilities as the system administrator.

You must specify at least one system administrator. To add the account, click Add Current User to add accounts to the list of system administrators.

Click Next.

11. In the Error Reporting window, select to allow error reporting. Click Next.
12. The Installation Progress page appears, allowing you to view the status of the installation.
13. In the Complete window, click Close to exit the installation wizard.
14. Restart the computer if you are instructed to do so.
15. Install the current SQL Server 2012 Express service pack. See the [Microsoft Download Center](#) for the latest service pack information.

Setting up an ODBC data source using the SQL Native Client driver

You must set up a 32-bit Open Database Connectivity (ODBC) data source using SQL Native Client or SQL Native Client 10 on your computer. If you are using SQL Server 2012, you must set up a 32-bit Open Database Connectivity (ODBC) data source using SQL Native Client or SQL Native Client 11 on your computer. Use these instructions to enter the appropriate setup information for ODBC for SQL Server.

If you are using a 64-bit operating system, you must set up a 32-bit ODBC data source. For instructions on how to set up a data source for a 64-bit operating system, see the Microsoft Knowledge Base article [How to set up an ODBC Data Source on SQL Server for Dynamics GP](#).

To set up an ODBC data source using the SQL Native Client driver:

1. Open the ODBC Data Source Administrator window.
2. Select the System DSN tab and choose Add.
3. In the Create New Data Source window, select SQL Native Client, SQL Native Client 10.0, or SQL Native Client 11.0 from the list and choose Finish.

The options in the list depend on the version of SQL Server you are using.

4. In the first Create a New Data Source to SQL Server window, enter the following information.

FIELD	VALUE
Name	Enter the name to use for the data source. This name will be stored in the Odbc.ini file.

FIELD	VALUE
Description	Enter a description of the data source.
Server	Enter the name you assigned to the SQL Server when you installed Microsoft SQL Server.

Choose Next.

In the second Create a New Data Source to SQL Server window, select With SQL Server authentication using a login ID and password entered by the user option as how to verify the login ID.

6. Enter sa as the login ID and enter a password. Choose Next.
7. In the third Create a New Data Source to SQL Server window, be sure that all the options are unmarked and choose Next.
8. In the fourth Create a New Data Source to SQL Server window, be sure that all the options are unmarked. Choose Finish.
9. In the ODBC Microsoft SQL Server Setup window, verify your settings and choose OK. You can also choose the Test Data Source button to test it before choosing OK.

SQL Server Agent

When you install Dynamics GP on the server, an automated database maintenance job is created. SQL Server Agent is used to run automated jobs.

Be sure that the SQL Server Agent service is set up to start automatically with the operating system if you are using Microsoft SQL Server. In SQL Server Service Manager, select SQL Server Agent from the list of services and mark the Auto-start service when OS starts option.

Jobs are customizable, and you can select how frequently they should be completed. You may want certain jobs to run every half hour, while others should run once at night. For more information on scheduling jobs, refer to Microsoft SQL Server Books Online.

SQL Server Agent is not available for SQL Server Express. For information about how to schedule backups for SQL Server Express, see the Microsoft Knowledge Base article [How to schedule and automate backups of SQL Server databases in SQL Server Express](#).

Microsoft SQL Server 2008 Express doesn't include SQL Server Agent. Refer to [Support Hot Topic on CustomerSource](#) for more information about scheduling a backup.

Enabling Delete PJournal job

The Delete PJournal job is created during the installation of Dynamics GP. By enabling the Delete PJournal job, the speed of the posting process is increased.

To enable Delete PJournal job using SQL Server

Management Studio:

1. Open SQL Server Management Studio by choosing Start >> Programs >> Microsoft SQL Server >> SQL Server Management Studio.
2. Log in to Microsoft SQL Server.
3. Expand SQL Server Agent, and click Jobs.

If you are using SQL Server 2012, expand Jobs.

4. Right-click on Remove Posted PJournals for your company database and click Properties to open the Properties window.
5. Unmark and mark the Enable option.
6. Click Apply and then click OK.

Account framework

10/18/2018 • 6 minutes to read

Use the information in this chapter to plan your account framework for your company. A framework is a set of maximum values, such as maximum segment lengths that each of your company's account formats must fit within. The account framework is very difficult to change later after it's set up.

WARNING

The account framework you enter in the Dynamics GP Utilities will be used for the account format in all companies you're planning to set up.

Understanding the account framework

The framework you'll enter includes maximums for the account length, the number of account segments, and the length of each segment. These maximums will be used for the account format in all companies you're planning to set up. You'll enter the specific account format for each company when you access Dynamics GP and set up the company.

Maximums you enter for account framework during installation will apply to additional companies you set up later. For example, you could enter the account framework maximums shown in the following table during the installation process.

ACCOUNT FRAMEWORK EXAMPLE	
Maximum account length	20
Maximum number of segments	3
Length of segment 1	7
Length of segment 2	10
Length of segment 3	3

With these maximums for the account framework defined during installation, you wouldn't be able to set up the following account format for a company.

INVALID ACCOUNT FORMAT FOR THE CORRESPONDING FRAMEWORK	
Maximum account length	20
Maximum number of segments	3
Length of segment 1	8
Length of segment 2	9

INVALID ACCOUNT FORMAT FOR THE CORRESPONDING FRAMEWORK	
Length of segment 3	3

Although the maximum account length and number of segments is within the limit, this account format is invalid because the length of the first segment—8—exceeds the segment maximum that was defined during installation.

Using a custom or default account framework

You can design your account framework or use a default account framework. The account framework applies to all companies in your Dynamics GP system, and represents the maximum length of your accounts, number of segments, and segment lengths. The account framework is very difficult to change later after you set it up using Dynamics GP Utilities.

To use the default account framework, you'll select Basic as the installation option in Dynamics GP Utilities after you install Dynamics GP. The Basic option also provides default settings for your system database and system password. For more information, see [Installation options in Dynamics Utilities](#).

The following is the account framework for a basic installation.

MAXIMUM NUMBER OF SEGMENTS	5
Length of each segment	9
Account preview	xxxxxxxx-xxxxxxxx-xxxxxxxx-xxxxxxxx-xxxxxxxx
Sorting options	No sorting options by segment

If you decide that the basic installation's default account framework fits your business needs, you don't need to plan your account framework before you install Dynamics GP and use Dynamics GP Utilities.

If you decide not to use the default framework, review the sections [Planning your account framework](#) and [Choosing account framework storage size](#) to plan your account framework before you install Dynamics GP. After you design your account framework and install Dynamics GP, you'll select Advanced as the installation option in Dynamics GP Utilities. Use Dynamics GP Utilities to enter a framework for the account formats that will be used by all companies you'll set up in Dynamics GP.

Planning your account framework

When planning an account framework, think about the account format you've used with your previous accounting system and consider future expansions and the account format for additional companies you may add to your system later. Plan the maximum number of segments you'll use in any company, and the maximum length of each segment.

WARNING

It's important to consider what your current and future needs are for the framework; after you've entered the framework, it's unlikely that you'll be able to change it. If you find that you need to change your account framework, contact your reseller or Dynamics GP Technical Support.

To use one of the default charts of accounts provided with Dynamics GP, set up the account framework with maximums that are at least the size listed below.

MINIMUM ACCOUNT FRAMEWORK FOR USE WITH SAMPLE COMPANY	SIZE
Maximum account length	At least 9 characters
Maximum number of segments	At least 3 segments
Length of segment 1	At least 3 characters
Length of segment 2	At least 4 characters
Length of segment 3	At least 2 characters

If you have more than one company, you may need to enter maximum segment lengths that exceed the 66-character account length maximum when the segment lengths are added together. Assume that you have two companies using the account formats shown in the following table.

ACCOUNT FORMAT	COMPANY 1	COMPANY 2
Account length	66	66
Number of segments	3	3
Length of segment 1	10	20
Length of segment 2	40	30
Length of segment 3	15	15

In this case, you'd enter the following account framework maximums.

ACCOUNT FRAMEWORK ACCOMMODATING BOTH ACCOUNT FORMATS	
Maximum account length	66
Maximum number of segments	3
Length of segment 1	20
Length of segment 2	40
Length of segment 3	15

Notice that the total of the three segment lengths—75—exceeds the maximum account length—66. However, the account format for each company is within the account framework maximum.

Choosing account framework storage size

You will need to consider the storage size that is required by each segment. The storage size is made up of segment units—a unit of measure that determines the size of each segment. In Dynamics GP, the storage size is calculated automatically when you enter each segment, though it isn't displayed. A message will be displayed if your framework exceeds the allowable storage size.

Each segment uses one or two segment units for storage, depending upon whether it's an odd or an even-numbered segment. These units will be added to the total length of all segments. When the maximum account length is set, the total of all segments units must be 82 or less. For example, assume that an account has two 5-character segments and seven 8-character segments, the total storage size will be 82 (one unit is added to each of the five character segments because 5 is an odd number and two units must be added to each of the 8-character segments because 8 is an even number). This example would be calculated as shown in the following table.

SEGMENT	SEGMENT LENGTH	SEGMENT UNITS	TOTAL SIZE
1	5	1	6
2	5	1	6
3	5	1	6
4	8	2	10
5	8	2	10
6	8	2	10
7	8	2	10
8	8	2	10
9	8	2	10
Total	66	16	82

Based on the previous example, if you use an account framework with two 5-character segments and eight 8-character segments, it would not be valid because the total would be 92, or ten greater than the maximum allowed, as shown in the following table.

SEGMENT	SEGMENT LENGTH	SEGMENT UNITS	TOTAL SIZE
1	5	1	6
2	5	1	6
3	5	1	6
4	8	2	10
5	8	2	10
6	8	2	10
7	8	2	10
8	8	2	10
9	8	2	10

SEGMENT	SEGMENT LENGTH	SEGMENT UNITS	TOTAL SIZE
10	8	2	10
Total	66	16	82

However, if you use all odd-numbered segment lengths, you can incorporate larger segments in your account framework because odd-numbered segment lengths use only one segment unit each. For example, you could use ten 7-character segments in your account framework, which provides a total length of 70 characters, and a total size of 80.

See also

[Installation checklist](#)

Install Dynamics GP on the first computer

10/18/2018 • 4 minutes to read

Use the information in this chapter to install Dynamics GP on the first computer.

Installation overview

In a multiuser local area network environment, Dynamics GP applications are typically installed on a server, and then on each client. However, Dynamics GP is not required to be installed on the server. Each client will have access to data stored on the server. You can install your clients using the Dynamics GP media or using a client installation package. For more about creating an installation package for your clients, see [Creating an installation package](#).

Installing Dynamics GP (first computer)

Before beginning the installation, be sure you've completed the installation preparation steps listed in Part 1, Preparation, and that no other applications are running.

To install Dynamics GP (first computer):

1. Be sure that you're logged in to Windows as a user with system administrator privileges.
2. From the Dynamics GP installation media, double-click the Setup.exe file to open the Dynamics GP installation window.
3. If one or more of the following components isn't installed on your computer, the Dynamics GP Bootstrapper Setup window opens and you can choose to install the missing component or components.
 - Dexterity Shared Components 18.0
 - Microsoft Application Error Reporting 11.0
 - Microsoft Lync 2010 SDK Runtime
 - Microsoft SQL Server Native Client 11.0
 - Microsoft Windows Installer 4.6
 - Microsoft .NET Framework 3.5
 - Microsoft .NET Framework 4.5
 - Open XML SDK 2.0 for Microsoft Office
 - Visual C++ 2015 Runtime Libraries
 - Visual Basic for Applications Core

After all the components are installed, you may need to restart your computer before continuing the installation of Dynamics GP.

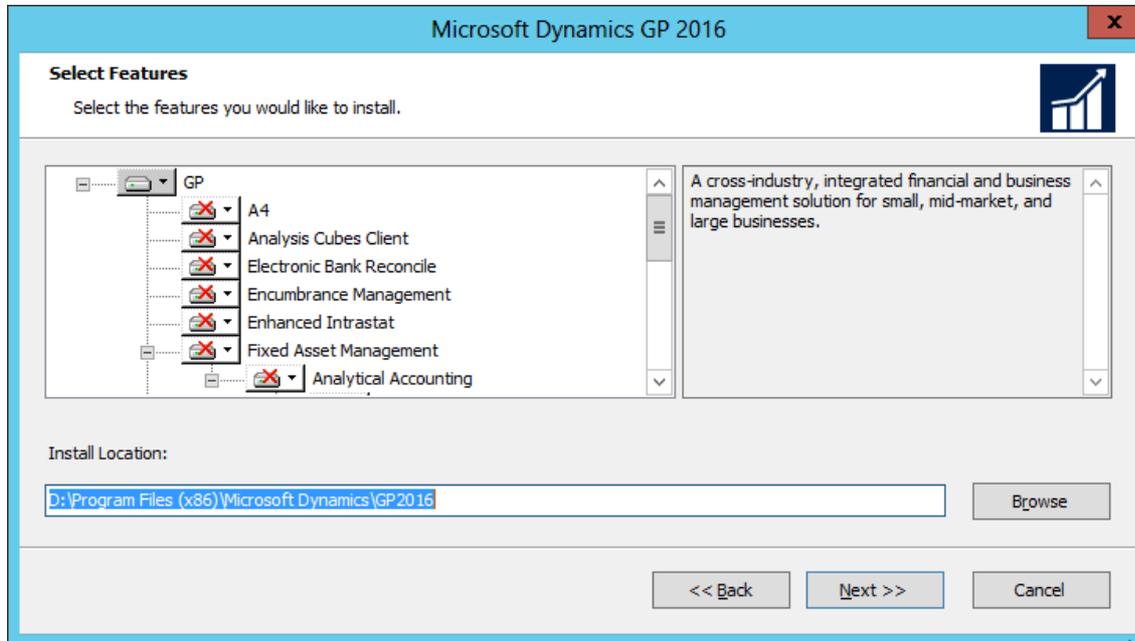
4. Click Dynamics GP.

The installation program verifies that your system has the minimum operating system required to run Dynamics GP. If your system does not meet requirements, the installation will not continue.

5. If you are installing Dynamics GP on a computer with an existing instance of Dynamics GP, select the

Create new instance option, enter a name for the new instance, and then click Next.

6. In the Country/Region Selection window, select the primary country or region where you do business. Your selection affects which features are available to install. Some features are available only in selected countries or regions. Click Next.
7. Follow the instructions in the window to accept the software license agreement. To install Dynamics GP, you must accept this agreement and click Next.
8. In the Select Features window, select the features to install.



When you click a button for a feature, a pop-up menu of options appears. Refer to the table for more information about each option.

OPTION	WHAT HAPPENS
 Run from My computer	The selected feature will be installed on the local hard disk. (This option installs the feature, but not sub-features.)
 Run all from My computer	Will install the feature and all of its sub-features.
 Not available	Will not install the selected feature or sub-features.

9. Specify the folder where you want the Dynamics GP files installed. The default folder is C:\Program Files\Microsoft Dynamics\GP 2018. To select a different folder, click Browse.

After you have specified the installation folder, click Next.

10. Provide the Windows account that will be used as the service account for the Service Based Architecture feature. This dialog is only displayed if you selected to install the Service Based Architecture feature on the Select Features dialog.

11. In the SQL Server window, you can set up an ODBC data source, enter the name you assigned to the SQL Server when you installed Microsoft SQL Server. A data source name called Dynamics GP also is created using SQL Native Client.

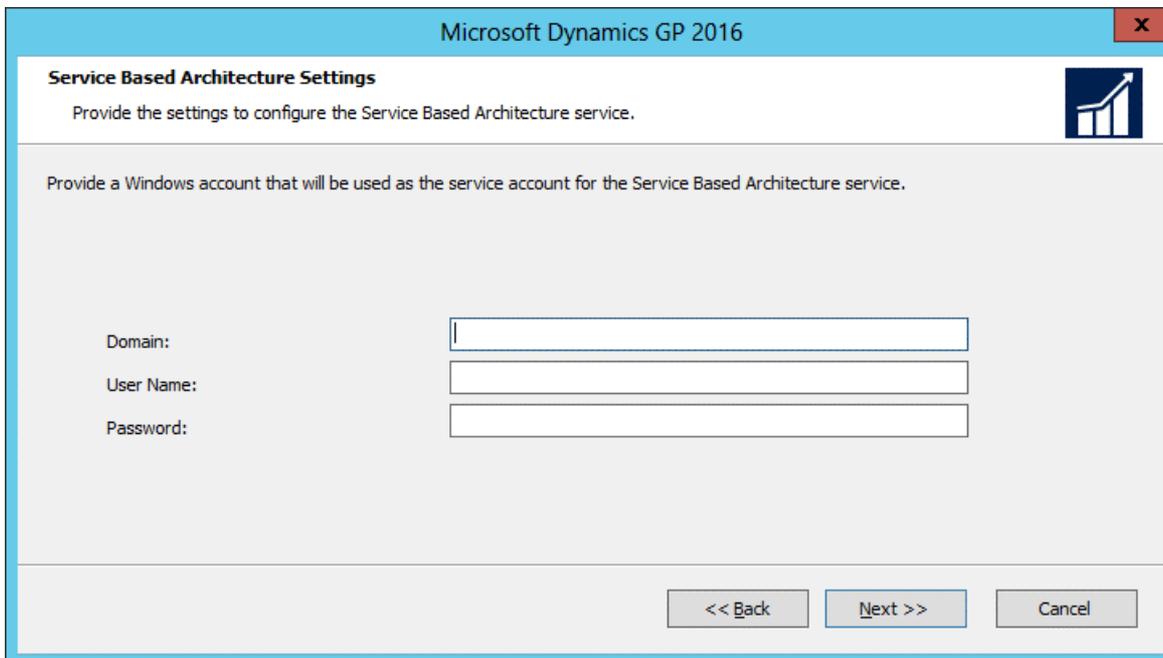
If you don't want to set up an ODBC data source, mark the Do not create a data source option.

12. Select to use DYNAMICS as the system database name or enter a different name for the system database name.

By entering a custom name for the system database, you can have multiple system databases on the same SQL Server instance. You cannot change the system database name in Dynamics GP Utilities.

Click Next.

13. If you have selected to install the Service Based Architecture feature, provide the Windows account that will be used as the service account for the Service Based Architecture service.



Microsoft Dynamics GP 2016

Service Based Architecture Settings

Provide the settings to configure the Service Based Architecture service.

Provide a Windows account that will be used as the service account for the Service Based Architecture service.

Domain:

User Name:

Password:

<< Back Next >> Cancel

The Service Based Architecture feature will create a Windows service on the computer. The Windows account provided will be the identity used for this service.

14. In the Install Program window, click Install.
15. The Installation Progress window appears, where you can view the status of the installation.
16. In the Installation Complete window, click Exit.
17. Before you start Dynamics GP Utilities, check for and install current update for Dynamics GP. See [CustomerSource](#) for the latest update information.

NOTE

To start Dynamics GP Utilities, you must have appropriate user privileges. Typically, this means being part of the Administrators group or the Power Users group. If you are using an operating system that has User Account Control (UAC) enabled, you will be prompted to run the program as a user with administrative privileges. Refer to your operating system's documentation for more information.

18. Start Dynamics GP Utilities. Choose Start >> All Programs >> Microsoft Dynamics >> GP 2018 R2>> GP Utilities.
19. Follow the instructions in [Using Dynamics GP Utilities](#). You can use the Dynamics GP Utilities windows to set up your account framework and the Dynamics GP system data tables, and to create your companies.
20. After using Dynamics GP Utilities, you can install additional features or components that add specialized functionality to your Dynamics GP system on the server computer. See [Installing additional components](#) for more information.

Installing Dynamics GP on subsequent computers

10/18/2018 • 5 minutes to read

Use the information in this chapter to install Dynamics GP on each client computer. You also use Dynamics GP Utilities to synchronize the Dynamics GP dictionary on each additional client with your account framework on the server.

Installation overview

In a multiuser local area network environment, Dynamics GP applications are typically installed on a server, and then on each client. However, Dynamics GP is not required to be installed on the server. Each client will have access to data stored on the server. You can install clients using the Dynamics GP media or using a client installation package. For more about creating an installation package for your clients, see Chapter 11, "Creating an installation package."

When you install Dynamics GP, the Distributed Process Server (DPS) and the Distributed Process Manager (DPM) are installed automatically. You can specify which computers in your system are process servers, and which tasks will be completed on those process servers. A process server is an application that allows users to direct the processing such as posting or printing checks and maintenance procedures to another computer on the network. The Distributed Process Manager is the application that tracks activity on all clients and process servers. See your System Administrator 's Guide (Help >> Contents >> select System administration) for more information.

Installing Dynamics GP on an additional computer

Use the information in this section to install a client in a multiuser system after you've installed Dynamics GP on the server or the first computer and created your first company.

To install Dynamics GP on an additional computer:

1. From the Dynamics GP installation media, double-click the Setup.exe file to open the Dynamics GP installation window.
2. Click Dynamics GP.

The installation program verifies that your system has the minimum operating system required to run Dynamics GP. If your system does not meet requirements, the installation will not continue.

3. Select a new Dynamics GP instance and click Next

If you are installing Dynamics GP on a computer with an existing instance of Dynamics GP, select Create a new instance and enter a name for the new instance. For more information, see [Multiple instances of Dynamics GP](#).

4. In the Select a Country/Region window, select the primary country or region where you do business. Click Next.
5. Follow the instructions in the window to accept the software license agreement.

To install Dynamics GP, you must accept this agreement.

6. In the Select Features window, select the features to install.

OPTION	WHAT HAPPENS
 Run from My computer	The selected feature will be installed on the local hard disk. (This option installs the feature, but not sub-features.)
 Run all from My computer	Will install the feature and all of its sub-features.
 Not available	Will not install the selected feature or sub-features.

When you click a button for a feature, a pop-up menu of options appears. Refer to the table for more information about each option.

- Specify the folder where you want the Dynamics GP files installed. The default folder is C:\Program Files\Microsoft Dynamics\GP. To select a different folder, click Browse.

After you have specified the installation folder, click Next.

- To set up an ODBC data source, enter the name you assigned to the SQL Server when you installed Microsoft SQL Server. A data source name called Dynamics GP also is created using SQL Native Client. If you don't want to set up an ODBC data source, mark the Do not create a data source option.

- Select the system database name. If you selected Enter custom name, enter the system database name.

Click Next.

- If you have selected to install the Service Based Architecture feature, provide the Windows account that will be used as the service account for the Service Based Architecture service.

The Service Based Architecture feature will create a Windows service on the computer. The Windows account provided will be the identity used for this service.

- In the Install Program window, click Install.

- The Installation Progress window appears, where you can view the status of the installation.

- In the Installation Complete window, click Finish.

- Before you start Dynamics GP Utilities, check for and install current update for Dynamics GP. See [CustomerSource](#) for the latest update information.

NOTE

To start Dynamics GP Utilities, you must have appropriate user privileges. Typically, this means being part of the Administrators group or the Power Users group. If you are using an operating system that has User Account Control (UAC) enabled, you will be prompted to run the program as a user with administrative privileges. Refer to your operating system's documentation for more information.

- Start Dynamics GP Utilities. Choose Start >> All Programs >> Microsoft Dynamics >> GP >> GP Utilities.

- Follow the instructions in the Dynamics GP Utilities windows to synchronize your account framework. For more information, see [Synchronizing a client's account framework](#).

- After using Dynamics GP Utilities, you can install additional component applications. For more information, see [Installing additional components](#).

Synchronizing a client's account framework

Synchronize the account framework of each client where you install Dynamics GP.

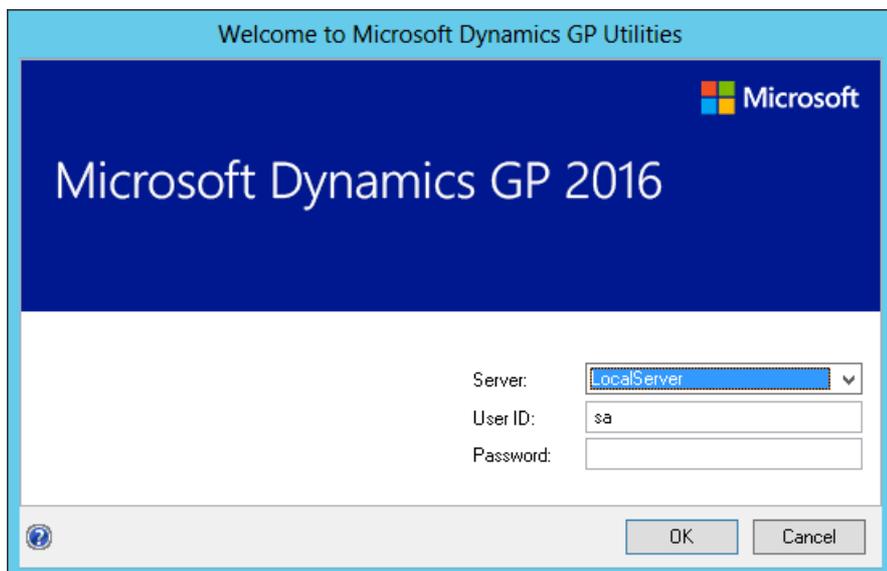
Dynamics GP Utilities uses the scripts and files installed previously to complete the client setup. In addition, you can use Dynamics GP Utilities to complete various maintenance procedures, now and on an ongoing basis.

NOTE

To start Dynamics GP Utilities, you must have appropriate user privileges. Typically, this means being part of the Administrators group or the Power Users group. If you are using an operating system that has User Account Control (UAC) enabled, you will be prompted to run the program as a user with administrative privileges. Refer to your operating system's documentation for more information.

To synchronize a client's account framework:

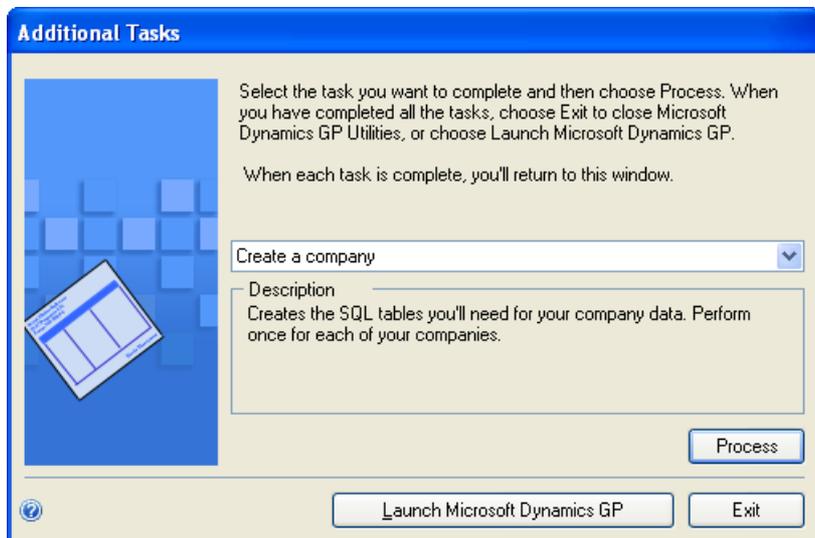
1. Start Dynamics GP Utilities. (Start >> Programs >> Microsoft Dynamics >> GP >> GP Utilities)
2. In the Welcome to Dynamics GP Utilities window, verify your server name, and enter a user ID and password. Click Next.



3. In the Welcome To Dynamics GP Utilities window, click Next.

The Dynamics GP dictionary is synchronized automatically with your account framework.

4. In the Additional Tasks window, you can choose to complete additional tasks, launch Dynamics GP, or end the installation. If you select any task, choose Process; otherwise, click Exit.



5. Repeat the client installation process for each computer you'll use as a client or process server for Dynamics GP.

Multiple instances of Dynamics GP

You can have multiple instances or installations of Dynamics GP on the same computer. Multiple instances are typically installed on client computers. You may want to use an additional instance of Dynamics GP for testing purposes.

When you install Dynamics GP on a computer with an existing instance of Dynamics GP, you'll enter a name for the new instance during the installation process. Each instance will be displayed in the Add or Remove Programs control panel. For example, if you entered TEST as an instance name, Dynamics GP (TEST) will be displayed in the Add or Remove Programs control panel. The instance also will appear in the program group for Microsoft Dynamics and in the folder where Microsoft Dynamics is installed. The default folder location is C:\Program Files\Microsoft Dynamics\GP\$TEST. The first instance of Dynamics GP on a computer is considered the default instance. The default instance of Dynamics GP isn't assigned an instance name.

Using Microsoft Dynamics Utilities

10/18/2018 • 26 minutes to read

After you've installed Dynamics GP, you need to complete a number of additional configuration procedures. To do this, you'll use an application called Dynamics GP Utilities.

NOTE

One of the most important—and difficult to change later—configuration tasks is setting up an account framework. So before you start using the Dynamics GP Utilities, see [Account framework](#).

Dynamics GP Utilities overview

You'll use Dynamics GP Utilities to complete the following tasks after you've installed software and data on a server computer.

- Select whether to use default or custom settings to configure the system database.
- Create SQL Server databases for Dynamics GP.
- Deploy predefined SQL Server Reporting Services reports that are included in Dynamics GP.
- Deploy predefined Microsoft Excel reports that are included in Dynamics GP.
- Create your account framework and synchronize the Dynamics GP dictionary, if you are providing custom settings.
- Select a default account framework and synchronize the Dynamics GP dictionary, if you decide to use default settings.
- Define account sorting options, if you are providing custom settings.
- Enter the password for the DYNOSA user.
- Set up the system password, which controls access to system management functions in Dynamics GP, if you are providing custom settings.
- Synchronize sample data with your account framework, if you installed the sample company.
- Remove SOP and Invoicing message. This lets you remove a message that appears every time you enter a transaction in Sales Order Processing or Invoicing, if both modules are registered.
- Create a SQLServer login for Dynamics GP Web Client
- Select the authentication type for the Dynamics GP Web Client.
- Create additional companies, as needed.

Installation options in Dynamics Utilities

When using Dynamics GP Utilities, you can select an installation option to use default settings or to provide your own custom settings. If you select the Basic option, the default settings for the system database, the account framework, and system password are provided. If you select the Advanced option, you'll provide the settings to create the database, the account framework, and system password.

The following table compares the default settings of the Basic option with the custom settings of the Advanced option.

SETTING	BASIC INSTALLATION	ADVANCED INSTALLATION
System database	The system database files are created at the default locations defined in the SQL Server. A typical default location is \Program Files\Microsoft SQL Server\MSSQL\dat.	You can specify the locations where the system database files are created in SQL Server.
Account framework	The following account framework is created for you. Maximum number of segments: 5 Maximum Account Length: 45 Length of each segment: 9 Sorting Options: No sorting options by segment Account preview: xxxxxxxx-xxxxxxx- xxxxxxx-xxxxxxx-xxxxxxx	You can design your account framework by entering the maximum for the account length, the number of account segments, and the length of each segment. You also can select sorting options. For more information about designing an account framework, see Account framework .
System password	The system password is blank. This means that all users will have access to system-wide setup information. You can enter this password in Dynamics GP.	You can enter a password for system-wide setup information.

Preparing Dynamics GP for use with default settings

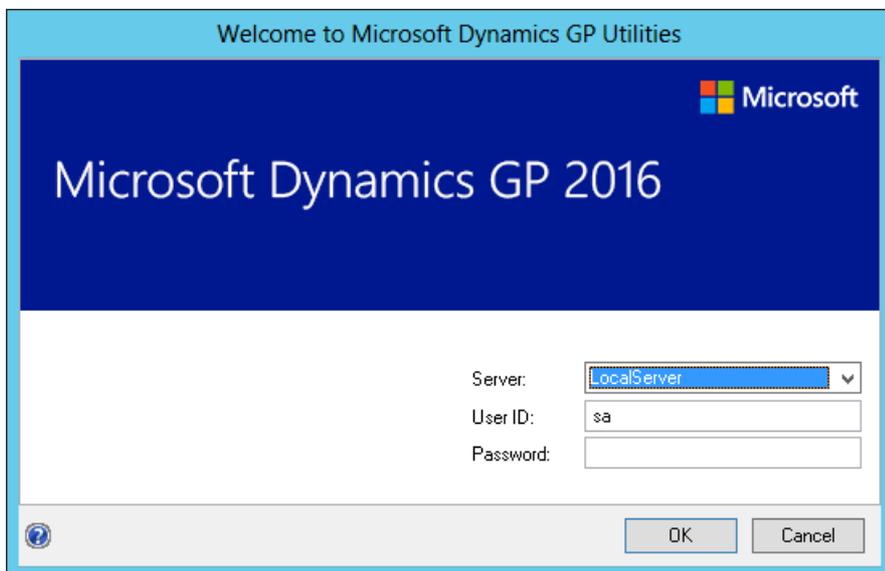
Use Dynamics GP Utilities to prepare Dynamics GP for use. Complete this procedure when you install Dynamics GP for the first time. You need to do this only once.

With this procedure, you'll select the Basic option in the Installation Options window to use default settings for the system database, account framework, and system password. For more information about the Basic option, see the **Installation options** section.

Before you use Dynamics GP Utilities, check for and install the most current update for Dynamics GP. See [CustomerSource] (<https://mbs.microsoft.com/customersource>) for the latest update information. After installing the update, start Dynamics GP Utilities.

To prepare Dynamics GP for use with default settings:

1. Start Dynamics GP Utilities. (Start >> All Programs >> Microsoft Dynamics >> GP 2018 >> GP Utilities)



2. In the Welcome to Dynamics GP Utilities window, verify your server name, and enter a system administrator user ID and password; then click OK.

NOTE

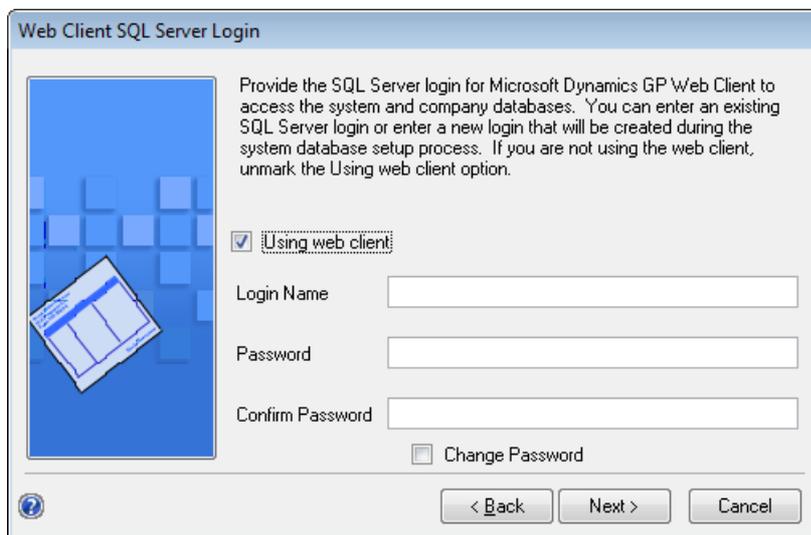
You must be logged in as a system administrator to complete database and system functions within Dynamics GP Utilities.

3. The Welcome To Dynamics GP Utilities window opens when you are logged into the server you selected. Read the message and click Next.
4. The Installation Options window appears. Mark Basic and then click Next.
5. If the DYNSA user doesn't have a password, the Enter DYNSA User Password window opens. Use this window to enter the password for the DYNSA user. The DYNSA user is the database owner and can perform tasks, such as table maintenance procedures. If you have multiple Dynamics GP system databases on the same SQL Server instance, the DYNSA user is the database owner for all of the system databases. This password is case-sensitive.



Click Next.

6. In the Web Client SQL Server Login window, you can create a SQL Server login for Dynamics GP Web Client. The Web Client SQL Server login is used for the connection to the SQL Server when a Dynamics GP user has been configured with a Windows login.



Web Client SQL Server Login

Provide the SQL Server login for Microsoft Dynamics GP Web Client to access the system and company databases. You can enter an existing SQL Server login or enter a new login that will be created during the system database setup process. If you are not using the web client, unmark the Using web client option.

Using web client

Login Name

Password

Confirm Password

Change Password

< Back Next > Cancel

Mark the Using web client option if you are creating a SQL Server login for the Dynamics GP Web Client. Enter an existing SQL Server login or enter a new login. Then, enter a password and confirm your password. Click Next.

Unmark the Using web client option if you are not creating a login for the Dynamics GP Web Client. Click Next.

7. Select the authentication type for the Dynamics GP web client. Accept the default Windows Account setting if GP users will be logging into the web client using their Windows domain credentials. Select Organizational Account if GP users will be logging into the web client using their organizational account credentials.



Authentication Type

Select how to authenticate GP users for Microsoft Dynamics GP Web Client. If you select Organizational Account, enter the name of your Microsoft Azure tenant, and the server and database for Microsoft Dynamics GP Web Client Session Central Service.

Authentication Type

Azure AD Domain Name

Web Components Server

Web Components Database

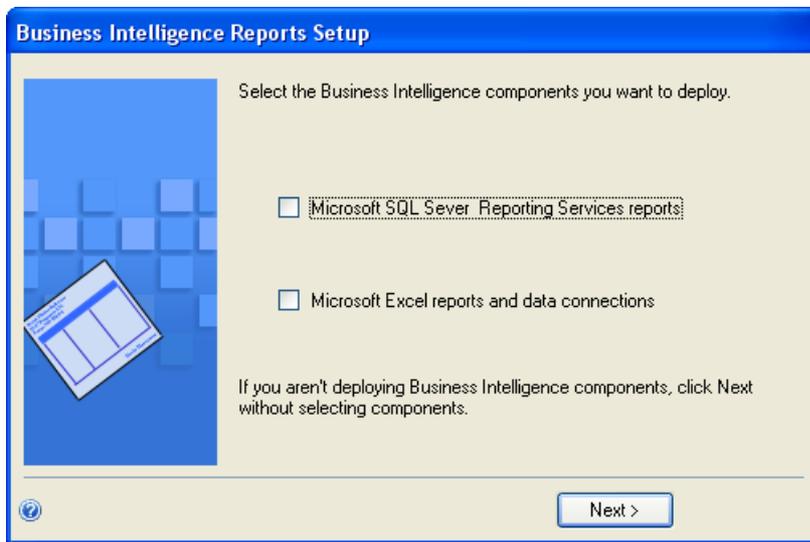
< Back Next > Cancel

When selecting Organizational Account, additional settings will be required complete the setup. Provide the Azure AD domain name for the user accounts. An example is *contoso.onmicrosoft.com*. Provide the name of the SQL Server where the web components database is stored and the name of the web components database.

8. In the Confirmation window, click Finish.

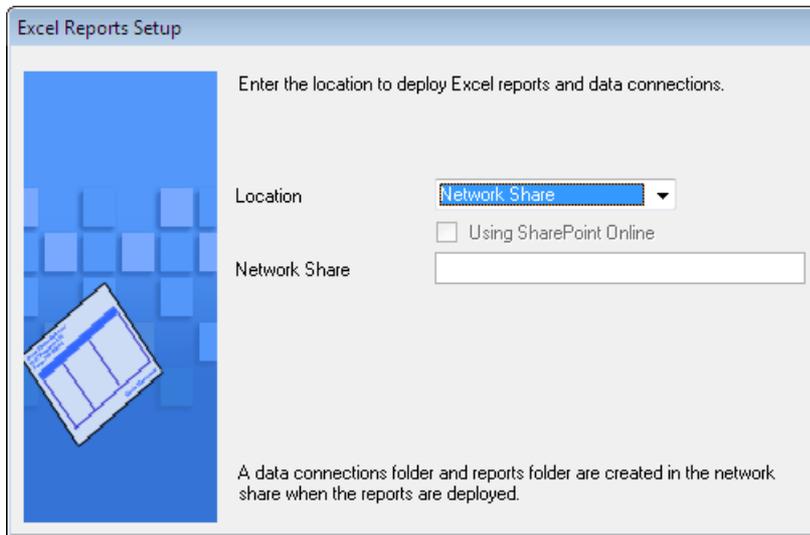
Dynamics GP Utilities installs databases, installs initial module setup information, and sets up Dynamics GP menus. These procedures may take several minutes to complete. The Server Installation Progress window describes the processes as they are completed.

9. In the Business Intelligence Reports Setup window, select the business intelligence components to deploy. Click Next. The window that opens depends on the components you selected.



If you don't want to deploy business intelligence components, leave the components unmarked and click Next. The Additional Tasks window will reappear. Skip to step 11.

- The SQL Server Reporting Services Reports Setup window appears if you marked to deploy Reporting Services reports.



After selecting your report server mode, enter the locations to deploy the reports to.

Native mode location example.

LOCATION	EXAMPLE
Report Server URL	http://<servername>/ReportServer
Report Manager URL	http://<servername>/Reports

SharePoint Integrated mode location example.

LOCATION	EXAMPLE
SharePoint Site	
Report Library	ReportsLibrary

NOTE

Make sure that your locations don't end with a slash. You can use the Reporting Services Configuration Manager to verify the Report Server Mode being used and the URL locations.

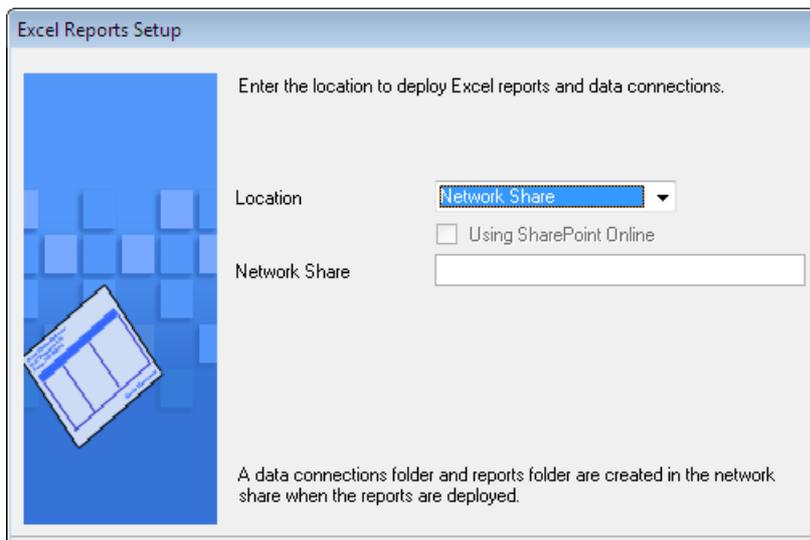
- 11. If you have selected Native as the report server mode, you can enter the name of the folder to deploy the reports to. By using a folder, you can deploy Reporting Services reports for multiple Dynamics GP instances to a single Microsoft SQL Server Reporting Server. The default folder name is the name of the system database. If DYNAMICS is the system database name, the Folder Name field is blank. After deploying reports to the folder, you must to provide access to the folder.

- 12. Click Next.

NOTE

If you don't have the appropriate permissions to deploy reports, a window opens where you can enter a domain\user name and the password you use to log in to Microsoft Windows.

The Excel Reports Setup window appears if you marked to deploy Microsoft Excel reports.



Select the location to deploy the reports to. Network share location example:

Network share	\\Servername\sharename

If you have selected SharePoint as the location to deploy reports to, you can mark the Using SharePoint Online option if you are using Microsoft Office 365 and want to deploy Excel reports to a reports library in SharePoint Online 2010. Mark the Using SharePoint Online option to deploy reports only in the Dynamics GP desktop client. Reports will not be deployed for the Dynamics GP Web Client.

SharePoint location example:

SHAREPOINT SITE	
Data Connections Library	
Report Library	ReportsLibrary

Make sure that you use backwards slashes when you are entering the location for reports even if you are

using a UNC path. You should also be sure that the location doesn't end in a slash.

NOTE

If you don't have the appropriate permissions to deploy reports, a window opens where you can enter a domain\user name and the password you use to log in to Microsoft Windows.

13. In the Additional Tasks window, you can choose to perform additional procedures, start Dynamics GP, or end the installation. If you select any task, click Process; otherwise, click Exit.

For more information, see [Additional installation tasks](#).

Preparing Dynamics GP for use with custom settings

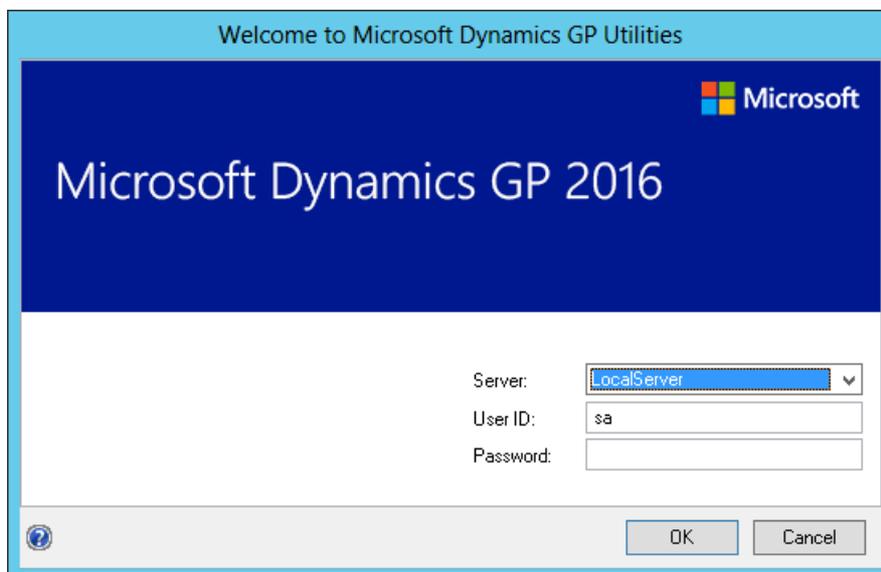
Use Dynamics GP Utilities to prepare Dynamics GP for use. Complete this procedure when you install Dynamics GP for the first time. You need to do this only once.

With this procedure, you'll select the Advanced option in the Installation Options window to use custom settings for the system database, account framework, and system password. For more information about the Advanced option, see the **Installation options** section.

Before you use Dynamics GP Utilities, check for and install the most current update for Dynamics GP. See CustomerSource (<https://mbs.microsoft.com/customersource>) for the latest update information. After installing the update, start Dynamics GP Utilities.

To prepare Dynamics GP for use with custom settings:

1. Start Dynamics GP Utilities. (Start >> Programs >> Microsoft Dynamics >> GP >> GP Utilities)
2. In the Welcome to Dynamics GP Utilities window, verify your server name, and enter a system administrator user ID and password; then click OK.



NOTE

You must be logged in as a system administrator to complete database and system functions within Dynamics GP Utilities.

3. The Welcome To Dynamics GP Utilities window opens when you are logged into the server you selected. Read the message and click Next.

- The Installation Options window appears. Mark Advanced and then click Next.
- In the Database Setup window, enter the location to create the data and log devices (files). For more information about disk and RAID configuration, see <https://go.microsoft.com/fwlink/?LinkId=263763>. Click Next.

Database Setup

Please specify the locations of the Microsoft Dynamics GP System Database files.

NOTE: The file location MUST already exist on the SQL Server.

System Database Name: DYNAMICS

Data Name: GPSDYNAMICSData.mdf

Location: C:\Program Files\Microsoft SQL Server\MSSQL11.MSSQLSERVER\

Log Name: GPSDYNAMICSLog.ldf

Location: C:\Program Files\Microsoft SQL Server\MSSQL11.MSSQLSERVER\

< Back Next > Cancel

- In the Set Up Account Framework window, enter a framework for the accounts for all Dynamics GP companies, as well as all companies you may set up in the future.

Set Up Account Framework

The account framework is the maximum account length, maximum number of account segments and maximum segment lengths allowed for the account format for each company that you'll set up.

To use the data provided with the sample company or the default charts of accounts provided with Microsoft Dynamics GP, the account length must be at least 9 and you must use at least 3 segments.

Maximum Account Length: 66 (Must be less than or equal to 66)

Maximum Number of Segments: 10 (Must be less than or equal to 10)

< Back Next > Cancel

Enter the maximum account length (up to 66 characters) and the maximum number of segments (up to 10) that you'll need for the charts of accounts in companies you set up now or in the future. Maximums you enter now will apply to all companies you plan to set up.

For more information, see [Planning your account framework](#).

- In the Set Up Account Segment Lengths window, enter a name for each segment of the account, as well as the maximum length you'll use for each segment in the charts of accounts for your companies.

Set Up Account Segment Lengths

Enter the name and maximum length of each segment. The total length of the segments that you enter here can exceed the maximum account length that you set up in the previous window.

To use the data provided with the sample company or the default charts of accounts provided with Microsoft Dynamics GP, the lengths must be at least 3, 4 and 2 for the first, second and third segments.

Segment	Name	Length
1	Segment1	3
2	Segment2	3
3	Segment3	3

< Back Next > Cancel

You should use descriptive names that clearly indicate how each segment will be used. These segment names will appear as the default segment names when you set up the account format for each company; you can change the names later, if necessary.

The length of each segment can be no longer than 66 characters. Maximums you enter now will apply to companies you set up later.

NOTE

If you have more than one company, you may need to enter maximum segment lengths that exceed the 66-character account length maximum when the segment lengths are added together. The total size must be 82 or less. For more information, see [Choosing account framework storage size](#).

8. Select sorting options in the Define Additional Sorting Options window. This window displays the predefined sorting options available in Dynamics GP to sort account information in windows and on reports.

Define Additional Sorting Options?

You'll be able to sort your accounts in Microsoft Dynamics GP windows and reports by the options listed below.

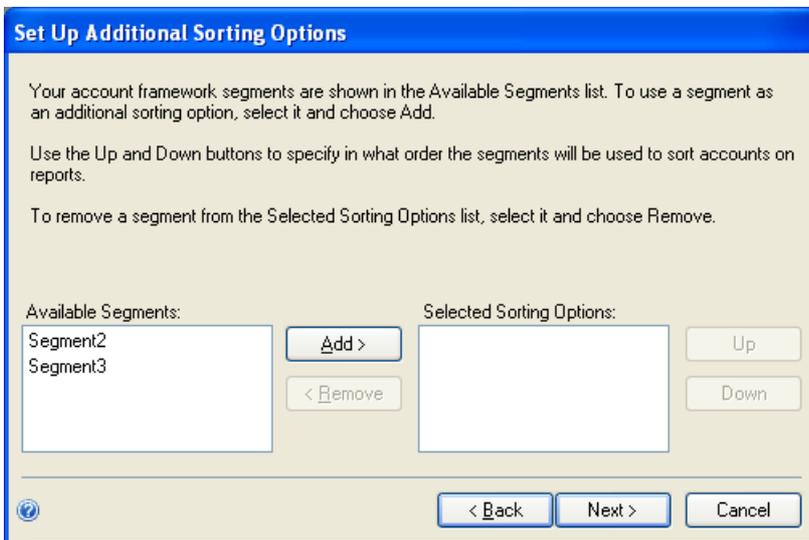
- Alias
- Description
- Account Type
- Account Category
- Account
- Main Segment

Do you want to be able to sort by segments of your account framework, as well?

Yes
 No

< Back Next > Cancel

- If the displayed sorting options include the ways you'll need to sort account information, leave the No option marked and click Next, then continue to step 10.
- To select segments of your account framework to sort by, as well, mark Yes, then click Next. The Set Up Additional Sorting Options window appears. Continue to step 9.



9. If you selected Yes in step 8, select each account segment you want to use as a sorting option and click Add. You can define up to nine additional sorting options.

If you select more than one segment, use the Up and Down buttons to specify in what order the segments will be used to sort account information. Sorting options are used to control the way accounts are displayed in Dynamics GP windows, in all your companies.

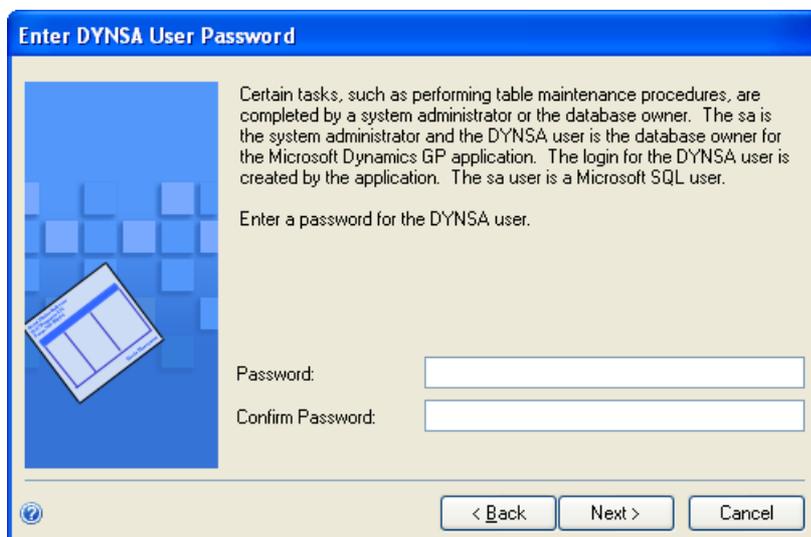
10. When you've finished selecting segments, click Next to verify your account framework in the Verify Account Framework window.

NOTE

To make corrections if necessary, click Back until the appropriate window is displayed, then click Next in each window until the Verify Account Framework window is displayed again.

A report file called Acctfram.txt is created in the Data folder inside of the GP folder, which contains the same account framework information. This file, which is created only on the first client, stores account framework information for your reference. Be sure to make a backup of the Acctfram.txt file.

11. If the DYNSA user doesn't have a password, the Enter DYNSA User Password window opens. Use this window to enter the password for the DYNSA user. The DYNSA user is the database owner and can perform tasks, such as table maintenance procedures. If you have multiple Dynamics GP system databases on the same SQL Server instance, the DYNSA user is the database owner for all of the system databases. This password is case-sensitive.



12. In the Web Client SQL Server Login window, you can create a SQL Server login for Dynamics GP Web Client. The Web Client SQL Server login is used for the connection to the SQL Server when a Dynamics GP user has been configured with a Windows login.

Web Client SQL Server Login

Provide the SQL Server login for Microsoft Dynamics GP Web Client to access the system and company databases. You can enter an existing SQL Server login or enter a new login that will be created during the system database setup process. If you are not using the web client, unmark the Using web client option.

Using web client

Login Name

Password

Confirm Password

Change Password

< Back Next > Cancel

Mark the Using web client option if you are creating a SQL Server login for the Dynamics GP Web Client. Enter an existing SQL Server login or enter a new login. Then, enter a password and confirm your password. Click Next.

Unmark the Using web client option if you are not creating a login for the Dynamics GP Web Client. Click Next.

13. Select the authentication type for the Dynamics GP web client. Accept the default Windows Account setting if GP users will be logging into the web client using their Windows domain credentials. Select Organizational Account if GP users will be logging into the web client using their organizational account credentials.

Authentication Type

Select how to authenticate GP users for Microsoft Dynamics GP Web Client. If you select Organizational Account, enter the name of your Microsoft Azure tenant, and the server and database for Microsoft Dynamics GP Web Client Session Central Service.

Authentication Type

Azure AD Domain Name

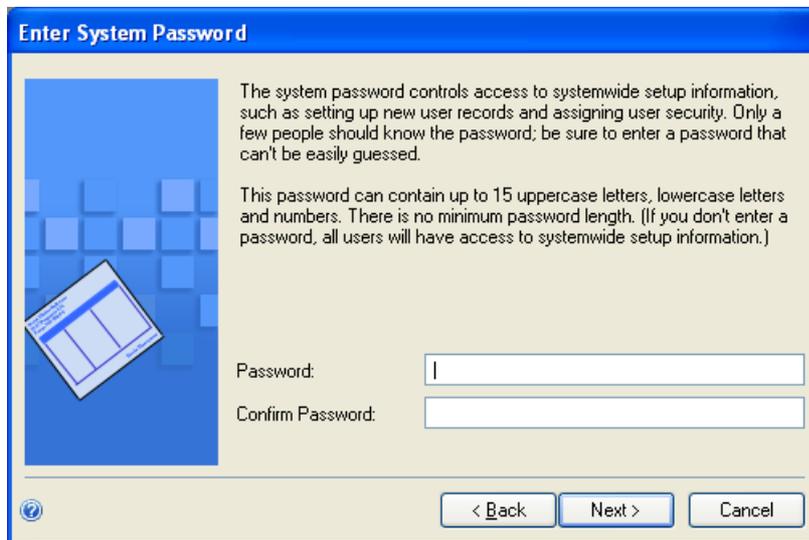
Web Components Server

Web Components Database

< Back Next > Cancel

When selecting Organizational Account, additional settings will be required complete the setup. Provide the Azure AD domain name for the user accounts. An example is contoso.onmicrosoft.com. Provide the name of the SQL Server where the web components database is stored and the name of the web components database.

14. In the Enter System Password window, enter the password to use to access Dynamics GP system windows, reports, and utilities. This password is case-sensitive and will be used for control functions, such as user security.



15. In the Confirmation window, click Next.

Dynamics GP Utilities installs databases, installs initial module setup information, and sets up Dynamics GP menus. These procedures may take several minutes to complete. The Server Installation Progress window describes the processes as they are completed.

16. In the Business Intelligence Reports Setup window, select the business intelligence components to deploy. Click Next. The window that opens depends on the components you selected.



If you don't want to deploy business intelligence components, leave the components unmarked and click Next. The Additional Tasks window will reappear. Skip to step 19.

17. The SQL Server Reporting Services Reports Setup window appears if you marked to deploy Reporting Services reports.

After selecting your report server mode, enter the locations to deploy the reports to.

Native mode location example:

LOCATION	EXAMPLE
Report Server URL	http://<servername>/ReportServer
Report Manager URL	http://<servername>/Reports

SharePoint Integrated mode location example.

SHAREPOINT INTEGRATED	
Location	Example
SharePoint Site	
Report Library	ReportsLibrary

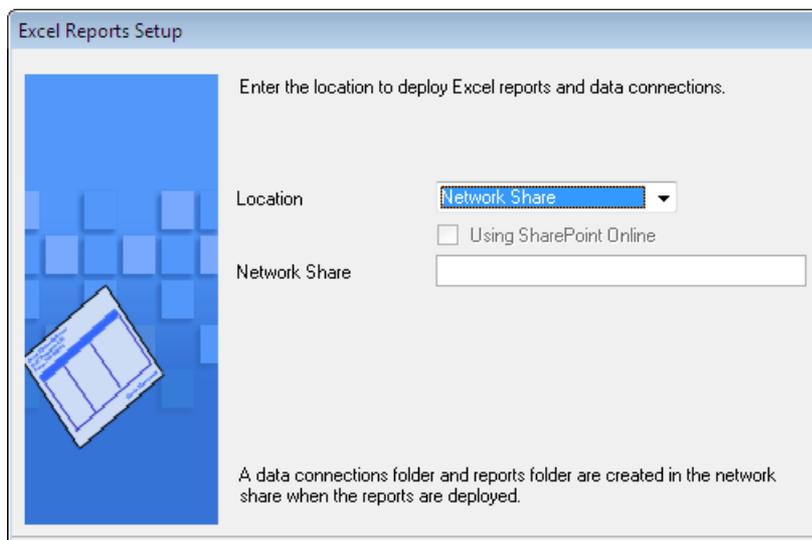
18. If you have selected Native as the report server mode, you can enter the name of the folder to deploy the reports to. By using a folder, you can deploy Reporting Services reports for multiple Dynamics GP instances to a single Microsoft SQL Server Reporting Server. The default folder name is the name of the system database. If DYNAMICS is the system database name, the Folder Name field is blank. After deploying reports to the folder, you must to provide access to the folder.

19. Click Next.

NOTE

If you don't have the appropriate permissions to deploy reports, a window opens where you can enter a domain\user name and the password you use to log in to Microsoft Windows.

20. The Excel Reports Setup window appears if you marked to deploy Excel reports.



21. Select the location to deploy the reports to.

Network share location example:

Network share	\\Servername\sharename

SharePoint location example:

SHAREPOINT SITE	
Data Connections Library	
Report Library	ReportsLibrary

Click Next.

NOTE

If you don't have the appropriate permissions to deploy reports, a window opens where you can enter a domain\user name and the password you use to log in to Microsoft Windows.

22. In the Additional Tasks window, you can choose to perform additional procedures, start Dynamics GP, or end the installation. If you select any task, click Process; otherwise, click Exit.

For more information, see [Additional installation tasks](#).

Additional installation tasks

The Additional Tasks window in Dynamics GP Utilities contains the following selections:

- Add sample company data
- Create a company
- Remove SOP and Invoicing message
- Update modified forms and reports
- Synchronize forms and reports dictionaries

- Manage Web Client SQL Server login
- Manage user authentication

The Update modified forms and reports option is used when upgrading from a previous release; it isn't used when you initially install Dynamics GP. The Synchronize forms and report dictionaries option can be used at anytime when you want to synchronize your forms and reports to your account framework.

Start Dynamics GP Utilities if you haven't already and follow the instructions in the Dynamics GP Utilities windows until you open the Additional Tasks window. The following procedures assume that the Additional Tasks window is open.

Adding sample company data

You can add data for the sample company, Fabrikam, Inc., to your Dynamics GP system to practice procedures. If a Dynamics GP feature is installed, the sample data for that feature will be included when adding sample data. When you are adding the sample company, you can create LessonUser1 and LessonUser2 as sample users. These users will have access only to Fabrikam, Inc. The process of adding sample company data may take some time.

When you create the sample company, you can deploy business intelligence components, such as SQL Server Reporting Services reports. If you deployed reports for your system database, you can use the default report locations for the sample company.

To add sample company data:

1. Select the Add sample company data option in the Additional Tasks window and click Process.
2. In the Database Setup window, enter or accept the sample company database name and then select a default location for new files that will be created for the sample company.

TWO is the default sample company database name if the TWO database doesn't exist. You can only create LessonUser1 and LessonUser2 as sample users for the TWO sample company database using the Dynamics GP Utilities.

If the sample company database has a different name than TWO, you must use the User Setup window to create lesson users for the sample company and then use the User Access Setup window to set up user access to the sample company.

3. In the Create Sample Users window, enter a password that will be used by the sample users, LessonUser1 and LessonUser2, to access the sample company. Reenter your password exactly as you previously entered it.

The Create Sample Users window appears if you are creating sample users for the TWO sample company database. If the sample company database is not the TWO database, you will not be able to create sample users using Dynamics GP Utilities.

4. Click Next.
5. In the Confirmation window, click Finish.

The Server Installation Progress window appears, showing the progress as the tables are loaded.

6. In the Business Intelligence Reports Setup window, select the business intelligence components to deploy. Click Next. The window that opens depends on the components you selected.

If you don't want to deploy business intelligence components, leave the components unmarked and click Next. The Additional Tasks window will reappear.

7. The SQL Server Reporting Services Reports Setup window appears if you marked to deploy Reporting Services reports. After selecting your report server mode, enter the locations to deploy the reports to.

Native mode location example:

LOCATION	EXAMPLE
Report Server URL	http://<servername>/ReportServer
Report Manager URL	http://<servername>/Reports

SharePoint Integrated mode location example.

SHAREPOINT INTEGRATED	
Location	Example
SharePoint Site	
Report Library	ReportsLibrary

NOTE

Be sure that your URL locations don't end with a slash. You can use the Reporting Services Configuration Manager to verify the Report Server Mode being used and the URL locations.

- 8. If you have selected Native as the report server mode, you can enter the name of the folder to deploy the reports to. By using a folder, you can deploy Reporting Services reports for multiple Dynamics GP instances to a single Microsoft SQL Server Reporting Server. The default folder name is the name of the system database. If DYNAMICS is the system database name, the Folder Name field is blank. After deploying reports to the folder, you must provide access to the folder.

- 9. Click Next.

NOTE

If you don't have the appropriate permissions to deploy reports, a window opens where you can enter a domain\user name and the password you use to log in to Microsoft Windows.

- 10. The CRM Reports Setup window appears, if you marked to deploy SQL Server Reporting Services reports with CRM data. Enter the CRM connection information. Microsoft Dynamics CRM supports only the native mode of deployment of SQL Server Reporting Services.

We recommend that you use Windows Authentication (Integrated Security). If you select to be prompted for credentials, you must mark the Use as Windows credentials when connecting to the data source option on the data source deployed.

- 11. The Excel Reports Setup window appears if you marked to deploy Excel reports. Select the location to deploy the reports to.

If you have selected SharePoint as the location to deploy reports to, you can mark the Using SharePoint Online option if you are using Microsoft Office 365 and want to deploy Excel reports to a reports library in SharePoint Online 2010. Mark the Using SharePoint Online option to deploy reports only in the Dynamics GP desktop client. Reports will not be deployed for the Dynamics GP Web Client.

Be sure to use back slashes when you are entering the location for reports even if you are using a UNC

path. You should also be sure that the location doesn't end in a slash.

Network share location example:

Network share	\\Servername\sharename
---------------	------------------------

SharePoint location example.

SHAREPOINT SITE	
Data Connections Library	DataConnections
Report Library	ReportsLibrary

12. Click Next.

If you don't have the appropriate permissions to deploy reports, a window opens where you can enter a domain\username and the password you use to log in to Microsoft Windows.

13. The Verify SQL Server window appears. Confirm your selections. If the selections are correct, click Finish.

The Business Intelligence Deployment Progress window appears. This window displays the report deployment progress.

14. After the reports deployed, the Additional Tasks window will reappear.

Creating a company

This option will create SQL tables that are needed for your company data. You must have at least one company set up before you can start Dynamics GP.

When you create a new company, you can deploy business intelligence components, such as SQL Server Reporting Services reports. If you deployed reports for your system database, you can use the default report locations for the company.

When adding a company, you can select how to configure your company. You can use wizards to migrate data from Intuit QuickBooks or Peachtree and enter basic configuration options, or you can configure the company later using the Setup Checklist window in Dynamics GP. To use a wizard to migrate or configure data, you must download and install the Rapid Implementation Tools for Dynamics GP. If you haven't installed the Rapid Implementation Tools, click the Download and install the wizards link in the Company Setup Options window.

For each company you create, be sure the folder you specify must exist on the hard disk.

To create a company:

1. Select the Create a company option in the Additional Tasks window and click Process.
2. In the Create Company window, enter a company ID and name and select additional options.

NOTE

The additional options, such as shipping methods and payment terms, may be overwritten if you choose to use the wizards to migrate QuickBooks or Peachtree data and enter basic configuration information in step 6.

3. Click Next.

4. In the Database Setup window, select a default location for new files that will be created.

5. The Confirmation window appears. Confirm your selections. If the selections are correct, click Finish.

The Server Installation Progress window appears, showing progress as tables loaded.

6. In the Business Intelligence Reports Setup window, select the business intelligence components to deploy. Click Next. The window that opens depends on the components you selected.

If you don't want to deploy business intelligence components, leave the components unmarked and click Next. The Company Setup Options window appears. Skip to step 13.

7. The SQL Server Reporting Services Reports Setup window appears if you marked to deploy Reporting Services reports. After selecting your report server mode, enter the locations to deploy the reports to.

Native mode location example:

LOCATION	EXAMPLE
Report Server URL	http://<servername>/ReportServer
Report Manager URL	http://<servername>/Reports

SharePoint Integrated mode location example.

SHAREPOINT INTEGRATED	
Location	Example
SharePoint Site	
Report Library	ReportsLibrary

NOTE

Make sure that your URL locations don't end with a slash. You can use the Reporting Services Configuration Manager to verify the Report Server Mode being used and the URL locations.

8. If you have selected Native as the report server mode, you can enter the name of the folder to deploy the reports to. By using a folder, you can deploy Reporting Services reports for multiple Dynamics GP instances to a single Microsoft SQL Server Reporting Server. The default folder name is the name of the system database. If DYNAMICS is the system database name, the Folder Name field is blank. After deploying reports to the folder, you must provide access to the folder.

9. Click Next.

NOTE

If you don't have the appropriate permissions to deploy reports, a window opens where you can enter a domain\user name and the password you use to log in to Microsoft Windows.

10. The CRM Reports Setup window appears, if you marked to deploy SQL Server Reporting Services reports with CRM data. Enter the CRM connection information. Microsoft Dynamics CRM supports only the native mode of deployment of SQL Server Reporting Services.

We recommend that you use Windows Authentication (Integrated Security). If you select to be prompted

for credentials, you must mark the Use as Windows credentials when connecting to the data source option on the data source deployed.

11. The Excel Reports Setup window appears if you marked to deploy Excel reports. Select the location to deploy the reports to.

If you have selected SharePoint as the location to deploy reports to, you can mark the Using SharePoint Online option if you are using Microsoft Office 365 and want to deploy Excel reports to a reports library in SharePoint Online 2010. Mark the Using SharePoint Online option to deploy reports only in the Dynamics GP desktop client. Reports will not be deployed for the Dynamics GP Web Client.

Make sure that you use backwards slashes when you are entering the location for reports even if you are using a UNC path. You should also be sure that the location doesn't end in a slash.

Network share location example:

Network share	\\Servername\sharename

SharePoint location example.

SHAREPOINT SITE	SERVER
Data Connections Library	DataConnections
Report Library	ReportsLibrary

12. Click Next.

NOTE

If you don't have the appropriate permissions to deploy reports, a window opens where you can enter a domain\user name and the password you use to log in to Microsoft Windows.

13. The Verify SQL Server window appears. Confirm your selections. If the selections are correct, click Finish.

The Business Intelligence Deployment Progress window appears. This window displays the report deployment progress.

14. The Company Setup Options window appears, where you can select to use a wizard to migrate data from QuickBooks or Peachtree, use a wizard to enter basic configuration options, or configure the company later using the Setup Checklist window in Dynamics GP.

To use a wizard to migrate or configure data, you must download and install the Rapid Implementation Tools for Dynamics GP. If you haven't installed the Rapid Implementation Tools, click the Download and install the wizards link in the Company Setup Options window before you click Next.

15. Click Next. If you decided to configure your company later, the Additional Tasks window reappears. You can click Create a company to set up a second company, start Dynamics GP, or Exit.

If you decided to use a wizard to migrate or configure your company data, the Rapid Migration Tool or the Rapid Configuration Tool starts.

Removing SOP and Invoicing message

Return to Dynamics GP Utilities and complete this task after you've set up Sales Order Processing. The following

message will appear every time you enter a transaction in Sales Order Processing or Invoicing, if both modules are registered: "Sales Order Processing and Invoicing modules are both installed. They do not share information. Transactions should be entered in one module only." To remove this message, select Remove SOP and Invoicing message in the Additional Tasks window and click Process, then follow the instructions in the window.

Managing the Web Client SQL Server login

Use the Manage Web Client SQL Server Login window to create or modify a SQL Server login for Dynamics GP Web Client. By using the single Web Client SQL Server login, each web client user can access the web client by providing their standard Windows login credentials instead of using their own SQL Server login.

During the initial Dynamics GP installation, you can create the SQL Server login. Each web client session can use the login to access SQL Server.

To manage the Web Client SQL Server login:

1. Select the Manage Web Client SQL Server Login option in the Additional Tasks window and click Process.
2. In the Manage Web Client SQL Server Login window, specify the SQL Server

Login and password for the Web Client SQL Server login.

3. If the login has an existing password, you can mark the Change password option to enter a different password.
4. Click Save. The Additional Tasks window reappears.

Managing user authentication

Use the Manage user authentication process to change the authentication type for this Dynamics GP instance. If there are accounts assigned for the current authentication type, the assigned accounts will be removed when the authentication type is changed. You cannot change the authentication type if there is an active workflow or a workflow that is currently pending user action.

During the initial Dynamics GP installation, you selected an authentication type. If you upgraded to this version of Dynamics GP from a previous release, the authentication type was set to Windows Account automatically.

To manage the user authentication

1. Select the manage user authentication option in the Additional Tasks window and click Process.
2. In the Manage User Authentication window, select the Authentication Type drop down and select the authentication type.
3. If you have selected Organizational Account, provide the required configuration information for using Organizational Accounts.

Provide the Azure AD domain name for the user accounts. An example is *contoso.onmicrosoft.com*. Provide the name of the SQL Server instance where the web components database is stored and the name of the web components database.

4. Click OK. The Additional Tasks window reappears.

Installing additional components

10/18/2018 • 6 minutes to read

Depending on your organization's needs, you may have purchased additional features that add specialized functionality to your Dynamics GP system. A Dynamics GP feature can be a single function or a complete a range of related business and accounting tasks that use one or more modules. Several products that integrate with Dynamics GP are included on the Dynamics GP media.

Dynamics GP features

After you've installed Dynamics GP, you may decide to purchase an additional feature or remove a feature. Some features add a single function to your Dynamics GP system while some, such as Manufacturing, allow you to complete a range of related business and accounting tasks that use one or more modules. You can use the Select Features window to install or uninstall a feature. For more information about accessing this window, see [Adding or removing additional features](#).

You can register Dynamics GP using the Registration window (Administration >> Setup >> System >> Registration) after you install. For more information about registration, see [Registering Dynamics GP](#). All features are registered for the sample company, Fabrikam, Inc. For more information about the sample company, see [Adding sample company data](#).

The following lists shows the Dynamics GP features. The features available depends on the country or region you selected when installing Dynamics GP.

For all countries and regions:

- A4
- Analysis Cubes Client
- Analytical Accounting
- Date Effective Tax Rates
- Electronic Bank Reconcile
- Encumbrance Management
- Enhanced Intrastat
- Fixed Asset Management
- Grant Management
- Manufacturing
- Multilingual Checks
- Payment Document Management
- Professional Services Tools Library
- Project Accounting
- Revenue/Expense Deferrals
- Safe Pay
- Service Based Architecture
- VAT Daybook
- Web Client Runtime

For all countries and regions except Canada and the United States:

- Bank Management

- Direct Debit Refunds
- Scheduled Installments

For the United States:

- Human Resources and Payroll suite

For Belgium and France:

- Export Financial Data

NOTE

We recommend that you install each Dynamics GP feature and additional component that you are going to register on all client computers.

Adding or removing additional features

Use the installation wizard to add or remove features from your Dynamics GP installation. You also can use the Program Maintenance window, opened from the Add or Remove Programs control panel, to add or remove features. You should make a complete backup of your data before adding or removing features. Removing a feature does not remove tables from the database.

Be sure to follow the instructions in the Dynamics GP Utilities windows after installing a feature. Depending on the feature that you're installing, you may have to update tables and update your companies.

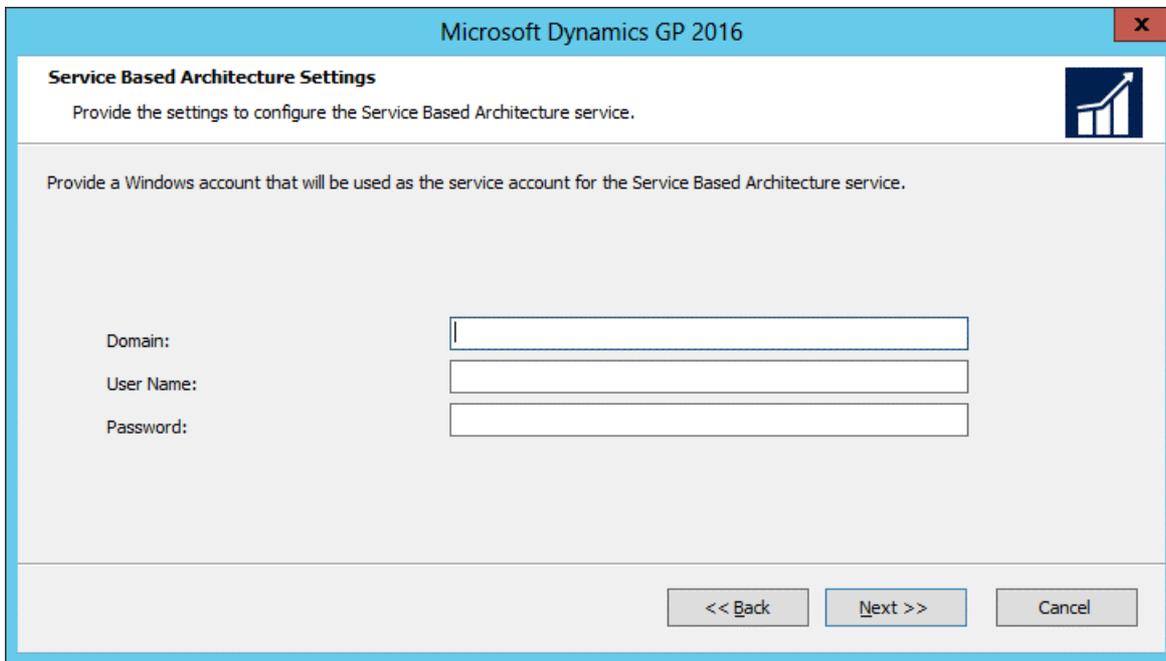
After you install a feature, be sure that the feature is at the current version. You can't log in to Dynamics GP on a client computer if a product installed on the client has different version information than the server. You can use the GP_LoginErrors. file in your temporary directory to help resolve the version information issue. The log file will contain the product name, along with the dictionary version and the database version.

To add or remove additional features:

1. Start the installation wizard. You can use either of the following methods.
 - From the Dynamics GP installation media, double-click the Setup.exe file to open the Dynamics GP installation window. Select the existing instance of Dynamics GP in the Instance Selection window and click Next.

—or—

- Open the Control Panel > Programs and Features or Uninstall a program Select Dynamics GP. Click Change to open the Program Maintenance window.



2. Click Add/Remove Features.
3. In the Select Features window, select the features to install or uninstall. When you install a new feature, you won't reinstall features that have been installed previously.

When you click a button for a feature, a pop-up menu of options appears. Refer to the table for more information about each option.

OPTION	WHAT HAPPENS
 Run from My computer	The selected feature will be installed on the local hard disk. (This option installs the feature, but not sub-features.)
 Run all from My computer	Will install the feature and all of its sub-features.
 Not available	Will not install the selected feature or sub-features.

After you have specified the feature or features, click Next.

4. In the Install Program window, click Install.
5. The Installation Progress window appears, where you can view the status of the installation.
6. In the Installation Complete window, click Exit.
7. Start Dynamics GP Utilities. Choose Start >> All Programs >> Microsoft Dynamics >> GP >> GP Utilities.

NOTE

To start Dynamics GP Utilities, you must have appropriate user privileges. Typically, this means being part of the Administrators group or the Power Users group. If you are using an operating system that has User Account Control (UAC) enabled, you will be prompted to run the program as a user with administrative privileges. Refer to your operating system's documentation for more information.

8. The Welcome To Dynamics GP Utilities window opens when you are logged into the server you selected. Read the message and click Next.
9. Follow the instructions in the Dynamics GP Utilities windows. Depending on the feature that you're

installing, you may have to update tables and update your companies.

10. After the processing is finished, the Additional Tasks window will open, where you can perform additional tasks, start Dynamics GP, or exit the installation.

Additional components

A smaller set of additional components are separate installations available on the Dynamics GP media. These additional components are listed on the main Dynamics GP installation window for media. For more information about accessing this window, see [Installing an additional component](#).

ADDITIONAL COMPONENTS	DESCRIPTION
Analysis Cubes Server	Installs Analysis Cube Server configuration wizards for SQL Server 2012, SQL Server 2014, and SQL Server 2016.
Dynamics GP Add-in for Microsoft Word	Installs the code necessary to enable template mapping so you can create and modify Word templates for Dynamics GP.
eConnect	A document integration tool that enables high volume, high speed programmatic integration to and from applications and the Dynamics GP back office solution.
Integration Manager	Allows you to perform a one-time data conversion from your existing system to Dynamics GP products, or to perform ongoing integrations from other applications.
Tenant Service	A service that will provide tenant and user configuration information to applications. This service is required if you are setting up Dynamics GP Web Client for multiple tenants.
Web Client	The web server components that will provide browser access to Dynamics GP.
GP Web Resource Cache	Install on each session server to improve performance by enabling web client caching.
Web Services Runtime	The runtime engine that adds a Web Services interface to Dynamics GP. Install this component if you want to run integrations that access Dynamics GP data through Web Services. Several prerequisites must be met before you can install this component. Refer to the Web Services Installation and Administration Guide for more details.
Web Services Management Tools	Installs the Security Console and Exceptions Management Console, which you can use to administer security and exception information for Web Services for Dynamics GP. Install this component if you want to manage Web Services from a workstation separate from where the Web Services Runtime is installed.
Companion Application Services	A tool that enables you to connect your Dynamics GP application to a data source.
GP PowerShell	PowerShell cmdlets that perform various configuration tasks for a Dynamics GP web client installation.

ADDITIONAL COMPONENTS	DESCRIPTION
OData Services	

There are some additional components that are released only on [CustomerSource](#).

Installing an additional component

Use this procedure to install an additional component after you've installed Dynamics GP. Before installing additional components, you should make a complete backup of your data.

Each additional component has its own installation instructions and documentation that you can access before you install the component. After you review the documentation you can install the component.

To install an additional component:

1. From the Dynamics GP installation media, double-click the Setup.exe file to open the Dynamics GP installation window.
2. Click the additional component you want to install and then click View Documentation.
3. After you review the documentation, install the component by clicking the additional component you want to install and then clicking Install.
4. Depending on the component you installed, you may be instructed to restart your computer.
5. When installation of the additional component is complete, you can either install another component or close the main Dynamics GP installation window.

See Also

[Using Microsoft Dynamics Utilities](#)

Creating a company

10/18/2018 • 8 minutes to read

Use the instructions in this chapter to create a company if you didn't create one when you first used Dynamics GP Utilities. You must set up at least one company before you can start Dynamics GP. See your System Setup instructions (Help >> Contents >> select Setting up the system) for information about setting up users and companies in Dynamics GP.

Chart of accounts overview

Several default charts of accounts are included with your Dynamics GP system. You may want to use a default chart of accounts for the following reasons:

- The charts of accounts we've provided reflect sound accounting practices.
- Extensive research was done to determine the most commonly used account types for the industries we've included.
- Even if changes need to be made after a default chart of accounts is copied for the company, setup time will be greatly reduced by using a default chart.

Based on the business and industry types you choose for your company, you can install the chart of accounts best tailored for your company's business needs. For instance, if your company is a retail corporation, select Corporation from the Business Type list, as shown in the previous illustration, then select Retail from the Industry Type list. Accounts specific to corporations, such as stock accounts, will then be added to the chart of accounts specifically designed for retail industries.

If you use a default chart of accounts, you won't be able to shorten the account format. However, it can be lengthened to the maximum length you established in the Account Definition Setup window of Dynamics GP Utilities, earlier in the installation process. Refer to the System Setup instructions (Help >> Contents >> select Setting up the system) for more information about lengthening account formats.

The default chart of accounts you choose for your company in this procedure is designed to be an accurate estimate of your company's business practices. However, we recommend that you review the accounts and make any necessary additions or changes. You'll be directed to the General Ledger documentation later in the setup process, if you need to modify the accounts.

Adding a company using Dynamics GP Utilities

Use Dynamics GP Utilities to create companies for Dynamics GP. You must have at least one company set up before you can start Dynamics GP.

When adding a company, you can select how to configure your company. You can use wizards to migrate data from QuickBooks or Peachtree and enter basic configuration options, or you can configure the company later using the Setup Checklist window in Dynamics GP. To use a tool to migrate or configure data, you must download and install the Rapid Implementation Tools for Dynamics GP. If you haven't installed the Rapid Implementation Tools, click the Download and install the wizards link in the Company Setup Options window.

Before you begin, be sure you have adequate space to add companies (including the sample company) to your SQL database. Each company requires about 300MB of free space.

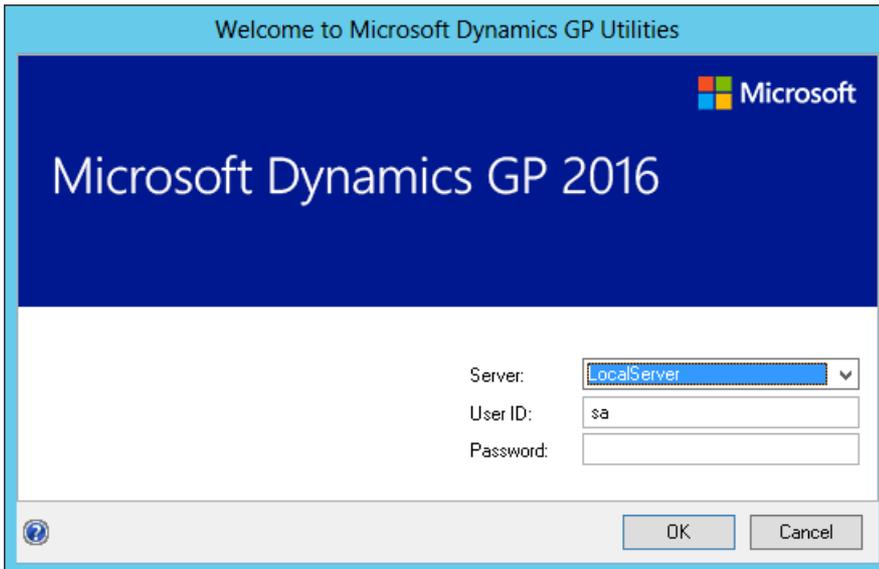
When you create a company, you can deploy SQL Server Reporting Services reports and Excel reports using

Dynamics GP Utilities. If you have deployed reports for your system database, you can use the default report locations for the company.

To start Dynamics GP Utilities, you must have appropriate user privileges. Typically, this means being part of the Administrators group or the Power Users group. If you are using an operating system that has User Account Control (UAC) enabled, you will be prompted to run the program as a user with administrative privileges. Refer to your operating system's documentation for more information.

To add a company using Dynamics GP Utilities:

1. Start Dynamics GP Utilities. (Start >> Programs >> Microsoft Dynamics >> GP >> GP Utilities)
2. In the Welcome to Dynamics GP Utilities window, verify your server name, and enter a system administrator user ID and Password; then click Next.



3. In the Welcome to Dynamics GP Utilities window, review the information and click Next.
4. The Upgrade Dynamics GP window opens, indicating that Dynamics GP is at the current version. Click Next to verify version information for companies.
5. After companies are verified, the Additional Tasks window opens. Select Create a company and then click Process.
6. The Create Company window opens, where you can enter a database/company ID, and a company name. You also can select the following options.
 - Mark to load shipping methods and payment terms.
 - Mark the Load Default Chart of Accounts option and click a business and industry type. For more information about charts of accounts, see [Chart of accounts overview](#).
 - Copy access from another company, except from the sample company, Fabrikam, Inc.

Create Company

DB / Company ID:

Company Name:

Load Shipping Methods and Payment Terms

Load Default Chart of Accounts

Business Type:

Industry Type:

Copy access from company:

From Company:

These setup options may be changed or overwritten as you continue through the company setup process.

< Back Next > Cancel

NOTE

If you choose to use wizards to migrate QuickBooks or Peachtree data and enter basic configuration information in step 10, the shipping methods and payment terms and the chart of accounts information you have loaded may change.

7. Click Next after entering and selecting company information.
8. The Database Setup window appears. Enter the location where the data and log devices should be created. Click Next.

Database Setup

Please specify a location for your data and log files.

NOTE: The file location MUST already exist on the SQL Server.

Data Name

Location

Log Name

Location

< Back Next > Cancel

9. The Very SQL Server window appears. Confirm your selections. If the selections are correct, click Finish.
 The Server Installation Progress window appears, showing progress as tables loaded.
10. In the Business Intelligence Reports Setup window, select the business intelligence components to deploy. Click Next. The window that opens depends on the components you selected.
 If you don't want to deploy business intelligence components, leave the components unmarked and click Next. The Company Setup Options window appears. Skip to step 18.
11. The SQL Server Reporting Services Reports Setup window appears if you marked to deploy Reporting Services reports. After selecting your report server mode, enter the locations to deploy the reports to. Be sure that the location you enter does not end with a slash.

Native mode location example:

LOCATION	EXAMPLE
Report Server URL	http://<servername>/ReportServer
Report Manager URL	http://<servername>/Reports

SharePoint Integrated mode location example.

LOCATION	EXAMPLE
SharePoint Site	
Report Library	ReportsLibrary

12. If you have selected Native as the report server mode, you can enter the name of the folder to deploy the reports to. By using a folder, you can deploy Reporting Services reports for multiple Dynamics GP instances to a single Microsoft SQL Server Reporting Server. The default folder name is the name of the system database. If DYNAMICS is the system database name, the Folder Name field is blank. After deploying reports to the folder, you must provide access to the folder.

13. Click Next.

NOTE

If you don't have the appropriate permissions to deploy reports, a window opens where you can enter a domain\user name and the password you use to log in to Microsoft Windows.

16. The Excel Reports Setup window appears if you marked to deploy Excel reports. Select the location to deploy the reports to.

If you have selected SharePoint as the location to deploy reports to, you can mark the Using SharePoint Online option if you are using Microsoft Office 365 and want to deploy Excel reports to a reports library in SharePoint Online 2010. Mark the Using SharePoint Online option to deploy reports only in the Dynamics GP desktop client. Reports will not be deployed for the Dynamics GP Web Client.

Be sure to use back slashes when you are entering the location for reports even if you are using a UNC path. You should also be sure that the location doesn't end in a slash.

Network share location example:

Network share	\\Servername\sharename
---------------	------------------------

SharePoint location example.

SHAREPOINT SITE	SERVER
Data Connections Library	DataConnections
Report Library	ReportsLibrary

17. Click Next.

NOTE

If you don't have the appropriate permissions to deploy reports, a window opens where you can enter a domain\user name and the password you use to log in to Microsoft Windows.

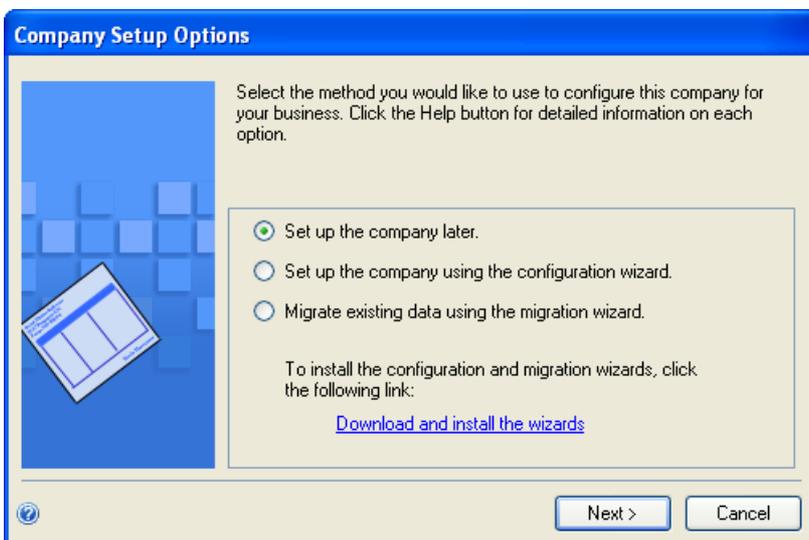
18. The Verify SQL Server window appears. Confirm your selections. If the selections are correct, click Finish.

The Business Intelligence Deployment Progress window appears. This window displays the report deployment progress.

19. The Company Setup Options window appears, where you can select one of the following options to configure your company.

- Mark the Set up the company later option to set up your company at another time. When you are ready to set up data for your company, you can use wizards to migrate data from QuickBooks or Peachtree and enter basic configuration options, or you can configure the company using the Setup Checklist window in Dynamics GP.
- Mark the Set up the company using the configuration wizard option to use the Rapid Configuration Tool for Dynamics GP. The Rapid Configuration Tool helps you enter the basic setup information required for Dynamics GP. With the Rapid Configuration Tool, you can start with a standard industry configuration, modify the configuration data, and then import the data into Dynamics GP. Or, you can import a configuration from a Microsoft Office Excel workbook prepared by a Dynamics GP partner or business consultant.
- Mark the Migrate existing data using the migration wizard option to use the Rapid Migration Tool for Dynamics GP. The Rapid Migration Tool migrates QuickBooks data or Peachtree to Dynamics GP. You can migrate master records, transactions, and configuration settings such as payment terms and shipping methods. Master records include customer records, vendor records, item records, and account records. Transactions include open payables transactions, open receivables transactions, open invoices transactions, and purchase orders. You also can review and edit information before you complete the migration.

To use a tool to migrate or configure data, you must download and install the Rapid Implementation Tools for Dynamics GP. If you haven't installed the Rapid Implementation Tools, click the Download and install the wizards link.



20. Click Next. If you decided to configure your company later, the Additional Tasks window reappears. You can click Create a company to set up a second company, start Dynamics GP, or Exit.

If you decided to migrate or configure your company data, the Rapid Migration Tool or the Rapid

Configuration Tool starts.

After installing Dynamics GP

10/18/2018 • 3 minutes to read

Use the information in this chapter to log in to Dynamics GP for the first time and register Dynamics GP. You also may have to grant user access to alternate Dynamics GP windows and reports.

Logging in to and quitting Dynamics GP

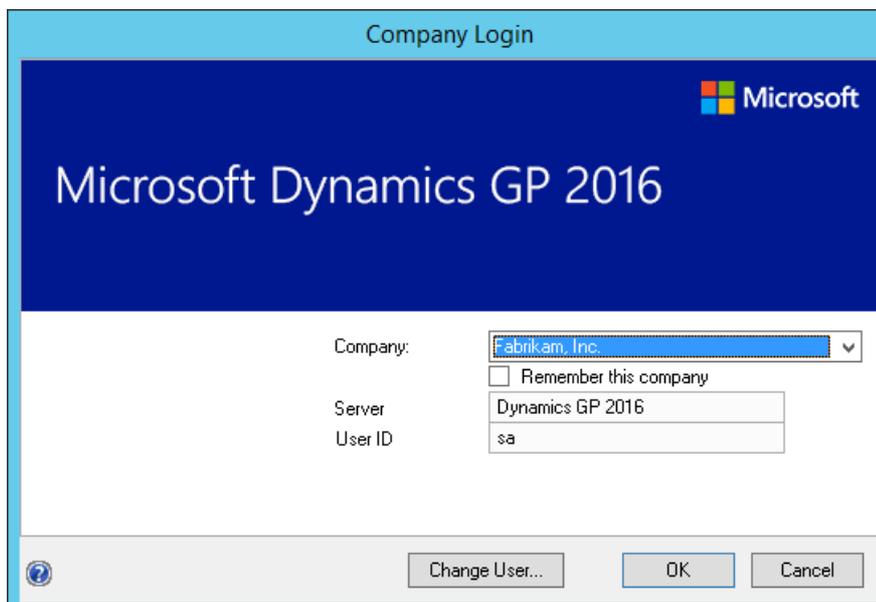
If you have trouble starting Dynamics GP, contact your network administrator.

To log in to Dynamics GP:

1. Choose Start > Programs > Microsoft Dynamics > GP The Welcome to Dynamics GP window opens.



2. Enter your user ID and password. Passwords are case-sensitive.
3. Click OK. The Company Login window appears.



4. Select a company and click OK. The Dynamics GP main menu appears.

To switch to a different company while you are working in Dynamics GP, choose Dynamics GP menu >> User and Company.

To quit Dynamics GP:

1. Save your work in the window you are working in.
2. Choose Dynamics GP menu >> Exit.

Registering Dynamics GP

By registering your software, we can provide you with better service. We can gather information about additional needs you have and how Dynamics GP can be improved. Software registration also eliminates unauthorized use of the software without imposing restrictive copy protection.

You can enter your site name and registration keys for Dynamics GP in the Registration window (Administration>> Setup >> System >> Registration).

You must register Dynamics GP before you can use it. Enter your site name and registration keys exactly as they appear on your registration document. If you don't register a module before you begin to use it, you won't be able to open any transaction entry window. Modules in the sample company, Fabrikam, Inc., are registered and you can use the sample company to practice procedures.

After you've registered Dynamics GP, you won't need to register additional companies that you add. To verify that a module has been registered, open the Dynamics GP Options window (Help >> About Dynamics GP >> Options). Registered modules have a check mark in the Registered column.

Security for Dynamics GP

The default security settings in Dynamics GP allow all users access to only the windows and forms in Dynamics GP that are needed to log in to the application. After setting up new user records, you should set access to companies and set up security for new users. To learn more about setting up security, refer to the System Setup Guide (Help >> Contents >> select Setting up the System).

Each time you install a new feature or component in Dynamics GP, such as Human Resources, you must set up security for that feature or component. For example, if you have been using Dynamics GP for a year and you just installed Human Resources, you will need to set up access to Human Resources before anyone can use it.

Refer to the Planning For Security document (C:\Program Files\Microsoft Dynamics\GP\Documentation\SecurityPlanning.pdf) or to the System Setup Guide (Help >> Contents >> select Setting up the System) for more information about security.

Tasks for SQL Server Reporting Services reports

Review the following tasks.

Security

After deploying the Dynamics GP SQL Server Reporting Services reports, the only individuals who will be able to access or view the reports within the Report Manager are those users who are members of the web server 's local administrator group and local administrators on SQL Server. The web site administrator has to implement and grant access to the Reporting Services Web site and database objects required to print reports.

If you have deployed reports using the SharePoint integrated mode and have already assigned permissions to users, those same users will have access to report server items and operations immediately after you configure the integration settings between Microsoft SharePoint and a report server. You can use existing permissions to upload report definitions and other documents, view reports, create subscriptions, and manage items.

If you have not assigned permissions, assign user and group accounts to predefined SharePoint groups. You also can create new permission levels and groups, or modify existing ones to vary server access permissions as specific needs arise.

You can deploy SQL Server Reporting Services reports for multiple Dynamics GP instances to a single Microsoft SQL Server Reporting Server. If you have deployed reports to a folder on a Microsoft SQL Server Reporting Server using the Native mode, you must to provide access to the folder.

Microsoft Dynamics CRM

Before you render a SQL Server Reporting Services report with CRM data, be sure to start the Microsoft Dynamics CRM application to initialize data

Creating an installation package

10/18/2018 • 5 minutes to read

Instead of physically going to each client computer to install Dynamics GP, you can use an installation package to install Dynamics GP on multiple client computers. An installation package stores the files required to install a custom configured installation in a shared network location you set up. How Dynamics GP is installed on the client computer using the installation package depends on the tools and applications you use.

Installation package overview

You can use a client installation package to install Dynamics GP on additional client computers without having to physically go to each client computer and use the Dynamics GP installation wizard. When you create an installation package, the installation package stores the files required to install a custom configured Dynamics GP installation.

We recommend that you install the following components on each client computer. You can install these components from the Dynamics GP installation media.

- Microsoft Windows Installer 4.5
- Microsoft .NET Framework 3.5
- Microsoft .NET Framework 4.6
- Microsoft SQL Server Native Client 11.0
- Microsoft Dexterity Shared Components 18.0
- Microsoft Application Error Reporting 11.0
- Microsoft Lync 2010 SDK Runtime
- Open XML SDK 2.0 for Microsoft Office
- Visual C++ 2015 Runtime Libraries
- Visual Basic for Applications Core

These components aren't installed for you if you set up your installation package to install Dynamics GP using the GreatPlains.msi file. If these components are not installed on the client computer, Dynamics GP won't be installed. These components are installed for you if you set up your installation package to install Dynamics GP using the Setup.exe file.

When creating the installation package, you'll select the shared network location where the installation package will be created, select Dynamics GP features, and enter a location where Dynamics GP will be installed on each client computer.

The installation package must be created in a shared network location that each client computer has access to. The location where Dynamics GP will be installed must be a valid location for each client computer.

After Dynamics GP is installed and the user on the client has started Dynamics GP, the user may have to include new code and use Dynamics GP Utilities to synchronize the account framework.

After the installation package is created, it can be run from the shared network location to install the Dynamics GP client without the user having to make install decisions. A progress window shows how the process is progressing.

How Dynamics GP is installed on the client computer using the installation package depends on the tools and applications you use. You can send an email with a link to the installation package. The user can click the link to install Dynamics GP. Or, you can create a deployment package using a software distribution tool such as Systems Management Server so that Dynamics GP is automatically installed after the user logs into his or her computer.

To create an installation package

You can use an installation package to install Dynamics GP on your client computers. An installation package contains all the information required to install Dynamics GP.

To create an installation package:

1. Create a shared network location or verify that the client computers have access to a shared network location.
2. From the Dynamics GP installation media, double-click the Setup.exe file.
3. Click Create Installation Package.
4. In the Installation Location window, enter or select the folder where the installation package will be created. It is recommended that you use an Universal Naming Convention (UNC) path or a mapped drive letter that is common across all targeted machines. The network location must be accessible from any computer that will have Dynamics GP installed on it using the installation package.

Click Next.

5. In the Country/Region Selection window, select the primary country or region where you do business. Click Next.
6. In the Select Features window, select the features to install.

When you click a button for a feature, a pop-up menu of options appears. Refer to the table for more information about each option.

OPTION	WHAT HAPPENS
 Run from My computer	The selected feature will be installed on the local hard disk. (This option installs the feature, but not sub-features.)
 Run all from My computer	Will install the feature and all of its sub-features.
 Not available	Will not install the selected feature or sub-features.

We recommend that you install each Dynamics GP feature and additional component that you are going to register on all client computers.

7. Specify the location on the client computer where you want the Dynamics GP files installed. If you don't enter the location, the default location is \Program Files\Microsoft Dynamics\GP on the hard disk that has the operating system installed.

Be sure that the location is a valid location for every computer on which the installation package is used to install Dynamics GP.

After you have specified the installation folder, click Next.

8. To set up an ODBC data source, enter the name you assigned to the SQL Server when you installed Microsoft SQL Server. A data source name called Dynamics GP also is created using SQL Native Client. If you don't want to set up an ODBC data source, mark the Do not create a data source option.

9. Select the system database name.

Click Next.

10. Specify the location of the Reports dictionary and the Forms dictionary. The location where dictionaries are must be a valid location for each client computer. The locations are written to the Dex.ini file. Click Next.

11. Specify the location of the OLE Notes files and Letter Wizard files. Click Next.

NOTE

Dynamics GP uses the Document Attachment Management functionality instead of OLE objects.

12. In the Install Program window, click Install.

13. The Installation Progress window appears, where you can view the status of the installation.

14. In the Create Installation Package Complete window, click Finish.

The installation package is installed in the shared network location you specified. The installation package stores the files, such as Great Plains.msi and Setup.exe, required to install a custom configured Dynamics GP installation.

15. How Dynamics GP is installed on the client computer using the installation package depends on the tools and applications you use. You can send an email with a link to the installation package. Or, you can create a deployment package using a software distribution tool such as Systems Management Server so that Dynamics GP is automatically installed after the user logs into their computer.

For more information about deployment, see the [Documentation and resources for Dynamics GP](#) page.

Installing Dynamics GP on subsequent computers

10/18/2018 • 5 minutes to read

Use the information in this chapter to install Dynamics GP on each client computer. You also use Dynamics GP Utilities to synchronize the Dynamics GP dictionary on each additional client with your account framework on the server.

Installation overview

In a multiuser local area network environment, Dynamics GP applications are typically installed on a server, and then on each client. However, Dynamics GP is not required to be installed on the server. Each client will have access to data stored on the server. You can install clients using the Dynamics GP media or using a client installation package. For more about creating an installation package for your clients, see Chapter 11, "Creating an installation package."

When you install Dynamics GP, the Distributed Process Server (DPS) and the Distributed Process Manager (DPM) are installed automatically. You can specify which computers in your system are process servers, and which tasks will be completed on those process servers. A process server is an application that allows users to direct the processing such as posting or printing checks and maintenance procedures to another computer on the network. The Distributed Process Manager is the application that tracks activity on all clients and process servers. See your System Administrator 's Guide (Help >> Contents >> select System administration) for more information.

Installing Dynamics GP on an additional computer

Use the information in this section to install a client in a multiuser system after you've installed Dynamics GP on the server or the first computer and created your first company.

To install Dynamics GP on an additional computer:

1. From the Dynamics GP installation media, double-click the Setup.exe file to open the Dynamics GP installation window.
2. Click Dynamics GP.

The installation program verifies that your system has the minimum operating system required to run Dynamics GP. If your system does not meet requirements, the installation will not continue.

3. Select a new Dynamics GP instance and click Next

If you are installing Dynamics GP on a computer with an existing instance of Dynamics GP, select Create a new instance and enter a name for the new instance. For more information, see [Multiple instances of Dynamics GP](#).

4. In the Select a Country/Region window, select the primary country or region where you do business. Click Next.
5. Follow the instructions in the window to accept the software license agreement.

To install Dynamics GP, you must accept this agreement.

6. In the Select Features window, select the features to install.

OPTION	WHAT HAPPENS
 Run from My computer	The selected feature will be installed on the local hard disk. (This option installs the feature, but not sub-features.)
 Run all from My computer	Will install the feature and all of its sub-features.
 Not available	Will not install the selected feature or sub-features.

When you click a button for a feature, a pop-up menu of options appears. Refer to the table for more information about each option.

- Specify the folder where you want the Dynamics GP files installed. The default folder is C:\Program Files\Microsoft Dynamics\GP. To select a different folder, click Browse.

After you have specified the installation folder, click Next.

- To set up an ODBC data source, enter the name you assigned to the SQL Server when you installed Microsoft SQL Server. A data source name called Dynamics GP also is created using SQL Native Client. If you don't want to set up an ODBC data source, mark the Do not create a data source option.

- Select the system database name. If you selected Enter custom name, enter the system database name.

Click Next.

- If you have selected to install the Service Based Architecture feature, provide the Windows account that will be used as the service account for the Service Based Architecture service.

The Service Based Architecture feature will create a Windows service on the computer. The Windows account provided will be the identity used for this service.

- In the Install Program window, click Install.

- The Installation Progress window appears, where you can view the status of the installation.

- In the Installation Complete window, click Finish.

- Before you start Dynamics GP Utilities, check for and install current update for Dynamics GP. See [CustomerSource](#) for the latest update information.

NOTE

To start Dynamics GP Utilities, you must have appropriate user privileges. Typically, this means being part of the Administrators group or the Power Users group. If you are using an operating system that has User Account Control (UAC) enabled, you will be prompted to run the program as a user with administrative privileges. Refer to your operating system's documentation for more information.

- Start Dynamics GP Utilities. Choose Start >> All Programs >> Microsoft Dynamics >> GP >> GP Utilities.

- Follow the instructions in the Dynamics GP Utilities windows to synchronize your account framework. For more information, see [Synchronizing a client's account framework](#).

- After using Dynamics GP Utilities, you can install additional component applications. For more information, see [Installing additional components](#).

Synchronizing a client's account framework

Synchronize the account framework of each client where you install Dynamics GP.

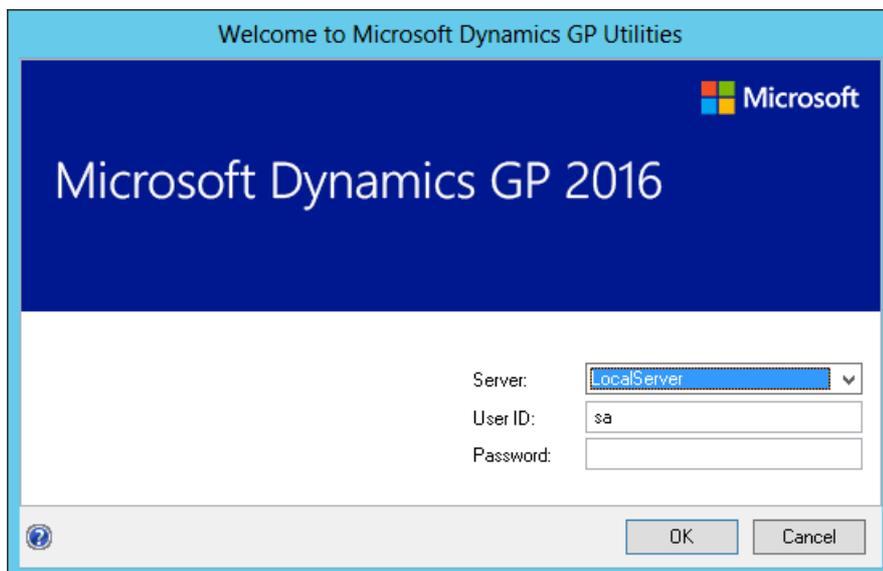
Dynamics GP Utilities uses the scripts and files installed previously to complete the client setup. In addition, you can use Dynamics GP Utilities to complete various maintenance procedures, now and on an ongoing basis.

NOTE

To start Dynamics GP Utilities, you must have appropriate user privileges. Typically, this means being part of the Administrators group or the Power Users group. If you are using an operating system that has User Account Control (UAC) enabled, you will be prompted to run the program as a user with administrative privileges. Refer to your operating system's documentation for more information.

To synchronize a client's account framework:

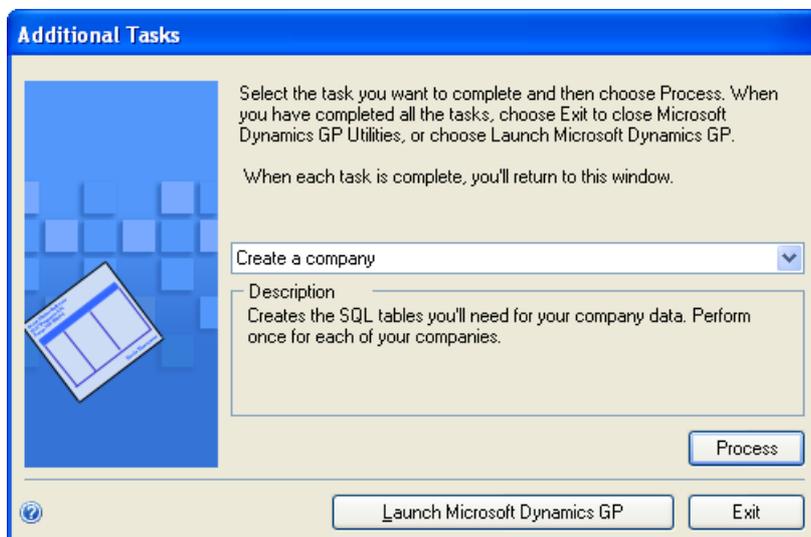
1. Start Dynamics GP Utilities. (Start >> Programs >> Microsoft Dynamics >> GP >> GP Utilities)
2. In the Welcome to Dynamics GP Utilities window, verify your server name, and enter a user ID and password. Click Next.



3. In the Welcome To Dynamics GP Utilities window, click Next.

The Dynamics GP dictionary is synchronized automatically with your account framework.

4. In the Additional Tasks window, you can choose to complete additional tasks, launch Dynamics GP, or end the installation. If you select any task, choose Process; otherwise, click Exit.



5. Repeat the client installation process for each computer you'll use as a client or process server for Dynamics

GP.

Multiple instances of Dynamics GP

You can have multiple instances or installations of Dynamics GP on the same computer. Multiple instances are typically installed on client computers. You may want to use an additional instance of Dynamics GP for testing purposes.

When you install Dynamics GP on a computer with an existing instance of Dynamics GP, you'll enter a name for the new instance during the installation process. Each instance will be displayed in the Add or Remove Programs control panel. For example, if you entered TEST as an instance name, Dynamics GP (TEST) will be displayed in the Add or Remove Programs control panel. The instance also will appear in the program group for Microsoft Dynamics and in the folder where Microsoft Dynamics is installed. The default folder location is C:\Program Files\Microsoft Dynamics\GP\$TEST. The first instance of Dynamics GP on a computer is considered the default instance. The default instance of Dynamics GP isn't assigned an instance name.

Installation overview

10/18/2018 • 4 minutes to read

This section describes the Dynamics GP web components and introduces the major parts of the installation. It also provides an installation checklist.

What are the web components?

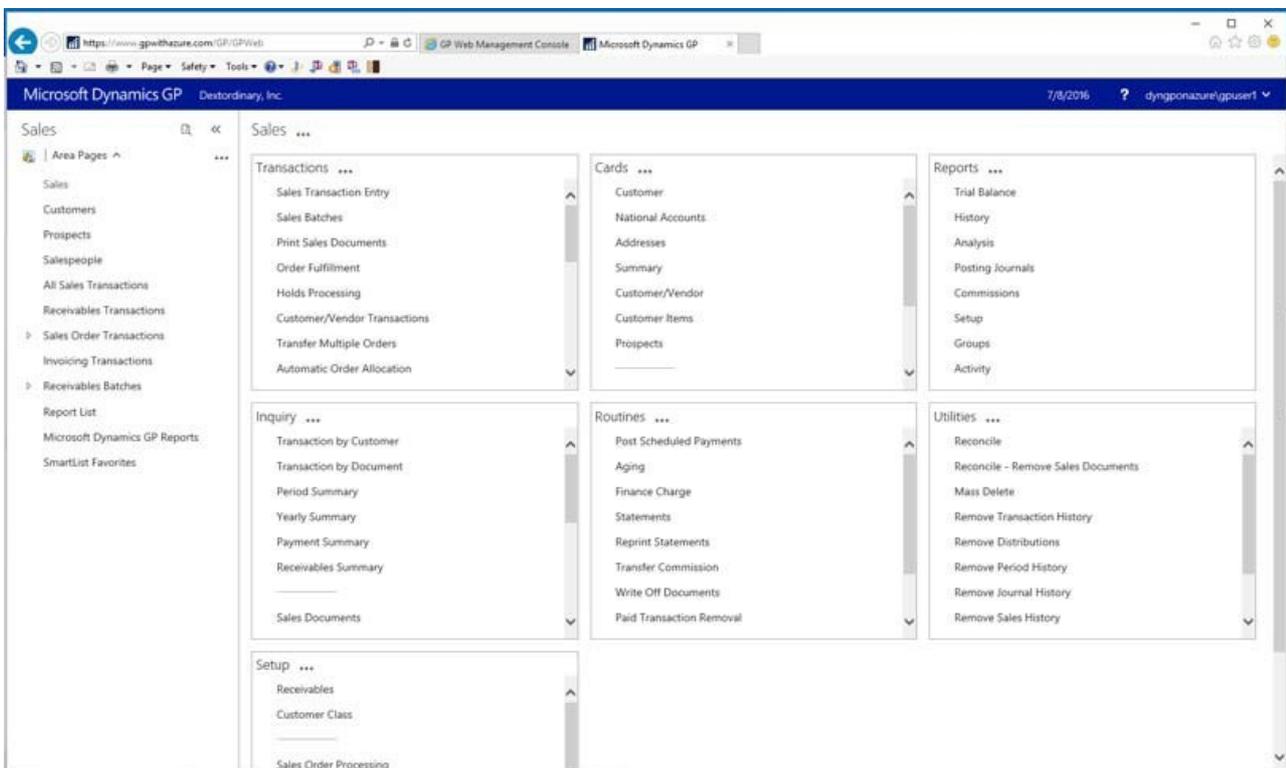
The Dynamics GP web components include the web client, service based architecture and web management console. These components can be installed together on the same server or installed separately on different servers as needed.

What is the web client?

The Dynamics GP web client provides access to Dynamics GP through the Internet Explorer web browser. The user experience and functionality provided by the Dynamics GP web client closely matches the experience of using the Dynamics GP desktop client.

No client application software is installed on the user's local system. The Dynamics GP application process for the user is running on a separate server. For the GP 2018 release, Silverlight is no longer needed as the Web Client is now an HTML web client.

The following illustration shows the Sales area page in the Dynamics GP Web Client.



Parts of the web components

There are several parts of the web components installation that function together to present the web client to the user.

Web site

An Internet Information Services (IIS) web site is the main entry point for the Dynamics GP web client. This is the web site that users connect to when they access the web client. It displays the login page where users supply their credentials to access the system. The site must be configured to use Secure Sockets Layer (SSL) to help ensure data security.

Session Hosts

The server machines that run the sessions of the Dynamics GP web client are called session hosts. Each session host machine will have an installation of Dynamics GP.

Session Service

The Session Service is running on each session host machine. It manages the new process that is created each time a user logs into the Dynamics GP web client.

Session Central Service

The Session Central Service controls the communication between the web site and the session host machines. When multiple session host machines are available, the Session Central Service will balance the processing load among the available machines.

Dynamics GP Web Client runtime

The Dynamics GP Web Client runtime is a component of the Dynamics GP installation. A web client runtime process is created by the Session Service each time a user logs into the Dynamics GP web client. Like the Dynamics.exe process used by the desktop client, the web client runtime process accesses the business logic in the application dictionaries and the data in the SQL database. Instead of displaying the user interface in a Windows application, the web client runtime displays the user interface in a browser.

NOTE

You might hear this component referred to as the runtime service.

Web Management Console

The Web Management Console is a separate HTML application that is used to perform administrative tasks for the Dynamics GP web client. These tasks include actions like removing abandoned web client sessions.

Description of service based architecture

The Dynamics GP service based architecture enables REST based integrations to Dynamics GP. The functionality existing in dictionaries is exposed as a service call. The functionality is the "base" used for the service as well as the web and desktop clients.

Components of service based architecture

The components of service-based architecture function together to expose the service calls to integrating applications. The components include the following:

GP Service

A WCF web service that serves as the main entry point for the service. The GP Service is responsible for performing the authentication on the incoming request and directing it to a Dexterity Service that can execute the request. The GP Service must be configured to use Secure Sockets Layer (SSL) to help ensure data security.

Session hosts

The server machines that host the Dexterity Service instances are called session hosts. Each session host machine will have an installation of Dynamics GP and the Dexterity Service Control.

Dexterity Service Control

The Dexterity Service Control is running on each session host machine. It manages the Dexterity Service instances that execute the requests.

Dexterity Service

The Dexterity Service is a component of the Dynamics GP installation. The Dexterity Service gets requests from the GP Service and executes them using a Dynamics GP runtime instance. A runtime instance is created by the Dexterity Service as needed to handle incoming requests. There could be one or more runtime instances for a single Dexterity Service on a session host. Like the Dynamics.exe process used by the desktop client, a Dexterity Service runtime instance accesses the business logic in the application dictionaries and the data in the SQL database.

Installation checklist

To install the Dynamics GP web components, complete the following tasks in the order shown.

TASK	FOR MORE INFORMATION SEE
1. Select a deployment configuration. Specify if you want to install the Dynamics GP web components on a single machine or as a scale-out installation.	Deployment configurations
2. Check the Dynamics GP installation. Verify that the Dynamics GP installation is running properly and that the required web client runtime components are installed.	Environment configuration
3. Create the security groups and user accounts. Determine which users will access the Dynamics GP web client and the Web Management Console.	Security groups and user accounts
4. Verify the prerequisite software. Install the software needed to support the Dynamics GP web components.	Prerequisite software
5. Create and configure web sites. Create and configure the web sites that will host the Dynamics GP web client and the Web Management Console.	Web sites
6. Obtain security certificates and configure SSL. Determine the type of security certificate you want to use. Configure the web site to use SSL.	Security certificates and SSL
7. Install the web components. Complete the installation procedure based on the type of deployment that you chose.	Scale out installation

Deployment configurations

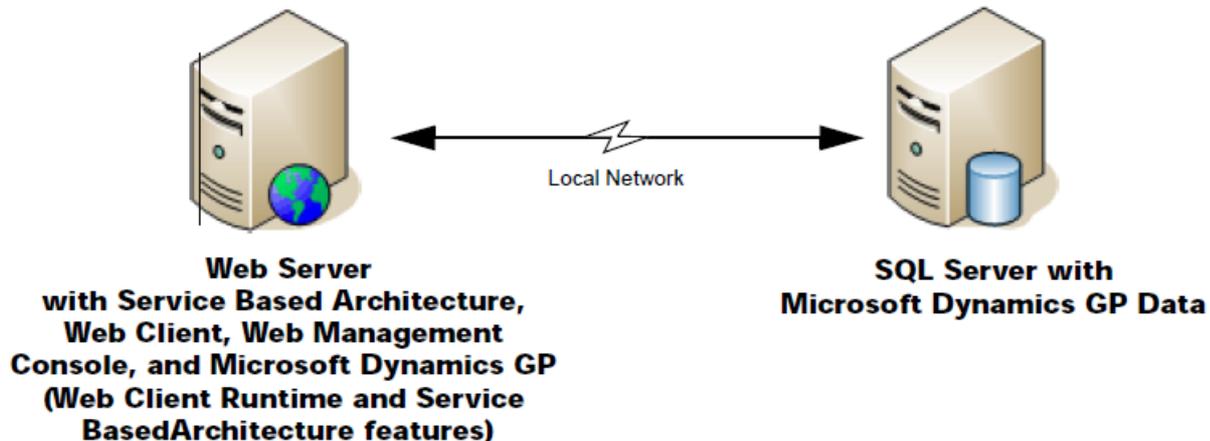
There are three common deployment configurations for the Dynamics GP web components. This chapter discusses these configurations. It is divided into the following sections:

- [Single machine](#)
- [Scale out](#)
- [Multitenant](#)

Single machine

The single machine configuration is the simplest configuration to use when deploying the Dynamics GP web components. In this configuration, the web client, service based architecture and web management console components are installed on a single server machine. This includes the Web Site, Session Central Service, Session Service, and Dynamics GP web client runtime for the web client. It also includes the GP Service, Dex Service Control and Dynamics GP with the service based architecture feature and Web Management Console snap-ins required to manage the environment.

A typical single machine configuration is shown in the following illustration.



This configuration is used when the number of users accessing the system is low. It is also commonly used by developers who are creating and testing integrations for Dynamics GP.

One limitation of the single machine configuration is that there is no redundancy. If the server machine is down, such as when installing an update, no web client users will be able to access Dynamics GP.

NOTE

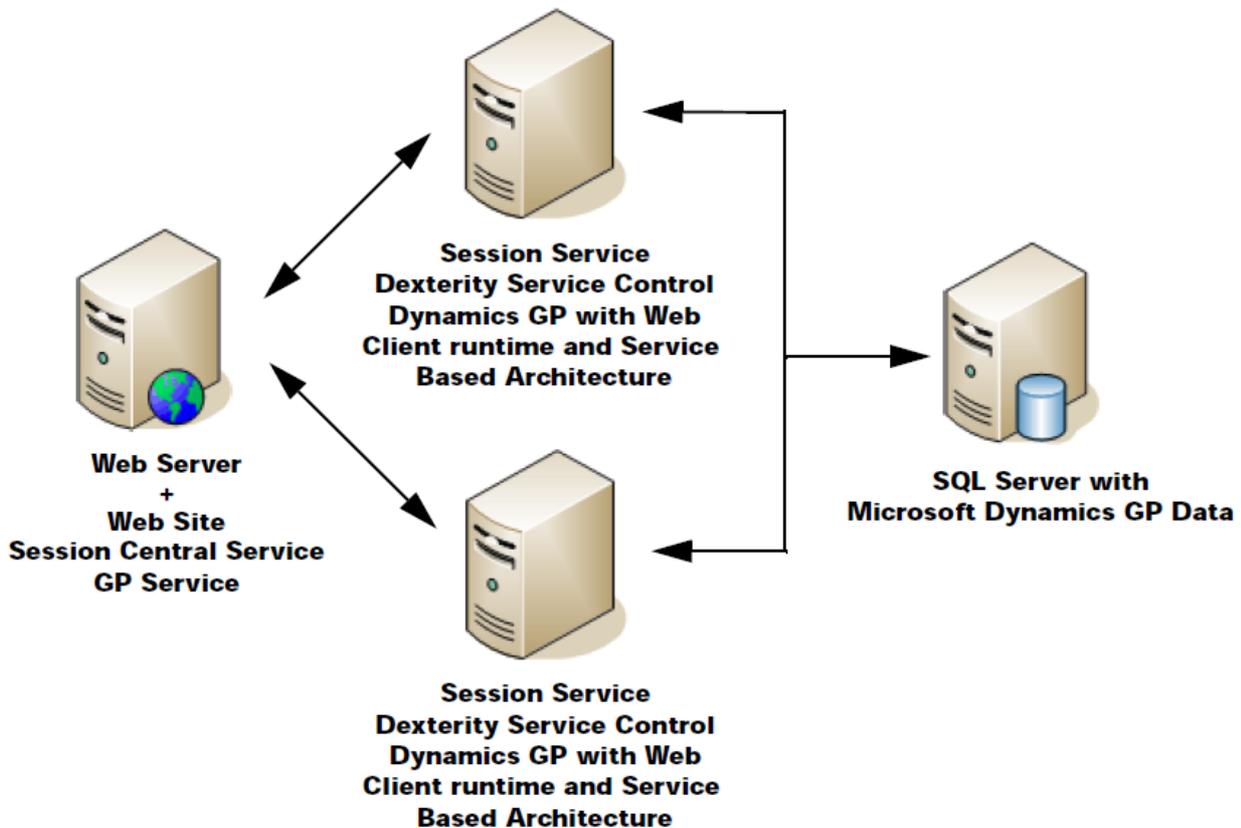
The installation process for this configuration is described in Chapter 10, "Single machine installation."

Scale out

The scale out configuration is used when an organization has a larger number of users that will be accessing the

Dynamics GP web components. In this configuration, one server contains the web site, Session Central Service, GP Service and Web Management Console. Two or more session host machines each contain the Session Service, Dex Service Control and Dynamics GP (web client runtime and service based architecture). The Session Central Service and GP Service balances the processing load among the session host machines.

A typical scale out configuration is shown in the following illustration.



The scale out configuration has some redundancy. If one of the session host machines must be taken out of service, such as when installing an update, the other session host machines will continue supporting web client users. A fully redundant configuration can be achieved by adding an additional Web Server that is load balanced with the initial Web Server. Additional session host machines can be added as needed to support a higher number of users.

NOTE

The installation process for this configuration is described in Chapter 11, "Scale out installation."

Multitenant

The multitenant configuration is typically used by organizations that host Dynamics GP for other customers. This configuration can support a large number of users. This configuration has the following characteristics:

- There are multiple front-end web servers that are each running the Session Central Service and the GP Service. These web servers are load balanced for redundancy.
- Multiple session host machines host the sessions of the Dynamics GP web client and service-based architecture. Each of these session host machines contains the Session Service, Dexterity Service Control, and the Dynamics GP web client runtime and service-based architecture.
- The Tenant Service is used with this configuration to allow multiple Dynamics GP installations to be run on the same physical server.

The multitenant configuration has the best redundancy of any of the typical Dynamics GP web client configurations. In addition to multiple session host machines, having multiple front-end web servers can allow web client users to access the system even when one of the web servers is unavailable.

NOTE

This is a more complex configuration and is not covered in this documentation.

Dynamics GP environment configuration

10/18/2018 • 3 minutes to read

Before you can install the Dynamics GP web components, you must have Dynamics GP installed, including the necessary web client runtime and/ or service based architecture components.

Dynamics GP installation

Dynamics GP should be installed, configured, and operating properly before you use the web components installation to install the Web Client or Service Based Architecture server components for Dynamics GP. While most administrative tasks can be performed with the web client, some important tasks such as creating companies cannot. These actions must be done with the Dynamics GP desktop client and GP Utilities.

Each server that will be acting as a session host must have a Dynamics GP desktop client installation installed. Use the desktop client to verify that the server is able to connect to the Dynamics GP database.

Web Client SQL Server login

During the Dynamics GP installation, a SQL Server login is created that web client and service based architecture sessions can use to access SQL Server. By using the single Web Client SQL Server login, each web client and service based architecture user doesn't need to have their own SQL Server login. Web client users can access the web client simply by providing their standard Windows login credentials or their Organizational Account. Service Based Architecture users must access Dynamics GP using either their Windows login credentials or their Organizational Account.

During the Dynamics GP web components installation, you will need to know the name and password for the Web Client SQL Server login. You can use Dynamics GP Utilities to configure or make changes to the Web Client SQL Server login for your Dynamics GP installation.

Web client only users

It's likely that you will have some users that will be accessing only the Dynamics GP web client and will never use the desktop client. You can set up these users in Dynamics GP as web client only users.

In the **User Setup** window, mark the **Web Client user only (no SQL Server Account)** option. The **SQL Server Account** tab will be disabled, because the user you are adding to Dynamics GP will not have a SQL Server login. On the **Directory Account** tab, you will supply the Windows login information for the user.

When the user signs in to the web client, they simply provide their Windows Login or organizational account credentials. The web client will determine the user's Dynamics GP user ID based on the credentials. The Web Client SQL Server login (discussed in the previous section) is used to access the SQL Server databases.

NOTE

Be aware that users who do not sign in to the web client using their own SQL Server login cannot send remote processes to the Distributed Process Server.

Web client runtime components

Each session host server must have the Dynamics GP web client runtime and service based architecture components. These components are part of the Dynamics GP installation. To install these components, complete

the following procedure:

To install the web client runtime components

1. Open the Programs and Features control panel.
2. Select the Dynamics GP application, and then click Change.
3. In the Program Maintenance window, click Add/Remove Features.
4. Be sure that the Web Client Runtime feature is marked to be installed.
5. Click Next to continue, and then click Install to complete the installation process.
6. Click Exit.

To install the service based architecture components

1. Open the Programs and Features control panel.
2. Select the Dynamics GP application and then click Change.
3. In the Program Maintenance window, click Add/Remove Features.
4. Be sure that the Service Based Architecture feature is marked to be installed.
5. Click Next to continue, and then click Install to complete the installation process.
6. Click Exit.

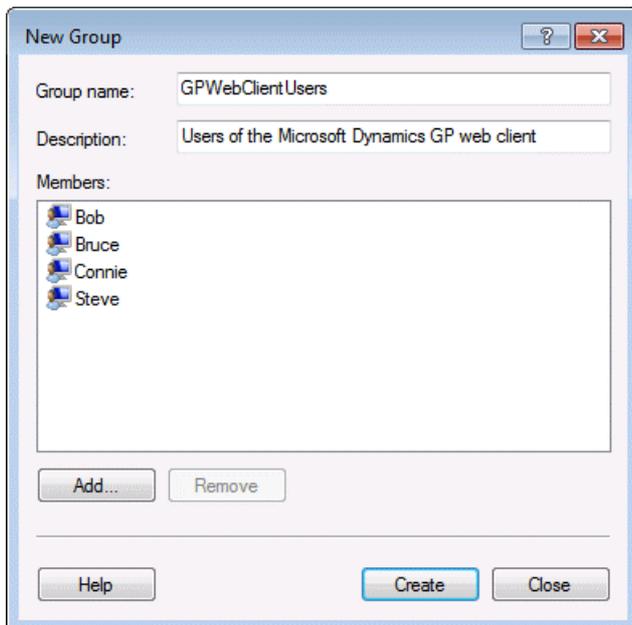
Security groups and user accounts

To properly secure the Dynamics GP web components installation, some security groups and specific user accounts are required. Information is divided into the following sections:

- [Security groups](#)
- [User accounts](#)

Security groups

Security groups are used to control which users are allowed to access the Dynamics GP web client and the Web Management Console. These security groups can be machine groups (for the single machine configuration) or domain groups. The domain groups must be security groups, not distribution groups.



Typically, you should create one security group for the Dynamics GP web client, and another security group for the Web Management Console. You can add individual users to these groups. If you have a more complex installation with a large number of users, you may want to create additional groups that you add users to.

User accounts

Several user accounts are needed to run the web site and services that are part of the Dynamics GP web components installation. These accounts are typically domain accounts since they will need to access a configuration database on the SQL Server. Ideally, these user accounts should have limited privileges, and a password that does not expire. You may want to use the same account for multiple components of the configuration.

Create the user accounts before you start installing the Dynamics GP web components. You must have user accounts for the following:

GP Web Client site application pool

This is the user account that runs the application pool for the web site that hosts the Dynamics GP web client.

Web Management Console application pool

This is the user account that runs the application pool for the web site that hosts the

Web Management Console.

Session Central Service

This is the user account that runs the Session Central Service. This account must have permissions to read information from Active Directory.

Session Service

This is the user account that runs the Session Service on each session host machine.

GP Service

This is the user account that runs the GP Service. This account must have permissions to read information from Active Directory.

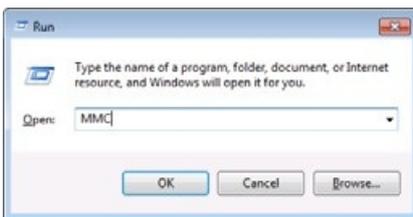
Dexterity Service Control

This is the user account that runs the Dexterity Service Control on each session host machine.

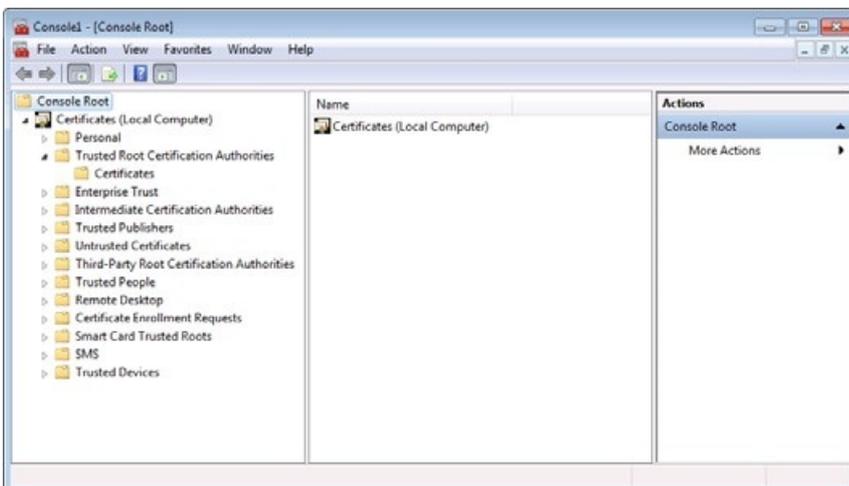
4. In the drop-down, click View certificates.
5. In the Certificate window, click the Details tab.
6. Click Copy to File to open the Certificate Export Wizard. Click Next.
7. Choose the DER encoded binary X.509 format, and click Next.
8. Click Browse to open a file dialog box that allows you to name the certificate file and select a location for it. A common practice is to name the certificate based on the computer that it is being accessed. In this example, the computer being accessed is named GPU2, so the certificate is named GPU2.cer. Choose a convenient location for the file, such as the desktop. Click Save.
9. In the Certificate Export Wizard, click Next. Then click Finish. A message will be displayed indicating that the security certificate was exported.
10. Click OK to close the Certificate window.

To install the security certificate

1. On the computer that will be used to connect to the web client, open the Run prompt. (Choose Start > Run or press Window-R)
2. In the Open field, type MMC and then click OK.

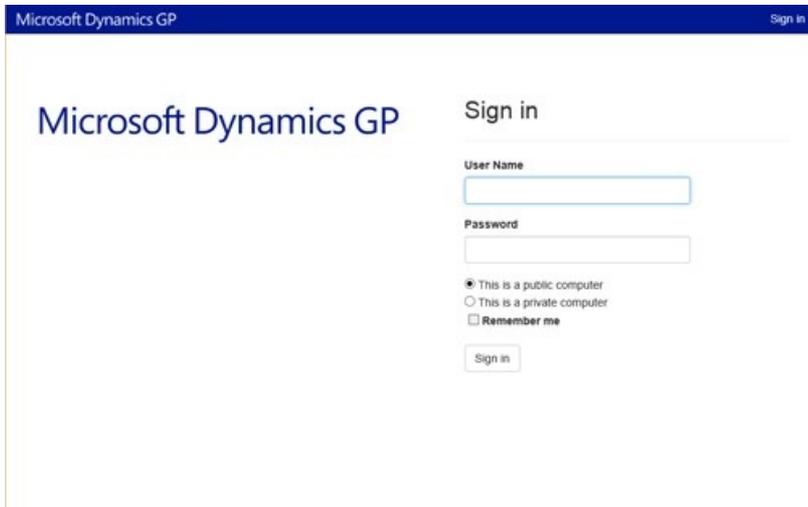


3. In the Microsoft Management Console, open the File menu and choose Add/ Remove Snap-in.
4. In the Add or Remove Snap-ins window, choose the Certificates snap-in from the Available snap-ins list, and then click Add.
5. In the Certificates snap-in dialog box, choose Computer account and then click Next.
6. In the Select Computer dialog box, choose Local computer and then click Finish.
7. In the Add or Remove Snap-ins window, click OK.
8. In the left pane, expand the Certificates (Local Computer) node, and then expand the Trusted Root Certification Authorities node.



9. In the Microsoft Management Console, open the File menu and choose Add/ Remove Snap-in.

10. In the Add or Remove Snap-ins window, choose the Certificates snap-in from the Available snap-ins list, and then click Add.
11. In the Certificates snap-in dialog box, choose Computer account and then click Next.
12. In the Select Computer dialog box, choose Local computer and then click Finish.
13. In the Add or Remove Snap-ins window, click OK.
14. In the left pane, expand the Certificates (Local Computer) node, and then expand the Trusted Root Certification Authorities node.



The screenshot shows the Microsoft Dynamics GP Sign in page. The page has a dark blue header with "Microsoft Dynamics GP" on the left and "Sign in" on the right. Below the header, the "Microsoft Dynamics GP" logo is displayed on the left, and the "Sign in" heading is on the right. The sign-in form includes a "User Name" text box, a "Password" text box, and two radio button options: "This is a public computer" (selected) and "This is a private computer". There is also a "Remember me" checkbox and a "Sign in" button at the bottom.

Register application for organizational accounts

10/18/2018 • 4 minutes to read

To set up the Dynamics GP web components for user access using Organizational Accounts, you must register the application in your Microsoft Azure Active Directory. This information is divided into the following sections:

- [Add application](#)
- [Configure for sign on](#)
- [Configure for multiple tenants](#)

Add application

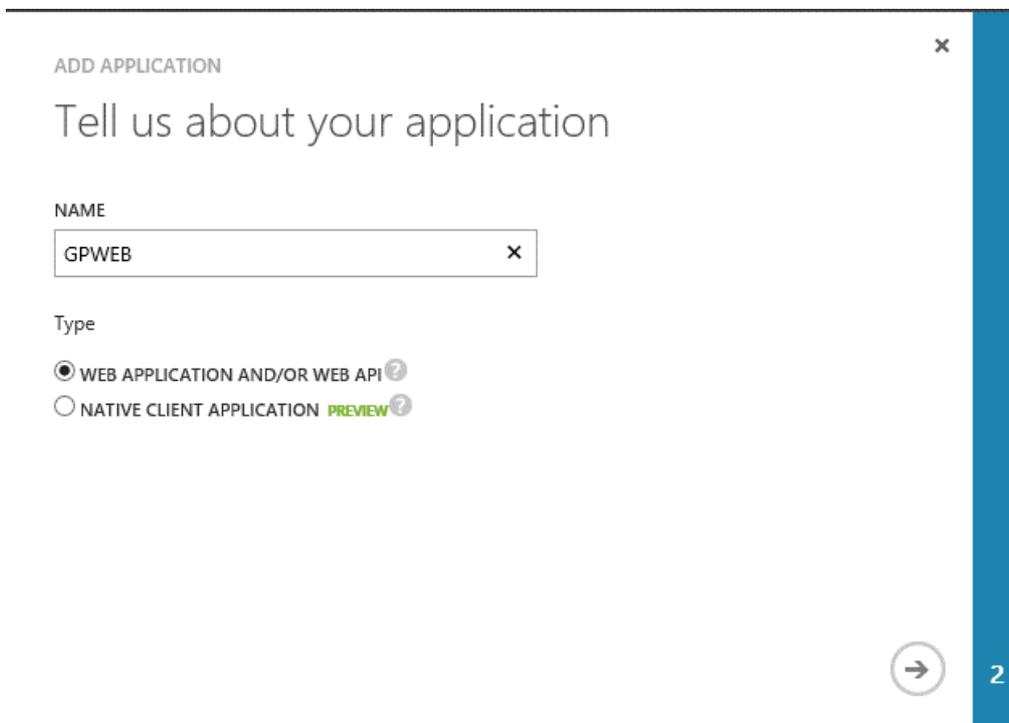
For an application to use Azure AD for sign in and authorization you must first register it with Azure AD by providing information about that application.

To successfully register the application with Azure AD, you will need to know the URL that you will be using when you deploy the Dynamics GP web components. A typical URL to access the Dynamics GP web client looks similar to the following:

<https://gpuaweb.contoso.com/GP>

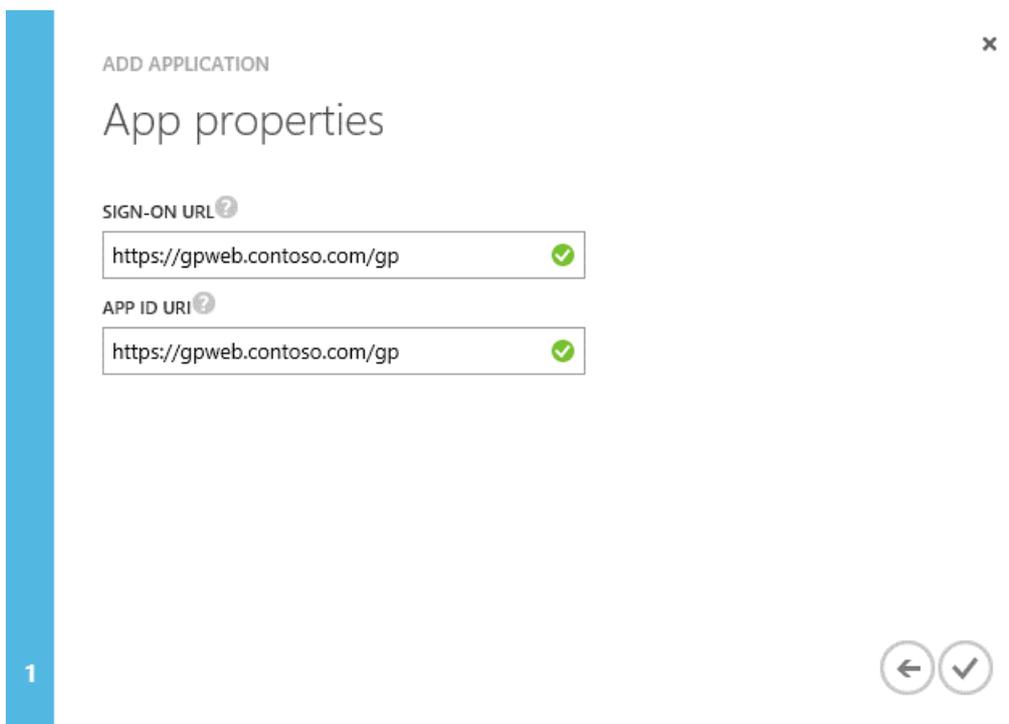
Use the following steps to register your Dynamics GP web components installation with Azure AD.

1. Sign on to the Azure Management Portal.
2. Click on the Active Directory icon on the left menu, and then click on the directory you want to use for the application.
3. On the top menu, click Applications. If no apps have been added to your directory, this page will only show the Add an App link. Click on the link, or alternatively you can click on the Add button on the command bar.
4. On the What do you want to do page, click on the link to Add an application my organization is developing.
5. On the Tell us about your application page, you must specify a name for your application as well as indicate the type of application you are registering with Azure AD. You will choose the web application and/or web API radio button.



When finished, click the arrow icon on the bottom-right corner of the page.

6. On the App properties page, provide the Sign-on URL and App ID URI for your web components. These can be the same value or different values. The APP ID URI must be a unique URI in Azure. Click the checkbox in the bottom-right corner of the page to add the application.



7. Your Application has been added and you will be taken to the Quick Start page for your application. After your application has been added, you can begin updating your application to enable users to sign in, access web APIs in other applications, or configure a multi-tenant application (which allows other organizations to access your application).

Configure for sign on

Once the application has been added to Azure Active Directory, you will need to configure the application to support sign on to Dynamics GP. You will need to capture the configuration information for use when deploying

the Dynamics GP web components.

Use the following steps in order to configure the application for sign on.

1. On your application's configuration properties page, select the drop-down in the keys section in order to generate a key. You can select to create a key that is good for either one or two years. The key will be generated when you select to save the application configuration changes.

keys

Select du... VALID FROM EXPIRES ON THE KEY VALUE WILL BE DISPLAYED AFTER YOU SAVE IT.

Select duration

1 year

2 years

single sign-on

APP ID URI https://gpweb.contoso.com/gp

REPLY URL https://gpweb.contoso.com/gp

(ENTER A REPLY URL)

2. In the permissions to other application section, select the Read directory data checkbox for the Application Permissions drop-down for the Microsoft Azure Active Directory row. This allows Dynamics GP to look up user accounts in the Azure Active Directory when setting up GP users.

permissions to other applications PREVIEW

Windows Azure Active Directory

Application Permissions: 1

Delegated Permissions: 1

Select application

Read directory data

Read and write directory data

Permissions: 0

3. Select the Save button at the bottom of the page to save your changes.
4. When the application configuration changes have been saved, the key will be displayed. It is important that you copy and store this key since you will not be able to retrieve the key after leaving the page.

Configure for multiple tenants

If you want to allow users from multiple Azure Active Directory tenants to access a multitenant web components deployment, you will configure the application as multitenant. A multitenant application will need to be provisioned in each tenant's directory, which requires user or administrator consent to register them in their directory.

In order to configure the application as multitenant, the domain name in the APP ID URI must be from a verified domain within your organization's directory. Use these steps to add the domain if you haven't already.

Use the following steps to configure the application as mulitenant.

1. On your application's configuration properties page, select Yes to indicate that the application is mulitenant.

APPLICATION IS MULTI-TENANT

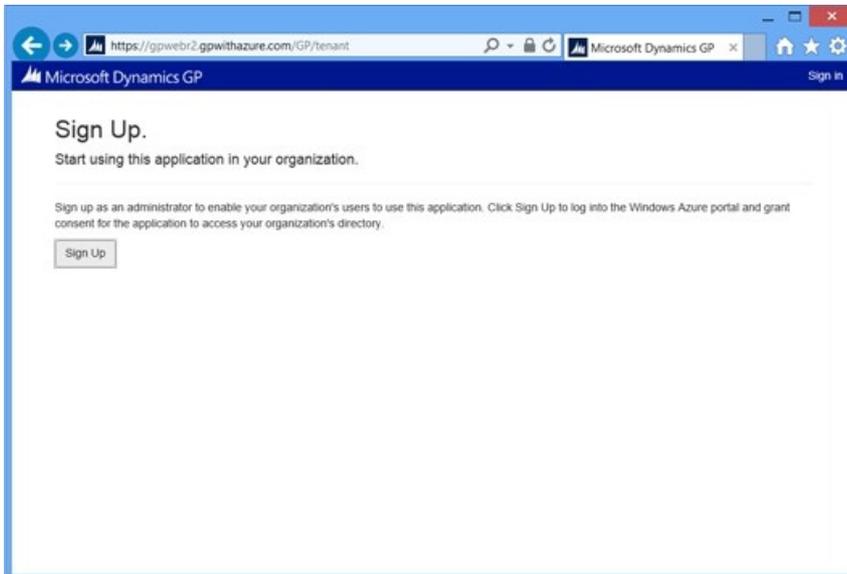
YES NO

2. Select Save to save your changes.

For an administrator to enable their organization's users to use the application, the administrator will need to sign up for the application using a special URL to your Dynamics GP web client deployment. A typical sign up URL looks similar to the following:

<https://gpuaweb.contoso.com/GP/tenant>

The administrator will select the sign-up button, which will prompt them for their Azure Active Directory credentials if they are not already signed in. Once the administrator has signed up, the application has been registered in their Azure Active Directory and users from that directory can be assigned to GP users.



Prerequisite software

10/18/2018 • 2 minutes to read

Before you can install the Dynamics GP web components, you must install other software on the web server and the session host servers. The prerequisite software to install will depend on the components you will be installing on the server.

Server operating system

To install the Dynamics GP web components, the web server and the session host servers must be running one of the following operating systems:

- Microsoft Windows Server 2016
- Microsoft Windows Server 2012
- Microsoft Windows Server 2012 R2
- Windows Server 2008 SP1

You cannot install any of the Dynamics GP web client components on a server that is also being used as a domain controller.

Internet Information Services (IIS) and ASP.NET

Internet Information Services (IIS) and ASP.NET must be installed on the web server on which you will be installing the Dynamics GP web client.

Windows Server 2008 R2

To install these items, complete the following steps for Windows Server 2008 R2:

1. Open the Server Manager.
2. Click **Roles**.
3. Choose **Add Roles**. In the Add Roles Wizard, click **Next**.
4. Mark **Web Server (IIS)** and then click **Next**.
5. At the Introduction screen, click **Next**.
6. Select the role services to install. The following items must be marked:

In **Common HTTP Features**:

- Static Content
- Default Document

In Application Development:

- ASP.NET

In **Security**:

- **Windows Authentication**

Other role services will already be marked. Some are marked by default. Others are marked depending on how the web server is configured. Click **Next**.

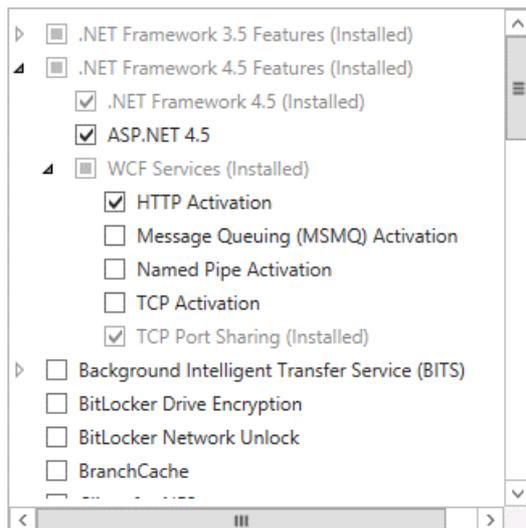
7. Click **Install**. The roles and role services will be added.
8. After the installation is complete, click **Close**.

Windows Server 2012 and Windows Server 2012 R2 and 2016

To install these items, complete the following steps for Windows Server 2012 and 2016:

1. Open the Server Manager.
2. Click **Manage >> Add Roles and Features**.
3. In the Add Roles and Features Wizard, click **Next**.
4. Choose **Role-based or feature-based installation**, and then click **Next**.
5. Select your server from the server pool, and then click **Next**.
6. Mark **Web Server (IIS)** and then click **Next**.
7. Select the features to install. Be sure that you mark **ASP.NET 4.5**. In the **WCF Services** group under **.NET Framework 4.5 Features**, be sure that you have marked **HTTP Activation**.

Features



Click **Next**.

8. The screen for the Web Server Role (IIS) is displayed. Click **Next**.
9. Select the role services to install for the web server. The following items must be marked:

In **Common HTTP Features**:

- Static Content
- Default Document

In **Security**:

- **Windows Authentication**

In Application Development:

- **ASP.NET 4.5**

Other role services will already be marked. Some are marked by default. Others are marked depending on how the web server is configured. Click **Next**.

10. Click **Install**. The roles, features, and role services will be added.
11. After the installation is complete, click **Close**.

Web sites

10/18/2018 • 2 minutes to read

This portion of the documentation discusses the web sites that are needed for the Dynamics GP web components installation.

Required web sites

Two web sites – one for the web client and another for web management console – are used for the Dynamics GP web components installation. These two web sites can be hosted in a single IIS web site, or on separate IIS web sites.

NOTE

The IIS web sites must be configured for SSL (secure sockets layer). This means each must have a security certificate. If you use two separate IIS web sites, then you will need two security certificates. If both web sites are hosted on the same web site, then only one security certificate is required.

Dynamics GP Web Client site

This web site hosts the Dynamics GP web client. It is the web site that the users connect to with their web browser when they log into the Dynamics GP web client. You can use the default web site in IIS (port 80) or you can create a new web site that runs on a different port.

Web Management Console site

This site hosts the Web Management Console that is used to manage the Dynamics GP web client installation. In basic web client installations, you can use the same web site that the Dynamics GP web client is installed on.

Extending sites with ASP.NET

On Windows Server 2008 R2, the web sites that you use for the Dynamics GP web client must be extended with ASP.NET functionality. This step is not necessary on Windows Server 2012, because the sites will already have been extended with .NET Framework 4.

To extend the web site, complete the following procedure:

1. Open a command prompt with administrative privileges.
2. Set the current directory to this location:

```
C:\Windows\Microsoft.NET\Framework64\v4.0.30319\
```

3. Run this command:

```
aspnet_regiis -i
```

Security certificates and SSL

10/18/2018 • 6 minutes to read

Security certificates and secure sockets layer (SSL) are used to help improve the security of the data being transmitted by the Dynamics GP web components. The web site that hosts the web client and web management console must be configured to use SSL. The GP Service and Web Client runtime service must be configured to use a security certificate. Optionally, the Session Central Service, Session Service and Dex Service Control can be configured to use a security certificate to improve their security in a scale out deployment where cross-machine communication is happening.

Security certificate requirements

The security certificates that you use for your Dynamics GP web components installation must meet some requirements to work properly.

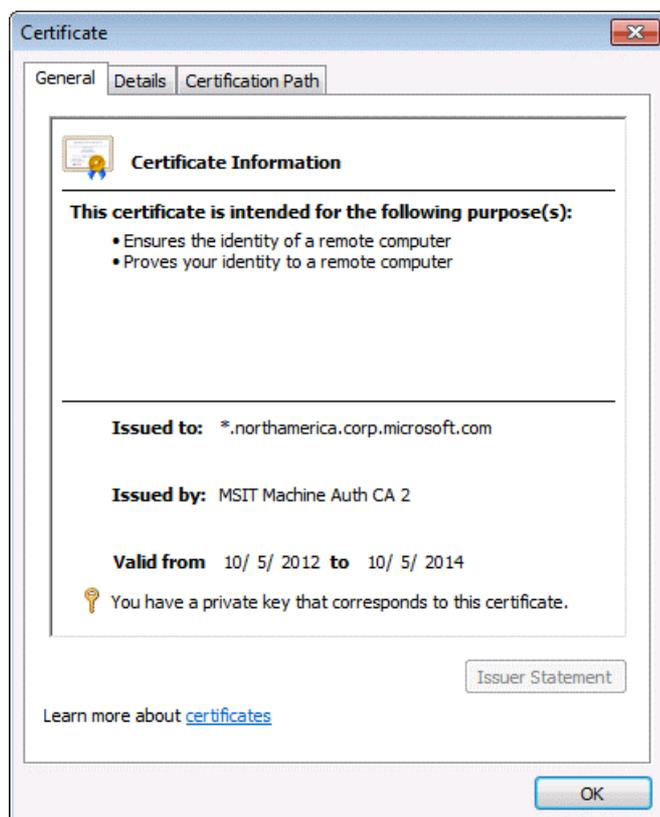
Certificate purpose

To be used for the Dynamics GP web components, the security certificate must have "Server Authentication" listed as one of its intended purposes. You can use the Certificates snap-in for the Microsoft Management Console to view the Intended Purpose column for the certificate.

Private key

It's essential that the security certificate that you are using for the runtime service has a private key. This allows the security certificate to be bound to the port that is being used for the runtime service.

To verify that a security certificate has a private key, you can view the details of the certificate file. At the bottom of the details, you should see that the certificate has a private key. If it does not, then the security certificate cannot be used for the runtime service.



Externally signed security certificates

Externally signed security certificates are the easiest way to implement SSL for the Dynamics GP web components. They must be purchased from the third- party supplier. Due to the additional cost, externally signed security certificates are typically used in a production environments.

There are three basic types of externally signed security certificates:

Single domain This type of security certificate is issued for a specific machine. For example you could get a security certificate issued for the machine with the following name:

- GPweb.contoso.com.

You would typically use this type of certificate when installing the Dynamics GP web components in a single machine configuration. This is the least- expensive type of certificate to purchase.

Multiple domain This type of security certificate is issued for a set of specific machines. You must know the machine names at the time that you are purchasing the security certificate. For example, you could get a security certificate issued that could be used for machines with the following names:

- **GPweb.contoso.com**
- **ServiceHost1.contoso.com**
- **ServiceHost2.contoso.com**
- **ServiceHost3.contoso.com**

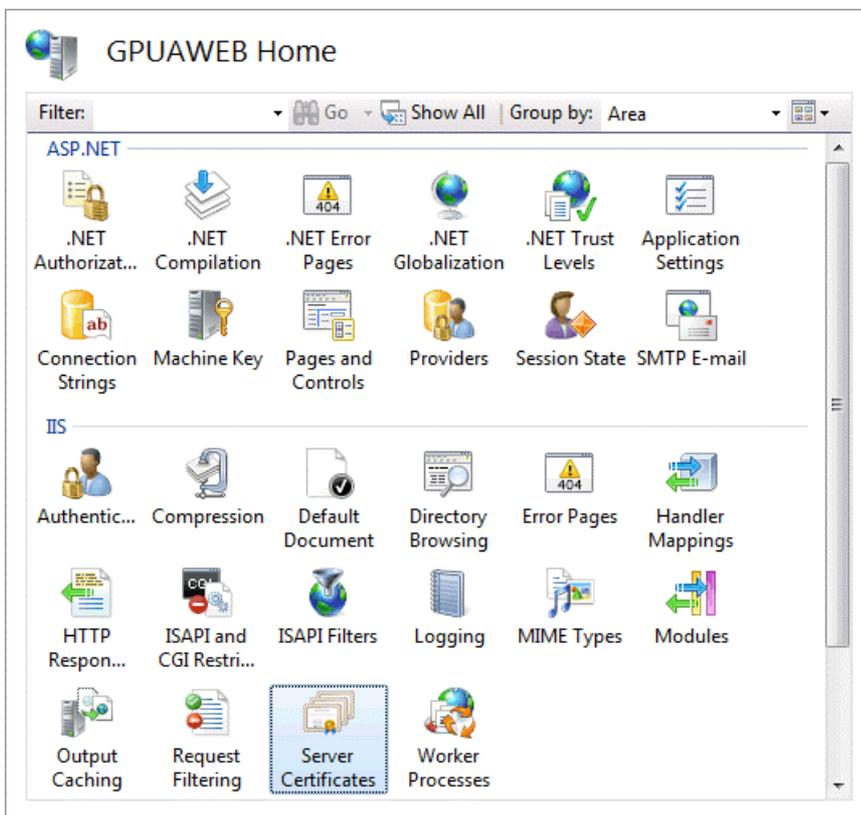
You would typically use the multiple domain certificate when installing the Dynamics GP web components in a scale out configuration. The certificate would contain entries for each of the machines that will be part of your web client installation. This security certificate is more expensive, because the same certificate can be used on multiple machines.

Using an externally signed security certificate for a web site

When an externally signed security certificate is used for a web site, the third-party certificate authority handles the certificate validation when users connect to the web client site. No additional action is needed by the Dynamics GP web client users.

To use an externally signed security certificate:

1. Obtain the security certificate (.cer or .pfx) file from the third-party certificate supplier.
2. In Administrative Tools on the web server system, open Internet Information Services (IIS) Manager.
3. In the left pane, select the computer name.
4. In the IIS group, open Server Certificates.



5. Install the certificate, based on the type of file that has been provided:

- If your certificate has been provided as a .cer file, complete these actions. In the Actions pane, click **Complete Certificate Request**. Select the certificate (.cer) file that you obtained from the third-party certificate supplier. In the **Friendly name** field, enter the name that will be displayed for the certificate. Click **OK**.
- If your certificate has been provided a .pfx file, complete these actions. In the Actions pane, click **Import**. Select the certificate (.pfx) file that you obtained from the third-party certificate supplier. Enter the password for the security certificate. Click **OK**.

Self-signed security certificates

Self-signed security certificates are the least expensive way to implement SSL for the Dynamics GP web components. You can generate these security certificates from within IIS Manager. They are typically used when you are setting up a Dynamics GP web components installation for testing or development purposes.

Self-signed security certificates have some limitations. You must use the default subject alternative name (SAN) that is assigned when the security certificate is created. Self-signed security certificates have a limited lifespan, typically one year.

When you use a self-signed security certificate, there is no external authority to handle the certificate validation when users connect to the web client site. Because of this, a certificate error will be displayed when users access the Dynamics GP web client site. To prevent the certificate error, users must import the security certificate onto their own machine. Refer to [Importing a Self- signed Security Certificate](#) for details about importing a self-signed security certificate.

To use a self-signed security certificate

1. In Administrative Tools on the web server system, open Internet Information Services (IIS) Manager.
2. In the left pane, select the computer name.
3. In the IIS group, open Server Certificates.

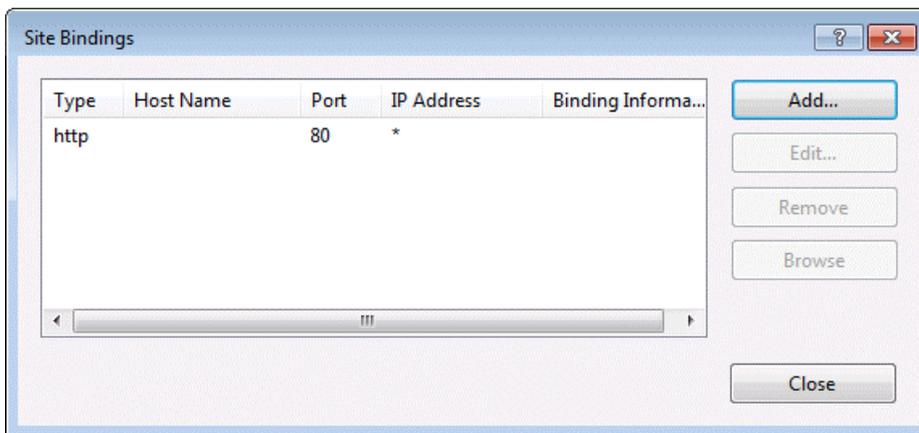
4. In the Actions pane, click Create Self-Signed Certificate.
5. Supply the friendly name for the security certificate.
6. Click OK. The security certificate will be created.

Configuring the web site to use SSL

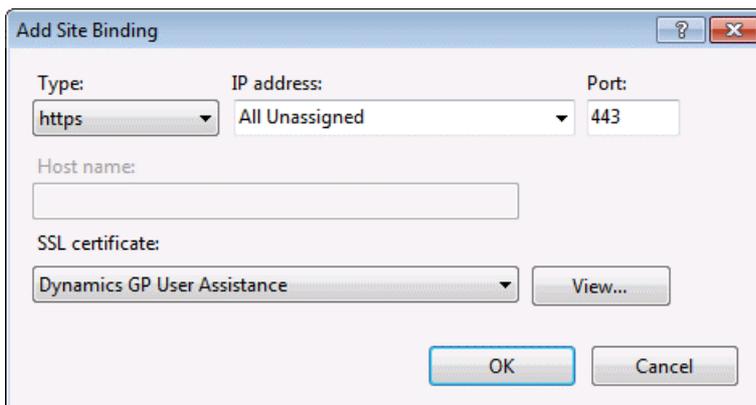
The web site used for the Dynamics GP web client must be configured to use SSL. Before configuring the web site, be sure that you have imported an externally signed security certificate or have created a self-signed security certificate.

To configure the web site for SSL

1. In Administrative Tools on the web server system, open Internet Information Services (IIS) Manager.
2. In the left pane, expand the Sites group. Within the Sites group, select the site that you are configuring to use SSL. For example, select the Default Web Site.
3. In the Actions pane, click Bindings.
4. In the Site Binding window, click Add.



5. In the Add Site Bindings window, select https for the type, and then choose an SSL certificate that you installed.



Click OK.

6. Click Close.

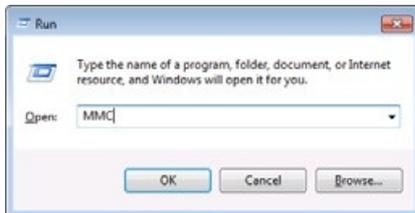
Installing a security certificate on a server

If you are setting up the scale out configuration for the Dynamics GP web client installation, the session host machines must have a security certificate that can be used when configuring the runtime session. You will also

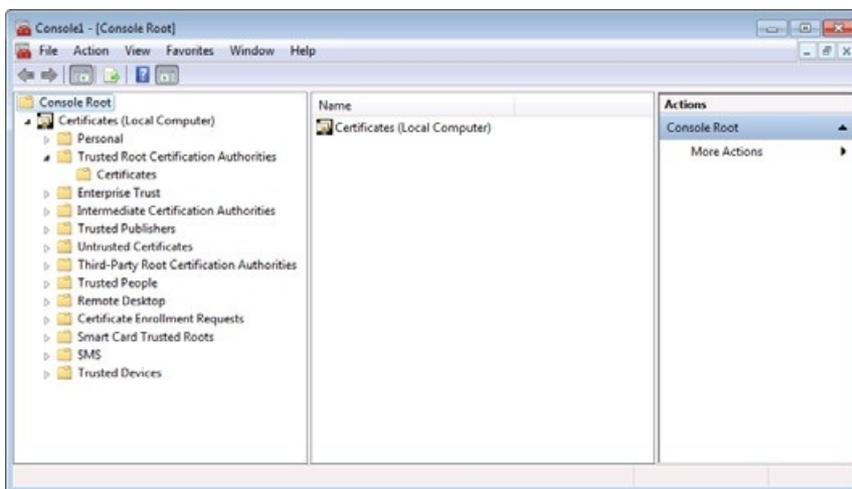
need to use these steps to install a security certificate in a Service Based Architecture only deployment. If you are using an externally signed security certificate, you will need to install the security certificate onto each session host machine so that the certificate is available to be used.

To install a security certificate

1. On the computer that will be used as a session host, open the Run prompt. (Choose Start > Run or press Window-R)
2. In the Open field, type MMC and then click OK.



3. In the Microsoft Management Console, open the File menu and choose Add/ Remove Snap-in.
4. In the Add or Remove Snap-ins window, choose the Certificates snap-in from the Available snap-ins list, and then click Add.
5. In the Certificates snap-in dialog box, choose Computer account and then click Next.
6. In the Select Computer dialog box, choose Local computer and then click Finish.
7. In the Add or Remove Snap-ins window, click OK.
8. In the left pane, expand the Certificates (Local Computer) node, and then expand the Personal node.



9. Under Personal, right-click the Certificates node, point to All Tasks, and then click Import.
10. In the Certificate Import Wizard welcome screen, click Next.
11. In the File to Import screen, click Browse.
12. Browse to the location of the security certificate that you want to use. Typically, this will be a file with a .pfx extension, because the certificate contains a private key. Select the file and click Open. Click Next to continue.
13. Enter the password for the certificate. This is the private key password that was either provided with the certificate, or that you defined when you exported the certificate for use on another machine. Be sure that you mark the Include all extended properties box. Click Next to continue.
14. In the Certificate Store screen, verify that the certificate is being added to the Personal store. Click Next.

15. Click Finish to complete the import process.
16. Close the Microsoft Management Console window.

Single machine installation

This chapter contains the procedures you need to follow to install and verify the Dynamics GP web components on a single machine installation. Using the single machine installation option performs a simple installation of all components using default settings for a single tenant configuration and Windows authentication. If you want to only install specific components, a multitenant configuration or use Organizational Accounts, use the Custom installation option to perform the installation.

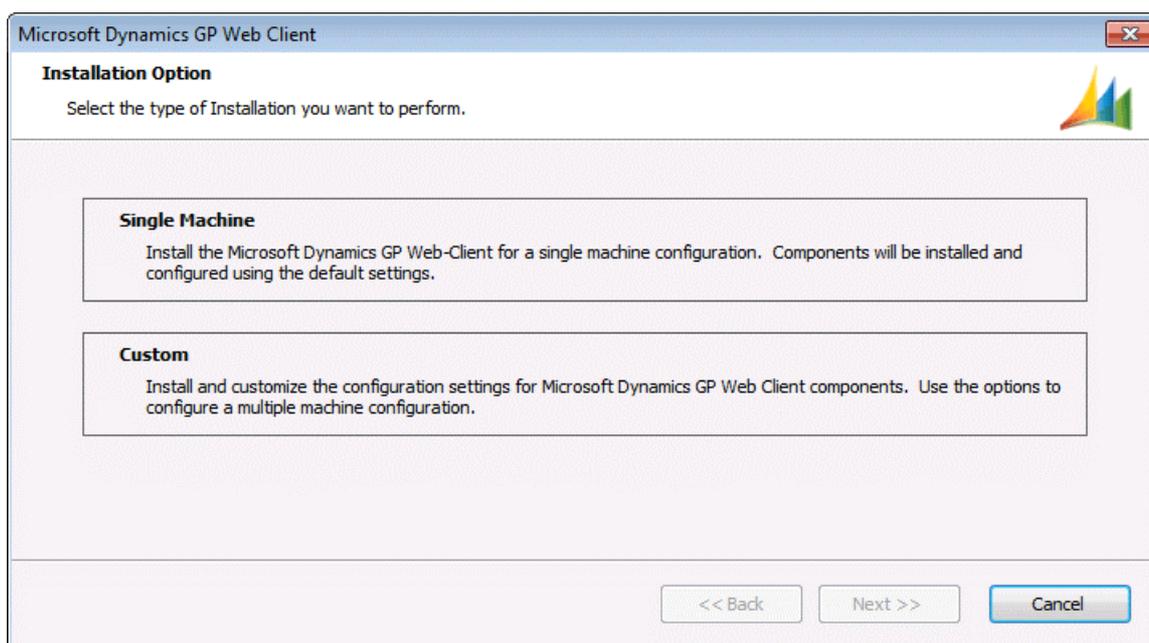
The following sections are included:

- [Install the web components](#)
- [Verify the web client installation](#)
- [Verify the Service Based Architecture installation](#)

Install the web components

Use the following steps to install the Dynamics GP web components on a single machine.

1. From the Dynamics GP installation media, double-click the **Setup.exe** file to open the Dynamics GP installation window.
2. Click **Web** components and then click **Install**.
3. In the License Agreement window, read the terms and conditions. Select **I accept the terms in the License Agreement**. Click **Next**.
4. Click **Single Machine** to perform a single machine installation.



5. Specify the SQL Server that will manage the Session Central database. You must supply credentials that allow you to connect to the SQL Server and create the database.

If the user installing the Dynamics GP web client has sufficient privileges, you can use Windows Trusted Authentication. Otherwise, you should use SQL Authentication and supply a SQL Login ID and Password for a SQL user account with sufficient privileges.

Click **Next** to continue.

6. Configure the Session Central Service.

Specify the Port (the default is 48650). Optionally, you can specify the security certificate that you want to use, however given all communication to the Session Central Service is initiated from other components on this server makes it unnecessary.

Supply the credentials for the user account that will be running the Session Central Service.

Click **Next** to continue.

7. Supply the names of the Windows security groups that specify which users can access the Dynamics GP web client and which users can access the Web Management Console.

For machine groups, the name must be prefixed by the machine name. For domain groups, the name must be prefixed by the domain name.

Windows User Group

Provide the Windows groups that the Web Client and Web Management Console users will be members of.

Enter the name of the Windows groups. If you are using more than one group, use a comma to separate the groups.

Web Client Users:

Web Management Console Users:

<< Back Next >> Cancel

Click **Next** to continue.

- Supply the information about the Dynamics GP installation. This information is used to start a Dynamics GP runtime process and creates a connection to the Dynamics GP databases.

GP Configuration

Provide the configuration settings for the web components.

The web components require the following configuration information. Provide the SQL Server login name and password that will be used to connect to the GP databases. The instance name and location of the configuration files for the Microsoft Dynamics GP client are on the session server computer.

Sql Server Login Name:

Password:

GP Instance Name:

Dynamics GP runtime folder:

Path to Dynamics.set:

Path to Dex.ini:

<< Back Next >> Cancel

Specify the SQL Login and password for the Web Client SQL Server login that you created for the Dynamics GP system database. You created this user when you ran Dynamics GP Utilities during the installation of Dynamics GP. You must specify the GP instance name to use service based architecture. If you only have a single installation of Dynamics GP on your machine, leave the DEFAULT instance name. If you have a named instance, provide the instance name you provided during the installation. You must also specify the locations of the components for the Dynamics GP installation. If you are not using the default locations for the Dynamics GP components, use the Browse buttons to select the location of each component.

Click **Next** to continue. You will be prompted to re-enter the password for the SQL login that you specified. Enter the password and click **OK**.

- Select the web site that will host the Dynamics GP web client. This site must have been configured to use secure sockets layer (SSL).

Specify the user account that will run the application pool for the Dynamics GP web client.

Decide whether the same web site will be used to host the Web Management Console. If you do not mark the option to use the same site, you will be prompted to select the web site and provide credentials to run the application pool for the site.

Click **Next** to continue.

10. Configure the Session Service.

Specify the Port (the default is 48651). Optionally, you can specify the security certificate that you want to use, however given all communication to the Session Central Service is initiated from other components on this server makes it unnecessary.

Supply the credentials for the user account that will be running the Session Service.

Click **Next** to continue.

11. Configure the Runtime Service URL.

Specify the Port (the default is 443).

Specify the security certificate to use. This is required for the runtime service. You can use the same certificate that you are using for the Dynamics GP web client site.

Verify the host name. The host name must match the common name (CN) or the subject alternative name (SAN) on the security certificate. If you are using a wild card certificate, replace the * on the host name with the address that the client machines will use to access this machine.

Click **Next** to continue.

12. Configure the GP Service.

Specify the Port (the default is 443).

Specify the security certificate to use. This is required for the GP service. You can use the same certificate that you are using for the Dynamics GP web client site.

Verify the host name. The host name must match the common name (CN) or the subject alternative name (SAN) on the security certificate. If you are using a wild card certificate, replace the * in the host name with the address that the client machines will use to access this machine.

Click **Next** to continue.

13. Review the installation settings and then click **Install**.
14. Click Exit**. The Web Client Configuration Wizard will start.
15. At the Welcome screen, click **Next**.
16. Specify the type of authentication to use to connect the to the SQL Server where the database for the Web Components will be created. Click **Next** to continue.
17. If necessary, verify that the databases will be created. Click Next to continue.
18. Click **Exit**.
19. The Dynamics GP Web Client Help installer will be started. Click Install to complete the help installation process.
20. Click **Finish** to close the installer.

Verify the web client installation

After the Dynamics GP web client installation is complete, verify that you can access the web client.

To verify the web client installation:

1. Open Internet Explorer.
2. Enter the URL of the Dynamics GP web client site. The default address of the site is

```
https://ServerName:PortNumber/GP
```

ServerName is the fully-qualified domain name (FQDN) for the server that is hosting the web site. This name must match the name you used when you requested the security certificate that you applied to the site when setting up SSL.

PortNumber is the port for the web site that you are using. If you chose to install on the default web site (port 443) then you do not need to supply the port number.

A typical URL to access the Dynamics GP web client looks similar to the following:

```
https://gpuaweb.contoso.com/GP
```

3. After entering the URL, you will be directed to the logon page. This is the first page that will be displayed to users who are accessing the Dynamics GP web client.

If you are using a self-signed security certificate and are accessing the Dynamics GP web client from another computer, you will see a certificate error. To resolve this error, you must import the security certificate into the certificate store on the machine that is accessing the web client.

4. Enter your user credentials. These are domain user credentials or machine user credentials for a user that is part of the security group you created to control access to the Dynamics GP web client. This security group is described in [Security groups and user accounts](#). These are not your Dynamics GP login name and password.

Click **Sign In**.

5. A session will be created. The window you see first will depend on settings for your Dynamics GP user.

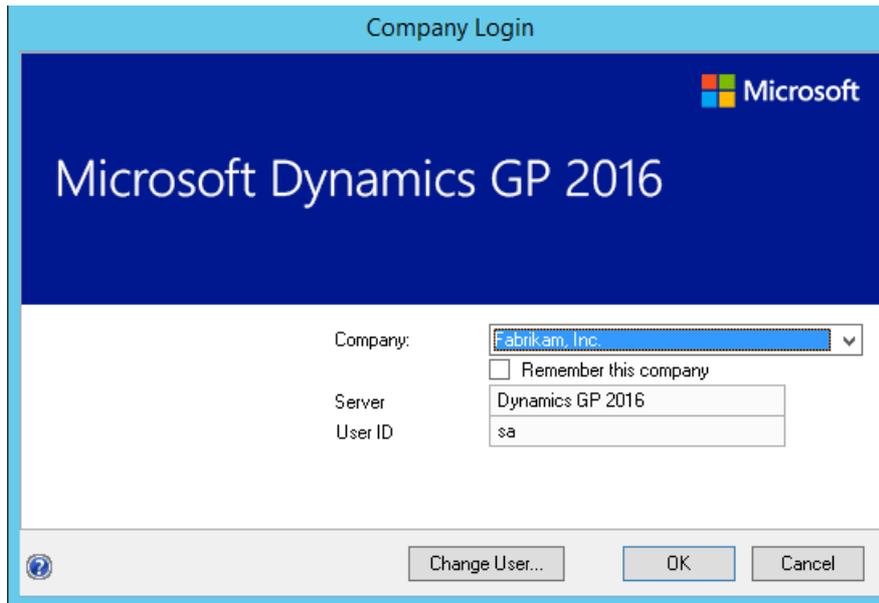
If your Dynamics GP user ID has only SQL Server Account information, the Dynamics GP login window will be displayed.

Log in with your Dynamics GP login name and password.

If your Dynamics GP user ID has Windows Account information, the Web Client SQL User will be used to access Dynamics GP data.

One company: If you have access to only one company, that company will automatically be used. The first page you see in Dynamics GP will be the Home page.

Multiple companies: If you have access to multiple companies, the Company Login window will be displayed, allowing you to select the company to use.



Verify the Service Based Architecture installation

After the Dynamics GP service based architecture installation is complete, verify that you can access service based architecture.

To verify the Service Based Architecture installation:

1. Open a web browser.
2. Enter the URL to the discovery service. The default address is:

```
https://ServerName:PortNumber/GPService/Tenants(DefaultTenant)/help
```

ServerName is the fully-qualified domain name (FQDN) for the server that is hosting the web components. This name must match the name you used when you requested the security certificate that you applied to the site when setting up SSL.

PortNumber is the port for the web site that you are using. If you chose to install on the default port (port 443) then you do not need to supply the port number.

DefaultTenant is the tenant name in a single tenant deployment.

A typical URL to access the Dynamics GP service based architecture looks similar to the following:

```
https://gpuaweb.contoso.com/GPService/Tenants(DefaultTenant)/help
```

3. After entering the URL, you may be prompted for your Windows credentials. Enter your user credentials. These are domain user credentials or machine user credentials that has been assigned to your GP user ID.
4. You should see results in your browser that look like the following image.

Internet Explorer browser window showing a help page for Dynamics GP. The address bar displays the URL: [https://gpweb2.gpwithazure.com/GPService/Tenants\(DefaultTenant\)/help](https://gpweb2.gpwithazure.com/GPService/Tenants(DefaultTenant)/help). The page content includes:

Dictionaries:
[Dynamics](#)

Object Libraries:
[Microsoft.Dynamics.GP.BusinessObjects](#)
[Microsoft.Dynamics.GP.ManagementReporterServices](#)
[Microsoft.Dynamics.GP.Svc.Application](#)

Scale out installation

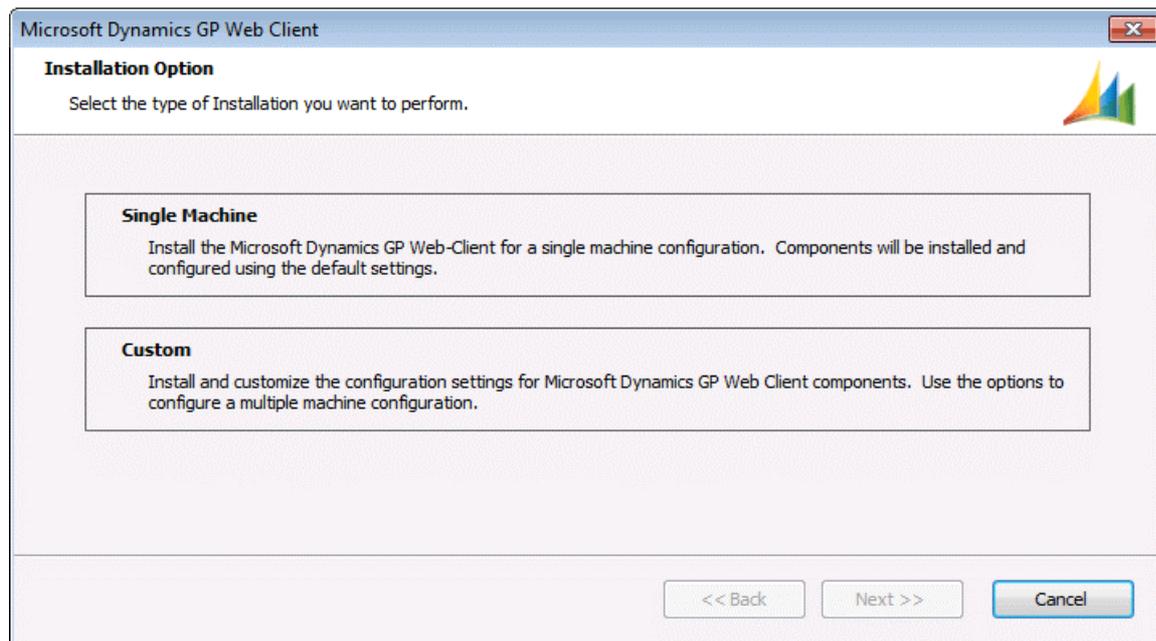
10/18/2018 • 14 minutes to read

This chapter contains the procedures you need to follow to install and verify the Dynamics GP web components in the scale out configuration.

Install the web server

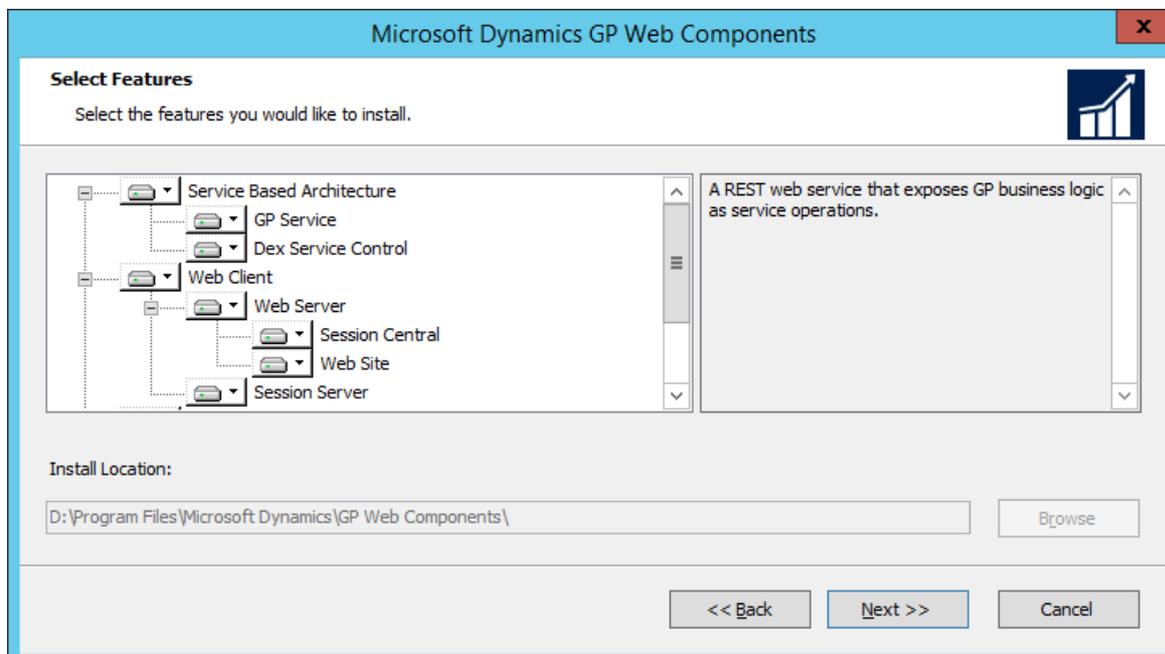
Use the following procedure to install components on the web server machine.

1. From the Dynamics GP installation media, double-click the **Setup.exe** file to open the Dynamics GP installation window.
2. Click Web Components and then click **Install**.
3. In the License Agreement window, read the terms and conditions. Select **I accept the terms in the License Agreement**. Click **Next**.
4. Click **Custom**.



5. Select the features that you want to install. On the web server machine, you will typically install the Web Server, Session Central, Web Site, and the Web Management Console.

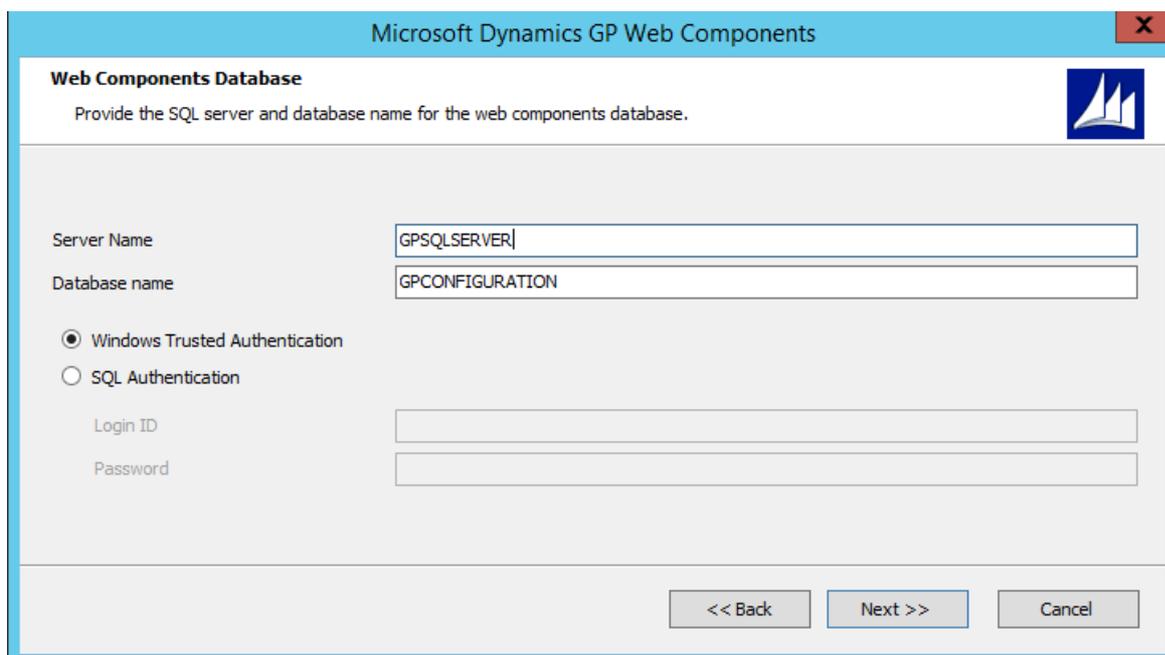
The Web Management Console and the management snap-ins, SBA Session Manager, Tenant Manager and Web Client Session Manager, related to the web components you are installing. The GP Service feature for Service Based Architecture.



If you are using the Tenant Service, you should mark the Tenant Manager snap-in as well. Use the default location for the installed components or choose a different location.

Click **Next** to continue.

- Specify the SQL Server that will manage the Web Components database. You must supply credentials that allow you to connect to the SQL Server and create the database.



If the user installing the Dynamics GP web components has sufficient privileges, you can use Windows Trusted Authentication. Otherwise, you should use SQL Authentication and supply a SQL Login ID and Password for a SQL user account with sufficient privileges.

Click **Next** to continue.

- Select the supported Authentication Type.

Specify if you will allow users to authenticate to the Dynamics GP web client and service based architecture using their Windows Account, Organizational Account or Mixed Mode. Since a single Dynamics GP system database can be set up for either Windows or Organizational Accounts, select Mixed Mode only if you are using a multitenant configuration with some tenants using Windows and some tenants using Organizational Accounts.

If you have selected Organizational Account or Mixed Mode, provide the Organizational Account settings for the Azure Application you registered in Chapter 6 Register Azure Application for Organizational Accounts. The information you provide will be validated.

Click **Next** to continue.

- Supply the name of the Windows account configured as the "Log On As" account for the SQL Server service hosting the Dynamics GP databases. The dialog is only displayed when selecting Organizational Account or Mixed Mode for the authentication type.

Workflow System Access

Provide account information that allows Dynamics Workflow to access the Session Central database.

The SQL Server Service that manages the Dynamics GP databases is run as the user specified in the "Log On As" account for the service. This Windows account must have permission to access the Session Central Service. Provide this account or a security group to which this account belongs. Typically this is one account or group. If you have multiple SQLServer instances that use different accounts for the Log On As account, you can enter multiple accounts that are separated by a comma.

Windows account or security group

Provide a Windows security group for a multitenant deployment with different Windows accounts.

Click **Next** to continue.

- Supply the names of the Windows security groups that specify which users can access the Dynamics GP web client and which users can access the Web Management Console.

For machine groups, the name must be prefixed by the machine name. For domain groups, the name must be prefixed by the domain name.

Windows User Group

Provide the Windows groups that the Web Client and Web Management Console users will be members of.

Enter the name of the Windows groups. If you are using more than one group, use a comma to separate the groups.

Web Client Users:

Web Management Console Users:

Click **Next** to continue.

- Indicate whether you are using a multitenant configuration. If you are installing the web client for a stand-alone instance of Dynamics GP, simply click Next.

Refer to the Tenant Installation and Administration Guide for complete details about deploying Dynamics GP web components in a multitenant configuration.

- Supply the information about the Dynamics GP installation if this is not a multitenant configuration. This information is used to start a Dynamics GP runtime process and creates a connection to the Dynamics GP databases.

Specify the SQL Login and password for the Web Client SQL Server login that you created for the Dynamics GP system database. You created this user when you ran Dynamics GP Utilities during the installation of Dynamics GP. You must specify the GP instance name to use service based architecture. If you only have a single installation of Dynamics GP on your machine, leave the DEFAULT instance name. If you have a named instance, provide the instance name you provided during the installation. You must also specify the locations of the components for the Dynamics GP installation. If you are not using the default locations for the Dynamics GP components, use the Browse buttons to select the location of each component.

Click **Next** to continue. You will be prompted to re-enter the password for the SQL login that you specified. Enter the password and click **OK**.

- Specify the Windows account that Dynamics GP processes will run as for users that log in using their Organizational Account. This dialog will only be displayed if the selected authentication type was Organizational Account or Mixed Mode for a single tenant deployment.

Click **Next** to continue.

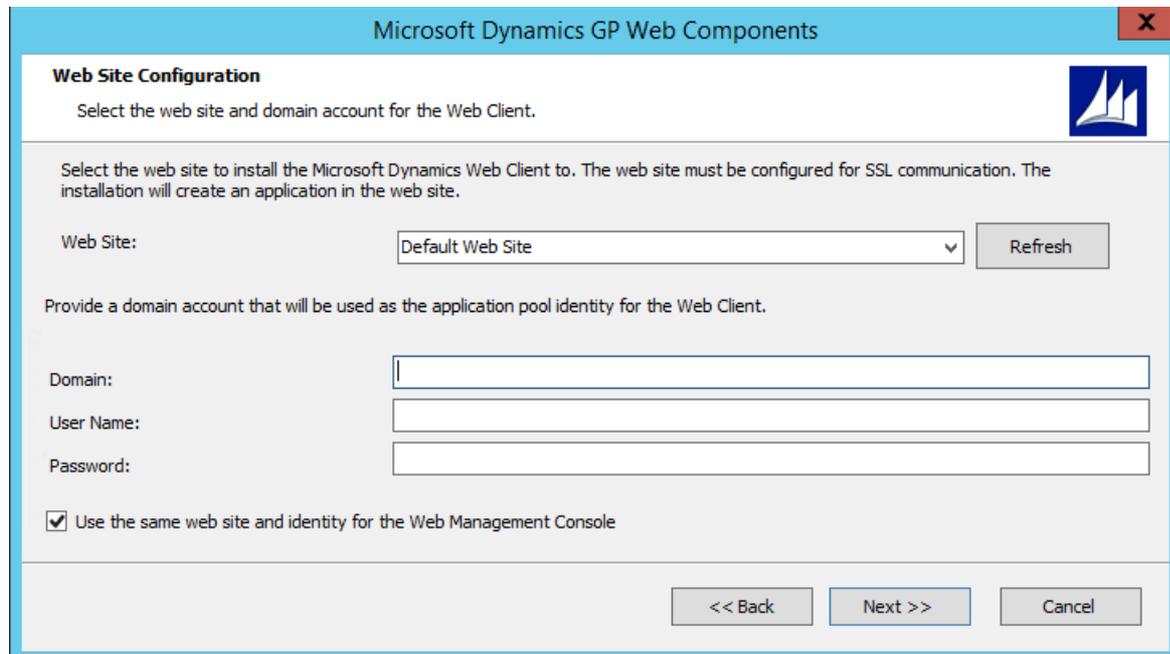
- Configure the Session Central Service.

Specify the Port (the default is 48650). Optionally, you can specify the security certificate to use. You can use the same certificate that you are using for the Dynamics GP web client site as long as the security certificate's common name is the address the Session Host machines can use to communicate with the 10 web server machine.

Supply the credentials for the user account that will be running the Session Central Service.

Click Next to continue.

14. Select the web site that will host the Dynamics GP web client. This site must have been configured to use secure sockets layer (SSL).



The screenshot shows a dialog box titled "Microsoft Dynamics GP Web Components" with a close button (X) in the top right corner. The main heading is "Web Site Configuration" with a sub-heading "Select the web site and domain account for the Web Client." and a Dynamics GP logo. Below this, there is a descriptive paragraph: "Select the web site to install the Microsoft Dynamics Web Client to. The web site must be configured for SSL communication. The installation will create an application in the web site." The "Web Site:" field is a dropdown menu currently set to "Default Web Site", with a "Refresh" button to its right. Below this, the instruction reads: "Provide a domain account that will be used as the application pool identity for the Web Client." There are three input fields for "Domain:", "User Name:", and "Password:". At the bottom left, there is a checked checkbox labeled "Use the same web site and identity for the Web Management Console". At the bottom right, there are three buttons: "<< Back", "Next >>", and "Cancel".

Specify the user account that will run the application pool for the Dynamics GP web client.

Decide whether the same web site will be used to host the Web Management Console. If you do not mark the option to use the same site, you will be prompted to select the web site and provide credentials to run the application pool for the site.

Click **Next** to continue.

15. Specify the web server farm configuration.

If you are installing the web site onto only a single web server, simply click **Next** to continue.

If you are installing the web client site on multiple web servers in a load balanced configuration, choose Deploy on multiple web servers. Specify the SQL Server that will manage the Web Client Session State database. You must supply credentials that allow you to connect to the SQL Server and create the database.

If the user installing the Dynamics GP web client has sufficient privileges, you can use Windows Trusted Authentication. Otherwise, you should use SQL Authentication and supply a SQL Login ID and Password for a SQL user account with sufficient privileges.

Click **Next** to continue.

16. Configure the GP Service.

Microsoft Dynamics GP Web Components

GP Service
Provide the configuration information for the GP Service.

Accept the default port or enter an available port for the GP Service
Port:

Select a certificate to configure the service for SSL access (required).
 View... Host Name

Provide a domain account that will be used as the service account for the GP Service.
 Domain:
 User Name:
 Password:

<< Back Next >> Cancel

Specify the Port (the default is 443).

Specify the security certificate to use. This is required for the GP service. You can use the same certificate that you are using for the Dynamics GP web client site.

Verify the host name. The host name must match the common name (CN) or the subject alternative name (SAN) on the security certificate. If you are using a wild card certificate, replace the * in the host name with the address that the client machines will use to access this machine.

Click **Next** to continue.

17. Review the installation settings and then click Install.
18. Click **Exit**. The Web Components Configuration Wizard will start.
19. At the Welcome screen, click **Next**.
20. Specify the type of authentication you want to use to connect to the SQL Server where the database for the Web Components will be created. Click **Next** to continue.
21. If necessary, verify that the databases will be created. Click **Next** to continue.
22. Click **Exit**.
23. The Dynamics GP Web Client Help installer will be started. Click **Install** to complete the help installation process.
24. Click **Finish** to close the installer.

Install the host machines

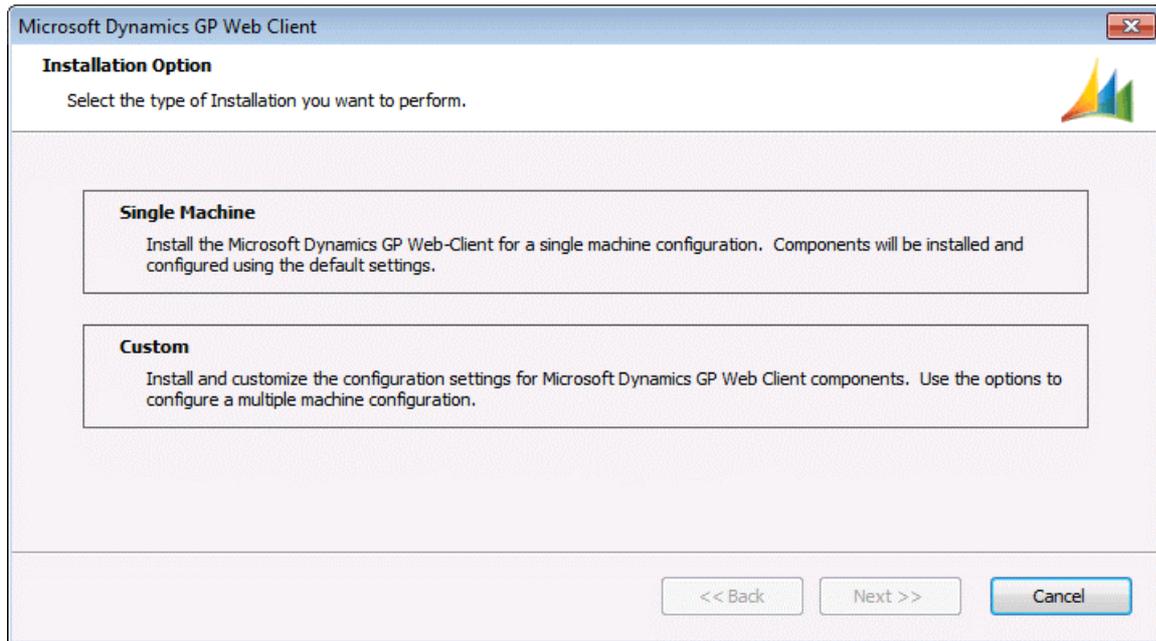
It is assumed that you have installed a Dynamics GP desktop client onto the session host machine, and that the desktop client is able to log in to Dynamics GP. The following prerequisites must have been completed:

- The web client runtime components for the Dynamics GP installation must also have been installed on the session host machine to use the web client. Refer to [Web client runtime components](#) for more information.
- The service based architecture components for the Dynamics GP installation must also have been installed on the session host machine to use service based architecture.
- It is also assumed that you have installed the security certificate on each session host machine as described

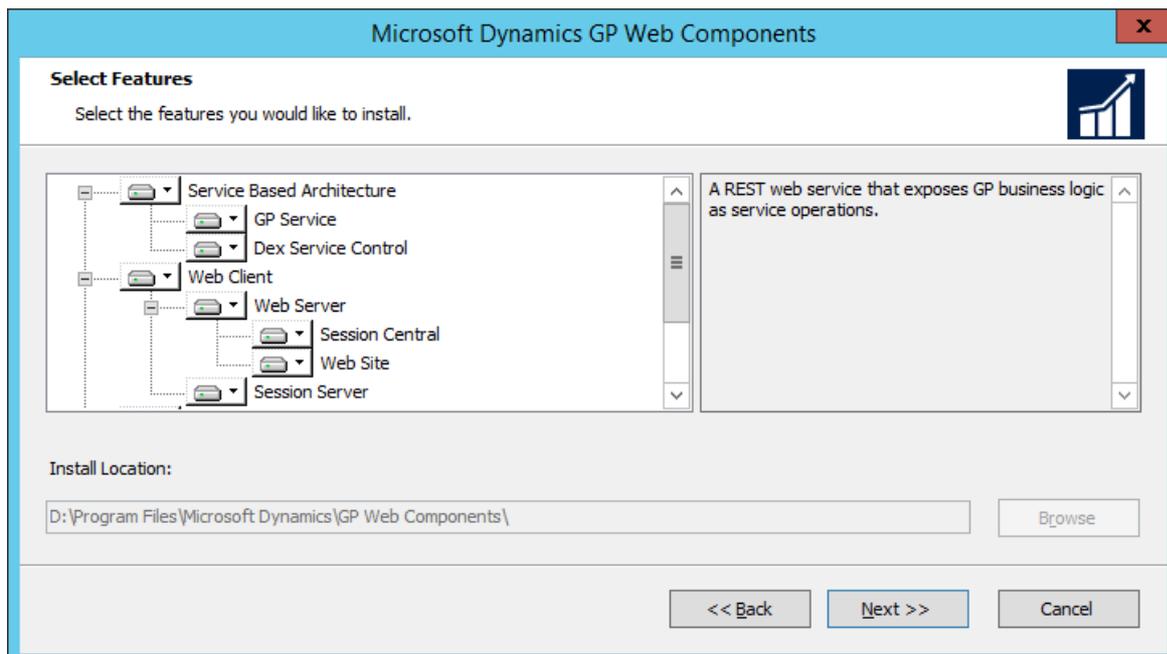
in the **Installing a security certificate on a server.**

Use the following procedure to install components on each session host machine. You will repeat this process for each session host machine that you add to the web components deployment.

1. From the Dynamics GP installation media, double-click the Setup.exe file to open the Dynamics GP installation window.
2. Click the Web Components and then click Install.
3. In the License Agreement window, read the terms and conditions. Select I accept the terms in the License Agreement. Click Next.
4. Click Custom.



5. Select the Session Server feature if installing the web client. Select the Dex Service Control feature if installing service based architecture.



Specify the location where you want to install the web component files.

WARNING

If you don't install to the default location, pay attention to the path length you specify for the install location. If the path length exceeds 100 characters, you may get application errors, such as not being able to re-open forms in the web client.

Click **Next** to continue.

- Specify the SQL Server that is managing the Web Components database. You must supply credentials that allow you to connect to the SQL Server and access this database.

Microsoft Dynamics GP Web Components

Web Components Database
Provide the SQL server and database name for the web components database.

Server Name: GPSQLSERVER

Database name: GPCONFIGURATION

Windows Trusted Authentication
 SQL Authentication

Login ID:
Password:

<< Back Next >> Cancel

If the user installing the Dynamics GP web components has sufficient privileges, you can use Windows Trusted Authentication. Otherwise, you should use SQL Authentication and supply a SQL Login ID and Password for a SQL user account with sufficient privileges.

Click **Next** to continue.

- Supply the name of the Windows security group that specifies which users can access the Dynamics GP web client. For machine groups, the name must be prefixed by the machine name. For domain groups, the name must be prefixed by the domain name.

Click **Next** to continue.

- Indicate whether you are using a multitenant configuration. If you are installing the web client for a stand-alone instance of Dynamics GP, simply click Next.

If you are installing the Dynamics GP web client for a multitenant configuration, choose Deploy for multiple tenants. Supply the URLs for the Tenant Discovery Service and the Tenant Management Service. Click Next.

Refer to the Tenant Installation and Administration Guide for complete details about deploying Dynamics GP web components in a multitenant configuration.

- Configure the Session Service.

Specify the Port (the default is 48651). Optionally, you can specify the security certificate that you want to use. You can use the same certificate that you installed onto the server to use for the runtime service as long as the security certificate's common name is the address the Web Server machines can use to communicate with the session host machine.

Supply the credentials for the user account that will be running the Session Service.

Click **Next** to continue.

10. Configure the Runtime Service URL.

The screenshot shows a configuration window titled "Microsoft Dynamics GP Web Components" with a sub-header "Runtime Service URL". The window contains the following elements:

- A title bar with a close button (X).
- A sub-header "Runtime Service URL" and a Microsoft Dynamics logo.
- Instructional text: "Provide the information for accessing the runtime service." and "Provide the information for building the user's session address. The port, certificate, and host name selected define how web clients will communicate with this server. It is required that the host name matches the common name (CN) on the certificate or a subject alternative name (SAN) on the certificate. The common name from the certificate is the default value. Be sure to verify the name for the certificate."
- A "Port:" label followed by a text box containing "443".
- A "Select a certificate to configure the service for SSL access (required)." label above a dropdown menu showing "SBATestDWA2.cloudapp.net".
- A "View..." button next to the certificate dropdown.
- A "Host Name" label above a text box containing "SBATestDWA2.cloudapp.net".
- Navigation buttons at the bottom: "<< Back", "Next >>", and "Cancel".

Specify the Port (the default is 443).

Specify the security certificate to use. This is required for the runtime service. You can use the certificate that you installed on the session host machine.

Verify the host name. The host name must match the common name (CN) or the subject alternative name (SAN) on the security certificate. . If you are using a wild card certificate, replace the * in the host name with the address that the client machines will use to access this machine.

Click **Next** to continue.

11. Configure the Dex Service Control.

The screenshot shows a configuration window titled "Microsoft Dynamics GP Web Components" with a sub-header "Dexterity Service Control". The window contains the following elements:

- A title bar with a close button (X).
- A sub-header "Dexterity Service Control" and a Microsoft Dynamics logo.
- Instructional text: "Provide the configuration information for the Dexterity Service Control service." and "Accept the default port or enter an available port for the Dexterity Service Control service".
- A "Port:" label followed by a text box containing "48665".
- A "Select a certificate to configure the service for SSL access (optional)." label above a dropdown menu showing "Not Selected".
- A "View..." button next to the certificate dropdown.
- A "Host Name" label above an empty text box.
- Instructional text: "Provide a domain account that will be used as the service account for the Dexterity Service Control service.".
- Three text boxes for "Domain:", "User Name:", and "Password:".
- Navigation buttons at the bottom: "<< Back", "Next >>", and "Cancel".

Specify the Port (the default is 48655). Optionally, you can specify the security certificate that you want to use. You can use the same certificate that you installed onto the server to use for the runtime service as long as the security certificate's common name is the address the Web Server machines can use to communicate with the session host machine.

Click **Next** to continue.

12. Review the installation settings and then click **Install**.
13. Click **Exit**. The Web Components Configuration Wizard will start.
14. At the Welcome screen, click **Next**.
15. Specify the type of authentication you want to use to connect to the SQL Server where the database for the Web Components is located. Click **Next** to continue.
16. Review the configuration actions that will be performed. Click **Next** to continue.
17. Click **Exit**.
18. Restart the Session Central Service for the Dynamics GP web client installation. You must do this on the machine where you installed the Session Central Service, typically the machine that is hosting the web site. This step is necessary to allow the Session Central Service to establish communication with the session host machine.

Verify the web client installation.

After the components for the scale out web components installation have been installed, give the system a few minutes to get synchronized. The Session Central Service will be updated with information that is provided by the Session Service running on each session host machine. The GP Service will be updated with information that is provided by the Dex Service Control running on each session host machine.

Web Management Console

You can use the Web Management Console to verify that the session host machines are accessible.

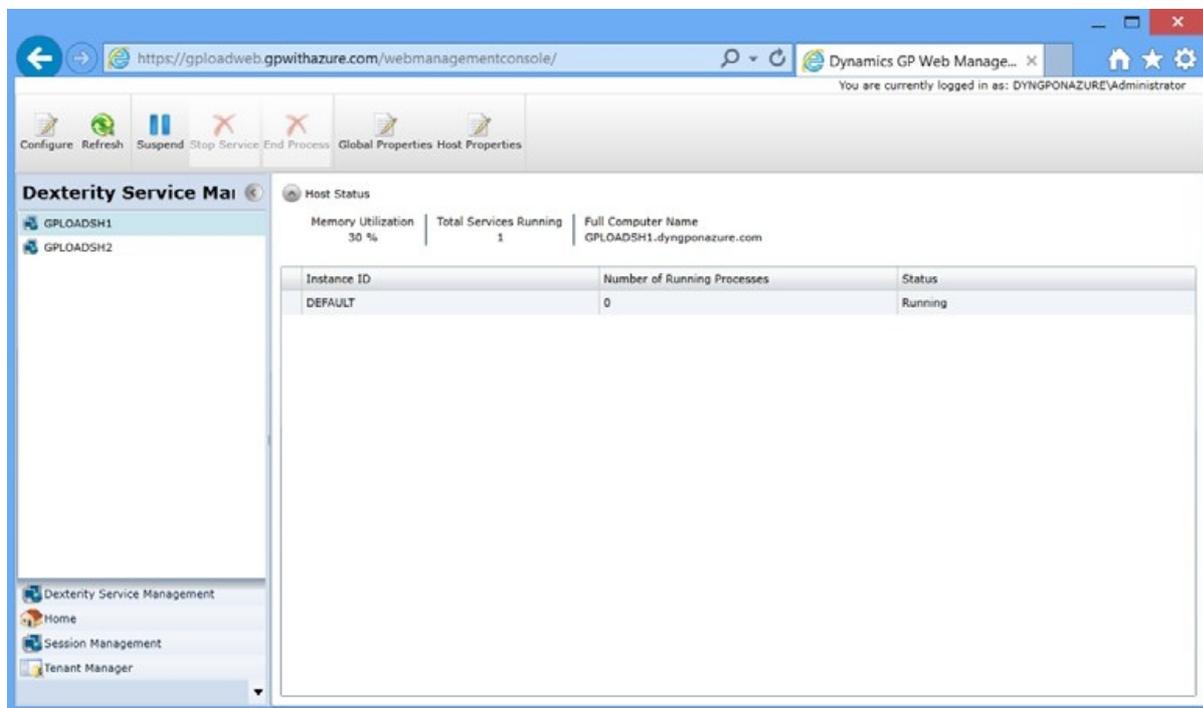
1. In the Web Management Console, click the Session Management snap-in to verify the web client. You should see the session host machines listed in the pane on the left side of the console.

The screenshot shows the Web Management Console interface. At the top, there are navigation buttons: Configure, Refresh, Suspend, End Session, and Logging. The main area is titled "Session Management" and shows a list of session host machines on the left: GPUASH1 and GPUASH2. The right pane displays "Session Host Status" for GPUASH1.northamerica.corp. It includes a summary table and a detailed session list table.

Last Status Update	Memory Utilization	Total Sessions Running	Potential Sessions Remaining	Full Computer Name
11/26/2012 4:36:16 PM	85 %	3	5	GPUASH1.northamerica.corp.

Created Date	Dynamics GP Company	Dynamics GP User	Last Heartbeat	Tenant Name	Host Machine	sk	Nr	12
11/26/2012 12:09:09 PM	Fabrikam, Inc.	DYNSA	11/26/2012 4:37 PM	GPWebApp	GPUASH1	sk	Nr	12
11/26/2012 4:13:07 PM	Fabrikam, Inc.	Bruce	11/26/2012 4:37 PM	GPWebApp	GPUASH1	br	nr	12
11/26/2012 4:23:32 PM	Fabrikam, Inc.	Steve	11/26/2012 4:37 PM	GPWebApp	GPUASH1	sk	Nr	12

2. In the Web Management Console, click the Dexterity Management snap-in to verify the web client. You should see the session host machines listed in the pane on the left side of the console.



Creating a session

After you have verified that the session host machines are working, verify that you can access the web client.

1. Open Internet Explorer.
2. Enter the URL of the Dynamics GP web client site. The default address of the site is:

```
https://ServerName:PortNumber/GP
```

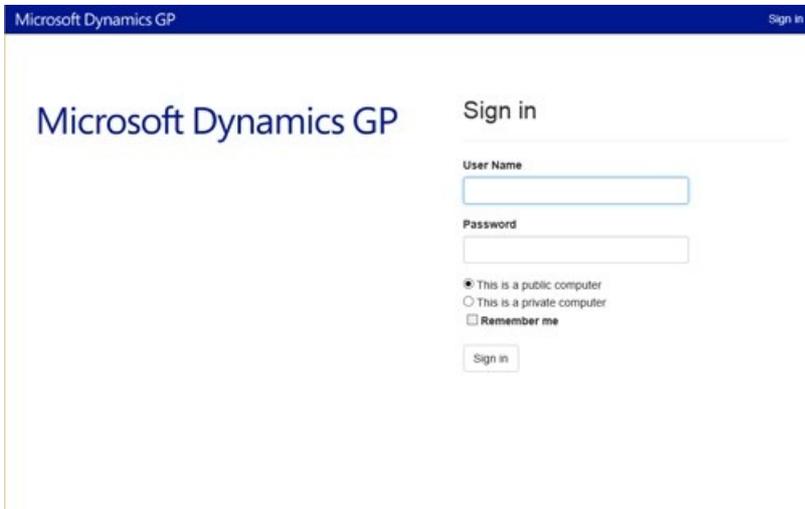
ServerName is the fully-qualified domain name (FQDN) for the server that is hosting the web site. This name must match the name you used when you requested the security certificate that you applied to the site when setting up SSL.

PortNumber is the port for the web site that you are using. If you chose to install on the default web site (port 443) then you do not need to supply the port number.

A typical URL to access the Dynamics GP web client looks similar to the following:

```
https://gpuaweb.contoso.com/GP
```

3. After entering the URL, you will be directed to the logon page. This is the first page that will be displayed to users who are accessing the Dynamics GP web client using a Windows Account. A deployment where users will use an Organizational Account for access will be redirected to the Azure sign in page.



4. Enter your user credentials. These are domain user credentials or machine user credentials for a user that is part of the security group you created to control access to the Dynamics GP web client. This security group is described in Chapter 5, "Security groups and user accounts." These are not your Dynamics GP login name and password. Enter your Organization Account credentials, if prompted, on the Azure sign-in page.

Click **Sign In**.

5. A session will be created. The window you see first will depend on settings for your Dynamics GP user. Log in with your Dynamics GP login name and password.
 - If your Dynamics GP user ID has Directory Account information, the Dynamics GP login window will be displayed.

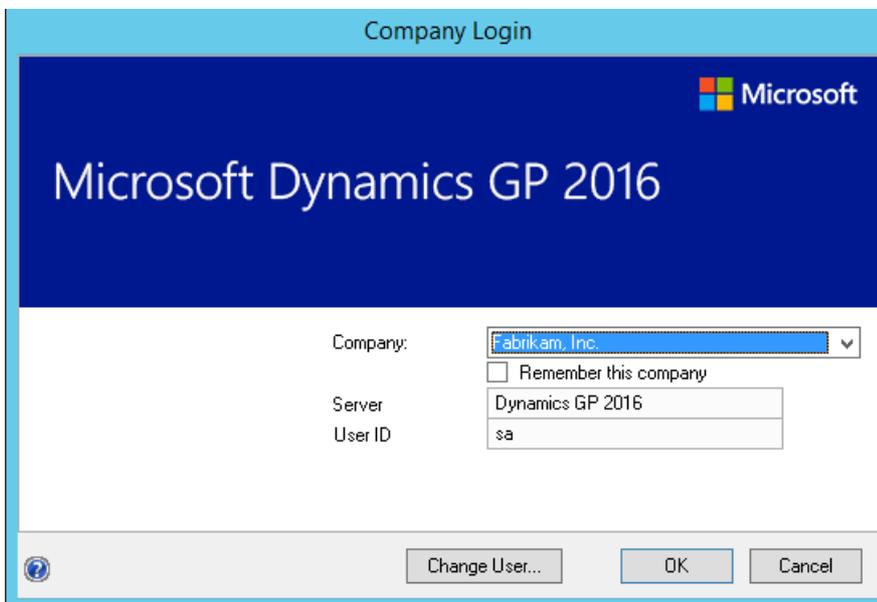


Log in with your Dynamics GP login name and password.

- If your Dynamics GP user ID has Directory Account information, the Web Client SQL User will be used to access Dynamics GP data.

One company: If you have access to only one company, that company will automatically be used. The first page you see in Dynamics GP will be

Multiple companies: If you have access to multiple companies, the Company Login window will be displayed, allowing you to select the company to use.



Verify the service based architecture installation

After the Dynamics GP service based architecture installation is complete, verify that you can access service based architecture.

These verification steps are for Windows and Mixed Mode authentication types only. An Organizational Account only deployment will require an application or tool that will obtain an Organizational Account user token from Azure Active Directory.

1. Open a browser.
2. Enter the URL to the discovery service. The default address is:

```
https://ServerName:PortNumber/GPService/Tenants(DefaultTenant)/help
```

ServerName is the fully-qualified domain name (FQDN) for the server that is hosting the web components. This name must match the name you used when you requested the security certificate that you applied to the site when setting up SSL.

PortNumber is the port for the web site that you are using. If you chose to install on the default port (port 443) then you do not need to supply the port number.

DefaultTenant is the tenant name in a single tenant deployment.

A typical URL to access the Dynamics GP service based architecture looks similar to the following:

```
https://gpuaweb.contoso.com/GPService/Tenants(DefaultTenant)/help
```

3. After entering the URL, you may be prompted for your Windows credentials. Enter your user credentials. These are domain user credentials or machine user credentials that has been assigned to your GP user ID.

Connecting to the web client

To have the Dynamics GP web client installation work as efficiently as possible, it's important that users follow the proper process for connecting to the web client. Information about this is divided into the following topics:

- [Signing in](#)
- [Disconnecting from a session](#)
- [Reconnecting to a session](#)
- [Signing out](#)
- [Signing in as the sa or DYNSA user](#)
- [Web browser security settings](#)

Signing in

To sign in to the web client, use the following procedure.

1. Open Internet Explorer or other support web browser.
2. Enter the URL of the Dynamics GP web client site. The default address of the site is:

<https://ServerName:PortNumber/GP>

ServerName is the fully-qualified domain name (FQDN) for the server that is hosting the web site. This name must match the name you used when you requested the security certificate that you applied to the site when setting up SSL.

PortNumber is the port for the web site that you are using. If you chose to install on the default web site (port 80) then you do not need to supply the port number.

A typical URL to access the Dynamics GP web client looks similar to the following:

<https://gpuaweb.contoso.com/GP>

3. View the sign-in page. If the site displays a security certificate error, report the issue to your system administrator, and do not continue the sign on process.

Microsoft Dynamics GP

Sign in

User Name

Password

 This is a public computer This is a private computer Remember me

4. Enter your user credentials (User Name and Password). These are either domain user credentials or machine user credentials, depending on how the web client installation is configured. The User Name will have the format:

domain\username or machine\username

WARNING

These are not your Dynamics GP login name and password.

5. Specify the security level for the session. You can click Show descriptions to display details of the two security options.

This is a public computer Choose this option if the computer is public or is shared by multiple users. Be sure that you close the browser window when you are finished with your session.

This is a private computer Choose this option if this is a private computer that only you have access to. When you choose this security level, you can mark the Remember me check box to save your user name and password. These will be used to automatically sign in to Dynamics GP the next time you access this page for the web client.

6. Click **Sign In**.
7. If you are using a multitenant configuration, and have access to more than one tenant, you will be prompted to choose the tenant (installation of Dynamics GP) that you want to connect to. Choose the Create Session action for the tenant.

If you are using a single tenant configuration, or have access to only one tenant, no prompt will be displayed.

8. A session will be created. The window you see first will depend on settings for your Dynamics GP user.
 - If your Dynamics GP user ID has only SQL Server Account information, the Dynamics GP login window will be displayed.

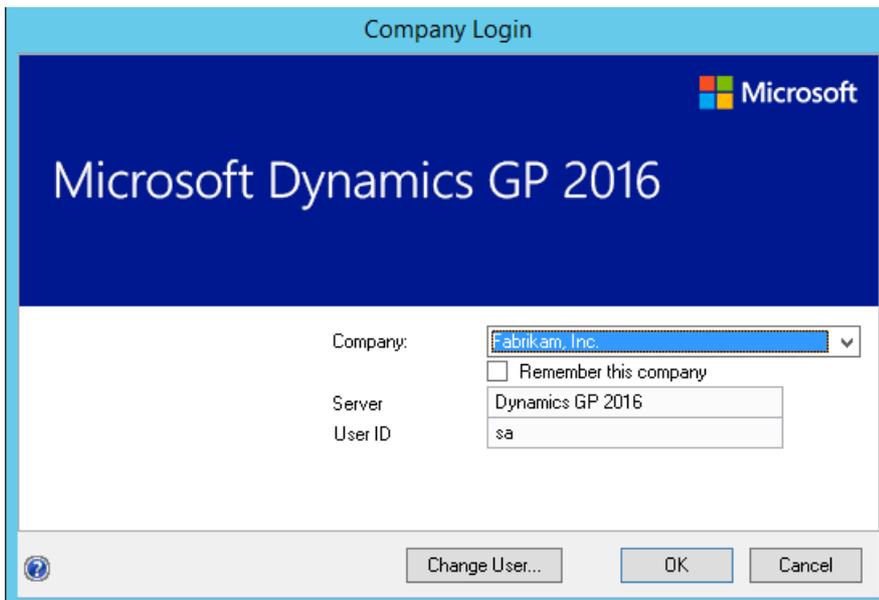


Log in with your Dynamics GP login name and password.

- If your Dynamics GP user ID has Windows Account information, the Web Client SQL User will be used to access Dynamics GP data.

One company If you have access to only one company, that company will automatically be used. The first page you see in Dynamics GP will be the Home page.

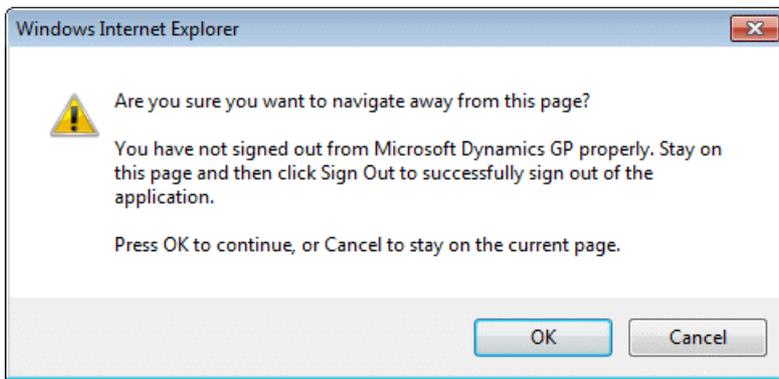
Multiple companies If you have access to multiple companies, the Company Login window will be displayed, allowing you to select the company to use.



Disconnecting from a session

In general, you should avoid closing the web browser when you have an active connection to the Dynamics GP web client. When you close the web browser while connected, your web client session remains active on the server. The resources used by your session are still dedicated to it and cannot be used for other web client sessions.

To help prevent you from accidentally closing the web browser, the following message is displayed when you attempt to close the web page or navigate away to another web page.



If you accidentally navigated away from the web client session, click **Cancel** to return to the web client.

Sometimes, disconnecting from a session by closing the web browser can be useful. The following are two examples:

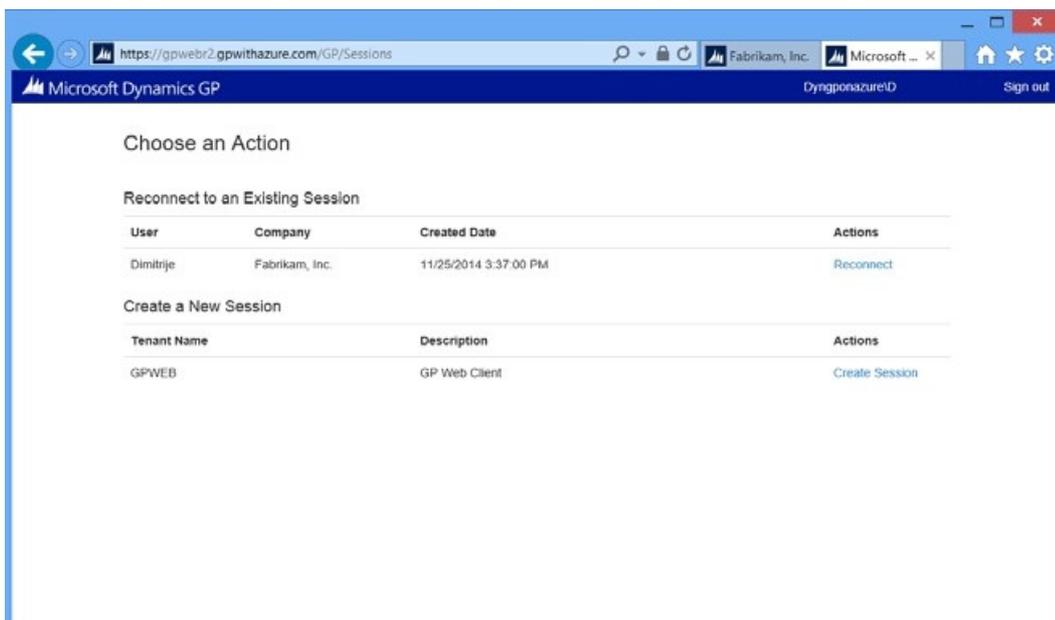
- Assume you need to shut down your computer, but you have multiple windows open in the Dynamics GP web client with data displayed in them. Disconnecting from the session allows those windows to remain open. When you reconnect to the session, which is discussed in the next section, the windows will have maintained their state information.
- A long-running process that you want to allow to finish is another reason to close the web browser and leave the session running on the server. After the process has started, it will continue processing, even after the web browser has been closed.

Reconnecting to a session

Reconnecting to an existing session is just like the process of signing in to the web client.

To reconnect to a session:

1. Open Internet Explorer.
2. Enter the URL of the Dynamics GP web client site.
3. At the sign-in page, enter your user credentials, and click **Sign In**. The Session Central Service will find any existing session that you had disconnected from. These sessions will be listed.

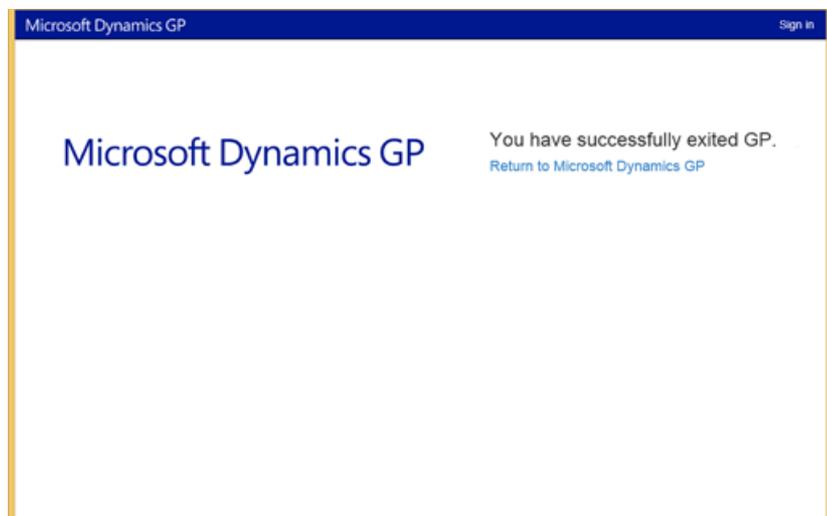


4. Select the one of the sessions in the list and then click **Connect to Existing Session** to reconnect.

The web client will restore as many of the existing session's session characteristics as possible. The web client will does not know which area page had been displayed. It will restore the correct set of windows, though the exact placement of the windows may not match the configuration that existed when you disconnected from the session.

Signing out

To exit the web client, click **Exit GP** in the upper-right corner of the web browser. You will be logged out of Dynamics GP, the web client session will end on the server, and the exit page will be displayed.



To go back into Dynamics GP, click **Enter Dynamics GP**. If you had chosen the option to remember your user name and password on the sign-in page, you will not be prompted for them.

If you want to remove the stored user name and password from the machine, click **Sign Out**, in the upper-right corner of the page.

When you have finished working with Dynamics GP, it's a good idea to exit Dynamics GP, rather than to just disconnect from the session. Some of the advantages of exiting include the following:

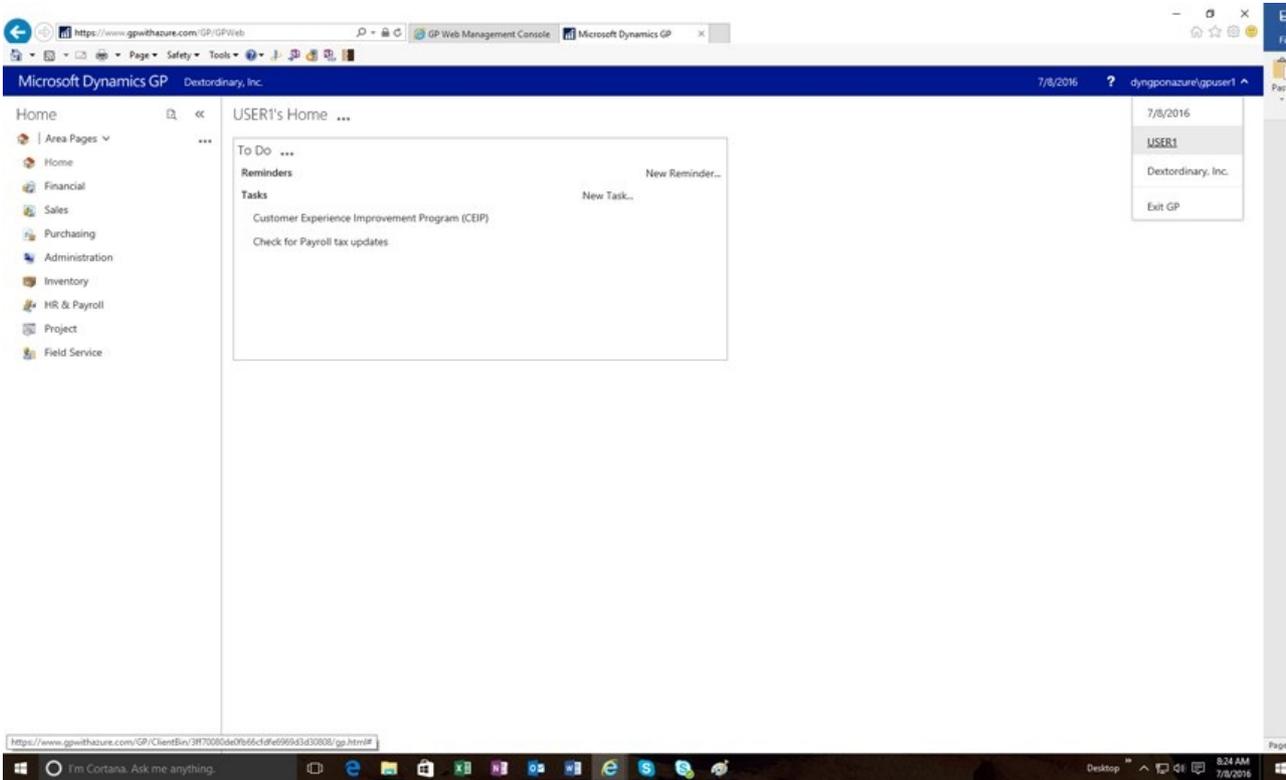
- System resources are made available for other web client sessions.
- It releases a Dynamics GP user in the system, so you are less likely to encounter the user limit.
- It reduces the possibility of data loss that might be caused the web client session had to be forcibly ended.

Signing in as the sa or DYNSA user

For some special circumstances, you may need to sign in to the Dynamics GP web client as the "sa" or "DYNSA" user. If you don't have your Windows account information associated with a Dynamics GP user, you will see the standard Dynamics GP log in window that you can use to sign in as "sa" or "DYNSA".

If your Windows account information is associated with a Dynamics GP user, you will be automatically signed in as that GP user. The standard Dynamics GP log in window will not be displayed. In this situation, use the following procedure to sign in as the "sa" or "DYNSA" user:

1. After the initial sign in operation is complete, click the user name in the lower- left corner of the web client.



2. The login window will be displayed. Choose **SQL Server Account** as the authentication type.



3. Specify "sa" or "DYNSA" as the User ID. Enter the appropriate password, and then click **OK**.

Web browser security settings

You may be accessing the Dynamics GP web client through an intranet or over the Internet. Depending on the access method, you may need to adjust your web browser security settings to allow printing and local file access to work properly. Do this in the **Internet Options** window for Internet Explorer.



You will have to do one or both of the following actions:

- Display the **Security** tab. Add the URL for the Dynamics GP web client site to the **Trusted sites** list.
- Reduce the security level for the specified zone. For example, if you are running the Dynamics GP web client in an intranet setting, reduce the security level for the **Local intranet zone**.

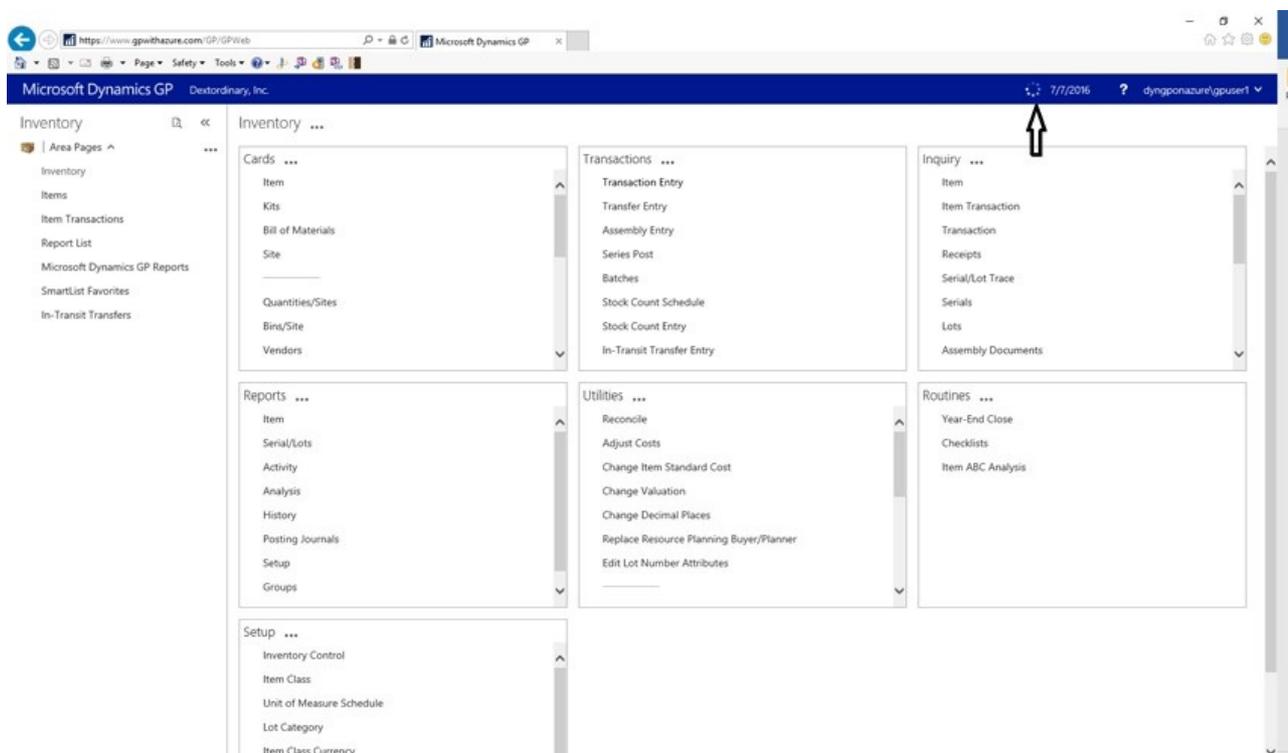
Working with the web client

Working with the Dynamics GP web client is very similar to working with the desktop client. This chapter provide information about functionality that is specific to the web client. It is divided into the following topics:

- [Connection status](#)
- [Web client errors](#)
- [Accessing windows in the web client](#)
- [Changing the order of items in the navigation pane](#)
- [Accessing help](#)
- [Reports and Printing](#)

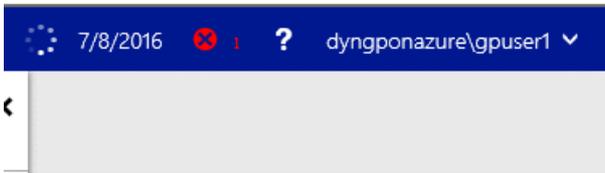
Connection status

Use the Connection Status indicator in the upper right corner of the window to help you determine the status of the web client.

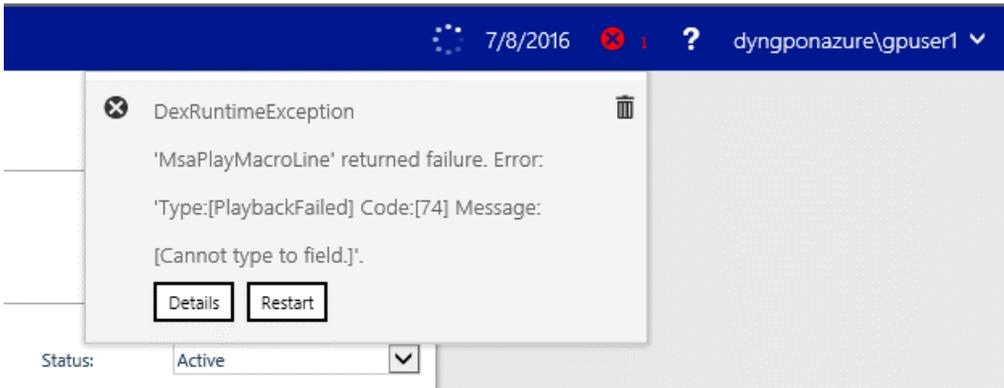


Web client errors

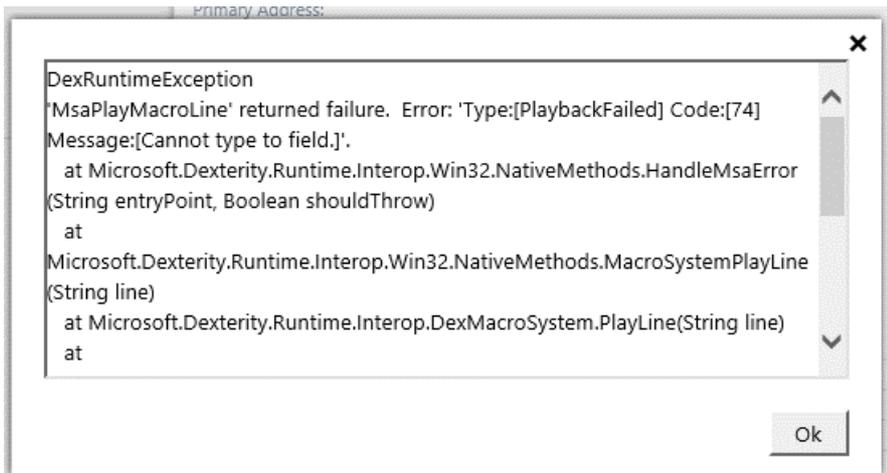
In an error occurs with the web client, the details of the error may be accessible from the status bar at the top of the web client window.



In some cases when an error might occur that you cannot recover from, you can attempt to recover from the error using the Restart button on the error window. If you are unable to successfully recover in this way you will need to close your web client session and reconnect using the standard sign in procedure.



You can click the error icon to display the details of the error that occurred. The information provided can be helpful when you work with your system administrator to troubleshoot issues with the web client.

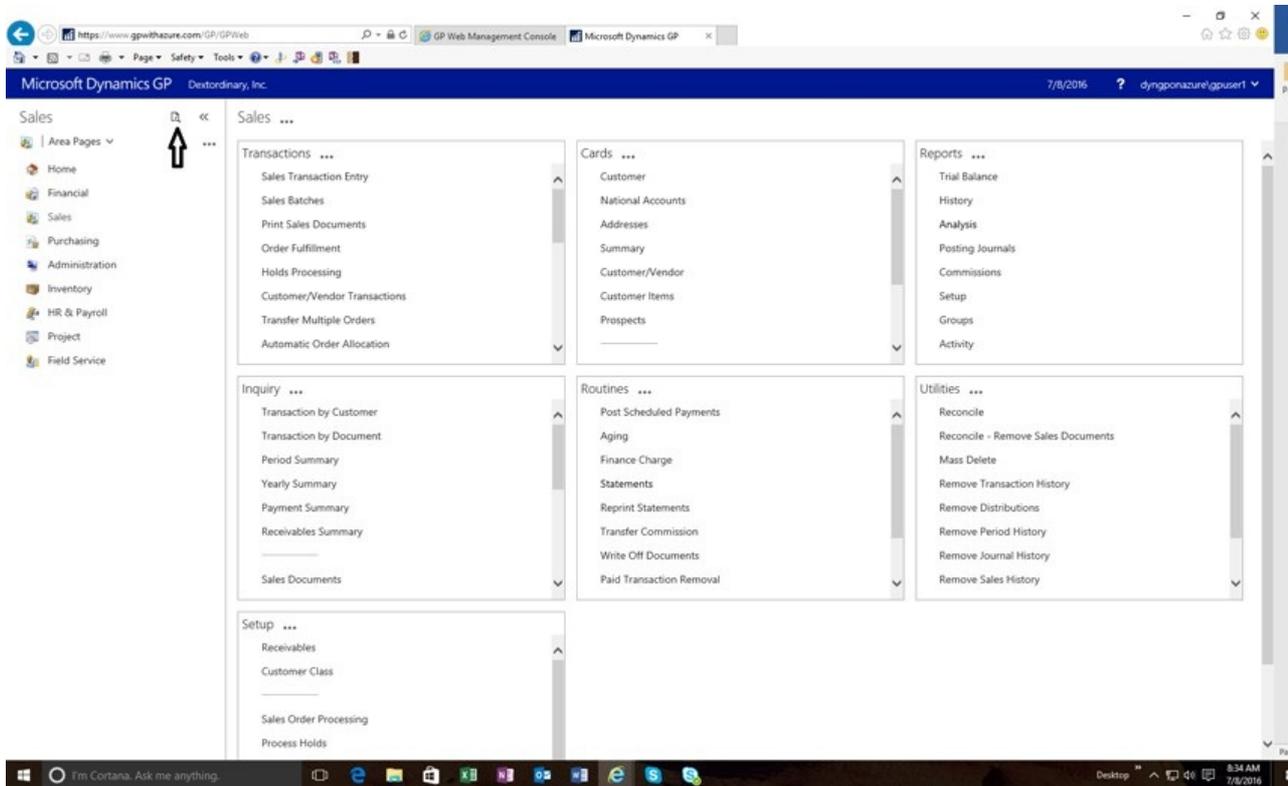


Accessing windows in the web client

Search functionality provides an option for accessing and opening windows in the web client as an alternative to the standard navigation. The search window is opened from an icon at the top of the navigation pane.

NOTE

Note that you'll use the search window to locate and open multiple windows at the same time in the web client.



To use this functionality, click the search icon to open the Search window. Begin typing the name of the window you're looking for. As you type, the windows that most closely match the letters you type are displayed in the search window.

![shows the location of the help menu on the home page in dynamics gp.](media/using web-help-icon.png "Help")

Changing the order of items in the navigation pane

To change the order, click the ellipsis (...), and then click the Navigation Pane Options Setup dialog to rearrange the items.

The screenshot shows the Microsoft Dynamics GP web interface. The browser address bar displays <https://www.gpwithazure.com/GP/GPWeb>. The page header includes the Microsoft Dynamics GP logo and the text "Dextordinary, Inc.". The left navigation pane is titled "Sales" and contains a list of menu items: "Area Pages", "Home", "Financial", "Sales", "Purchasing", "Administration", "Inventory", "HR & Payroll", "Project", and "Field Service". A context menu is open over the "Sales" item, with a black arrow pointing to the three-dot menu icon. The context menu is divided into three sections: "Sales ...", "Inquiry ...", and "Setup ...".

Sales ...

- Navigation Pane Options...
- Print Sales Documents
- Order Fulfillment
- Holds Processing
- Customer/Vendor Transactions
- Transfer Multiple Orders
- Automatic Order Allocation

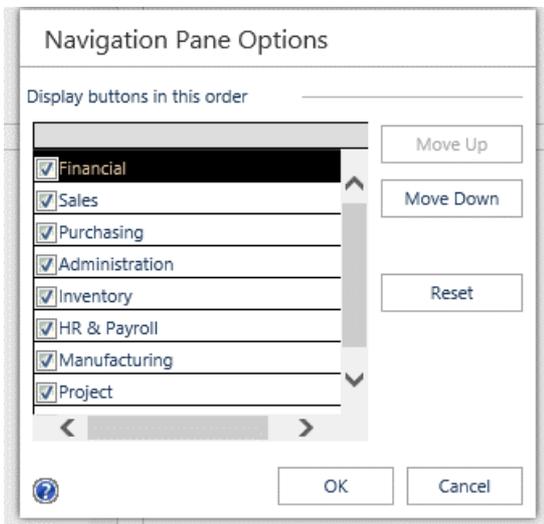
Inquiry ...

- Transaction by Customer
- Transaction by Document
- Period Summary
- Yearly Summary
- Payment Summary
- Receivables Summary
- Sales Documents

Setup ...

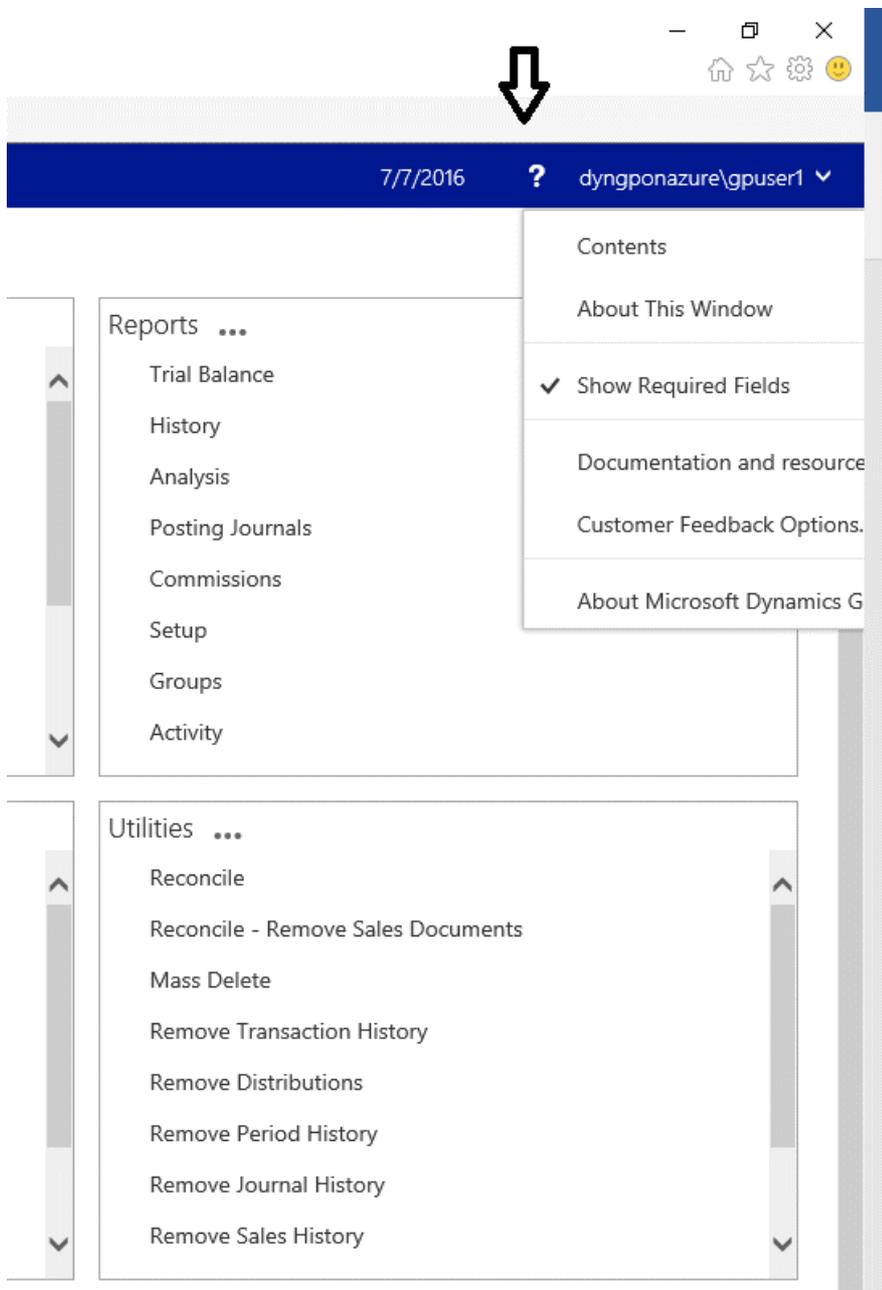
- Receivables
- Customer Class
- Sales Order Processing
- Process Holds

The dialog allows you to change the order in which items are listed in the navigation pane.



Accessing help

The Help menu is available in the status bar in the upper right corner of the web client window.



You can choose Contents to display help for the active application. You can choose About This Window to display

context-sensitive help for the current window. The same Help menu items are available in the ribbon for most windows in the web client.

Reports and Printing

You can use standard Report Writer reports, Report Writer reports with Word templates, and SSRS reports with the Dynamics GP web client.

Standard Report Writer reports

When you print a Report Writer report, you will see the standard Report Destination dialog. If you choose the Standard report type, and choose to send the report to the screen, then the report will be displayed in the Screen Output window.

Standard Report Writer reports

When you print a Report Writer report, you will see the standard Report Destination dialog. If you choose the Standard report type, and choose to send the report to the screen, then the report will be displayed in the Screen Output window.

Screen Output - Detailed Item List

Print Send To Completed 1 Page Page 1

System: 11/29/2012 5:40:18 PM Fabrikam, Inc. Page: 1
 User Date: 4/12/2017 DETAILED ITEM LIST User ID: Steve
 Inventory Control

Ranges: From: To: From: To:

Item Number
 Item Description
 Item Generic
 Class ID

Sorted By: Include Discontinued Items: Vendor Information:
 Include Inactive Items:

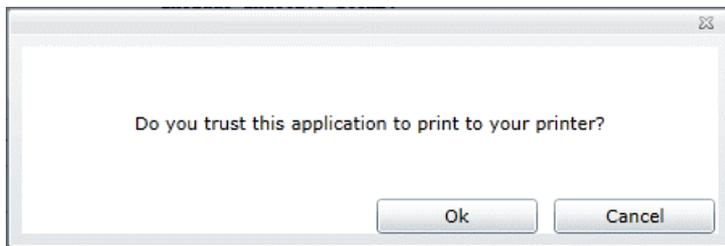
* Primary Vendor
 + Inactive Items

Item Number	Item Description	Generic	Sales Tax Schedule	Purch Tax
1-A3261A	Multi-Core Processor	Servers		
Sales Inventory	0.00	0	2	0
				EACH

FOB Vendor ID Vendor Name Vendor Item Number U of M Schedule ID

Total Number of Items: 1

If you choose the Standard report type, and choose to send the report to the printer, you will be prompted to indicate whether you trust the application to print to the local printer. Click OK to allow printing to continue.



After the report has been sent to the printer, a dialog box is displayed to indicate that printing is complete.

Report Writer reports with Word templates

When you print a Report Writer report and choose the Template report type, Dynamics GP will use a Word template for the report. If a Word template has already been previously defined for the report, that template will be used. If no template has been defined for the report, a template will be automatically generated by the Report Template Generator and used.

You will be prompted for a location where you want to save the local report. If you have configured the application to run in trusted mode, you will be asked this only one time for your web client session.

WARNING

The Dynamics GP web client doesn't remove any content from the location you specify. It's up to you to be sure that any sensitive information is removed from the location that you choose on your local workstation.

SSRS reports

You can generate SQL Server Reporting Services (SSRS) reports from the web client. These reports are rendered in a separate web browser window.

Managing web client sessions

10/18/2018 • 6 minutes to read

The administrator of the Dynamics GP web client installation has the responsibility to monitor and manage the web client sessions.

Session Management snap-in

The Session Management snap-in for the Web Management Console is the primary tool that you will use to manage web client sessions. Use the following procedure to access this snap-in.

1. Open Internet Explorer.
2. Enter the address of the Web Management Console site. The default address of the site is:

```
https://ServerName:PortNumber/WebManagementConsole
```

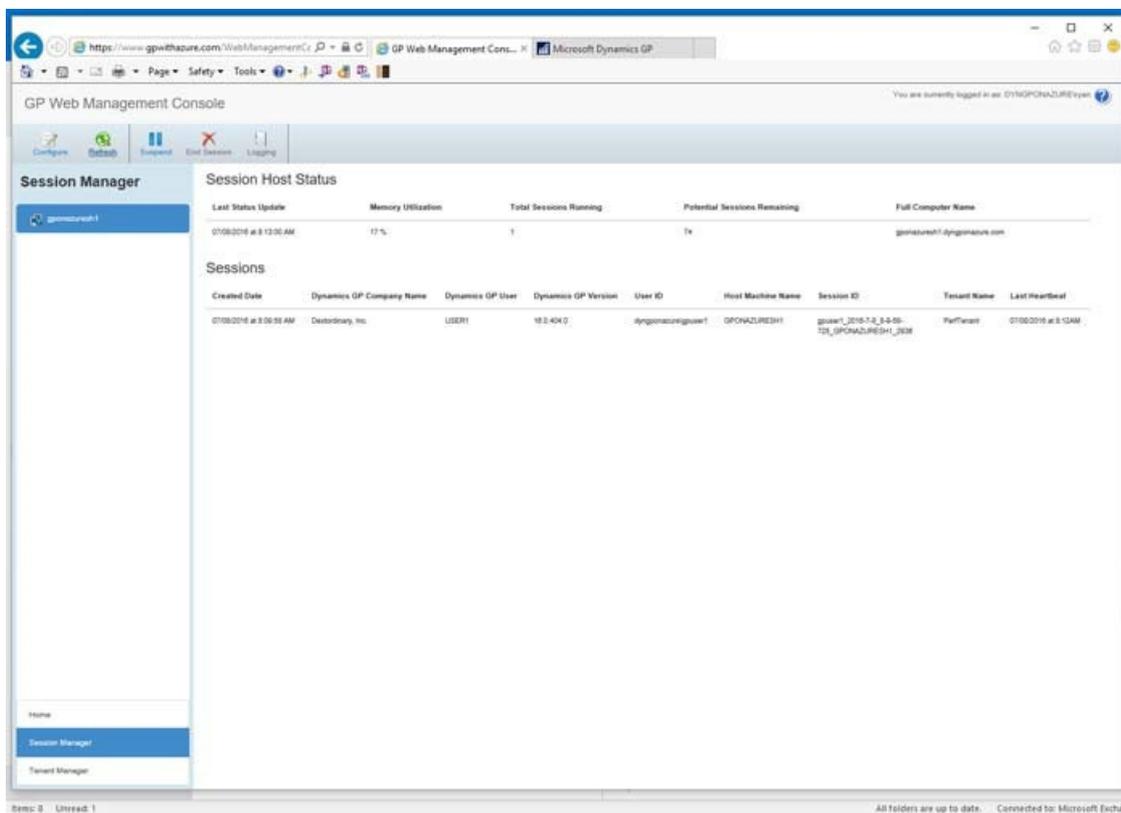
ServerName is the fully-qualified domain name (FQDN) for the server that is hosting the web management console site. This name must match the name you used when you requested the security certificate that you applied to the site when setting up SSL.

PortNumber is the port for the web site that you are using. If you chose to install on the default web site (port 80) then you do not need to supply the port number.

A typical URL to access the Web Management Console looks similar to the following:

```
https://gpuaweb.contoso.com/WebManagementConsole
```

3. You may be prompted for your login credentials when you access the Web Management Console. If you are, provide your login name and password.
4. In the Web Management Console, click the Session Management snap-in.



Connecting to Session Central

To use the Session Management snap-in to monitor Dynamics GP web client session, the snap-in must be configured to access the Session Central Service. The Session Central Service is the component of the Dynamics GP web client installation that creates and tracks web client sessions.

To connect to the Session Central Service, the Session Management snap-in must have the URL for the service. In most cases, this will be automatically configured when the Dynamics GP web client components were installed. Use the following procedure to manually configure the connection to the Session Central Service.

To connecting to Session Central

1. With the Session Management snap-in selected, click **Configure** in the ribbon of the Web Management Console.
2. In the window that is displayed, supply the URL for the Session Central Service. A typical URL to access the service looks like the following:

```
http://machinename:48650/SessionCentralService
```

Substitute machinename with the name of the computer on which the Session Central Service is running. The default port used for the service is 48650. If you have used a different port for the service, you must use that port number in the URL.

If the Session Central Service has been configured to use SSL (secure sockets layer) than the URL must begin with https, instead of http.

3. Click **OK**. The value entered will be validated. If the Session Central Service cannot be contacted, an error will be displayed. Correct the URL and then click OK to save the changes.

Session host machines

The left pane of the Session Management snap-in lists the session host machines that are configured to host Dynamics GP web client sessions. Select the machine name to see the detailed information about that machine.

The following details are provided:

Last Status Update Indicates the last time that the status information was updated. Click Refresh in the ribbon to retrieve the latest information from the Session Central Service.

Memory Utilization Indicates the percentage of memory that is used on the selected machine.

Total Sessions Running Indicates the total number of web client sessions that are running on the selected machine.

Potential Sessions Remaining Provides an estimate of the number of additional web client sessions that could be hosted on the selected machine. This estimate is based primarily on the amount of available memory on the machine.

Full Computer Name Displays the full name of the machine.

Session List Lists the individual web client sessions that are running on the machine.

Suspending a session host machine

An active session host machine allows new web client sessions to be created for it. You may want to remove a session host machine from service, such as when you want to apply system updates. To do this, you can suspend the session host machine, which prevents it from accepting any new web client sessions. To do this, complete the following procedure.

1. In the left pane of the Session Management snap-in, select the session host machine that you want to suspend.
2. In the ribbon, click **Suspend**.

Suspending a machine does not affect the web client sessions that are already running on the machine. The existing web client sessions will continue to run until they are closed.

Sessions

When a session host machine is selected in the left pane of the Session Management console, the sessions running on that machine are displayed. The following details are provided for each session:

Created Date Indicates the date and time that the web client session was created.

Dynamics GP Company Name Displays the company in the Dynamics GP installation that the user logged in to.

Dynamics GP User Displays the Dynamics GP user name that the web client user supplied when they signed into the company.

Dynamics GP Version Provides the version number of Dynamics GP that is being used for the web client session.

User ID Displays the user ID supplied when the user signed in to the Dynamics GP web client.

Host Machine Name Displays the name of the machine that is hosting the web client session.

Session ID Shows the internal session ID.

Tenant Name Displays the name of the tenant that is being used for the web client session. If the Tenant Service is not being used, the tenant name is GPWebApp.

Last Heartbeat Indicates that last time the web client communicated with the session host machine.

Ending a session

A web client session ends when the user signs out. However, situations occur in which a session may be left running on the session host machine. For example, the web client user may have closed their web browser without signing out first. You may have a need to manually end a session that a web client user has left running on a session host machine.

When you manually end a session, there is a risk of data corruption, because the Dynamics GP session was not closed down normally.

To manually end a web client session:

1. Select the session that you want to end.
2. In the ribbon, click **End Session**.
3. In the End Session window, verify that you really want to end the session. If you are sure you want to end the session, click **End Session**.

Session timeout

You can configure whether inactive web client sessions are automatically closed after a specified amount of time has passed.

Single tenant

If you are using the Dynamics GP web client in a single tenant configuration (not using the Tenant Service), a settings in the TenantConfiguration.xml file of the web client installation controls the session timeout. This file is typically found in this location on the machine that is hosting the web site for the web client installation:

```
C:\Program Files\Microsoft Dynamics\GP Web Client\GPweb\
```

The <HeartbeatTimeout> element in the TenantConfiguration.xml file controls the amount of time that must pass before an inactive web client session is automatically closed. The format for the value is:

```
Days.Hours:Minutes:Seconds
```

The value 0.00:00:00 indicates that the timeout is infinite, and no inactive web client sessions will be automatically closed.

Multiple tenants

If you are using the Microsoft Dynamic GP web client in a multitenant configuration, you will use the Tenant Management snap-in for the Web Management Console to control the session timeout value. Refer to the Tenant Services Installation and Administration Guide or the Tenant Management snap-in help for information about how to configure the session timeout value in a multitenant configuration.

Logging

The logging capability provided by the Dynamics GP web client installation can help you troubleshoot issues that users may experience with the Dynamics GP web client. Information about logging is divided into the following topics:

- [Logging overview](#)
- [Enabling logging for a tenant](#)
- [Enabling logging for a session](#)

Logging overview

To effectively use logging, a basic understanding of the logging features is helpful.

Levels of logging

Logging can be configured at multiple levels for a web client installation:

- At the top level, you can enable logging for all of the users of a specific tenant.
- If you are using multitenant environment, you can enable logging for specific users of a tenant.
- At the lowest level, you can enable logging for a specific web client session.

Types of logs

The following types of logs are available:

Runtime Log Provides details about the actions performed by the web client runtime process.

Script Log Contains a record of all of the sanScript scripts that are run by the Dynamics GP web client runtime process.

Timing Log Contains timing details for web client operations. Microsoft can analyze this information to isolate issues with web client performance.

SQL Log Contains a record of all of the SQL statements there were issues by the Dynamics GP web client runtime process.

Log location

The logs are generated on the session host machine where the web client session is being run. The default location for the log files is:

```
C:\ProgramData\Microsoft Dynamics\GPSessions\Logs
```

To view the ProgramData folder, you will need to show the hidden files and folders on the session host machine.

Enabling logging for a tenant

The tenant configuration you are using determines how you enable logging for the tenant.

Single tenant

If you are using the Dynamics GP web client in a single tenant configuration (not using the Tenant Service), you can enable logging for all users of the installation. Settings in the TenantConfiguration.xml file of the web client installation control the logging. This file is typically found in this location on the machine that is hosting the the web site for the web client installation:

```
C:\Program Files\Microsoft Dynamics\GP Web Client\GPweb\
```

The <RuntimeLogEnabled> element in the TenantConfiguration.xml file controls logging for all users of the web client installation. When it has the value true, the runtime log is generated for every web client user.

The <CustomRuntimeSettings> element controls whether the other log types are generated. If the setting for the specific log type is set to true, that log will be generated.

If logging for a tenant is enabled for an extended time, the quantity and size of the log files generated can become very large. Be sure to disable logging after it is no longer needed.

The following example shows the settings in the TenantConfiguration.xml file that cause all of the logs to be generated.

```
<RuntimeLogEnabled>true</RuntimeLogEnabled>
```

```
<CustomRuntimeSettings>ScriptLogEnabled=true|TimingLogEnabled=true|  
SqlLogEnabled=true</CustomRuntimeSettings>
```

Multiple tenants

If you are using the Microsoft Dynamic GP web client in a multitenant configuration, you can enable logging for a specific tenant or for specific users of the tenant. You will do this using the Tenant Management snap-in for the Web Management Console. Refer to the Tenant Services Installation and Administration Guide or the Tenant Management snap-in help for information about how to configure logging in a multitenant configuration.

Enabling logging for a session

The Session Management snap-in of the Web Management Console is used to enable logging for a specific web client session. To enable logging for a session, complete the following procedure:

1. Select the session that you want to enable logging for.
2. In the ribbon, click Logging.
3. In the Logging Settings window, select the log types that you want to create.
4. Click OK. The logging for the session will begin.

NOTE

Be sure that you disable logging when you have finished creating the logs.

Repairing the web client

If the Dynamics GP web client installation becomes damaged, the repair operations available may help resolve the issues. Information about repairing is divided into the following sections:

- [Common repair scenarios](#)
- [Performing a repair](#)

Common repair scenarios

When using the Dynamics GP web client, there are some common scenarios that can be fixed through using a repair operation.

Corrupted configuration

The Dynamics GP web client has numerous configurable components. If something has corrupted the configuration for one of these components, the repair action can return the component to its originally installed condition.

Expired security certificates

The security certificates that are used in the web client installation have a finite lifespan. When a security certificate expires, it will no longer function properly in the web client installation. The security certificate must be replaced. After the new security certificate is installed into the certificate store on the machine, you can select the new certificate during the web client repair process.

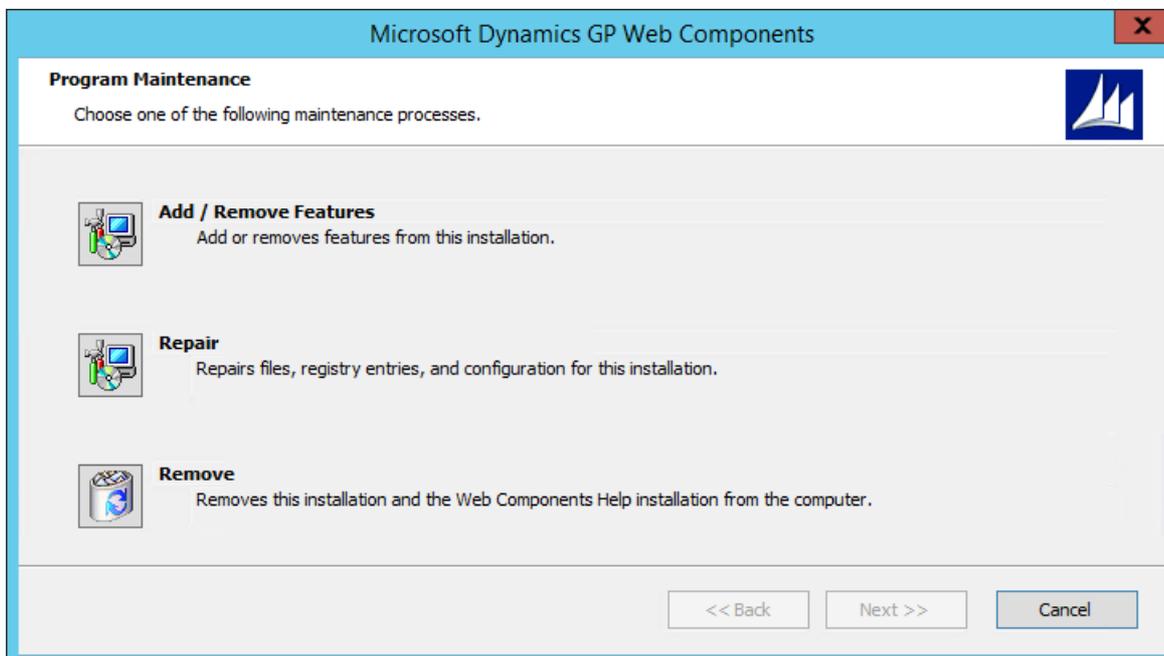
Changed user credentials

If the credentials (user name and/or password) have changed for one of the user accounts that is used in the web client installation, the web client will not work correctly. For instance, one of the services for the web client may not start. You can supply the updated credentials as part of the web client repair process.

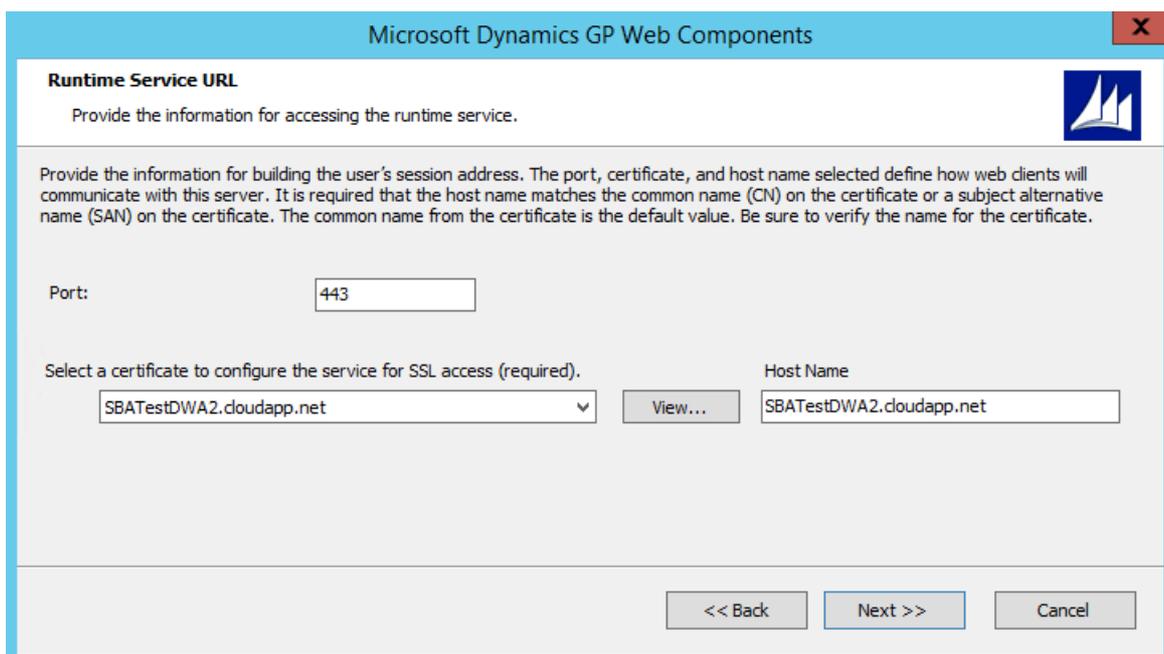
Performing a repair

To repair the Dynamics GP web client installation, complete the following steps:

1. Log in to the machine where the repair operation is to be performed.
2. Open the Programs and Features control panel.
3. From the list, select Dynamics GP Web Components. Click **Change**.
4. In Program Maintenance, click **Repair**.



5. The components to be configured during the repair process will depend upon which components are installed on the machine where the repair is being performed. Supply the required values for each component that will be repaired. For example, if you were replacing an expired security certificate, you would choose the new certificate during the repair process.
6. After all of the components have been configured, click **Next** to start the repair actions. The repair steps will be performed.



6. After all of the components have been configured, click **Next** to start the repair actions. The repair steps will be performed.
7. After the repair is complete, click **Exit**. The Web Client Configuration Wizard will start.
8. At the Welcome screen, click **Next**.
9. If required, specify the type of authentication you want to use to connect to the SQL Server where the database for the Web Management Console is being stored. Click **Next** to continue.
10. If required, specify the type of authentication you want to use to connect to the SQL Server where the database for the Session Central service is being stored. Click **Next** to continue.
11. Review the status information for the databases. Click **Next** to continue.

12. After the repair actions are complete, click **Exit**.

GP Web Resource Cache

The Dynamics GP Web Resource Cache is an optional component that you can install on the session host machines of your web client installation to help improve the performance and resource utilization. It is a Windows service that runs on the session host machines for the web client installation. Information about caching is divided into the following sections:

- [Caching for the web client](#)
- [Installing the GP Web Resource Cache](#)
- [Managing the cache](#)

Caching for the web client

Any form that is displayed by the web client is first retrieved from the application dictionary and then converted into a format that can be used by the web client. Because the result is the same each time, it is useful to cache the converted form.

In the standard Dynamics GP web client installation, form caching is done at the session level. Each user session on the session host machine has its own cache folder that stores cached versions of the forms that the user has opened during that session. If a user re-opens a form that had previously been opened, the cached version is used. When the user closes the session, the contents of the cache are deleted.

The GP Web Resource Cache allows caching at the machine level. When a user accesses a form in the web client, the form is cached on the session host machine. If any other user session running on that machine accesses that same form in the web client, the cached version is used. The content of the machine level cache is persistent. It is not affected when users close their web client sessions.

The machine level cache can help improve performance in three ways:

- It's faster to use the cached version of a form, rather than to retrieve and convert the form definition from the application dictionary.
- Because it is persistent beyond the life of individual user sessions, the cached information does not have to be re-created for each session.
- The cached information is shared. The first time a web client user accesses a form, the form is cached. After that time, other web client users will access the cached version of the form.

If a form in the Dynamics GP web client installation has changed, such as being customized with the Modifier, the cache is updated automatically the next time the form is accessed.

Installing the GP Web Resource Cache

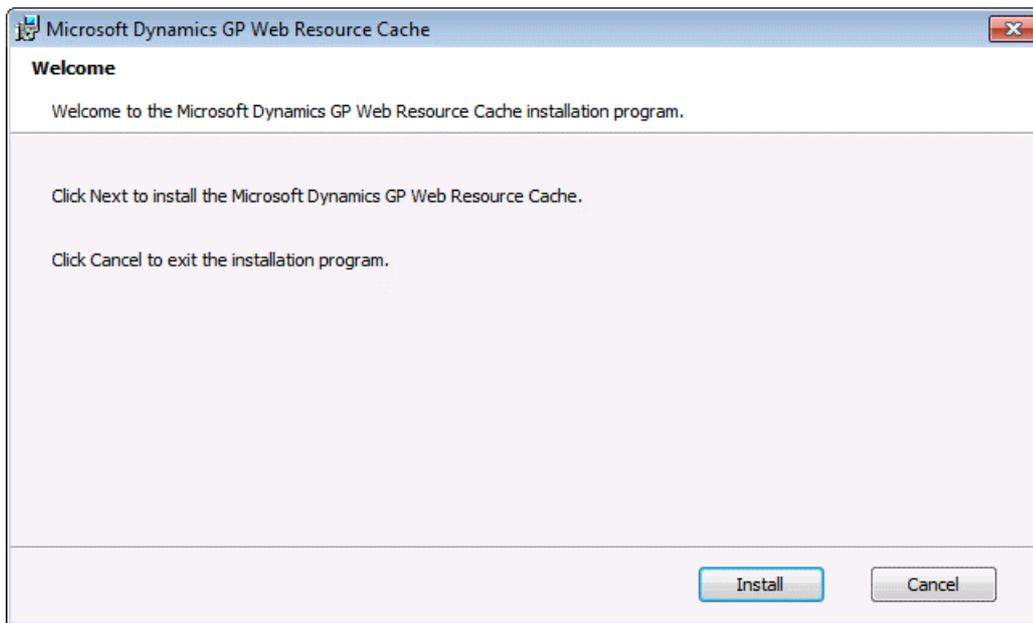
You can install the GP Web Resource Cache on any session host machine (a machine that is running the Session Service). Use the following procedure to install the cache:

To install the GP Web Resource Cache:

1. From the Dynamics GP installation media, double-click the Setup.exe file to open the Dynamics GP

installation window.

2. Click **GP Web Resource Cache** and then click **Install**.
3. At the Welcome screen, click **Install**.



4. After the installation is complete, click Finish. The GP Web Resource Cache will begin working immediately.

Managing the cache

In most cases, you won't need to do any configuration or management actions for the GP Web Resource Cache. There are actions you can take to manage the cache, and some configuration settings that you can use to control the behavior of the cache.

Starting and stopping the cache

The GP Web Resource Cache is a Windows service, so you can use the Services control panel to start or stop the cache. As soon as you stop the cache, any new web client sessions will fall back to session level caching.

NOTE

Any time the GP Web Resource Cache is not available, session level caching is used.

Cache configuration file

A configuration file for the GP Web Resource Cache can be found in this location: C:\Program Files\Microsoft Dynamics\GP Web Resource Cache\Providers

The configuration file has the following name:

Microsoft.Dynamics.GP.Web.Services.Runtime.Caching.Provider.FileSystem.dll.config

The following settings are found in this configuration file:

Location This setting specifies the complete path to the location of the machine level cache. The default value is the empty string (""), which causes the cache to be created in the temporary folder for the user account that is running the GP Web Resource Cache service.

You may want to supply a specific location for the machine level cache for special circumstances, such as when you have a high-performance storage device like a solid state disk available. You should always keep the machine level cache on the local machine. Do not put it on a network or shared location.

CleanupInterval The GP Web Resource Cache will automatically remove infrequently used content. This setting specifies how often the GP Web Resource Cache will scan the cache content for content that has not been accessed within the specified time period (defined by the CleanupMaxAge setting). The default value is once a day. The format for this setting is days:hours:minutes:seconds.

CleanupMaxAge This setting specifies the minimum amount of time that must have elapsed since the content was last accessed before it is removed by the automatic cleanup action. The default value is 30 days. The format for this setting is days:hours:minutes:seconds.

NOTE

After you have made any changes to the configuration file, be sure to restart the Dynamics GP Web Resource Cache service in the Services control panel.

Troubleshooting

Use the information in this chapter to help you troubleshoot issues you may have when you are installing or using the Dynamics GP web client. The following topics are discussed:

- [Errors reported on the main page](#)
- [Incomplete sign-on](#)
- [Web client is Initializing and becomes unresponsive](#)
- [Port issues](#)
- [Performance issues](#)
- [Printing issues](#)
- [Help not available](#)

Errors reported on the main page

When a sign-on error occurs and is reported on the main page for the web client, look on the Dynamics section of the Event Log on the machine running the web site and Session Central Service for the web client installation. The information provided in the error(s) listed there can help you troubleshoot the issue.

If the error detail indicates that a file cannot be found, be sure that you have installed the web client runtime components on the session host machines. The file that cannot be found may be one of these components.

You should also verify that the Session Central Service and the Session Service are both started.

Incomplete sign-on

Many actions occur during the sign-on process. Issues in any of those actions can prevent the sign-on from completing.

If you do not see the status bar in the bottom portion of the web client window, with the status "Initializing", this may indicate that the HTML application (.xap file) for the web client has not loaded. Verify that the .xap file was installed with the web client runtime components.

Web client is Initializing and becomes unresponsive

If the status bar indicates "Initializing" for an extended period of time, but no web client windows are displayed, then there is likely a communication problem between the HTML application in the web browser and the runtime service. Check the following:

- Verify that you didn't have any certificate errors reported in Internet Explorer when you access the Dynamics GP web client site. A certificate error can prevent the sign-on action from completing.
- Verify that you can access the Runtime service. This is the service that the web client application communicates with on the session host machine. By default, this service is accessed through port 443. The port is secured with a security certificate. If there are any problems with the security certificate, the

connection cannot be made. Use a web browser to access the following file on the session host machine:

https://session_host_machine:443/clientaccesspolicy.xml

The XML content for the file should be displayed in the web browser. If it is not, then there is an issue with the configuration of the runtime service. Usually the issue involves the security certificate that is used for the port. Use the following command to find the details of the security certificate that is bound to the port:

```
netsh http show sslcert
```

If you do not see that there is a security certificate bound to port 443, then the web client will need to be repaired or re-installed, so that a security certificate can be bound to the port.

- Verify the security certificate that was selected for the Runtime service when the web client was installed. The client machine must be able to validate this security certificate so that the connection to the Runtime service can be established.

If you choose to use different security certificates for the web site and for the Runtime service, you are more likely to see this issue. The client machine is able to validate the security certificate for the web site, so no certificate error is reported in Internet Explorer. However, the client machine may not be able to validate the different security certificate that was used for the Runtime service. This prevents the connection from being established, but the error does not get displayed in Internet Explorer. One way to resolve this situation is to use the same security certificate for both the web site and the Runtime service.

- Verify that the web client is running in trusted mode on the client machine. If you see the padlock icon in the lower-left corner of the web client window, the application is not running in trusted mode. This can indicate that the machine that is running the web client does not have the required security certificate for the Silverlight .xap file. This may prevent the application from initializing.

Port issues

For the web client to work properly, the appropriate ports must be opened in the computer 's firewall. The Dynamics GP Web Client installer opens the appropriate ports when components of the web client are installed. You can use the following command to list the ports that are open on a system:

```
netstat - anob
```

Port accessibility issues are more likely to occur in scale out installation, when web client components are installed on different machines. For example, the session host machines must be able to access the Session Central Service, which is typically done through port 48651. That means this port must be open on the system that is running the Session Central Service.

Another common port accessibility problem is the port used for the runtime service. This issue is more common if you use a port other than 443, the default port. This port must be opened so that the web client on an end-user machine can access the runtime instance on the session host machine.

Performance issues

In a typical installation of the web client, the performance of the web client is comparable to the performance of a desktop client. You can expect that some operations may be slower in the web client, while other actions may be faster. If you notice that the web client does not have good performance, it is worth further investigation.

Session host performance

To gauge the overall system performance, verify the performance that you see when you run the Dynamics GP desktop client on each session host machine. If the desktop client does not have optimal performance, the web client sessions that are hosted on that machine will also have sub-optimal performance. When you resolve the desktop client performance issues, the web client performance should also improve.

Real-time virus scanning

On each session host machine, consider turning off real-time virus scanning for the runtime session process. The runtime session process is going to be very active, and can attract the attention of antivirus software. Limiting the scanning can speed up performance of the web client sessions.

Virtual machine configuration

You may be using a virtualization solution such as Hyper-V, and installed the web client into a virtual machine configuration. Check the settings for the virtual machines to be sure they are optimal for the workload of the web client. For example, a virtual machine that is running low on memory may have reduced performance.

Another situation that can occur with virtual machines involves Network Interface Card (NIC) settings that are not fully compatible with the operating system settings. Specifically, NIC settings may be set to use "offload" optimizations that actually slow down network performance for the virtual machine. To turn off these optimizations, do the following on each virtual machine.

1. Open the **Network and Sharing Center**.
2. Click the link for Connections to view the information about the local network connection.
3. Click **Properties**.
4. Click **Configure**.
5. Click the **Advanced** tab.
6. Disable all of the settings that have "offload" in their name.
7. Click **OK** to save the changes. This will reset the NIC for the virtual machine.

Printing issues

The follow printing issues may occur.

Printing to a file

When a web client user prints a report that uses a Word template, and chooses to save the report to a file, the file may not be saved in the location that was specified. The user may also see a "file not found" error if they chose to display the report on their local machine. Typically, this indicates that the security settings for Internet Explorer are preventing the file from being written to the local machine.

To solve this problem, perform one or both of these actions in the Internet Options window for Internet Explorer:

- Display the Security tab. Add the URL for the Dynamics GP web client site to the Trusted sites list.
- Reduce the security level for the specified zone. For example, if you are running the Dynamics GP web client in an intranet setting, reduce the security level for the Local intranet zone.

Help not available

Depending on the order that the web client components are installed, the web client help components might not be installed. If this occurs, you can manually install the web client help components.

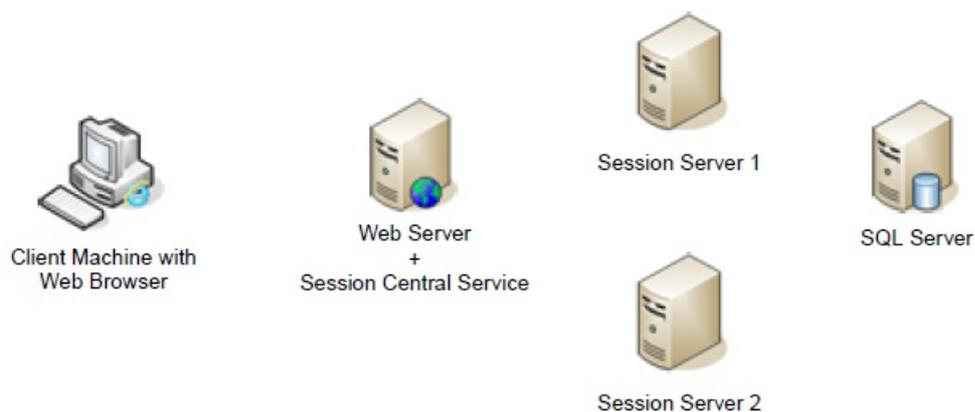
Web Client Operation

It is important to understand how all of the components of the Dynamics GP web client installation work together as a user logs in, performs standard operations, and logs out of the web client. This information can be helpful when you are troubleshooting any issues with the web client. The following topics are discussed:

- [Logon](#)
- [Standard operations](#)
- [Logoff](#)

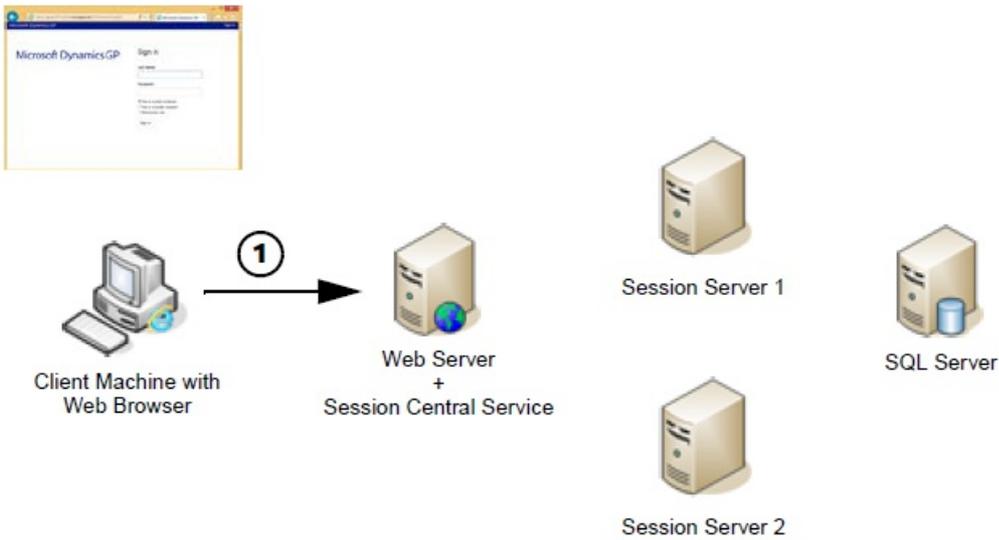
Logon

The logon process has multiple steps, although most of them are not visible to the web client user. For simplicity, the log on process for a typical scale out configuration is described. The parts of the configuration are shown in the following illustration.



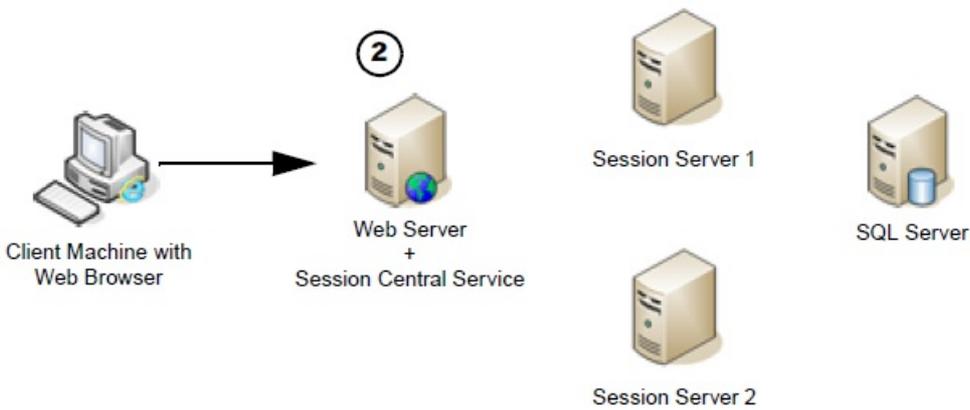
1. User accesses the web client site.

In the first step of the logon process, the client machine with a web browser accesses the URL for the Dynamics GP web client site. The logon page for the site is displayed.



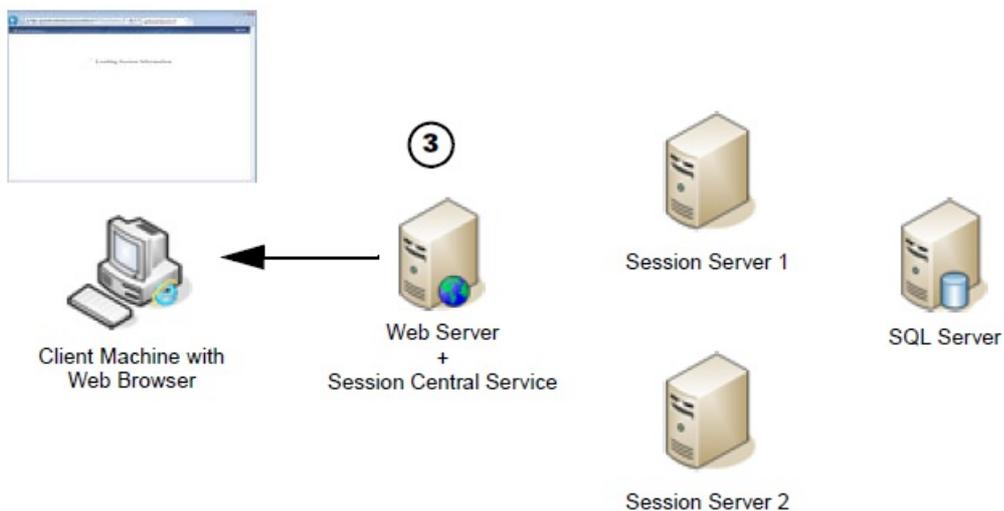
*2. The user supplies their windows account credentials. *

Typically, these will be their domain credentials, but could also be their Organizational Account credentials. If the web site can verify that the user is allowed to access the Dynamics GP web client, the logon process is allowed to proceed.



3. The Session Central Service directs the session request.

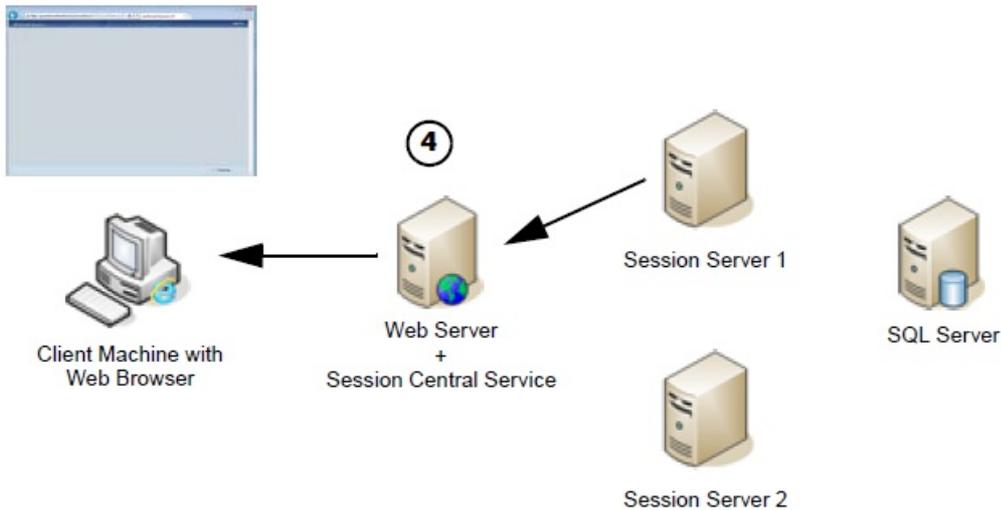
Session information for the current user is retrieved.



The session Central Service performs several action to determine how it will direct the user 's request.

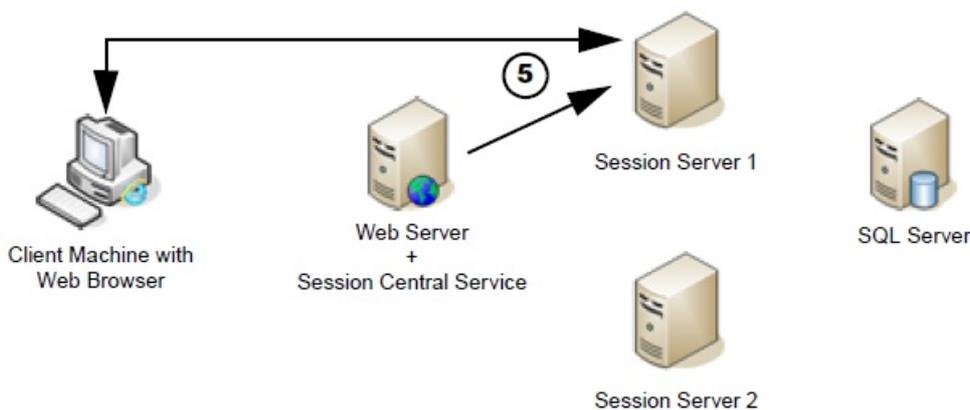
- It will determine whether the user has existing sessions already running on the session host machines. If one or more sessions exist, they are presented in a list for the user. The user can re-connect to an existing session or create a new session.
- If no previous sessions exist, the Session Central Service will determine on which session host machine the new session will be created.

4. The HTML application is loaded into the browser on the client computer.



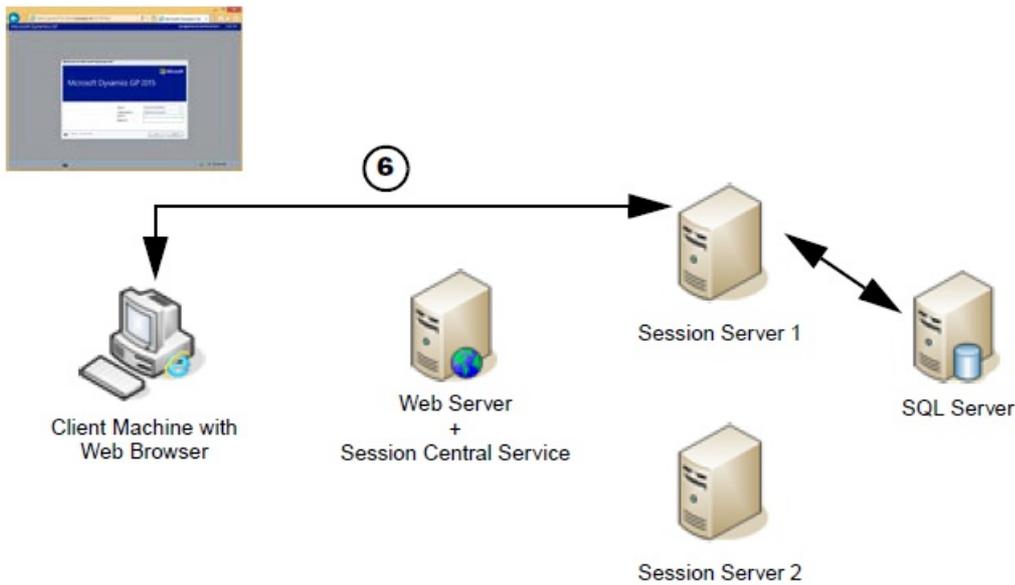
5. The Session Service creates a new runtime session.

On the session host machine that was chosen by the Session Central Service, the Session Service will create a new instance of the runtime service. This is the process that accesses the business logic in the application dictionaries and the data in the SQL database. It also communicates with the application to display the client user interface.



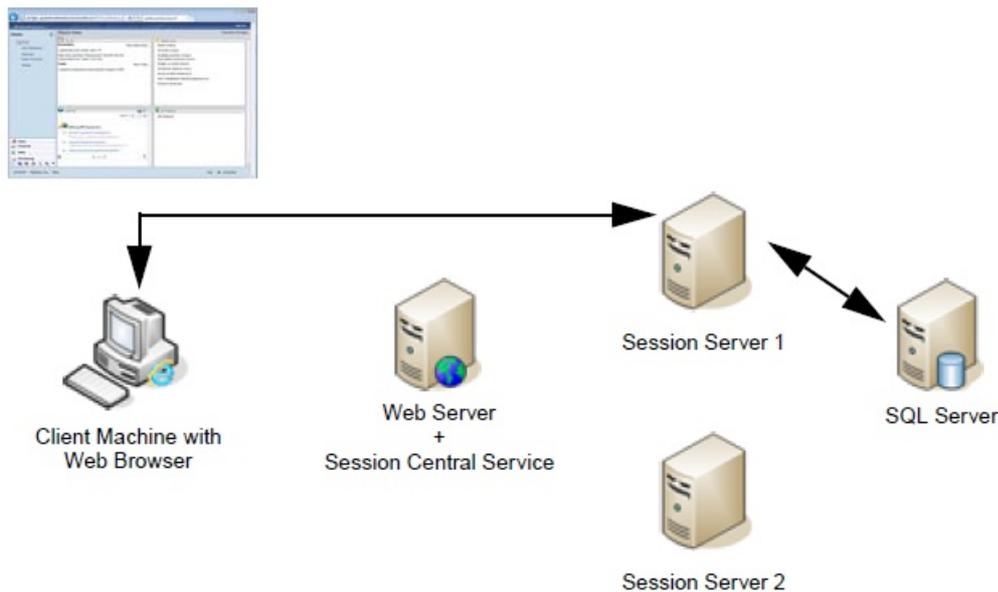
6. The Dynamics GP application is displayed.

After the connection is established between the HTML application on the client and the runtime session on the session server machine, the Dynamics GP application will start. If the user credentials can be matched to a Dynamics GP user account, the user will be signed in. Otherwise, the login window will be displayed.



Standard operations

When a user logs on to the Dynamics GP web client, a connection is created between the HTML application that is loaded in the web browser and the runtime session that is created on the session host server. After this connection is established, the web server that hosts the site for the Dynamics GP web client does not play any part in the interaction.



The connection between the HTML application and the runtime session transmits all of the information needed to present the application user interface, as well as any input supplied by the user. The runtime session on the session server machine interacts with the SQL Server database, just as the Dynamics GP desktop client would.

If the user is disconnected, such as by closing their web browser without logging out of Dynamics GP, the runtime session on the session server machine will remain running. The next time the user logs in, that existing runtime session will be found by the Session Central Service. The user will have the option to reconnect to that existing session and continue where they left off.

Logoff

When the user clicks the Exit GP link in the upper-right corner of the Dynamics GP web client window, the

standard Dynamics GP logoff procedure is performed. The connections between the runtime session and the SQL Server are closed, and the runtime session is ended. The user is returned to the main logon screen for the Dynamics GP web client site

Single machine upgrade

10/18/2018 • 3 minutes to read

This chapter contains the procedures you need to follow to perform an upgrade of the Dynamics GP web client on a single machine installation.

Preparing for the upgrade

Before you perform the upgrade for the Dynamics GP web client, you must perform the upgrade for the database and the desktop client components. Use Dynamics GP Utilities to upgrade the system database and the company databases. Refer to the procedures described in the upgrade documentation for Dynamics GP to complete this process.

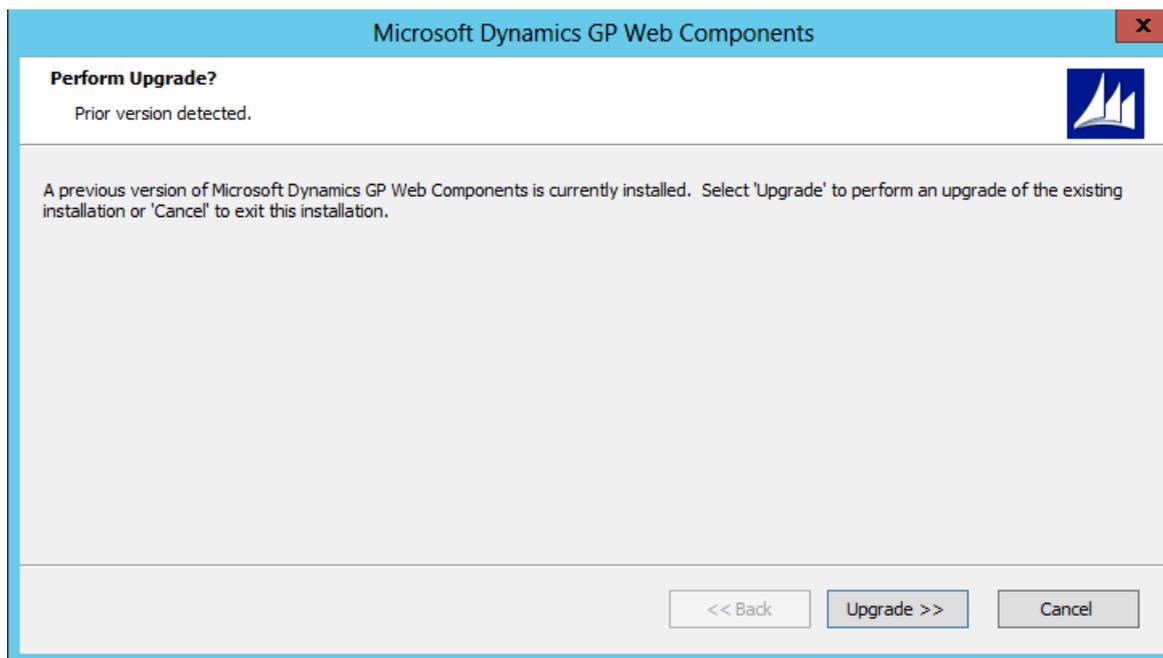
You should verify that the desktop client is working properly before you continue with the Dynamics GP web client upgrade. Resolve any issues before you continue.

Be sure that all of the users have signed out of the system before you start the web client upgrade process.

Upgrading Web Components from a Dynamics GP 2013, or GP 2013 R2 deployment

To upgrade a web client deployment from a Dynamics GP 2013 deployment in the single machine configuration, complete the following procedure.

1. From the Dynamics GP installation media, double-click the Setup.exe file to open the Dynamics GP installation window.
2. Click Web Components and then click **Install**.
3. Select to upgrade your existing web client installation.



4. The installation wizard will default with the selections from the installation being upgraded. You can change settings as needed. You can also select to add the service based architecture components to the installation. Upgrading the database will ask you for a new database name, defaulting to GPCONFIGURATION. The

data will be migrated to the new database when running the configuration wizard.

5. When the installation is complete, run the Dynamics GP Web Components Configuration Wizard. You can access this from the Start menu.
6. At the Welcome screen, click **Next**.
7. Click **Exit**.
8. The Dynamics GP Web Client Help installer will be started. Click **Install** to complete the help installation process
9. Click **Finish** to close the installer.

Upgrading Web Components from a Dynamics GP 2015 Web Components deployment

To upgrade Web Components from a Dynamics GP 2015 deployment in the single machine configuration, complete the following procedure.

1. Open an elevated command prompt as an administrator.
2. Change the directory to the AdProd\WebComponents\Updates folder on the Dynamics GP installation media.
3. Install the msp file in the updates folder using a command like the following:

```
msiexec /update filename.msp
```

Replace the filename.msp with the name of the file with an msp extension in the updates folder.

4. When the installation is complete, run the Dynamics GP Web Components Configuration Wizard. You can access this from the Start menu.
5. At the Welcome screen, click **Next**.
6. At the SQL Connection Information screen, Click **Next**.
7. At the Configuration Status and Action screen, Click **Next**.
8. Click **Exit** to close the Dynamics GP Web Components Configuration Wizard.

Client machine update steps

To ensure that the updated Dynamics GP web client is working properly, you should perform the following steps on each of the client machines that access the web client.

1. Clear the Internet Explorer browser cache. This helps to ensure that the updated application and help files are being used for the web client.

To clear the browser cache, open Internet Explorer. In the Tools menu, choose Internet options. In the Browsing history group, click **Delete**.

2. In the Delete Browsing History window, be sure to remove the temporary Internet files. Click **Delete**.
3. After the browser cache has been cleared, click **OK**.
4. In Internet Explorer, go to the Dynamics GP web client site. Sign in to the web client.
5. Look in the lower-right corner to verify the trust level for the web client. If you see the icon indicating that the web client is running in sandboxed mode, you have an additional step to perform.

The HTML application included with the updated web client may have been signed with a security certificate that is not available on the client machine. To get this certificate, you must run the DynamicsGPTrustedApp.msi that is included with the updated web client code.

Scale out upgrade

This chapter contains the procedures you need to follow to perform an upgrade of the Dynamics GP web client in the scale out configuration. The following sections are included:

- [Preparing for the upgrade](#)
- [Updating the web site and Session Central Service](#)
- [Updating session host machines](#)
- [Verifying the services](#)
- [Client machine update steps](#)

Preparing for the upgrade

The first step to performing the upgrade for a scale out installation is to upgrade for the database and the desktop client components for Dynamics GP. Use Dynamics GP Utilities to upgrade the system database and the company databases. Refer to the procedures described in the upgrade documentation for Dynamics GP to complete this process.

You should verify that at least one desktop client installation is working properly before you continue with the Dynamics GP web client upgrade. Resolve any issues before you continue.

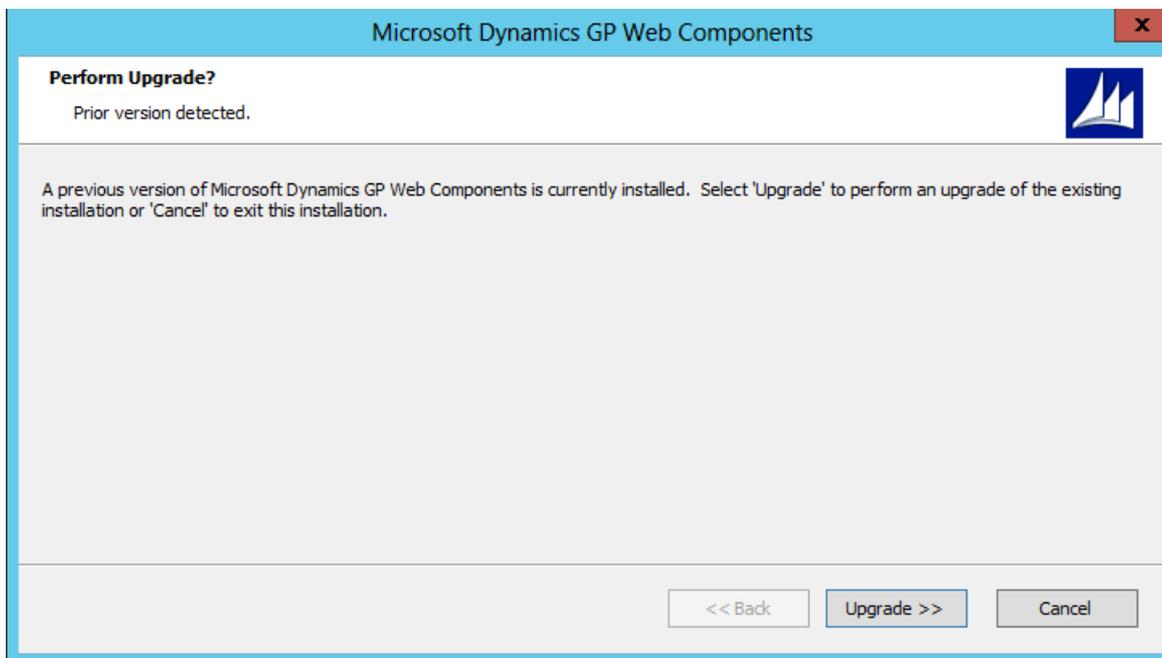
Be sure that all of the users have signed out of the system before you start the web client upgrade process.

If you are using Tenant Services with your Dynamics GP web client installation, you must apply the update to Tenant Services before you update the web client components. Refer to the Tenant Services Installation and Administration Guide for information about updating Tenant Services. The Dynamics GP upgrade can take place after the upgrade of the web client since older versions of the Dynamics GP runtime can be used with the latest version of the web components.

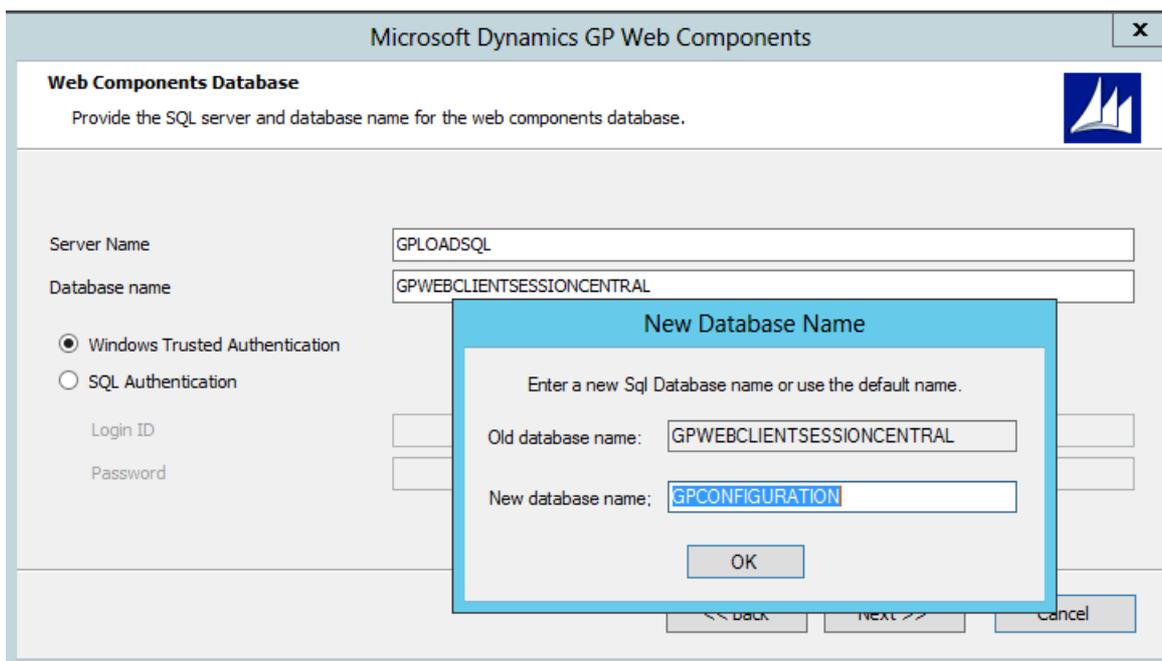
Updating the web site and Session Central Service

To install the upgrade for the web site and the Session Central Service, complete the following procedure.

1. Log in to the machine that is running the web site and the Session Central Service for the Dynamics GP web client installation.
2. From the Dynamics GP installation media, double-click the Setup.exe file to open the Dynamics GP installation window.
3. Click Web Components and then click Install.
4. Select to upgrade your existing web client installation.



5. The installation wizard will default with the selections from the installation being upgraded. You can change settings as needed. You can also select to add the service based architecture components to the installation. Upgrading the database will ask you for a new database name, defaulting to GPCONFIGURATION. The data will be migrated to the new database when running the configuration wizard.



6. When the installation is complete, run the Dynamics GP Web Components Configuration Wizard. You can access this from the Start menu.
7. At the Welcome screen, click **Next**.
8. Specify the type of authentication you want to use to connect to the SQL Server where the database for the Web Components is located. Click Next to continue.
9. Review the configuration actions that will be performed. Click **Next** to continue.
10. Click **Exit**.
11. The Dynamics GP Web Client Help installer will be started. Click **Install** to complete the help installation process.

12. Click **Finish** to close the installer.

Updating session host machines

To install the upgrade for each session host machine in the scale out installation, complete the following procedure.

1. Log in to the session host machine.
2. If you haven't already done so, perform the update for the Dynamics GP desktop client components. Be sure that the desktop client on the session host machine is working properly before you continue this upgrade procedure.
3. From the Dynamics GP installation media, double-click the Setup.exe file to open the Dynamics GP installation window.
4. Click Web Components and then click **Install**.
5. Select to upgrade your existing web client installation.
6. The installation wizard will default with the selections from the installation being upgraded. You can change settings as needed. You can also select to add the service based architecture components to the installation. When asked for the web components database, provide the new database name selected when upgrading the web server.
7. When the installation is complete, run the Dynamics GP Web Components Configuration Wizard. You can access this from the Start menu.
8. When the installation is complete, run the Dynamics GP Web Components Configuration Wizard. You can access this from the Start menu.
9. At the Welcome screen, click **Next**.
10. Specify the type of authentication you want to use to connect to the SQL Server where the database for the Web Components is located. Click **Next** to continue.
11. Review the configuration actions that will be performed. Click **Next** to continue.
12. Click **Exit**.
13. Start the installer for the updated help content. The installer has the following name:

Microsoft_DynamicsGP18_GPWebClientHelp.msi.
14. At the Welcome screen, click **Install**. The installation process may take a few minutes.
15. Click **Finish**.

Verifying the services

When all of the components of the web client installation have been updated, • On the machine that is hosting the web site for the web client installation, verify that the Session Central Service is running.

- On each session host machine, verify that the Session Service is running.
- In the Session Management snap-in for the Web Management Console, all of the session host machines should be listed. Be sure that each machine is set to allow new web client sessions.

At this point, you can allow users to sign in to the Dynamics GP web client installation.

Client machine update steps

To ensure that the updated Dynamics GP web client is working properly, you should perform the following steps on each of the client machines that access the web client.

1. Clear the Internet Explorer browser cache. This helps to ensure that the updated application and help files are being used for the web client.

To clear the browser cache, open Internet Explorer. In the Tools menu, choose Internet options. In the Browsing history group, click Delete.

2. In the Delete Browsing History window, be sure to remove the temporary Internet files. Click Delete.
3. After the browser cache has been cleared, click OK.
4. In Internet Explorer, go to the Dynamics GP web client site. Sign in to the web client.

NOTE

If you watch closely, you should see a new Silverlight application is downloaded for the Dynamics GP web client.

5. Look in the lower-right corner to verify the trust level for the web client. If you see the icon indicating that the web client is running in sandboxed mode, you have an additional step to perform.

The Silverlight application included with the updated web client may have been signed with a security certificate that is not available on the client machine. To get this certificate, you must run the DynamicsGPTrustedApp.msi that is included with the updated web client code.

Glossary

10/18/2018 • 2 minutes to read

Directory Account

A directory account is a Windows Account or Organizational Account mapped to GP users.

Externally signed certificate

A security certificate that was issued by a third-party certificate provider. These certificates are used in production environments for the web client.

Multiple domain certificate

A type of security certificate that is issued for a set of named machines. The names of the machines must be specified at the time the security certificate is purchased.

Sandboxed mode

A mode for the Silverlight application that restricts the access to local system resources.

See Trusted mode.

Scale out

A web client configuration that has multiple session host machines on which Dynamics GP web client sessions are run.

Self-signed certificate

A security certificate that is generated by IIS for a specific machine. These certificates are free, but have significant limitations. These certificates are used in test environments for the web client.

Session Hosts

The server machines that run sessions of the Dynamics GP web client.

Session Central Service

The service that control communication between the web site and the session host machines.

Session Service

The service that runs on each session host machine and manages the process that is created each time a user logs into the web client.

Single domain certificate

A type of security certificate that is issued for a specific machine. The name of the machine must be specified at the time the security certificate is purchased.

Subject Alternative Name (SAN)

The set of machine names associated with a security certificate. When you use a security certificate, you must specify the SAN that will be used for the certificate.

Trusted mode

A mode for the Silverlight application that allows less restricted access to local system resources. Some features of

the Dynamics GP web client require that the application is running in trusted mode.

See Sandboxed mode.

Web Client Runtime

A component of the Dynamics GP installation. A web client runtime process is created by the Session Service each time a user logs into the web client.

Web Management Console

A Silverlight application that is used to perform administrative tasks for the Dynamics GP web client.

Wildcard certificate

A type of security certificate that is issued for a domain, rather than for a specific machine. The specific machine name is specified at the time the certificate is used. Wildcard certificates are the most flexible, but also the most expensive.

Tenant Services Basics

11/5/2018 • 20 minutes to read

Chapter 1 Tenant Services Overview

Microsoft Dynamics GP Tenant Services are Windows Communication Foundation (WCF) services that help you to host Microsoft Dynamics GP for more than one organization in your data center. The following topics introduce Microsoft Dynamics GP Tenant Services:

- What are Tenant Services?
- What can Tenant Services do?
- Getting started

What are Tenant Services?

Microsoft Dynamics GP Tenant Services are three WCF services:

- Microsoft Dynamics GP Tenant Discovery Service
- Microsoft Dynamics GP Tenant Management Service
- Microsoft Dynamics GP Tenant Public Discovery Service

You install Tenant Services when you want your data center to host Microsoft Dynamics GP for more than one organization. Each organization is called a tenant. Hosting multiple tenants enables several organizations to share servers and other resources.

Tenant Services helps you to isolate the data and configuration information for each tenant. As a result, a user is not aware that there are other users from other organizations that are also working with Microsoft Dynamics GP in a shared data center.

To work with tenant data, you use a multitenant application. A multitenant application includes a service that runs in your data center and is shared by all the tenants. When you install Tenant Services, you can use the following Microsoft Dynamics GP multitenant applications:

- Microsoft Dynamics GP Web Client
- Web Services for Microsoft Dynamics GP
- Microsoft Dynamics GP Service Based Architecture

For example, a user views data and performs operations using the Microsoft Dynamics GP web client. The user is unaware that people from other organizations are also using the shared web client infrastructure to work with other tenants. What can Tenant Services do?

Tenant Services enables you to setup and manage a multitenant environment for Microsoft Dynamics GP. You should install Tenant Services when you want to use Microsoft Dynamics GP in the following scenarios:

1. Host multiple organizations in a data center. You want to host Microsoft Dynamics GP for multiple, unrelated organizations. For example, you create a tenant for each organization and enable the web client for each tenant.
2. Host separate tenants for a single organization. You want to host multiple Microsoft Dynamics GP tenants for a single organization. For example, you create a tenant where you perform tests of the multitenant applications. The tenant keeps the data in the test environment separate from the data in your production tenant.

Getting started

How you start depends on your role: System administrator If you are the system administrator, complete the following:

- Review Chapter 2, "Tenant Services architecture," to understand the components that work with Tenant Services. This information can help you to understand how Tenant Services works in a multitenant Microsoft Dynamics GP environment.
- Review Chapter 4, "Prerequisites," to determine whether your system has all the prerequisites for Tenant Services. You may need to install some additional software or complete additional configuration before installing Tenant Services.
- Review Chapter 5, "Tenant Services Installation," to acquaint yourself with the Tenant Services installation procedure.
- Review Chapter 9, "Configuring Tenants," to learn how to add tenants, users, and multitenant applications.
- Review Chapter 10, "Maintenance," to learn what you can do to change, repair, or remove an existing Tenant Services installation. Software Developer If you are a developer and you want to create a multitenant application, complete the following:
 - Review Chapter 2, "Tenant Services architecture," to familiarize yourself with the services and components of Tenant Services. You should understand how Tenant Services enables a multitenant application to access Microsoft Dynamics GP data for a tenant.
 - Determine which Tenant Service endpoint you want your application to target. To get tenant information, you can use the Tenant Discovery Service or the Tenant Public Discovery Service. If your application will run on a different network than where you installed Tenant Services, you have to use the Tenant Public Discovery Service. If your application will run on the same network where you installed Tenant Services, you can use the Tenant Discovery Service. Applications that run on the same network can also use the Tenant Management Service.
 - Discuss the installation procedure with the system administrator to learn what security and port settings were used during the Tenant Services installation. If you plan to use the Tenant Public Discovery Service, verify that the service was installed.
 - Review the Microsoft Dynamics GP Web Client Service Reference documentation. Use the reference to learn about the classes and operations of the Tenant Discovery Service and the Tenant Management Service.

Chapter 2: Tenant Services architecture

Before you install Tenant Services, it might help to understand multitenancy. You should also be familiar with how Microsoft Dynamics GP implements multitenancy. Information about the Microsoft Dynamics GP multitenant environment is divided into the following sections:

- Multitenancy and Microsoft Dynamics GP
- Tenant Services architecture
- Tenant Manager and the Web Management Console

Multitenancy and Microsoft Dynamics GP

Multitenancy is a software architecture where an application runs as a service and is used by multiple, independent organizations that are called tenants. The service runs in a single, shared physical environment. Users from several tenants can simultaneously use the application because the service logically isolates data and configuration information for each tenant. To use Microsoft Dynamics GP in a multitenant environment, you install the following components to the servers in you data center:

- You first install Tenant Services. Tenant Services are WCF services that enable Microsoft Dynamics GP multitenant applications to logically isolate data and configuration information for each tenant.
- You install Microsoft Dynamics GP for each tenant organization. When you install Microsoft Dynamics GP you have to specify a separate, named system data base for each tenant organization. An important advantage of multitenancy is that you can use a single SQL Server for all the tenants.
- You install the Tenant Manager snap-in and the Web Management Console. You use the Tenant Manager to add and configure tenants and multitenant applications. The Tenant Manager uses Tenant Services to perform

operations on tenants, applications, and users.

- You install a multitenant application. Microsoft Dynamics GP multitenant applications include the Microsoft Dynamics GP Web Client, Service Based Architecture, and Web Services for Microsoft Dynamics GP. Each multitenant application includes a service that is shared by all the tenants.

The following sections describe the key structural concepts in a Microsoft Dynamics GP multitenant environment.

Tenant

A tenant is an organization that can use a multitenant application to access Microsoft Dynamics GP. You use the Tenant Manager snap-in to create tenants. Each tenant has a unique name.

You assign a multitenant application to a tenant. You also assign a tenant user to a tenant. The tenant users assigned to a tenant can use all the multitenant applications for that tenant.

Application

A multitenant application is a client that connects to a shared service. You use a multitenant application to perform operations that use Microsoft Dynamics GP data for a specified tenant. The install includes the following multitenant applications:

- Microsoft Dynamics GP Web Client
- Web Services for Microsoft Dynamics GP
- Microsoft Dynamics GP Service Based Architecture

You first have to use the Tenant Manager snap-in to add the application to your multitenant environment. You then use Tenant Manager to assign the application to the tenant.

After you assign an application to a tenant, you use the Tenant Manager to populate the application properties. The application properties enable you to configure the service for the specified tenant.

User

A user is a person that can perform operations with tenants and multitenant applications. There are two types of users:

- Service users
- Tenant users

A service administrator is a person that has access to all tenants, multitenant applications, tenant users, and service administrators. The Tenant Services install adds two service administrators. The following table shows the type of service administrators:

SERVICE USER TYPE	DESCRIPTION
Delegating user	The log on identity for the service that the multitenant application uses. For example, the login for the application pool for the Dynamics GP Web Client must be a delegating user. The delegating user enables the service to work on behalf of the logged in user. For example, access to a Tenant Services operation is based on the credentials of the logged in user and not the service identity. You cannot use the same login for both a delegating user and a service administrator. A delegating user should not be assigned to a tenant. You can have more than one delegating user.

SERVICE USER TYPE	DESCRIPTION
Service administrator	A user that can add, update, or remove tenants, tenant users, multitenant applications, and service administrators. To add a service administrator, you have to add the login ID of the person to the Users list in Tenant Manager. A service administrator should not be assigned to a tenant. You can have more than one service administrator. You cannot use the same login for both a delegating user and a service administrator.

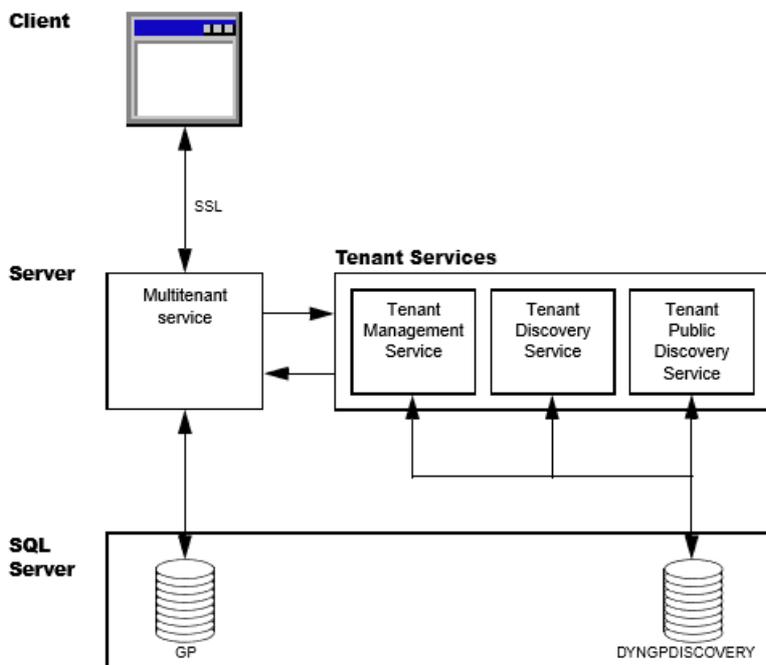
A service user is a user that has access to all tenants, multitenant applications, tenant users, and service administrators or can work on behalf of another user.

A tenant user is a person or group that is authorized to use a multitenant application to perform operations for a tenant. You use the Tenant Manager snap-in to add a tenant user to a tenant. The following table shows the type of service users.

TENANT USER TYPE	DESCRIPTION
Tenant administrator	A user that can add other tenant users to a tenant. You can upgrade any tenant user to be a tenant administrator.
Tenant user	A user that is assigned to a tenant. When you assign a user to a tenant, that person is authorized to use any of the multitenant applications for that tenant. A tenant can have one or more than one tenant user. In addition, a tenant user can be associated with more than one tenant. To add a tenant user, you associate the login ID of the person or the group with the tenant.

Tenant Services architecture

Microsoft Dynamics GP Tenant Services is a collection of WCF services that help a multitenant application to access Microsoft Dynamics GP for a tenant. Tenant Services run on a server in your data center. You have to install Tenant Services before you can use any multitenant application. The following diagram shows how a multitenant application uses Tenant Services:



Client and the multitenant service

A multitenant application includes a client and a multitenant service. The multitenant application enables you to perform operations that use Microsoft Dynamics GP data for a specified tenant. You can use the following multitenant applications:

- Microsoft Dynamics GP Web Client
- Web Services for Microsoft Dynamics GP
- "Microsoft Dynamics GP Service Based Architecture

To start a multitenant application, you have to login to the client with the credentials of a tenant user. You must also have permissions to access Microsoft Dynamics GP data. The multitenant service uses the Tenant Discovery Service to determine whether your login ID is a tenant user. If you are not a tenant user, access to the multitenant service is denied. If your login is a tenant user, the multitenant application needs to identify the tenant you want to work with. To help specify the tenant, you see the following behaviors:

- If your login is associated with a single tenant, you are logged in to that tenant. You do not need to perform any additional action.
- If your login is associated with more than one tenant, you can get a list of available tenants. You can then choose the tenant that you want to log in to.

After you choose the tenant, the multitenant service gets configuration information that enables the service to work with Microsoft Dynamics GP data for the specified tenant. You can now use the client to perform operations for the specified tenant.

Tenant Services

Microsoft Dynamics GP Tenant Services includes three Windows Communication Foundation (WCF) services. These services enable you to add, view, and update tenants, users, and multitenant applications. The following table describes the WCF services.

SERVICE NAME	DESCRIPTION
Microsoft Dynamics GP Tenant Discovery Service	You use the Tenant Discovery Service to get basic tenant information for a specified user and a specified multitenant application. You can use this information to select the tenant you want to work with.

SERVICE NAME	DESCRIPTION
Microsoft Dynamics GP Tenant Management Service	You use the Tenant Management Service to create, update, and remove tenants, multitenant applications, tenant users, and service administrators.
Microsoft Dynamics GP Public Tenant Discovery Service	You use the Tenant Public Discovery Service to get basic tenant information for a specified user or a specified tenant application. You use the public discovery service when your multitenant application has to access tenant information from the internet. By default, the public discovery service is not initially installed.

DYNGPDISCOVERY database

Information about tenants, users, and multitenant applications is stored in a SQL Server database. The default name for the database is DYNGPDISCOVERY. You can specify a different name during installation. You can place the Tenant Services database on the same SQL Server you use for Microsoft Dynamics GP.

To add, update or remove records from the database, you use the Tenant Manager snap-in and the Web Management Console..

###Security The diagram shows that the client communicates with the multitenant service over a network. To help secure the information in the messages between the client and the service, you have to use security certificates and Secure Sockets Layer (SSL). You use SSL to encrypt the messages.

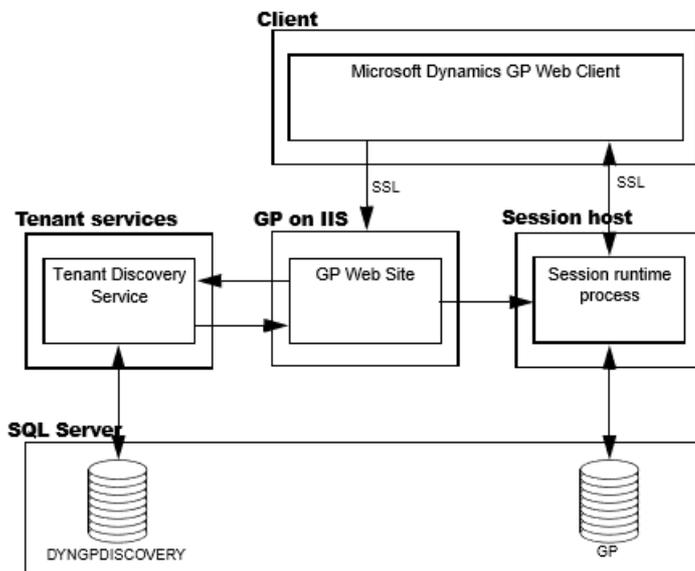
The Tenant Discovery Service and Tenant Management Service do not require security certificates and SSL. However, it is recommended that you use SSL with these services whenever possible.

If you use the Tenant Public Discovery Service, you are required to have a security certificate and SSL. You use the Tenant Public Discovery Service when your multitenant application is on a different network than where you installed tenant services.

To get information from any of the Tenant Services, you must provide an authenticated Windows login. Your login ID is used to determine what tenants and services you can access.

Web client example

The following illustration shows an example of how Tenant Services works with a multitenant application. The example shows Tenant Services and the Microsoft Dynamics GP Web Client.



To begin, you use a web browser to start the Dynamics GP web client. The browser contacts the GP web site on your IIS web server. You are prompted to enter your login credentials and click Sign In. The service behind the GP web site queries the Tenant Discovery Service to determine whether your login credentials are authorized to use the web client. The service is called the Session Central Service.

The Session Central Service then determines whether you were previously using the web client. If an existing web client session is found, you can choose to reconnect. If you choose to start a new web client, the Session Central Service uses the Tenant Discovery Service to get the list of tenants that you can access. The list is retrieved from the DYNGPDISCOVERY database. You then have to specify the tenant you want to use:

- If the query returns one tenant, the web client defaults to use that tenant.
- If the query returns more than one tenant, you will see a list of tenants in the browser. You select the Create Session action for the tenant you want to use.

After you choose the tenant, the Session Central Service uses the Tenant Discovery Service to get web client configuration information for that tenant. The configuration information includes how to connect to Microsoft Dynamics GP for the tenant. The Session Central Service uses the configuration information to start another service called a session runtime process. The Session Central Service returns the URL for the session runtime process to the browser. The browser uses that URL to connect to the session runtime process and the web client appears. For more information about the web client, see the Web Client Installation and Administration Guide.

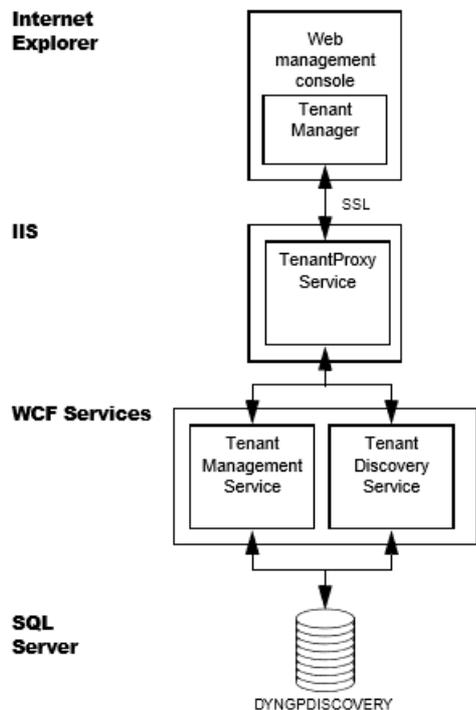
In a single tenant environment where Tenant Services are not installed, you will find a file named TenantConfiguration.xml at the root of the Session Central Service installation folder. The file contains default tenant information that is automatically used when you login to the web client.

Tenant Manager and the Web Management Console

After you install Tenant Services you will want to add tenants, multitenant applications, tenant users, and service administrators. To perform these operations, you have to install the Tenant Manager snap-in for the Microsoft Dynamics GP Web Management Console. For more information about how to install the Web Management Console, see Chapter 6, "Tenant Manager Installation."

Tenant Manager is the application you use to manage your multitenant environment. To view the Tenant Manager, you use your browser to open the Web Management Console.

The following illustration shows the architecture of the Tenant Manager. Notice how the Tenant Manager uses Tenant Management Service and Tenant Discovery Services to get and save information about tenants, multitenant applications, tenant users, and service administrators in the DYNGPDISCOVERY database.



You might also notice that the Tenant Manager uses a service named Tenant Proxy Service. The Tenant Proxy Service is an intermediate service that helps the Silverlight Tenant Manager application to use the operations of the WCF Tenant Services. Tenant

Chapter 3: Tenant Services preparation

If you plan to use Microsoft Dynamics GP in a multitenant environment, you need to spend time planning how to use Tenant Services. You use Tenant Services when you want to use a multitenant application like the Web Client or web services with Microsoft Dynamics GP. If you plan to use other applications, you do not need to install Tenant Services. Planning information is divided into the following sections:

- Deployment configurations
- User accounts
- Signed security certificates

Deployment configurations

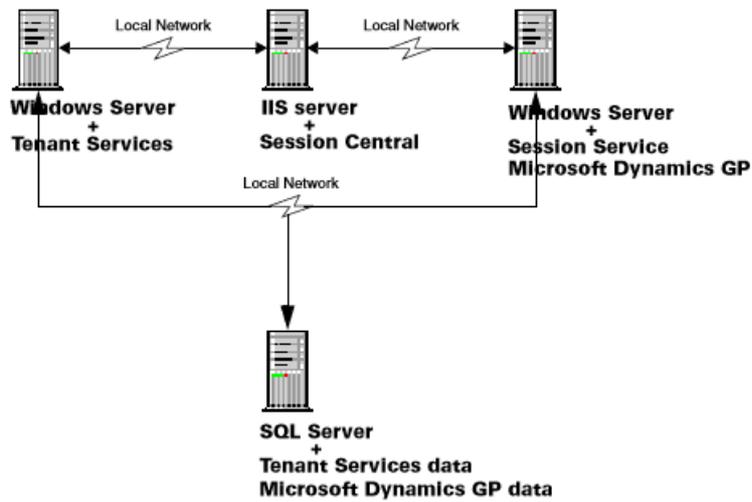
Which configuration you choose will depend on what types of integration you need, and the server resources you have available.

Scale-out

A scale-out configuration is a multiserver deployment configuration. Typically, you use the scale-out configuration to support the Microsoft Dynamics GP Web Client. To create a multitenant environment, you have to add Tenant Services to the scaleout configuration.

You use the scale-out configuration when you expect to host more than one organization and a large number of users. To obtain optimal performance, you should use the scale-out configuration whenever possible.

The following illustration shows a basic scale-out configuration that you would use for Microsoft Dynamics GP Web Client. Notice that Tenant Services is installed on a separate server, and accesses the SQL Server over the local network.



Typically, you install Tenant Services onto a separate server. However, you can put Tenant Services on any server that can be accessed by the other servers in your deployment.

In addition, you can install Tenant Services on more than one server. The separate Tenant Services installs use the same SQL Server database. This would enable you to load-balance Tenant Services and to provide additional reliability.

Also notice how the scale-out configuration includes a separate IIS server and a session host server.

The scale-out configuration provides the following advantages:

- Better performance for a large number of tenants.
- Better resistance to failure.
- Easier maintenance. You make changes to the tenant services without having to take your multitenant environment offline.

In multiserver configuration you can use a firewall to shield the tenant services from outside access. In the web client example, access to the tenant services is provided by the Session Central Service on the web server.

For additional security you can also have a firewall between the tenant service, the session host server and the SQL Server. The firewall can provide additional security by further restricting access to the SQL Server.

Single-server

An alternate configuration adds Tenant services to a single-server deployment. In this configuration, you install Tenant Services on the same server as Microsoft Dynamics GP and the SQL Server. The following illustration shows the configuration for a single server:



This configuration is best suited for development and evaluation environments where the number of tenants and

users is expected to be small.

User accounts

You will need at least two user accounts during the installation of tenant services. For the multiple-server installation, you have to use domain accounts. For the single-server installation, you can use machine accounts. Ideally, these user accounts should have limited privileges, and a password that does not expire.

Create the user accounts before you start installing the Microsoft Dynamics GP Tenant Services. You must have user accounts for the following:

Tenant Services Installation

The login you use to install Microsoft Dynamics GP Tenant Services is added as a service administrator. You can use this login to access the Tenant Manager snap-in of the Web Management Console where you can add tenants, applications, and user to your multitenant environment.

Service login IDs

You have to specify a user account as the login ID for the Tenant Discovery Service, Tenant Management Service, and the Tenant Public Discovery Service. Use a different user account than you use to install Tenant Services. The service logins are given SQL permissions to the tenant database.

Tenant Manager

If you install the Microsoft Dynamics GP Web Management Console and the Tenant Manager snap-in, you have to specify a login ID for the IIS application pool. You can use the same user account that you use for the service login IDs.

The user account that you specify for the application pool will be added as a delegating user for Tenant Services. You should not use this login for a service administrator, tenant administrator, or tenant user.

You cannot use the login of a service administrator as a delegating user. If you try to use the same login for both, you will not be able to use the Tenant Manager snap-in of the Web Management Console.

Signed security certificates

You can use security certificates and secure sockets layer (SSL) to help improve the security of data being transmitted to the Tenant Services. You will use the security certificate when you install Tenant Discovery Service, Tenant Management Service, and the Tenant Public Discovery Service. In addition, you use a security certificate to help secure the web site that hosts the Web Management Console and the Tenant Manager snap-in.

The easiest way to implement SSL for Tenant Services is to get a signed security certificate. To get a signed security certificate, you purchase it from a third-party supplier. When you use a third-party signed security certificate the third-party handles the certificate validation when users connect to the site. No additional action is needed by the users.

The following sections describe the types of signed security certificates that you can use.

Single domain

This type of security certificate is issued for a specific machine. For example, you could get a security certificate issued for the machine with the following name:

- GPTenantServices.contoso.com

You would typically use this type of certificate when installing your multitenant environment in a single machine configuration. This is the least expensive type of certificate to purchase.

Multiple domain

This type of security certificate is issued for a set of specific machines. You must know the machine names at the time that you purchase the security certificate. For example, you could get a security certificate issued that you use with the following machine names:

- GPTenantServices.contoso.com
- GPweb.contoso.com
- GPServiceHost1.contoso.com
- GPServiceHost2.contoso.com

You would typically use the multiple domain certificate when installing Tenant Services in a scale-out configuration. The certificate would contain an entry for each machines that will be part of your configuration. This security certificate is more expensive because the same certificate can be used on multiple machines.

Wildcard

This type of security certificate is not issued for specific machines. Instead, it is issued for a specified domain. The security certificates can be used for any machines that follow the naming convention of the domain. For example, if you purchased a wildcard certificate for the *.contoso.com domain, any machine in that domain (such as GPTenantServices.contoso.com) could use the wildcard certificate.

You would typically use the wildcard certificate when installing a multitenant Microsoft Dynamics GP environment in the scale-out configuration. The wildcard certificate is especially useful when you expect to add additional machines to the configuration but do not know the names at the time you are purchasing the certificate. The extra flexibility does come with a cost. Wildcard certificates are the most expensive signed certificate.

The certificate must list "Server Authentication" as one of its intended purposes. To view the intended purpose, use the Certificates snap-in for the Microsoft Management Console and view the Intended Purpose column.

Tenant Services Installation

11/5/2018 • 27 minutes to read

This portion of the documentation explains how to install the Microsoft Dynamics GP Tenant Services. The following information is discussed:

- Chapter 4, "Prerequisites," describes the software required and the actions you must perform before you install the Microsoft Dynamics GP Tenant Services.
- Chapter 5, "Tenant Services Installation," describes the steps to install Tenant Services.
- Chapter 6, "Tenant Manager Installation," describes the steps to install the Tenant Manager and the Web Management Console.

Chapter 4 Prerequisites

Before installing Microsoft Dynamics GP Tenant Services, there are several prerequisites you must check. This portion of the documentation describes the software requirements and the additional steps to perform before installing Tenant Services. The following topics are discussed:

- Operating system
- User accounts
- Security group
- SQL Server
- Security Certificates
- Internet Information Services (IIS)

Operating system

To install Microsoft Dynamics GP Tenant Services, the computer must be running the 64-bit version of Windows Server 2008 R2 (Standard or Enterprise) or later.

User accounts

You will have to have domain user accounts that you can use during the install. Before you begin the install, you need to create the following accounts:

1. Create the service administrator account.

Select or create the domain user account that you will use to install Tenant Services. The install will add the account as a service administrator for Tenant Services. The user account must be in the Administrators security group on the server where you will install Tenant Services. In addition, you will use this login when you first open the Web Management Console. You can then use the Tenant Manager snap-in to add other service administrator accounts.

2. Create an account for the services and application pool.

Select or create a user account that you can use as the log on ID for the Tenant Discovery Service, Tenant Management Service, Tenant Public Discovery Service, and the DynGPWebMgmt application pool for the Web Management Console.

You should not use the same account that you use to install Tenant Services. The log on account for the application pool has to be a delegating user. You cannot have an account that is both a service administrator and delegating user.

Security group

Security groups are used to specify which users are allowed to access the Microsoft Dynamics GP Web Management Console. You use the security group to grant your tenant service administrator access to the Tenant Manager snap-in. You also have to add tenant administrator accounts to the group.

You can also use a domain group to specify who has access to the Tenant Manager snap-in.

To create the security group, complete the following steps:

1. Start Server Manager.

Start Server Manager on the computer where you install the Web Management Console and the Tenant Manager snap-in.

2. Expand Groups in Local Users and Groups.

Expand Configuration, expand Local Users and Groups, and then click Groups. Right-click Groups and then click New Group. The New Group window opens.

3. Type the group name and description.

Enter a name that uniquely identifies the group. For example, you enter TSUsers for the group name. You can enter a description of the group but it is not required.

4. Click Add to add a member to the group.

To add a member to the group, click Add. You use Select Users, Computers, Service Accounts, or Groups to enter the login ID you want to add to the group. Click Check Names to validate the ID. Click OK to add the specified user to the group. You should add the login IDs of the service user accounts that you created earlier to the group.

5. Create the group.

Click Create. The group is added to the list of groups. The group contains the member or members you specified in the previous step. Click Close to close the New Group window.

SQL Server

Identify the SQL Server you want Tenant Services to use. Tenant Services stores information about tenants, users, and multitenant applications in a database. When you configure Tenant Services, you will specify the SQL Server where you want to add the database.

You need Microsoft SQL Server 2012 or higher. SQL Server can be on the same machine where you install Tenant Services or on a separate machine within the domain. In addition, you can use the same SQL Server that you use for Microsoft Dynamics GP data.

Security Certificates

Get the security certificates for your servers. The following steps describe how to determine what security certificates you need and where to place the files.

1. Obtain the security certificate.

Get the security certificate (.cer) file from the third-party certificate supplier.

COMPONENT	DESCRIPTION
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COMPONENT	DESCRIPTION
Tenant Services	If you will install Tenant Services to a separate machine in a scale-out configuration, you have to obtain a security certificate for that machine. If you will install Tenant Services in a single-server or similar configuration and you already have a security certificate for that server, you do not need another.
Web Management Console with the Tenant Manager snap-in	If you will install the Web Management Console and the Tenant Manager snap-in on a separate web server, you have to obtain a security certificate for that machine. If you will install the Tenant Manager on the web server you use for the web client, you do not need another security certificate.

2. Place the security certificate on the Tenant Services server.

Place your Tenant Services security certificate file in a location that you can access from the machine where you plan to install Tenant Services.

3. Place the security certificate on the web server.

Place the web server security certificate file in a location that you can access from the machine where you plan to install the Web Management Console and the Tenant Manager snap-in.

Internet Information Services (IIS)

After you install Tenant Services, you have to install the Tenant Manager snap-in for the Microsoft Dynamics GP Web Management Console. The Tenant Manager is the web application that you use to add and configure tenants, users, and multitenant applications.

The Web Management Console requires a web server where you have installed IIS 7.5 or later. If you plan to install the Microsoft DynamicsGP web client, you can also use that web server to host the Web Management Console.

To install IIS on a Windows Server 2008 R2 machine, complete the following steps:

1. Open the Server Manager.
2. Click Roles.
3. Click Add Roles.

The Add Roles Wizard opens. Click Next.

4. Select the Web Server role.

Click Web Server (IIS) in the list of Server Roles. Click Next to continue.

5. Click Next to close the Introduction screen.

6. Select the role services.

In addition to the default role service that appear in the Select Role Services window, you have to click ASP.NET. If you are asked to add role services required for ASP.NET, click Add Required Role Services. Click Windows Authentication in the Security list. Click Next.

7. Click Install.

In the Confirm Installation Selections window, click Install. The specified role and role services are added to the server.

8. Click Close.

After the installation is complete, click Close.

Chapter 5: Tenant Services Installation

This portion of the documentation describes how to install Microsoft Dynamics GP Tenant Services. The following information is discussed:

- Install the security certificate
- Install Tenant Services
- Configure the Tenant Services database
- Upgrading an earlier installation
- What to do next

Install the security certificate

If you are adding Tenant Services to a scale-out configuration for the Microsoft Dynamics GP web client installation, you have to supply a security certificate for the server where you want to install Tenant Services. To install a security certificate onto the server, complete the following procedure:

1. Verify you are logged in with administrator privileges.

The user you are currently logged in as must be in the Administrator group for the computer on which you are installing Tenant Services.

2. Open the Run prompt.

Choose Start > Run or press Window-R.

3. Open the Microsoft Management Console.

In the Open field, type MMC and then click OK.

4. Open the Add or Remove Snap-ins window.

In the Microsoft Management Console, open the File menu and choose Add/Remove Snap-in.

5. Add the Certificates snap-in.

In the Add or Remove Snap-ins window, choose the Certificates snap-in from the Available snap-ins list, and then click Add.

6. Specify the computer account.

In the Certificate snap-in dialog box, choose Computer account, and then click Next.

7. Select to manage the local computer.

In the Select Computer dialog box, choose Local computer, and then click Finish.

8. Add the snap-in to the console.

In the Add or Remove Snap-ins window, click OK.

9. Expand Personal in the Certificates node.

In the left pane, expand the Certificates (Local Computer) node, and then expand the Personal node.

10. Start the certificate import wizard.

Under Personal, right-click the Certificates node, click All Tasks, and then click Import. When the Certificate Import Wizard appears, click Next.

11. Specify the security certificate file.

In the File to Import screen, click Browse. Navigate to the location where placed the security certificate (.cer) file that you got for the tenant server. Select the .cer file, and click Open.

12. Import the security certificate.

In the Certificate Import Wizard, click Next.

13. Verify the certificate store.

In the Certificate Store screen, verify that the certificate is being added to the Personal store. Click Next.

14. Complete the import.

Click Finish to complete the import process.

15. Close the Microsoft Management Console window.

Install Tenant Services

To install Tenant Services, complete the following procedure:

1. Start the Tenant Services installer.

To install the Tenant Services, run Setup from the Microsoft Dynamics GP install media. Click Tenant Services and then click Install. You can also start the install by opening the AdProd folder on the install media, expand TenantServices, and then double-click TenantServices.

2. Install prerequisites.

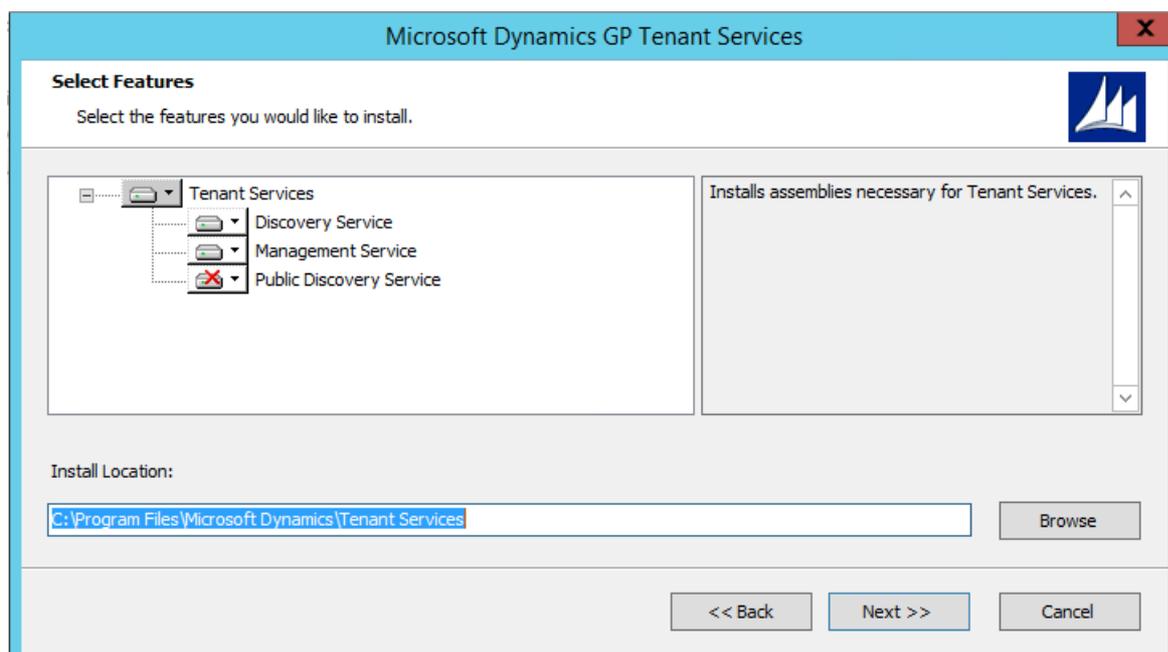
If you see a window that prompts you to install prerequisite components, click Install. If you previously installed Tenant Services, Microsoft Dynamics GP, or another product, you might not see this window.

3. Review the license agreement.

After reviewing the license agreement, mark the option to accept the terms. Click Next to continue.

4. Specify the components to install.

Select the features you would like to install. The install allows you to select from the following features:



NAME	DESCRIPTION
Tenant Discovery Service	Installs the Tenant Discovery Service. The default is to install this service.
Tenant Management Service	Installs the Tenant Management Service. The default is to install this service.
Tenant Public Discovery Service	Installs the Tenant Public Discovery Service. The public discovery service is optional. The default is to not install this service. You install the Tenant Public Discovery Service when you have multitenant applications other than Microsoft Dynamics GP that get tenant information from outside your domain.

When you click a button for a feature, a pop-up menu of options appears. Refer to the following table for information about each option.

OPTION	WHAT HAPPENS
Run from My Computer	Installs the feature on the local hard disk. This option installs the feature but not sub features.
Run all from My Computer	Installs the feature and all of its sub features. Not Available Do not install the selected feature. You can install the feature later using Add or Remove Programs.
Not Available	Do not install the selected feature. You can install the feature later using Add or Remove Programs.

To include a feature, click the button and select "Run from My Computer" To exclude a feature, click the button and select "Not Available"

5. Configure the Tenant Discovery Service settings.

To install the discovery service you have to specify the following settings:

SETTING	DESCRIPTION
Port	The default port value is 48630. If the port is in use, the next available port is selected. In addition, you can enter the port number that you want the service to use.
Certificate	Specify a security certificate when you want the connections to the service to use SSL. A certificate is optional. The default value is Not Selected. If you do not specify a certificate, SSL will not be used to encrypt messages to and from the service. To review information about available certificates, click the certificate in the drop-down list, and then click the View button. A dialog window opens that provides detailed information about the certificate.
Host name	The fully qualified domain name of the server where you have installed the security certificate.

SETTING	DESCRIPTION
Domain	Enter the domain name associated with login ID you want to use with the service.
User name	Specify the login name for the service.
Password	Enter the password for the specified login ID.

Microsoft Dynamics GP Tenant Services

Discovery Service Settings
Provide the settings for the discovery service.

Accept the default port or enter an available port for the discovery service.

Port:

Select a certificate to configure the service for SSL access. (optional)

Host Name

Provide a domain account that will be used as the service account for the Discovery Service.

Domain:

User Name:

Password:

6. Configure the Tenant Management Service settings.

To install the management service you have to specify the following settings: Setting | Description -|- Port | The default port value is 48631. If the port is in use, the next available port is selected. In addition, you can enter the port number that you want the service to use. Certificate | Specify a certificate when you want the connections to the service to use SSL. A certificate is optional. The default value is Not Selected. If you do not specify a certificate, SSL will not be used to encrypt messages to and from the service. To review information about available certificates, click the certificate in the drop-down list, and then click the View button. A dialog window opens that provides detailed information about the certificate. Host name | The fully qualified domain name of the server where you have installed the security certificate. Domain | Enter the domain name associated with login ID you want to use with the service. User name | Specify the login name for the service. Password | Enter the password for the specified login ID.

Click Next to continue.

7. Configure the Tenant Public Discovery Service settings

If you specified that you want to install the public discovery service, you have to supply the following settings:

SETTING	DESCRIPTION
Port	The default port value is 48632. If the port is in use, the next available port is selected. In addition, you can enter the port number that you want the service to use.
Certificate	If you install the public discovery service, you have to use SSL. SSL insures that messages to and from the service are encrypted. Specify the security certificate you want the service to use. If you do not specify a certificate, you will not be able to proceed with the install. To review information about available certificates, click the certificate in the drop-down list, and then click the View button. A dialog window opens that provides detailed information about the certificate.
Host name	The fully qualified domain name of the server where you have installed the security certificate.
Domain	Enter the domain name associated with login ID you want to use with the service.
User name	Specify the login name for the service.
Password	Enter the password for the specified login ID.

Click Next to continue.

8. Start the installation.

Click Install to begin the installation process. The install will run for several minutes.

9. Complete the installation.

Once the installation completes, you can choose to run the Tenant Service Configuration Wizard. To start the wizard, click Run the Microsoft Dynamics GP Tenant Services Configuration Wizard. Click Exit.

Configure the Tenant Services database

After you install Tenant Services, you have to specify a database that the services can use. The tenant services store configuration information for tenants, users, and multitenant applications in the specified database.

You use the Tenant Services Config Wizard to specify the database for Tenant Services. The wizard enables you to specify the Microsoft SQL Server and database you want to use for the tenant service. To use the wizard, complete the following steps:

1. Start the Tenant Services Configuration Wizard

Click Start, click Administrative Tools, and then click Tenant Services Config Wizard. The Microsoft Dynamics GP Tenant Services Configuration Wizard opens. Click Next.

2. Specify the SQL Server.

Enter the machine name of the SQL Server where you want to put the Tenant Services database.

3. Specify the name of the database.

The wizard adds the DYNGPDISCOVERY database to the specified server.

4. Specify the type of authentication you use with the SQL server.

The default uses Windows Trusted Authentication. You can use Windows Trusted Authentication when your login has permissions to add a database to the specified SQL server. If you click to use SQL Authentication, you have to provide the Login ID and password you want to use to connect to the specified SQL server. Click Next.

5. Confirm the configuration.

If you are asked to confirm the configuration, click Next.

6. Click Exit.

Click Exit to close the wizard. The Tenant Services database is installed and ready to use.

Upgrading an earlier installation

If you have a Tenant Services installation from an earlier release of Microsoft Dynamics GP, you can upgrade it to the current version. The same upgrade method is used whether you are upgrading to a new major version or just applying a service pack. The upgrade makes changes to the following services:

- Microsoft Dynamics GP Tenant Discovery Service
- Microsoft Dynamics GP Tenant Management Service
- Microsoft Dynamics GP Tenant Public Discovery Service

To upgrade Tenant Services, complete the following steps:

1. Verify the user you are logged in as.

You must be in the Administrator role for the computer on which you are upgrading the installation.

2. Open a command prompt window

Click Start >> All Programs >> Accessories, right-click Command Prompt, and then click Run as administrator. The Command Prompt window opens.

3. Find the install file for the upgrade.

The installer for the Tenant Services upgrade is found in the \AdProd\TenantServices\Updates folder of the Microsoft Dynamics GP installation media. In the Command Prompt window, change folders to the location where you found the upgrade install file.

4. Start the upgrade.

In the Command Prompt window, type the name of the install file and press Enter. Watch the Command Prompt window to see when the upgrade is done.

5. Start the Tenant Services Configuration Wizard.

After you run the upgrade, you should run the Microsoft Dynamics GP Tenant Services Configuration Wizard. To run the wizard, click Start > All Programs > Administrative Tools > Tenant Service Config Wizard. After the Microsoft Dynamics GP Tenant Services Configuration Wizard opens, click Next.

6. Verify the SQL connection information

The wizard shows the existing SQL connection information for Tenant Services. Verify the following values and then click Next:

- Server name
- Database name
- Type of authentication

For more information about the wizard, see [Configure the Tenant Services database](#).

7. Close the Tenant Services Configuration Wizard

Click Exit to close the wizard.

8. Verify Tenant Services restarted.

Open Server Manager, expand Configuration, and then click Services. Verify that the Microsoft Dynamics GP Tenant Discovery Service and the Microsoft Dynamics GP Tenant Management Service have started.

After you upgrade the Tenant Services, you should also upgrade the Tenant Manager snap-in and the Microsoft Dynamics GP Web Management Console. To learn more about the Tenant Manager upgrade, see [Upgrading an earlier installation in the Tenant Manager Installation section](#).

What to do next

After you install and configure Microsoft Dynamics GP Tenant Services, consider taking the following steps:

- Install or upgrade the Tenant Manager snap-in for the Microsoft Dynamics GP Web Management Console. You use the Tenant Manager to create, update, and remove tenants, users, and multitenant applications. For information about how to install the Tenant Manager snap-in, see [Chapter 6, "Tenant Manager Installation"](#).
- Learn about developing multitenant applications that use the Microsoft Dynamics GP Tenant Services. To learn about the services and the application programming interface (API) they provide, find and review the [Microsoft Dynamics GP Web Client Services Reference](#).

Chapter 6: Tenant Manager Installation

This portion of the documentation describes how to install the Microsoft Dynamics GP Web Management Console and the Tenant Manager. You use the Tenant Manager to view and update tenants, users, and multitenant applications in a multitenant environment.

You can also add the Tenant Manager to an existing Web Management Console. You use Add/Remove Features to add the Tenant Manager to the Web Management Console.

The following information describes how to install the Web Management Console and the Tenant Manager:

- Add the security certificate to the web site
- Configure the web site to use SSL
- Install Tenant Manager and the Web Management Console
- Configure the Web Management Console database
- Upgrading an earlier installation
- Start the Tenant Manager
- What to do next

Add the security certificate to the web site

Before you install the Web Management Console, specify the security certificate for the site. To add the certificate, complete the following steps:

1. Verify you are logged in with administrator privileges.

The user you are currently logged in as must be in the Administrator group for the computer on which you are installing the Tenant Manager.

2. Start IIS Manager.

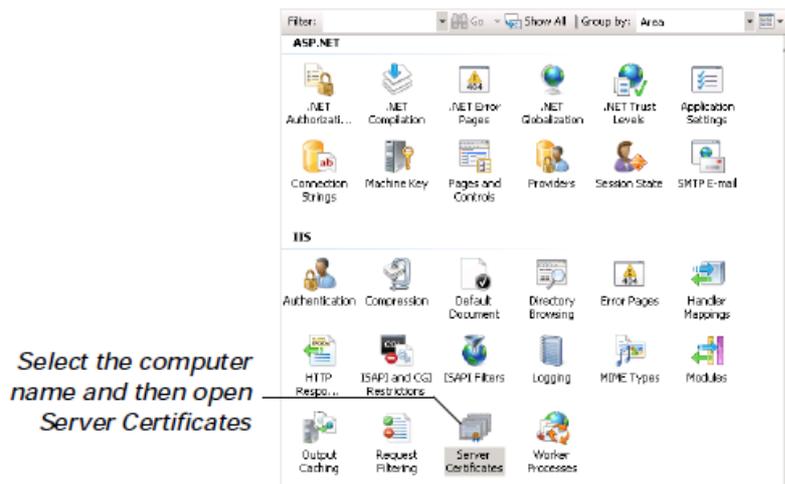
In Administrative Tools, open Internet Information Services (IIS) Manager.

3. Specify the computer.

In the left pane, click the computer name.

4. Open Server Certificates.

In the IIS group, double-click Server Certificates.



5. Click Complete Certificate Request.

In the Actions pane, click Complete Certificate Request. The Complete Certificate Request window opens.

6. Specify the certificate file for the web server.

Click the browse button, navigate to the location where you placed the security certificate (.cer) file you obtained from the third-party certificate supplier.

7. Specify a name for the certificate.

Type a name in the Friendly name field. Enter a name that easily identifies the certificate.

8. Import the security certificate.

To import the security certificate, click OK.

Configure the web site to use SSL.

The web site you use for the Microsoft Dynamics GP Web Management Console can be configured to use SSL. To use SSL, complete the following steps:

1. Specify the site on the web server.

In Internet Information Services (IIS) Manager, expand the Sites group in the left pane. Click the web site that you are configuring to use SSL. For example, click the Default Web Site.

2. View Bindings for the web site.

In the Actions pane, click Bindings. The Site Bindings window appears.

3. Open the Add Site Bindings window.

In the Site Bindings window, click Add.

4. Specify the binding type and choose the security certificate.

In the Add Site Bindings window select https for the type. In the SSL certificate, click the name of the security certificate that you added earlier. Click OK.

5. Close the Site Bindings window.

Click Close.

Install Tenant Manager and the Web Management Console

To install the Tenant Manager and the Web Management Console, complete the following steps:

1. Start the Microsoft Dynamic GP installer.

Start the installer on the server that has the web site you want to use for the Web Management Console.

2. Click Web Client

In the list of Additional Products, click Web Client, and then click Install.

3. Review the License Agreement.

Review the License Agreement. To continue the install, click to accept the terms of the agreement. Click Next.

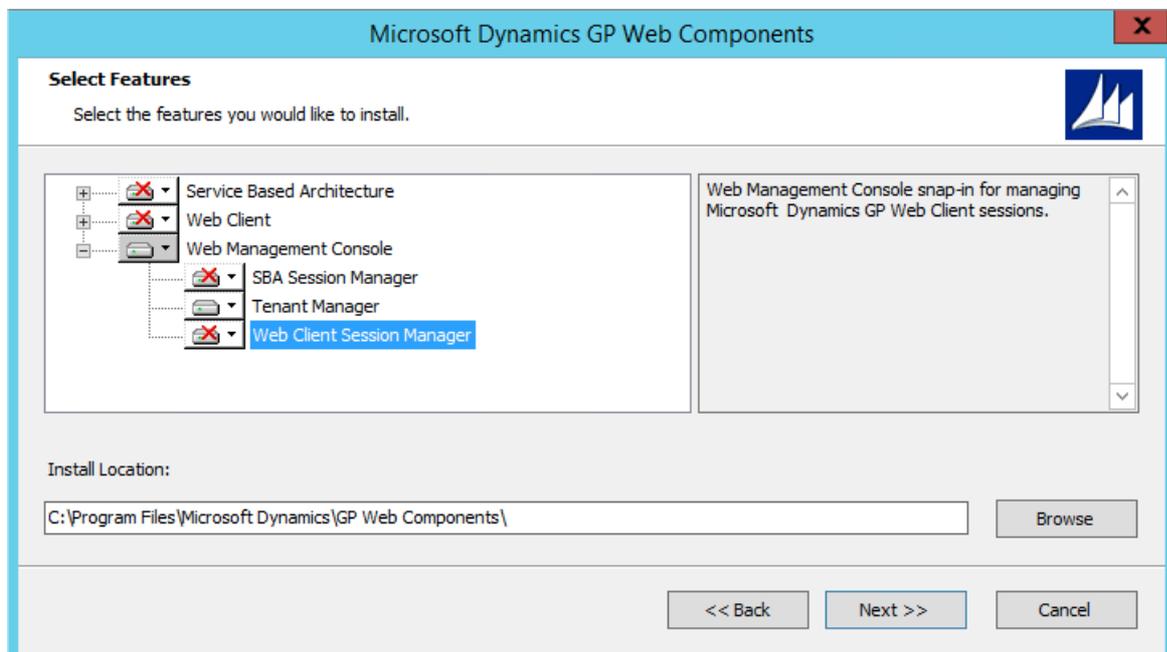
4. Specify the type of install.

In the Install Options window, click Custom. The Select Features window opens.

5. Specify Tenant Manager for the Web Management Console.

In the Select Features window, click the Web Management Console and Tenant Manager drop down lists and click Run from My Computer. Click Service Based Architecture and Web Client drop down lists and click Not Available.

The following illustration shows how to install the Web Management Console and the Tenant Manager.



If you add Tenant Manager to an existing Web Management Console, do not make changes that set Session Central, Web Site, Web Client Session Manager, or Session Server to Not Available. You should leave the existing values.

Specify the install location for the Web Management Console. You can use the default location or specify another folder. Click Next.

6. Specify the name of the Web components.

Enter the name of the SQL server where you want the database to appear. You can keep the default name for the database or specify the name you want to use.

Specify the type of authentication you use with the SQL Server. If the user installing the Web Management Console has sufficient privileges, you can use Windows Trusted Authentication. Otherwise, you should use SQL Authentication and supply a SQL Login ID and Password for a SQL user account with sufficient privileges. Click Next.

7. Specify the name of the Web Management Console user group.

Enter the name of your web management console user group in the Web Management Console Users text box. Click Next.

8. Specify the URL for the discovery and management services.

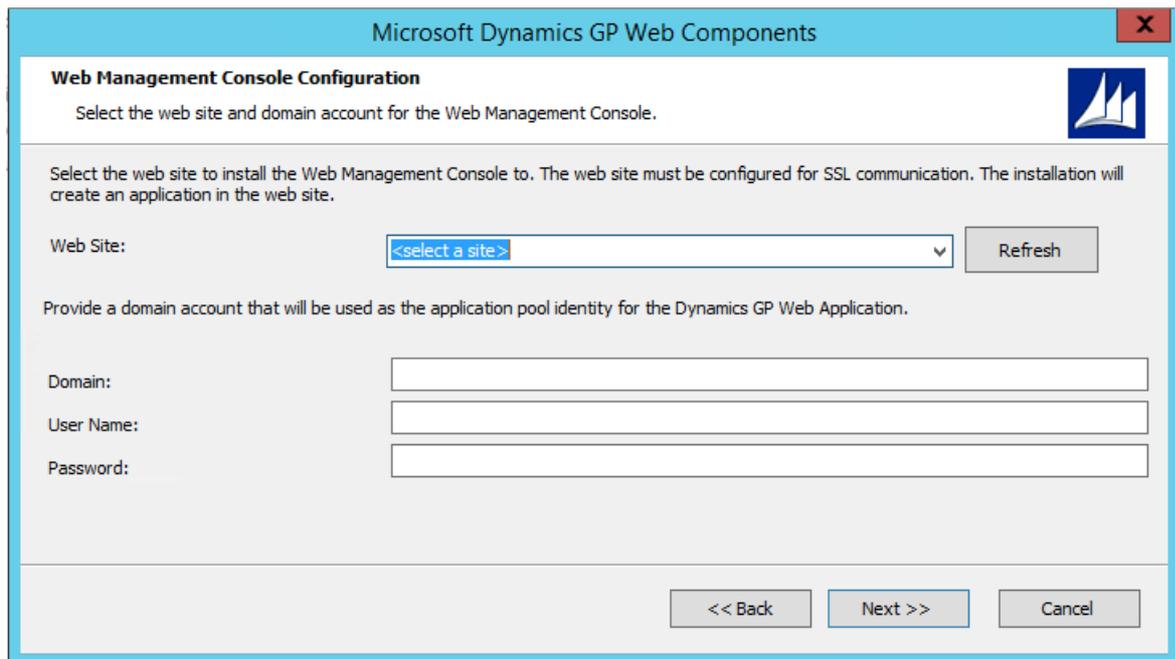
In the Tenant Configuration window, click the checkbox labeled Deploy for multiple tenants. Enter the URL for the discovery and management services. The URL should use the format of the following URLs.

- <https://:/:TenantDiscoveryService>
- <https://:/:TenantManagementService>

To get the URL for the Tenant Discovery Service you can use the Microsoft.Dynamics.MultitenantService.Discovery.config file. The baseAddress node contains the URL of the service. The file is found in the c:\Program Files\Microsoft Dynamics\Tenant Services\DiscoveryService folder on the server where you installed Tenant Services. To get the URL for the Tenant Management Service, you can use the Microsoft.Dynamics.MultitenantServices.Management.config file. The file is found in the C:\Program Files\Microsoft Dynamics\Tenant Services\ManagementService folder.

- Specify the web site for the Web Management Console.

Click the web site in the drop down list where you want to install the Web Management Console. The Web Site Configuration shows the settings for the web client web site.



The screenshot shows a window titled "Microsoft Dynamics GP Web Components" with a sub-header "Web Management Console Configuration". The window contains the following elements:

- A close button (X) in the top right corner.
- A Microsoft Dynamics logo in the top right corner.
- Text: "Select the web site and domain account for the Web Management Console."
- Text: "Select the web site to install the Web Management Console to. The web site must be configured for SSL communication. The installation will create an application in the web site."
- A "Web Site:" label followed by a dropdown menu showing "<select a site>" and a "Refresh" button.
- Text: "Provide a domain account that will be used as the application pool identity for the Dynamics GP Web Application."
- Labels and input fields for "Domain:", "User Name:", and "Password:".
- Navigation buttons at the bottom: "<< Back", "Next >>", and "Cancel".

Enter the domain, name, and password for login identity you want to use for the application pool. Click Next.

- Specify the database for the Web Management Console.

Enter the name of the SQL server where you want the database to appear. You can keep the default name for the database or specify the name you want to use.

Specify the type of authentication you use with the SQL Server. If the user installing the Web Management Console has sufficient privileges, you can use Windows Trusted Authentication. Otherwise, you should use SQL Authentication and supply a SQL Login ID and Password for a SQL user account with sufficient privileges. Click Next.

- Begin the install.

Click Install to continue with the installation.

- Click Exit.

When the install is complete, click Exit to close the install window

Configure the Web Management Console database

To use the Web Management Console, you first have to configure a data store. To create the database that you specified during the install, you run the Web Client Components Wizard.

- Start the wizard.

Start the Microsoft.Dynamics.GP.Web.ConfigurationWizard application. You can use Windows Explorer to find the application. Typically, the install places the application in the following folder: c:\Program Files\Microsoft Dynamics\GP Web Components\

To start the wizard, double click the application. The following window appears.

- Specify the type of authentication you use with the SQL server.

The default uses Windows Trusted Authentication. You can use Windows Trusted Authentication when your login has permissions to add a database to the specified SQL server.

If you click to use SQL Authentication, you have to provide the Login ID and password you want to use to connect to the specified SQL server. Click Next.

3. Create the Web Components database.

In the Configuration Status and Action window, click Next.

4. Click Exit to close the wizard.

After the wizard runs, click Exit to close the window.

Upgrading an earlier installation

If you have a Tenant Manager installation from an earlier release of Microsoft Dynamics GP, you can upgrade it to the current version. The same upgrade method is used whether you are upgrading to a new major version or just applying a service pack.

To upgrade the Tenant Manager snap-in, you run the Web Components upgrade. The upgrade can also make changes to any of the following components that are installed on the server:

- Session Management snap-in
- GP Web Management Console
- Web site for the Web Management Console
- Web site for the GP Web Client
- GP Session Central Service
- GP Session Services

To upgrade Tenant Manager, complete the following steps:

1. Verify the user you are logged in as.

You must be in the Administrator role for the computer on which you are upgrading the installation.

2. Open a command prompt window

Click Start >> All Programs >> Accessories, right-click Command Prompt, and then click Run as administrator. The Command Prompt window opens.

3. Find the install file for the upgrade.

The installer for the Tenant Manager upgrade is found in the \AdProd\WebComponents\Updates folder of the Microsoft Dynamics GP installation media. In the Command Prompt window, change folders to the location where you found the upgrade install file.

4. Start the upgrade.

In the Command Prompt window, type the name of the install file and press Enter. Watch the Command Prompt window to see when the upgrade is done

5. Start the Web Components Configuration Wizard.

After you run the upgrade, you should run the Dynamics GP Web Components Configuration Wizard. To run the wizard, click Start >> All Programs >> Administrative Tools >> Dynamics GP Web Components Configuration Wizard. After the Dynamics GP Web Components Configuration Wizard opens, click Next.

6. Verify the SQL connection information

The wizard shows the existing SQL connection information for the Web Management Console. Verify the following values and then click Next:

- Server name
- Database name
- Type of authentication

7. View the Configuration Status and Actions.

Click Next.

8. Close the Web Client Configuration Wizard.

Click Exit to close the wizard.

For more information about the Web Client Configuration Wizard, see Configure the Web Management Console database.

9. Clear the cache of your web browser.

You have to clear the cache of the web browser you use to connect to the Tenant Manager and the Web Management Console. In Internet Explorer, click Settings, Safety, and Delete browsing history. Click Temporary Internet files, click Cookies, and then click Delete.

Repeat this step on any machine where you use the web browser to view the Web Management Console. If you do not clear the cache, you might not see the upgrade or you might encounter an error while trying to open the Tenant Manager snap-in.

For more information about the Web Components upgrade, see the Microsoft Dynamics GP Web Client Install and Administration Guide.

Start the Tenant Manager

After you install the Tenant Manager console, you have to specify the services you want to manage. To configure the Tenant Manager, complete the following steps:

1. Open Internet Explorer.

You must be logged in with an ID that you specified as a service administrator for the Tenant Services. Use the login ID that you used to install Tenant Services.

2. Enter the address of the Microsoft Dynamics GP Web Management Console.

The default address for the Web Management Console is:

`https://ServerName:PortNumber/WebManagementConsole`

The address requires that you specify the following information:

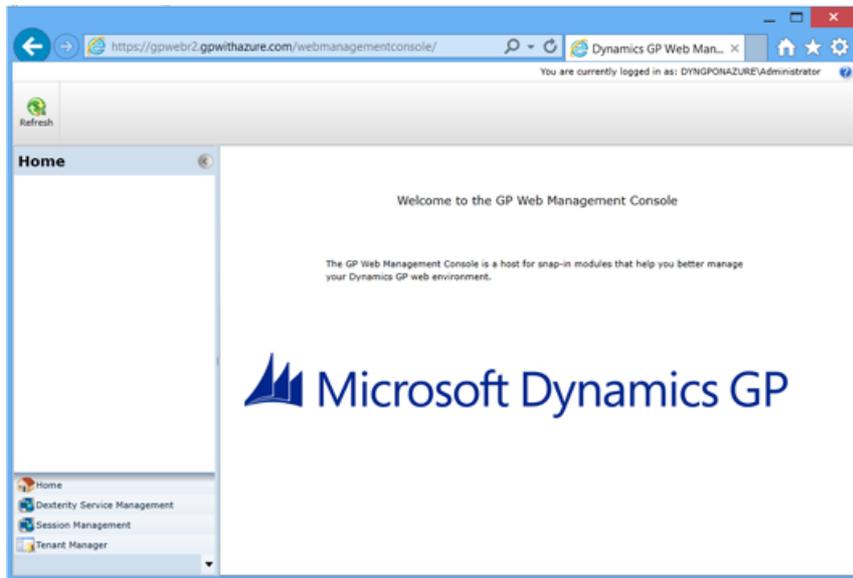
URL COMPONENT	DESCRIPTION
ServerName	The fully-qualified domain name (FQDN) for the server that hosts the web site. The name must match the name you used when you requested the security certificate that you applied to the site when setting up SSL.
PortNumber	The port for the web site that you are using. If you chose to install on the default web site (port 80) then you do not need to supply the port number.

A typical URL to access the Microsoft Dynamics GP Web Management Console looks similar to the following:

`https://gpweb.contoso.com/WebManagementConsole`

3. View the Web Management Console home page.

The home page appears in the browser. The left pane of the console is the Navigation pane that shows the snap-ins that the console contains. The Tenant Manager should appear at the bottom of the Navigation Pane.



4. Click Tenant Manager.

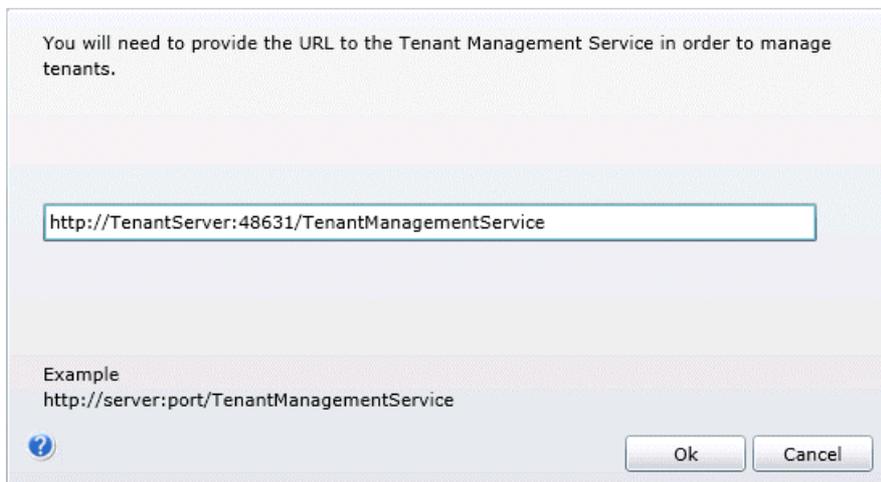
Click the Tenant Manager in the navigation pane of the Web Management Console. The Tenant Manager opens in the console.

5. Specify the URL for the Tenant Management Service.

You have to specify the URL for the Tenant Management Service. Enter the URL in the dialog window and press Enter.

The following example shows the format of the URL:

```
http://<servername>:<port>/TenantManagementService
```

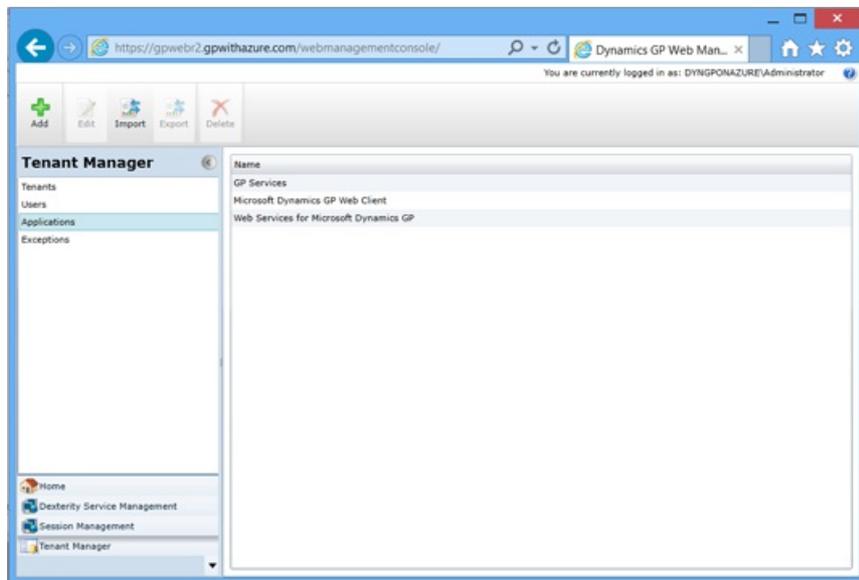


To get the URL, use the Microsoft.Dynamics.MultitenantServices.Management.config file. The baseAddress node contains the URL of the service. The file is found in the c:\Program Files\Microsoft Dynamics\Tenant Services\ManagementService folder on the server where you installed Tenant Services.

6. View the Tenant Manager snap-in.

In the Navigation pane of the console, click Tenant Manager. The Tenant Manager snap-in opens in the console..

The navigation pane shows a list that includes Tenants, Users, Applications, and Exceptions. To view or update manage tenants, you use the buttons in the ribbon.



What to do next

After you install and configure Microsoft Dynamics GP Tenant Services, consider taking the following steps:

- If you installed the Web Management Console and Tenant Manager on a separate machine from the where you installed Session Central, you have to restart the Session Central service. This enables the Session Central service to use the additional security.
- Use the Microsoft Dynamics GP Web Management Console to create, update, and remove tenants, users, and multitenant applications. For more information, see Chapter 9, "Configuring Tenants,"
- Learn about actions you will need to take to configure and maintain the Microsoft Dynamics GP Tenant Services components that you installed. Details are found in Part 3, Configuration and Administration.

Tenant Services Configuration and Administration

11/5/2018 • 35 minutes to read

This portion of the documentation explains the configuration and maintenance options for Microsoft Dynamics GP Tenant Services. To complete the steps in the following sections, you have to use the Tenant Manager snap-in of the Microsoft Dynamics GP Web Management Console. For information about how to install the Tenant Manager, see Chapter 6, "Tenant Manager Installation."

The following information is discussed:

- Chapter 7, "Configuring Users," describes how you add and maintain service administrator and delegating users.
- Chapter 8, "Configuring Applications," describes how you add and maintain multitenant applications in a multitenant environment.
- Chapter 9, "Configuring Tenants," describes how you add and maintain tenants.
- Chapter 10, "Maintenance," describes how to make changes to an existing Tenant Services installation.
- Chapter 11, "Troubleshooting," describes how to resolve common issues with the Tenant Services.

Chapter 7: Configuring Users

After installing Microsoft Dynamics GP Tenant Services, you can add or update information about the users you want to administer Tenant Services. To view, add, update, or remove users, you use the Tenant Manager snap-in of the Web Management Console. To complete any of the following procedures, you have to log in to the Tenant Manager snap-in as a service administrator.

The following sections describes how to add, configure, and remove service administrators and delegating users:

- To add users
- To update a user
- To remove a user

To add users

The following steps describe how to add a service administrator or delegating user.

1. Open the security group on the tenant server.

Open Server Manager. Expand Configuration, expand Local Users and Groups, and then click Groups. In the list of Groups, find the security group that you added for Tenant Services. Double-click the group and the group properties window opens.

2. Click Add to add a member to the group.

To add a member to the group, click Add. You use Select Users, Computers, Service Accounts, or Groups to enter the login ID you want to add to the group. Click Check Names to validate the ID. Click OK to add the specified user to the group.

3. Start the Web Management Console.

In a browser, open the Web Management Console. To start the Web Management Console, you use a URL similar to the following: <https://WebManagementConsole/>

4. Click Tenant Manager.

You click Tenant Manager to open the snap-in in the Web Management Console. Click Users in the navigation pane.

5. Click Add.

Click Add in the ribbon of the Web Management Console. The Add User window opens.

The screenshot shows the 'Add User' dialog box with the following fields and values:

- Name*: [Empty text box]
- Authentication Type: Windows
- Identity*: [Empty text box]
- UserType: Service Admin
- Status: Active
- Get protected application settings: [Unchecked checkbox]

FIELD	DESCRIPTION
Name	Specify a name for the user.
Identity	Specify the login ID of the user. You should use the format of domain\alias or alias@domainname.
User Type	Specify whether the user is a service administrator or a delegating user. A service administrator has access to all tenants, users, and multitenant applications. A delegating user is used to 'work on behalf' of another user. The default value is service administrator.
Status	Specify whether the user is active. Click Inactive if you do not want the specified login to have access to Tenant Services. The default value is Active.
Get protected application settings	Specify whether application properties that are marked as Protected are retrieved for the user

6. Click Save.

To add the user, click the Save button.

To update a user

The following steps describe how to update an existing service administrator or delegating user.

1. Start the Web Management Console.

In a browser, open the Web Management Console. To start the Web Management Console, you use a URL similar to the following:

https://<web server name>/WebManagementConsole/

2. Click Tenant Manager.

You click Tenant Manager to open the snap-in in the Web Management Console. Click Users in the navigation pane.

3. Click the user and then click Edit.

Click the name of the user, and then click Edit in the ribbon of the Web Management Console. The User Properties window opens.

User Properties

Name* Contoso\delegatinguser

Authentication Type Windows

Identity* Contoso\delegatinguser

UserType Delegating User

Status Active

Get protected application settings

Save Cancel

4. Update the properties for the user.

The following table shows the information you can update.

FIELD	DESCRIPTION
Name	Specify a name for the user.
Authentication Type	Specify the authentication type. Typically, you use Windows authentication.
Identity	Specify the login ID of the user. You should use the format of domain\username.
User Type	Specify whether the user is a service administrator or a delegating user. A service administrator has access to all tenants, users, and multitenant applications. A delegating user is used to 'work on behalf' of another user.
Status	Specify whether the user is active. Click Inactive if you do not want the specified login to use tenant services or the Web Management Console. The default value is Active.
Get protected application settings	Specify whether application properties that are marked as Protected are retrieved for the user. The default value is unmarked.

5. Click Save.

To update the properties for the user, click the Save button.

To remove a user

You can remove a service administrator or delegating user from your multitenant environment.

Take care when removing delegating users that you do not delete a login that is in use with an application pool. If you remove the user, the application pool will no longer be able to use any of the tenant services.

The following steps describe how to remove a service administrator or delegating user.

1. Start the Web Management Console.

In a browser, open the Web Management Console. To start the Web Management Console, you use a URL similar to the following:

```
https://<web server name>/WebManagementConsole/
```

2. Click Tenant Manager.

Click Tenant Manager to open the snap-in in the Web Management Console. To view the available user, click Users in the navigation pane.

3. Click the name of the user.

The Tenant Manager shows a list of available users. Click the name of the user you want to remove.

4. Click Delete.

Click the Delete button in the tenant manager ribbon of the Web Management Console. The user is removed from the list of users.

5. Open the security group on the tenant server.

Open Server Manager. Expand Configuration, expand Local Users and Groups, and then click Groups. In the list of Groups, find the security group that you added for Tenant Services. Double-click the group and the group properties window opens.

6. Click Remove to delete the member from the group.

Click the member you want to remove, and then click Remove. Click OK to close the group properties window.

Chapter 8: Configuring Applications

After installing Microsoft Dynamics GP Tenant Services, you can specify the multitenant applications you want your tenants to use. To add, update, or remove a multitenant application, use the Tenant Manager snap-in of the Web Management Console. To complete any of the following procedures, you have to log in to the Tenant Manager snap-in as a service administrator.

The following sections describes how to add, update, export, import, and remove multitenant applications:

- To add an application
- To update an application
- To export application information
- To import an application
- To remove an application

To add an application

You have to specify the application properties for the multitenant application. You use the application properties to specify the instance of Microsoft Dynamics GP for a tenant.

1. Start the Web Management Console.

In a browser, open the Web Management Console. To start the Web Management Console, you use a URL similar to the following:

```
https://ServerName:PortNumber/WebManagementConsole/
```

2. Click Tenant Manager.

Click Tenant Manager to open the snap-in in the Web Management Console. Click Applications in the navigation pane.

3. Click Add.

Click the Add button in the tenant manager ribbon of the Web Management Console. The Add Application window opens.

Configuration Name	Internal	Protected	Password
--------------------	----------	-----------	----------

4. Specify whether to add the default applications or another application.

To add the Microsoft Dynamics GP default applications, click Add default applications. This enables the following multitenant applications to support tenants:

- GP Services
- Microsoft Dynamics GP Web Client
- Web Services for Microsoft Dynamics GP

To add another multitenant application, click Add other application, and then type the name of the application.

5. Add the application properties for the application.

You have to specify a name for each application property for the specified multitenant application.

If you specified to add the default applications, you do not have to add application properties. Continue to

the next step.

Click the Add button. An application property is added. Provide the following information.

PROPERTY	DESCRIPTION
Configuration Name	Type the name for the property. The name will appear when you have to configure the multitenant application for a tenant.
Internal	Specify whether the property is an internal property. The default is to mark the checkbox.
Protected	Specifies that the property will not be retrieved unless the user account has been configured to display protected properties.
Password	Specifies that the property is a password value and will be encrypted when it is stored.

6. Click Save.

To save the application information you added, click Save. The new multitenant application appears in the list of applications in the Web Management Console.

To update an application

The following steps describe how to add or remove an application property for an existing multitenant application.

1. Start the Web Management Console.

In a browser, open the Web Management Console. To start the Web Management Console, you use a URL similar to the following:

```
https://ServerName:PortNumber/WebManagementConsole/
```

2. Click Tenant Manager.

You click Tenant Manager to open the snap-in in the Web Management Console. Click Applications in the navigation pane.

3. Click Edit.

Click the Edit button in the ribbon of the Web Management Console. The Application Properties window opens.

4. Click the buttons to add or remove application properties.

To add a new named property, click the Add button and provide the name. You should also specify whether the property is an internal setting.

To remove a property, click the property name in the list of properties and then click the Delete button. The property is removed from the list.

Take care when removing application properties. If you remove an application property, the multitenant application may no longer run for any tenant. Changes to applications should be completed by the person that added the application.

5. Click Save. To save the change you made, click Save. The Application Properties window closes.

To export application information

You can create a file that contains the configuration information for a multitenant application. You can later import that file on another server to quickly add the application to a different multitenant environment.

The following steps show how to export an application.

1. Start the Web Management Console.

In a browser, open the Web Management Console. To start the Web Management Console, you use a URL similar to the following:

```
https://ServerName:PortNumber/WebManagementConsole/
```

2. Click Tenant Manager.

Click Tenant Manager to open the snap-in in the Web Management Console. Click Applications in the navigation pane.

3. Specify the application.

Click the name of the multitenant application you want to export.

4. Click Export.

Click the Export button in the Tenant Manager ribbon of the Web Management Console. The Application Properties window opens.

5. If you are asked to confirm the export, click OK.

If you receive a File Download security warning, click OK. The Save As window opens.

6. Specify a name and location for the file.

Use the Save As window to specify a name and location for the file. Be sure to leave the file type as .adf.

7. Click Save.

The Save As window closes and the file appears in the folder that you specified.

##To import an application If you have an .adf file that contain configuration information for a multitenant application, you can import the application to Tenant Services. You have to first put the .adf file in a folder that is accessible from your Tenant Services machine.

The following steps show how to import a multitenant application.

1. Start the Web Management Console.

In a browser, open the Web Management Console. To start the Web Management Console, you use a URL similar to the following:

```
https://ServerName:PortNumber/WebManagementConsole/
```

2. Click Tenant Manager.

You click Tenant Manager to open the snap-in in the Web Management Console. Click Applications in the navigation pane.

3. Click Import.

Click the Import button in the ribbon of the Web Management Console. The Open window appears.

4. Navigate to the folder that contains your application definition file.

Click the name of the .adf file that you want to import. Click Open.

5. Verify the application was imported.

View the list of Applications in the Tenant Manager. The multitenant application should appear in that list.

To remove an application

You can remove a multitenant application from Tenant Services. When you remove the multitenant application, the application can no longer be used for any of the tenants for which the application has been configured. You should not delete a multitenant application until you confirm that no tenants are using that application.

The following steps describe how to remove a multitenant application.

1. Start the Web Management Console.

In a browser, open the Web Management Console. To start the Web Management Console, you use a URL similar to the following:

```
https://ServerName:PortNumber/WebManagementConsole/
```

2. Click Tenant Manager.

You click Tenant Manager to open the snap-in in the Web Management Console. To view the available applications, click Applications in the navigation pane.

3. Click the name of the application.

The Web Management Console shows a list of available multitenant applications. Click the name of the application you want to remove.

4. Click Delete.

Click the Delete button in the tenant manager ribbon of the Web Management Console. The multitenant application is removed from the list of applications.

Chapter 9: Configuring Tenants

After you install Microsoft Dynamics GP Tenant Services, you can add tenants, tenant users, and the multitenant applications for each tenant. To add, configure, or remove tenants, you use the Tenant Manager snap-in of the Web Management Console.

The following sections describes how to add, configure, and remove tenants, tenant users, and multitenant applications:

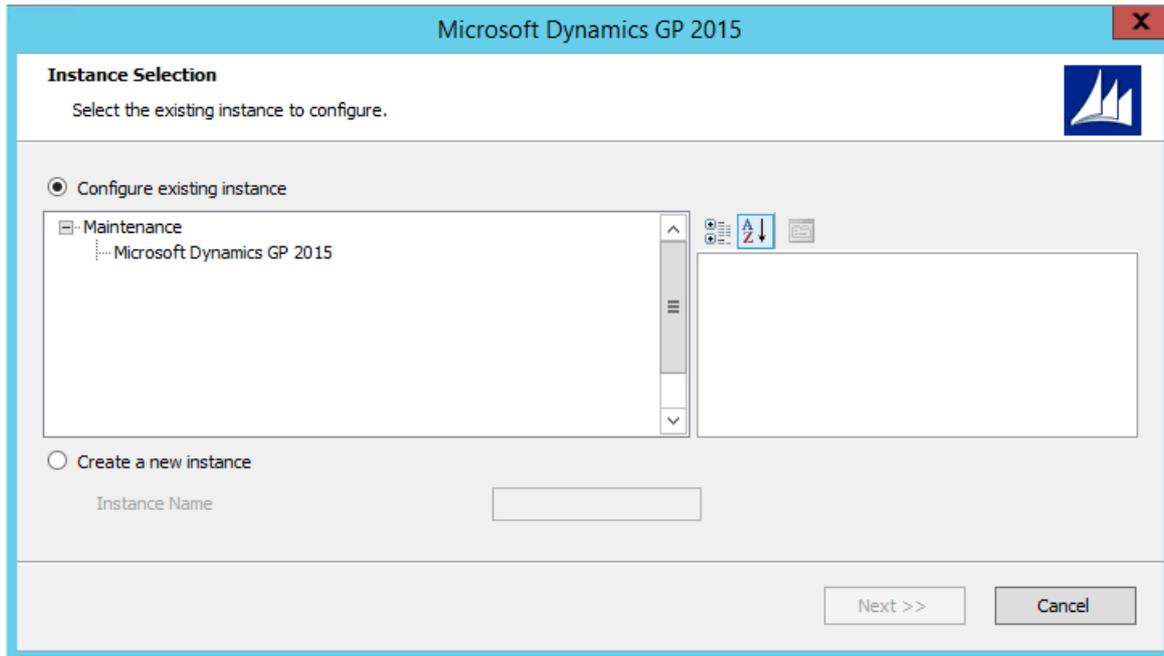
- Before you start
- To add a tenant
- To add a tenant user
- To add and configure a tenant application
- To update or remove a tenant
- To update or remove tenant users
- To update or remove tenant applications

Before you start

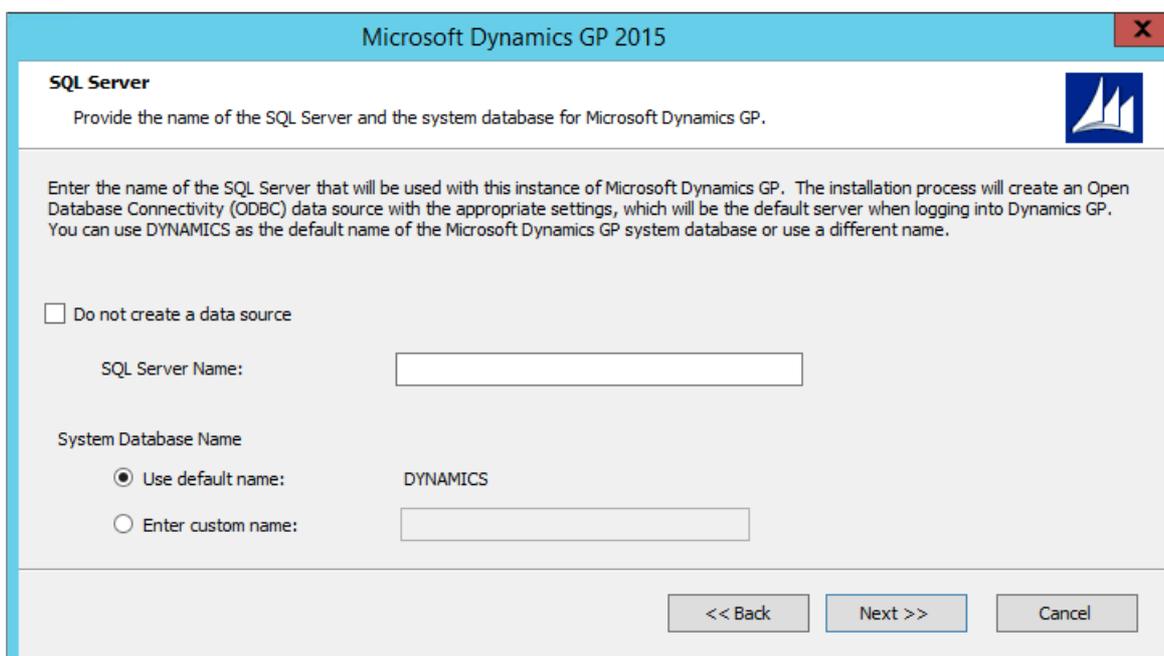
Before you add a tenant, you might have to install a new instance of Microsoft Dynamics GP. To add an instance of Microsoft Dynamics GP, you customize the name of the instance during the install. You have to provide a unique name for each instance of Microsoft Dynamics GP in your multitenant environment.

For example, the default name for the first instance of Microsoft Dynamics GP is GP2013. You can use this instance with the first tenant in your multitenant environment.

To add a second instance of GP to a multitenant environment, you use the Microsoft Dynamics GP installer. The following illustration shows the Instance Selection window from the install. To add a new GP instance to your multitenant environment, click Create new instance, and then type a name that uniquely identifies that instance. Notice how the instance name is specified as CONTOSO.



You also have to specify a name for the system database for the new instance. The following illustration shows how to specify the SQL Server and the name of the system database for the Contoso instance of GP.



Typically, you use the GP instance name in the application property of an multitenant application for a tenant. For example, the Microsoft Dynamics GP Web Client has the `Dynamicsexelocation` property that specifies the instance

for the web client.

To add a tenant

This section of the documentation shows how to add a tenant. The sections that follow show how to add a tenant user and a multitenant application to the tenant.

To add a tenant, you have to log in as a service administrator to the Tenant Manager snap-in of the Web Management Console.

The following steps describe how to add and configure a tenant.

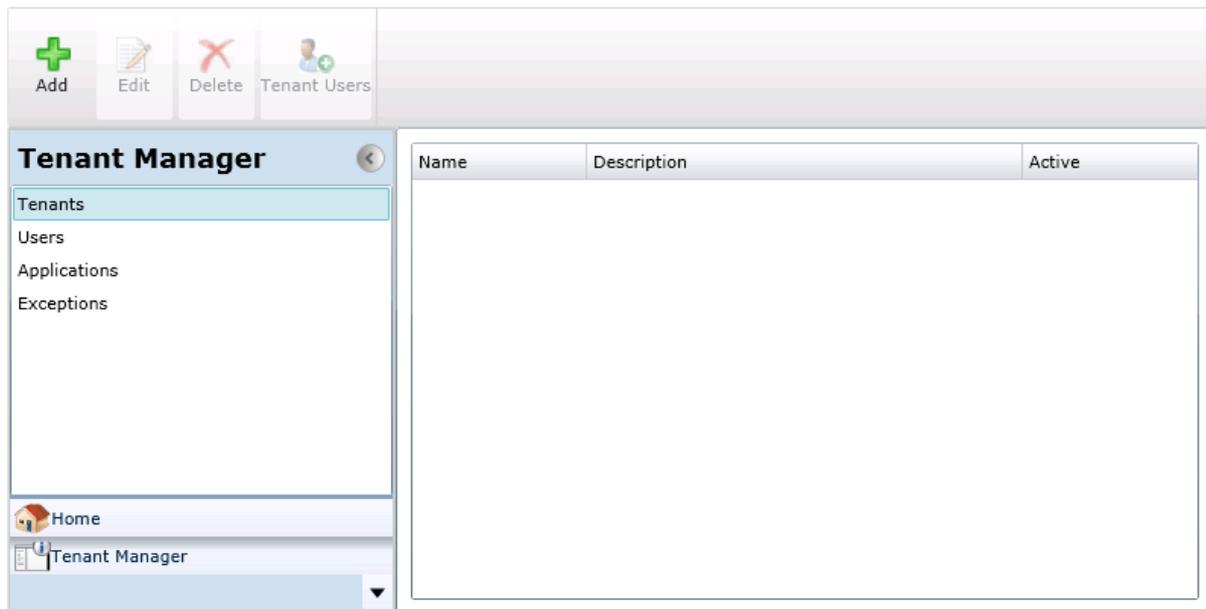
1. Start the Web Management Console.

In a browser, open the Web Management Console. To start the Web Management Console, you use a URL similar to the following:

```
https://ServerName:PortNumber/WebManagementConsole/
```

2. Click Tenant Manager.

Click Tenant Manager in the navigation pane. The snap-in opens in the Web Management Console. Click Tenants in the navigation pane.



3. Click Add.

Click Add in the ribbon of the Web Management Console. The Add Tenant window opens.

Add Tenant

Name*

Description

Status

Select the applications the tenant will use and provide the tenant's configuration information.

Selection	Names

Name	Value

4. Specify the tenant properties.

The following table describes the properties you have to provide:

PROPERTY	DESCRIPTION
Name	Specify the name for the tenant.
Description	Specify a brief description for the tenant.
Status	Specify whether the tenant is active or inactive. If the the tenant is inactive, the multitenant application will not be accessible.

5. Click Save.

To save your tenant, click the Save button. The Add Tenant window closes.

To add a tenant user

The following steps describe how to add a tenant user to a tenant that you created earlier. Before you begin, click the tenant name in the list of tenants that appears in the Tenant Manager snap-in.

1. Click the Tenant Users button.

Click the Tenant Users button in the ribbon of the Web Management Console. The Tenant Users window opens.

Tenant Users

Name

Description

Add the tenant users  

Name	Identity	Admin	Status

 User Application Settings



2. Click the Add button above the Add the tenant users section.

Click Add (the green plus) to create a new tenant user in the list of tenant users.

3. Populate the properties for the tenant user.

The following table describes the properties you use to add a tenant user:

PROPERTY	DESCRIPTION
Name	Specify a name for the tenant user.
Identity	Specify the login ID or security group name for the tenant user if the tenant user is a Windows Account. The login ID can use the domainname\alias or alias@domainname format. Use the format that the user will enter when logging in to the multitenant application. Specify the login ID or domain name for the tenant user if the tenant user is an Organizational Account. The login ID will use the alias@domainname format. A domain name will allow any users with a login ID in that domain name access to this tenant. (i.e. *@domainname)

PROPERTY	DESCRIPTION
Admin	Specify whether the tenant user is a tenant administrator. A tenant administrator can use the Tenant Manager snap-in of the Web Management Console to add or remove tenant users. To add a tenant administrator, mark the checkbox. To give a tenant administrator access to the Web Management Console, you also have to add the login ID for that user to the security group being used for the Web Management Console.
Status	Specify whether the user is active or inactive. An inactive user cannot use the multitenant applications. The default value is Inactive.

To add more tenant users, click the Add button and repeat this step.

4. Click Save.

When you have added all the tenant users, click Save.

To add and configure a tenant application

The following procedures describe how to associate a multitenant application to a tenant that you added earlier. Before you begin, click the tenant name in the list of tenants that appears in the Tenant Manager snap-in.

To associate a multitenant application with a tenant, you have to first add the application to your multitenant environment. To learn more about how to add a multitenant application, see [To add an application on page 57](#).

Select the application

The following steps describe how to associate a multitenant application with a tenant.

1. Display the list of tenants.

Click Tenant Manager in the navigation pane of the Web Management Console. Click Tenants in the navigation pane, and then select the tenant you want to work with.

2. Edit the tenant properties.

Click the Edit button in the ribbon of the Web Management console. The Tenant Properties window opens.

3. View the list of applications.

The Application Settings section of the Tenant Properties windows shows the list of available multitenant applications. By default, none of the applications are selected.

If you install the Microsoft Dynamics GP default applications you will see the following list:

- GP Services
- Microsoft Dynamics GP Web Client
- Web Services for Microsoft Dynamics GP

4. Select the application you want to use with the tenant.

Click the checkbox in the Selection column for the application you want to associate with the tenant.

Configure the application

The following steps describe how to configure the properties of the multitenant application that you specified in the previous section.

1. Click the application you want to configure.

When you click the application, the application properties for that application appear in the section below the selection list. The following illustration shows the properties for the Microsoft Dynamics GP Web Client application.

Name	Value
DynamicsexecLocation	
DynamicssetLocation	
DexiniLocation	
HeartbeatTimeout	0.00:00:00
RuntimeLogEnabled	false
CustomRuntimeSettings	ScriptLogEnabled=false TimingLogEnabled=false SqlLogEnabled=false
SQLUserName	
SQLPassword	

2. Specify the value for each property.

In the list of properties, specify the configuration value for each property. For example, the following table show the properties and configuration values for the Microsoft Dynamics GP Web Client. For more information about how to install and configure the Web Client application, see Chapter 12, "Configuring the Web Client." Name | Value -|- DynamicsexecLocation | c:\Program Files (x86)\Microsoft Dynamics\GP2015\ DynamicssetLocation | c:\Program Files (x86)\Microsoft Dynamics\GP2015\Dynamics.set DexiniLocation | c:\Program Files (x86)\Microsoft Dynamics\GP2015\Data\Dex.ini HeartbeatTimeout | 0.20:00:00 RuntimeLogEnabled | false CustomRuntimeSettings | ScriptLogEnabled=false|TimingLogEnabled=false|SqlLogEnabled=false SQLUserName | The name for the SQL login that was specified to be used for the web client when the Microsoft Dynamics GP web client runtime was installed. SQLPassword | The password for the SQL login being used for the web client. RuntimeProcessUserName | The name of the Windows account that the runtime process will run as when a user logs in using an Organizational Account. You only need to provide a value if you are using Organizational Accounts. RuntimeProcessPassword | The password for the Windows account used to run the runtime process.

3. Click Save.

To save the application information for the tenant, click the Save button.

To update or remove a tenant

This section describes how to make the following types of changes to an existing tenant:

- Change tenant property values.
- Remove a tenant.

To complete the following procedures, you have to log in to the Tenant Manager snap-in as a service administrator.

Change tenant properties

The following steps describe how to update existing tenant information.

1. Start the Web Management Console.

In a browser, open the Web Management Console. To start the Web Management Console, you use a URL similar to the following:

```
https://ServerName:PortNumber/WebManagementConsole/
```

2. Click Tenant Manager.

The Tenant Manager snap-in opens in the Web Management Console. Click Tenants in the navigation pane.

3. Click the name of the tenant.

The Tenant Manager snap-in shows a list of available tenants. Click the name of the tenant you want to update.

4. Click Edit.

Click Edit in the ribbon of the Web Management Console. The Tenant Properties window opens. You can change the value of the following properties:

PROPERTY	DESCRIPTION
Name	Specify the name for the tenant.
Description	Specify a brief description for the tenant.
Status	Specify whether the tenant is active or inactive. If the the tenant is inactive, the multitenant application will not be accessible.

Remove a tenant

You can remove an existing tenant from a multitenant environment. To remove a tenant, you have to log in to the Tenant Manager as a service administrator. The following steps describe how to remove a tenant.

1. Start the Web Management Console.

In a browser, open the Web Management Console. To start the Web Management Console, you use a URL similar to the following:

```
https://ServerName:PortNumber/WebManagementConsole/
```

2. Click Tenant Manager.

You click Tenant Manager to open the snap-in in the Web Management Console. To view the available tenants, click Tenants in the navigation pane.

3. Click the name of the tenant.

The Web Management Console shows a list of available tenants. Click the name of the tenant you want to remove.

4. Click Delete.

Click the Delete button in the tenant manager ribbon of the Web Management Console. The tenant is removed from the list of tenants.

To update or remove tenant users

This section describes how to make the following types of changes to an existing tenant:

- Change tenant user property values.
- Deactivate or remove a tenant user.

To complete the following procedures, you have to log in to the Tenant Manager snap-in as a service administrator or a tenant administrator.

Change tenant user properties

The following steps describe how you change the status of tenant user.

1. Click the Tenant Users button.

Click the tenant name in the list of tenants and then click the Tenant Users button in the ribbon of the Web Management Console. The Tenant Users window opens and lists the tenant users. Select one of the users.

2. Display the user application settings.

Expand the User Application Settings section of the window to display the settings for the selected user.

3. Change the name of the tenant user.

Click Name and enter the name for the tenant user.

4. Change the identity for the tenant user.

Click Identity and enter the login name for that tenant user.

5. Change whether the user is tenant administrator.

Use the Admin checkbox to indicate whether the user is a tenant administrator.

- Mark the checkbox to make the user a tenant administrator.
- Clear the checkbox to remove tenant administrator privileges for the user.

6. Change the value in Status drop down list.

Use the Status value to specify whether an user is active or inactive.

- To make a tenant user inactive, click the drop down list and select Inactive. The specified user will no longer be able to use the multitenant applications for the tenant.
- To make the tenant user active, click the drop down list and select Active. The specified user can now use the multitenant applications associated with the tenant.

7. Specify application property values for the tenant user.

Click the application in the Application Settings list. The properties for the specified multitenant application appear. Click the property that you want to set for the tenant user and enter a value.

If you do not specify a property value, the tenant user defaults to the application property settings that you specified when you configured the multitenant application for the tenant.

For example, you set the RuntimeLogEnabled property of the Web Client application to true. The change enables logging for that tenant user. Activity by other tenant users is not recorded in the log file.

8. Click Save.

Remove a tenant user

The following steps describe how to remove a tenant user.

1. Click the Tenant Users button.

Click the tenant name in the list of tenants and then click the Tenant Users button in the ribbon of the Web Management Console.

2. Specify the user in the Tenant Users list.

Click the user name in the Tenant Users list.

3. Click Delete.

Click the delete button (the red X) above the list of tenant users. The specified tenant user is removed from the list. That user will no longer be able to login to that tenant.

To update or remove tenant applications

This section describes how to make the following types of changes to an existing tenant:

- Add, or remove a multitenant application.
- Update the application properties of an multitenant application.

To complete the following procedures, you have to log in to the Tenant Manager snap-in as a service administrator.

Add or remove an application

The following steps describe how to change the multitenant applications that are associated with a tenant.

1. Open the Tenant Properties window.

Click the tenant name in the list of tenants, and then click the Edit button in the ribbon of the Web Management Console. The Tenant Properties window opens.

2. View the list of available applications.

The Application Settings section of the Tenant Properties window shows the list of available multitenant applications. Click the application you want to change.

3. Click the application.

You use the checkbox in the Selection column to add or remove applications for the tenant.

- To add an application, mark the checkbox in the Selection column. After you add an application, you must configure the properties for that application.
- To remove an application, unmark the checkbox in the Selection column.

4. Click Save.

To save the tenant information, click the Save button of the Tenant Properties window.

Change application configuration

The following steps describe how to change the application properties for a multitenant application.

1. Open the Tenant Properties window.

Click the tenant name in the list of tenants, and then click the Edit button in the ribbon of the Web Management Console. The Tenant Properties window opens.

2. Click the application you want to configure.

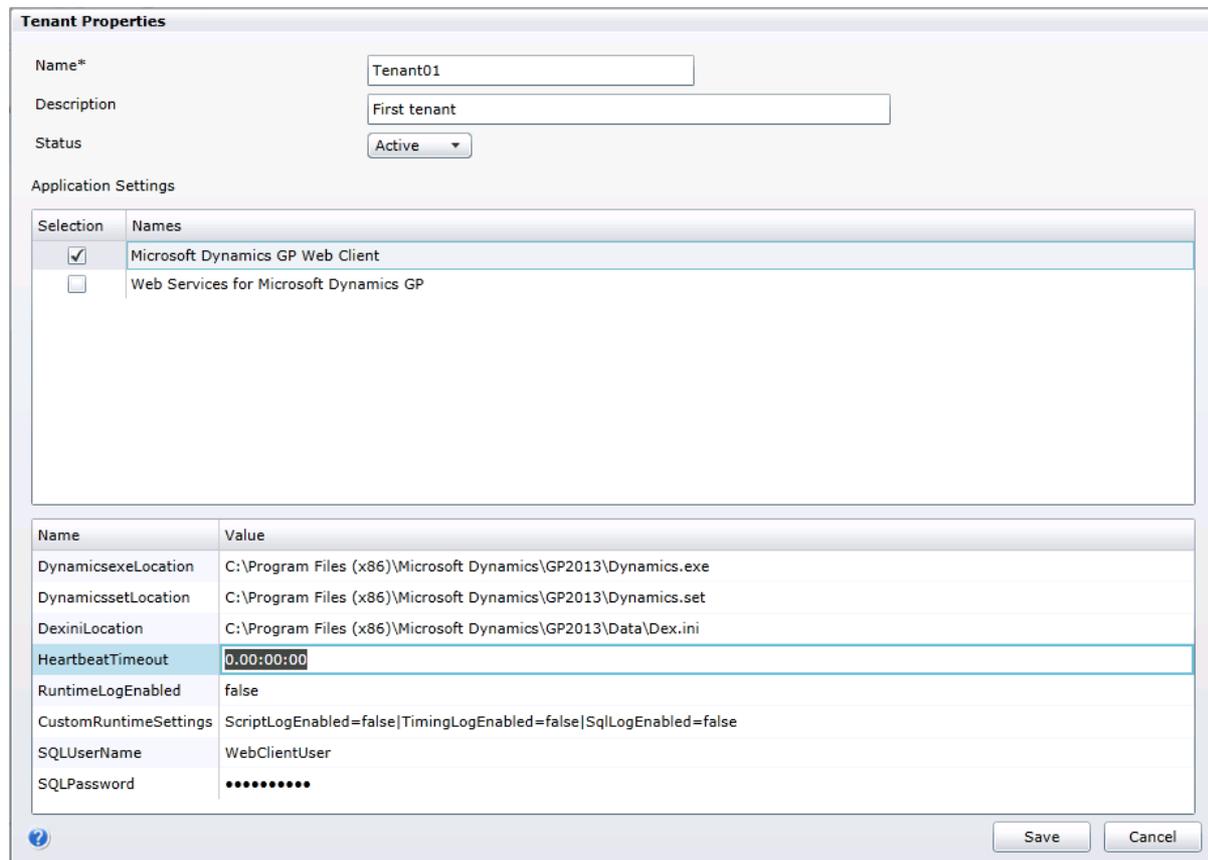
Click the application in the Application Setting list. The properties for that application appear as a list below

the Application Settings section of the Tenant Properties window.

3. Specify a value for each property.

In the list of properties, click the property you want to change. Enter the value to use for the property.

For example, the following illustration shows how to change the value of the Heartbeat Timeout property for the Microsoft Dynamics GP Web Client application for the specified tenant. Notice how the other properties keep their existing values.



4. Click Save.

To save the changes, click the Save button of the Tenant Properties window.

Chapter 10: Maintenance

This portion of the documentation provides information about modifying, repairing, or removing an existing Microsoft Dynamics GP Tenant Services installation. The following items are discussed:

- Modifying a Tenant Services installation
- Completing a repair
- Removing Tenant Services

Modifying a Tenant Services installation

Tenant Services allows you to add or remove individual features from an existing installation. To add or remove features, complete the following steps:

1. Start the Tenant Services installer.

Open Programs and Features in the Control Panel, right-click Microsoft Dynamics GP Tenant Services, and then click Change. The Program Maintenance window opens.

2. Choose Add/Remove Features.

Click Add/Remove Features. The Select Features window opens.

3. Specify the features to add or remove.

Use the Select Features window to specify the features you want to add or remove.

- To add a feature, click the drop down list and click Run from My Computer.
- To remove a feature, click the drop down list and click Not Available.

Click Next.

4. Provide settings for the services.

You need to provide the configuration setting for each service that is enabled. As a result, you might need to specify the configuration settings the Tenant Discovery, Tenant Public Discovery, and Tenant Management Services. If you previously installed the service, the existing setting values appear in window. The services include the following settings:

SETTING	DESCRIPTION
Port	Each service has a default port. If that port is in use, the next available port is selected. In addition, you can enter the port number that you want the service to use.
Certificate	Specify a security certificate for the service. The security certificate enables the service to use SSL. The default value is Not Selected. A security certificate is optional for the Tenant Discovery Service and the Tenant Management Service. If you do not specify a certificate, SSL will not be used to encrypt messages to and from that service. A security certificate is required for the Tenant Public Discover Service. To review information about available certificates, click the certificate in the drop-down list, and then click the View button. A dialog window opens that provides detailed information about the certificate.
Host name	The fully-qualified domain name of the server where you have installed the security certificate.
Domain	Enter the domain name associated with login ID.
User name	Enter the login ID you want the service to use.
Password	Enter the password for the specified login ID.

Click Next.

5. Begin the installation.

Click Install to add or remove the specified features. The installer may take several minutes to complete the update.

6. Close the wizard.

When the Installation Complete window appears, click Exit to close the wizard.

If you added a service, you might need to run the Microsoft Dynamics GP Tenant Services Configuration Wizard. You use the wizard to specify the SQL Server name, your tenant services database, and the authentication type. For more information about how to use the wizard, see Configure the Tenant Services database.

Completing A Repair

If the Microsoft Dynamics GP Tenant Services becomes damaged, the repair operation may help resolve the issue. The Repair wizard fixes the following:

- Missing or corrupt files
- Missing or corrupt shortcuts
- Missing or corrupt registry entries

To complete a repair, perform the following steps:

1. Start the Tenant Services installer.

Open Programs and Features, click Microsoft Dynamics GP Tenant Services, and then click Change. The Program Maintenance window opens.

2. Click Repair.
3. Provide login credentials for the services.

You need to provide login information for each service that you installed. As a result, you might need to provide the login information for the Tenant Discovery, Tenant Public Discovery, and Tenant Management Services. Each service requires the following login information.

SETTING	DESCRIPTION
Domain	Enter the domain name associated with login ID you want the service to use. The domain of the existing account appears in the text box. You can keep the existing domain or enter new domain information.
User name	Specify the login ID you want the service to use. The name of the existing account appears in the text box. You can keep the existing login ID or enter a new login ID.
Password	Enter the password for the specified login ID.

Click Next.

4. Ready to repair.

Click Repair to begin. The repair might run for several minutes.

5. Repair complete

When the Repair Complete window appears, click Exit to close the wizard.

Removing Tenant Services

The Tenant Services remove operation allows you to delete all of the installed tenants services, related folders, and files. It deletes only the files and folders created in file system of the local machine.

When you remove Tenant Services, the DYNGPDISCOVERY database is not removed. To remove the database, you have to use SQL Server Management Studio.

To remove Tenant Services from a computer, complete the following steps:

1. Start the Tenant Services installer.

Open Programs and Features, choose Microsoft Dynamics GP Tenant Services, and then click Change. The Program Maintenance window opens.

2. Click Remove.

Click Remove.

3. Begin the uninstall.

The Remove window opens. Click Remove to begin the uninstall. The uninstall will run for several minutes.

4. Close the wizard.

When the Remove Complete window appears, click Exit to close the wizard.

Chapter 11: Troubleshooting

If you encounter problems with Microsoft Dynamics GP Tenant Services, the following sections may be helpful. They describe some of the most common situations that can occur when using tenant services. The following items are discussed:

- Tenant Services do not start
- Error occurs when opening the Web Management Console
- Login problems with the Tenant Manager snap-in
- Tenant Manager requests the service URL
- Error when starting a multitenant application
- View the Tenant Manager exception log
- Check the service configuration files
- Enable error messages to provide additional information
- Enable logging for the Web Client application

Tenant Services do not start

After you install Tenant Services, you view Services in the Server Manager and find that the Microsoft Dynamics GP Tenant Discovery Service and the Microsoft Dynamics GP Tenant Management Service have not started. You attempt to start both services but neither will run.

The login you used may not have sufficient privileges to initialize the service on the server. Use Local User and Groups in Server Manager and add the login to the Administrators group. Try starting each service again. The services should start and run.

Error occurs when opening the Web Management Console

You have installed the Microsoft Dynamics GP Web Management Console but you see the following error when you open the console in Internet Explorer.

```
HTTP Error 500.21 -Internal Server Error
Handler "PageHandlerFactory - Integrated" has a bad module
"ManagedPipelineHandler" in its module list.
```

This error can occur when ASP.NET has not been successfully installed on the server. To correct the specified issue, open a command prompt with administrator privileges and navigate to the following folder:

```
c:\Windows\Microsoft.NET\Framework64\v4.0.30319\
```

Type the following command and press enter:

```
aspnet_regiis -i
```

The command installs the specified .NET framework and should eliminate the error message. After you complete the install, you should run the IIS reset command (iisreset) to restart the web server.

Login problems with the Tenant Manager snap-in

After installing Tenant Services, you are unable to open the Tenant Manager in the Web Management Console. To open the Tenant Manager, you need to be logged in as a service administrator for Tenant Services.

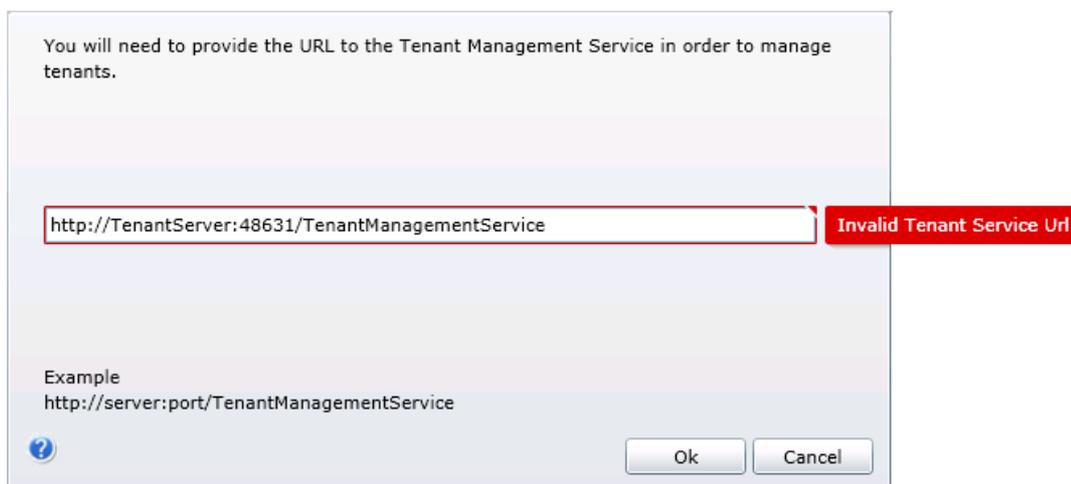
When you install Tenant Services, your login is added as a service administrator for Tenant Services. However, you also need to supply a login for the application pool for the Web Management Console. The specified login is added as a delegating user for Tenant Services.

A login cannot be both a service administrator and a delegating user. Be sure that you used a different login for the application pool. If you used the same login for the application pool identity that you use to install Tenant Service, you might not be able access the Tenant Manager console.

To use the Tenant Manager in the Web Management Console, be sure that you login with the ID of the service administrator. Verify that you are logged in with the login ID you used to install Tenant Services or another ID that is specified as a service administrator.

Tenant Manager requests the service URL

When you attempt to open the Tenant Manager in the Web Management Console, you see the following error message:



Verify the Microsoft Dynamics GP Tenant Management Service is running. You will not be able to use Tenant Manager until the service is started.

Error when starting a multitenant application

You start the web client or other multitenant application and receive an unexpected error.

Verify the Microsoft Dynamics GP Tenant Discovery Service is running. You will not be able to use the application until the service is running.

If you use the public discovery service to support additional multitenant applications, you should verify the Microsoft Dynamics GP Tenant Public Discovery Service is running. The multitenant applications that rely on that service will not be able to connect to Microsoft Dynamics GP until that service is started.

View the Tenant Manager exception log

The Tenant Manager of the Microsoft Dynamics GP Web Management Console includes a list of tenant services exceptions. The following illustration shows the console.

Tenant Manager Display messages for

Date	Level	Operation	Name	Message	ID
10/30/2012	Error	Service Access		An identity was passed to the service, but the caller is not a delegating user.	NOR
10/30/2012	Error	Service Access		An identity was passed to the service, but the caller is not a delegating user.	NOR
10/30/2012	Error	Service Access		An identity was passed to the service, but the caller is not a delegating user.	NOR
10/30/2012	Error	Service Access		An identity was passed to the service, but the caller is not a delegating user.	NOR
10/30/2012	Error	Service Access		An identity was passed to the service, but the caller is not a delegating user.	NOR
10/30/2012	Error	Service Access		An identity was passed to the service, but the caller is not a delegating user.	NOR
10/30/2012	Error	Service Access		An identity was passed to the service, but the caller is not a delegating user.	NOR
10/30/2012	Error	Service Access		An identity was passed to the service, but the caller is not a delegating user.	NOR
10/30/2012	Error	Service Access		An identity was passed to the service, but the caller is not a delegating user.	NOR
10/30/2012	Error	Service Access		An identity was passed to the service, but the caller is not a delegating user.	NOR
10/30/2012	Error	Service Access		An identity was passed to the service, but the caller is not a delegating user.	NOR
10/30/2012	Error	Service Access		An identity was passed to the service, but the caller is not a delegating user.	NOR
10/30/2012	Error	Service Access		An identity was passed to the service, but the caller is not a delegating user.	NOR
10/30/2012	Error	Service Access		An identity was passed to the service, but the caller is not a delegating user.	NOR
10/30/2012	Error	Service Access		An identity was passed to the service, but the caller is not a delegating user.	NOR
10/30/2012	Error	Service Access		An identity was passed to the service, but the caller is not a delegating user.	NOR
10/30/2012	Error	Service Access		An identity was passed to the service, but the caller is not a delegating user.	NOR
10/30/2012	Error	Update Tenant User		A null parameter was supplied to the service call.	NOR
10/30/2012	Error	Update Tenant User		A null parameter was supplied to the service call.	NOR

Home Tenant Manager Error Details

To view detailed error information, click the error in the list you want to view more information. Click the Error Details button at the bottom of the page. The Error Details shows more complete information and additional details about the error.

Check the service configuration files

The default Microsoft Dynamics GP Tenant Services installation adds two Windows services to your computer. The installer initially configures each service and stores the configuration information in an XML file. These XML configuration files contain elements that have attributes and values that control the operation of the service.

To understand the behavior of a service, you can view the configuration information in the file. In addition, you can change value to reflect changes in your environment.

The XML configuration file for the discovery service is named:

```
Microsoft.Dynamics.MultitenantServices.Discovery.config
```

You can find the file in the following location:

```
c:\Program Files\Microsoft Dynamics\Tenant Services\DiscoveryService
```

The management service has an XML configuration file named

```
Microsoft.Dynamics.MultitenantServices.Management.config.
```

You can find the file in the following location:

```
c:\Program Files\Microsoft Dynamics\Tenant Services\ManagementService
```

The public discovery service has an XML configuration file named

Microsoft.Dynamics.MultitenantServices.Discovery.Public.config. You can find the file in the following location:

```
c:\Program Files\Microsoft Dynamics\Tenant Services\PublicDiscoveryService
```

Be sure to make a copy of the configuration file before you make any changes to the file. You can use the saved copy to restore the original configuration settings for the service.

Enable error messages to provide additional information

Change the setting in the XML configuration file for the discovery or management service. You can change the includeExceptionDetailInFaults attribute to the serviceDebug node to true.

You can use this setting when you are debugging an issue to get the complete error message. You will see more information about the exception which can help you identify the cause of the exception.

When you are done, set the value of the includeExceptionDetailInFaults attribute to false. If you do not restore the original settings, everyone who uses the service will get the detailed error messages.

You can find includeExceptionDetailInFaults in the following service configuration files:

- Microsoft.Dynamics.MultitenantServices.Discovery.config
- Microsoft.Dynamics.MultitenantServices.Management.config
- Microsoft.Dynamics.MultitenantServices.Discovery.Public.config

The previous section provides the typical location of each configuration file.

Enable logging for the Web Client application

The Microsoft Dynamics GP Web Client application includes properties you can use to enable logging for a tenant or tenant user. You can use the logs to help identify activity surrounding issues you might encounter while using the Web Client in a multitenant environment.

You can have the Web Client tenant application produce the following logs:

NAME	DESCRIPTION
Runtime log	The primary log you use to record and view web client activity. The log records information about service calls, client actions, generated macro lines, and Dexterity callbacks.
Script log	Enables the Dexterity script log you can use when you debug sanScript code
Sql log	Enables the same type of logging that you get when you enable SQL logging in the Dex.ini file. The log contains information about the connection to the SQL server and the queries to that server.
Timing log	The log you use to record the timing information for messages, script execution, callbacks, and other events. You enable this log to gather information you can use to monitor performance for an event or action.

To enable logging, the Web Client application includes the following properties:

PROPERTY	DESCRIPTION
----------	-------------

PROPERTY	DESCRIPTION
RuntimeLogEnabled	This property enables you to create the runtime log for a tenant. The default value for the property is false. To start the Runtime log, set the property to true.
CustomRuntimeSettings	This property enables you to create more detailed log information for scripts, SQL server activity, and the time for specified actions and events. The property includes a parameter for each type of log. The parameters are named ScriptLogEnabled, TimingLogEnabled, and SqlLogEnabled. The default value for the each parameter is false. To start a log, you set the value for that log parameter to true.

You can determine what information goes into a log file by where you enable the log.

- If you set the property to true in the Application Settings of the Tenant Properties window, the log contains information for all Web Client users for the tenant.
- If you set the property to true in the Application Settings section of the Tenant Users window, the log contains information for the specified tenant user.

After you enable logging, you can find the generated log in the following location:

```
%Program Data%\Microsoft Dynamics\GP Sessions\Logs\
```

When you have completed your analysis, be sure to return the value of the log properties to false.

Multitenant Applications

11/5/2018 • 27 minutes to read

This portion of the documentation explains the configuration and maintenance options for Microsoft Dynamics GP multitenant applications. The following information is discussed:

- Chapter 12, "Configuring the Web Client," describes how you configure the Microsoft Dynamics GP Web Client application for a tenant.
- Chapter 13, "Configuring Web Services," describes how you specify web service and tenant configuration information. The Web Services for Microsoft Dynamics GP Configuration Wizard uses this configuration information to add web services access to the tenant.

Chapter 12: Configuring the Web Client

This portion of the documentation describes how you use the Tenant Manager to make the Dynamics GP Web Client available for use with tenants. The documentation also describes how you provide information that is used to configure the web client for a specified tenant.

The following items are discussed:

- Before you start
- To add the Web Client to the list of applications
- To configure the Web Client application for a tenant
- What to do next

Before you start

To add and configure the Dynamics GP Web Client for a tenant, you have to first complete the following tasks:

- Install Tenant Services
- Install Microsoft Dynamics GP for the tenant
- Install the Web Management Console and the Tenant Manager snap-in

In addition, you should have already added the tenant. To add a tenant, you use the Tenant Manager snap-in. For information about how to add a tenant, see [To add a tenant](#) on page 64.

To add the Dynamics GP Web Client to the tenant, you use the Tenant Manager snap-in to supply important configuration information. The following table shows the information you will need to gather:

File | Description
-|- Dynamics.exe | The Dynamics executable file from the Microsoft Dynamics GP instance for the tenant. You need to specify the path to the folder where the file was installed. For example: c:\Program Files (x86)\Microsoft Dynamics\GP2015

Dynamics.set | The Dynamics set file from the Microsoft Dynamics GP instance for the tenant. You need to specify the file and its location. For example: c:\Program Files (x86)\Microsoft Dynamics\GP2015\Dynamics.set
Dex.ini | The Dex initialization file from the Microsoft Dynamics GP instance for the tenant. You need to specify the file and its location. For example: c:\Program Files (x86)\Microsoft Dynamics\GP2015\Data\Dex.ini

SQLUserName | The name for the SQL login that was specified to be used for the web client when the web client runtime was installed for the Microsoft Dynamics GP instance.
SQLPassword | The password for the SQL login being used for the web client for the Microsoft Dynamics GP instance.
RuntimeProcessUserName | The name of the Windows account that the runtime process will run as when a user logs in using an Organizational Account. You only need to provide a value if you are using Organizational Accounts.
RuntimeProcessPassword | The password for the Windows account used to run the runtime process.

To add the Web Client to the list of applications

Before you can begin using the web client with tenants, you have to add Web Client to the list of multitenant applications in the Tenant Manager snap-in. If you previously added the default applications (Microsoft Dynamics GP Web Client and Web Services for Microsoft Dynamics GP) to the list of applications, you do not need to repeat the steps in this section.

The following steps describe how to add the Microsoft Dynamics GP Web Client to the list of applications in the Tenant Manager snap-in:

1. Verify your login is a Service Admin

Verify that your login has the Service Admin role for Tenant Services. You must be a Service Admin to add the web client to the list of applications. The Service Admins are identified in the Users section of the Tenant Manager snap-in.

In addition, your login must have authorization to use the Microsoft Dynamics GP Web Management Console. Your login must be a member of the security group you specified during the install of the Tenant Manager.

2. Start the Web Management Console.

In a browser, open the Microsoft Dynamics GP Web Management Console. To start the Web Management Console, you use a URL similar to the following:

```
https://ServerName:PortNumber/WebManagementConsole/
```

Replace ServerName with the name of the server that is running the Web Management Console. If the web site isn't using port 80, supply the PortNumber as well.

3. Click Tenant Manager.

To open the snap-in in the Web Management Console, click Tenant Manager in the navigation pane.

4. Click Applications in the navigation pane.

The Tenant Manager shows the multitenant applications that are available.

5. Click Add.

Click the Add button in the ribbon of the Web Management Console. The Add Application window opens.

6. Click Add default applications.

This adds GP Services, Microsoft Dynamics GP Web Client and Web Services for Microsoft Dynamics GP as multitenant applications.

7. Click Save.

To verify the changes, click Applications in the Tenant Manager navigation pane. You should see GP Services, Microsoft Dynamics GP Web Client and Web Services for Microsoft Dynamics GP in the list.

To configure the Web Client application for a tenant

You use the Tenant Manager snap-in to configure the web client application for a tenant. If you do not provide the required configuration information, the web client will not run.

The following steps describe how to configure the web client for a tenant:

1. Verify your login is a Service Admin

Verify you are using a login that has the Service Admin role in tenant services. If you are not a Service

Admin, you will not be able to access the Tenant Properties window. The Service Admins are identified in the Users section of the Tenant Manager snap-in.

In addition, your login must have authorization to use the Microsoft Dynamics GP Web Management Console. Your login must be a member of the security group you specified during the install of the Tenant Manager.

2. Start the Web Management Console.

In a browser, open the Dynamics GP Web Management Console. To start the Web Management Console, you use a URL similar to the following:

```
https://ServerName:PortNumber/WebManagementConsole/
```

Replace ServerName with the name of the server that is running the Web Management Console. If the web site isn't using port 80, supply the PortNumber as well.

3. Click Tenant Manager.

Click Tenant Manager at the bottom of the navigation pane. The snap-in opens in the Web Management Console.

4. Click Tenants in the navigation pane.

The Tenant Manager shows the list of available tenants.

5. Click the tenant and then click Edit.

To add a multitenant application to a tenant, you first click the tenant and then click Edit in the ribbon of the Web Management Console. The Tenant Properties window opens.

6. Select Microsoft Dynamics GP Web Client

In the Application Settings section, click the checkbox in the Selection column for the Microsoft Dynamics GP Web Client.

7. Specify the value for each web client application property.

When you click the Microsoft Dynamics GP Web Client, the web client application properties appear as a list.

You have to specify the value for each application property. The following table shows the properties and describes how to specify a value for each property:

Property name	Description
DynamicsexecLocation	Specify the folder where you find the Dynamics.exe file of the Microsoft Dynamics GP instance that is associated with the tenant. For example: c:\Program Files (x86)\Microsoft Dynamics\GP2013

DynamicssetLocation	Specify the location of the Dynamics.set file of the Microsoft Dynamics GP that is associated with the tenant. For example: c:\Program Files (x86)\Microsoft Dynamics\GP2013\Dynamics.set
---------------------	---

DexiniLocation	Specify the location of the Dex.ini file for the Microsoft Dynamics GP instance that is associated with the tenant. For example: c:\Program Files (x86)\Microsoft Dynamics\GP2013\Data\Dex.ini
----------------	--

HeartbeatTimeout	The amount of time a Web Client session can be in a disconnected state before it is terminated. The default value of 0.00:00:0 means the session is never terminated. You can change the value to specify the length of time before the session terminates. The format is hours.minutes:seconds. For example, the following sets the value to 20 minutes: 00.20:00:00
------------------	---

RuntimeLogEnabled	Specify whether to enable logging for the application. To enable logging, set the property value to true. The default value is: false
-------------------	---

CustomRuntimeSettings	Specify whether enable more detailed logging for the application. To enable logging, set one or more values to true. The default value is:
-----------------------	--

ScriptLogEnabled=false|TimingLogEnabled=false|SqlLogEnabled=false SQLUserName | The name for the SQL login that was specified to be used for the web client when the web client runtime was installed for the Microsoft Dynamics GP instance. SQLPassword | The password for the SQL login being used for the web client for the Microsoft Dynamics GP instance. RuntimeProcessUserName | The name of the Windows account that the runtime process will run as when a user logs in using an Organizational Account. You only need to provide a value if you are using Organizational Accounts. RuntimeProcessPassword | The password for the Windows account used to run the runtime process.

8. Click Save.

To save the application configuration information, click the Save button.

What to do next

You can add the users that you want to access the Web Client as tenant users for the tenant.

Chapter 13: Configuring Web Services

This portion of the documentation describes how you use the Tenant Manager to make Web Services for Microsoft Dynamics GP available for use with tenants. The documentation also describes how you provide information that is used to configure web services for a specified tenant. You have to complete these steps before you can run the Web Services for Microsoft Dynamics GP Configuration Wizard.

The following items are discussed:

- Before you start
- To add Web Services to the list of applications
- To specify Web Services configuration information
- What to do next

Before you start

Before you add and configure Dynamics GP Web Services for a tenant, you have to first complete the following tasks:

- Install Tenant Services
- Install Microsoft Dynamics GP for the tenant
- Install the Web Management Console and the Tenant Manager snap-in
- Install Dynamics GP Web Services

In addition, you should have already added the tenant. To add a tenant, you use the Tenant Manager snap-in.

To add Web Services for Microsoft Dynamics GP to the tenant, you use the Tenant Manager snap-in to supply important configuration information. The following table shows the information you will need to gather:

REQUIRED INFORMATION	DESCRIPTION
Dynamics GP SQL Server	Get the name of the SQL Server where you installed Microsoft Dynamics GP for the tenant.
Dynamics GP system database	Get the name of the Microsoft Dynamics GP system database for the tenant. You specified the database name during the install of Microsoft Dynamics GP. To find the name of the database, open Microsoft SQL Server Management Studio, connect to the SQL Server, and view the list of databases on the server.

REQUIRED INFORMATION	DESCRIPTION
Dynamics Security Administration service SQL Server	Get the name of the SQL Server where you want to add the security Administration database. You can use the same SQL Server you use for Dynamics GP or you can use another SQL Server.
URL for Dynamics GP Web Services	Get the name of the web server and the port number you use to connect to web services. For example, a typical install of web services might use the following URL: http://GPServer:48620/DynamicsGPWebServices/DynamicsGPService.aspx You will use GPServer and 48620 to configure the URL for the multitenant web services.
URL for the Dynamics Security Administration service	Get the name of the web server and the port number you use to connect to Microsoft Dynamics Security Administration service. For example, a typical install of the security administration service might use the following URL: http://GPWebService:48621/DynamicsAdminService.aspx You will use GPWebService and 48621 to configure the URL for the multitenant web services security.

To add Web Services to the list of applications

Before you can begin using web services with tenants, you have to add Web Services to the list of applications in the Tenant Manager snap-in. If you previously added the default applications (Web Services for Microsoft Dynamics GP, GP Services, and Microsoft Dynamics GP Web Client) to the list of applications, you do not need to repeat the steps in this section.

The following steps describe how to add Web Services for Microsoft Dynamics GP to the list of applications in the Tenant Manager snap-in:

1. Verify your login is a Service Admin

Verify that your login has the Service Admin role for Tenant Services. You must be a Service Admin to add web services to the list of applications. The Service Admins are identified in the Users section of the Tenant Manager snap-in. In addition, your login must have authorization to use the Microsoft Dynamics GP Web Management Console. Your login must be a member of the security group you specified during the install of the Tenant Manager.

2. Start the Web Management Console.

In a browser, open the Microsoft Dynamics GP Web Management Console. To start the Web Management Console, you use a URL similar to the following:

```
https://ServerName:PortNumber/WebManagementConsole/
```

Replace ServerName with the name of the server that is running the Web Management Console. If the web site isn't using port 80, supply the PortNumber as well.

3. Click Tenant Manager.

To open the snap-in in the Web Management Console, click Tenant Manager in the navigation pane.

4. Click Applications in the navigation pane.

The Tenant Manager shows the multitenant applications that are available.

5. Click Add.

Click the Add button in the ribbon of the Web Management Console. The Add Application window opens.

6. Click Add default applications.

This adds GP Services, Microsoft Dynamics GP Web Client and Web Services for Microsoft Dynamics GP to the list of applications.

7. Click Save.

To verify the changes, click Applications in the Tenant Manager navigation pane. You should see GP Services, Microsoft Dynamics GP Web Client and Web Services for Microsoft Dynamics GP in the list.

To specify Web Services configuration information

You use the Tenant Manager snap-in to provide configuration information that associates web services with a tenant. You have to complete these steps prior to running the Web Services for Microsoft Dynamics GP Configuration Wizard. The wizard uses this information to configure web services for the tenant. If you do not provide all the configuration information, the wizard will not be able to finish.

The following steps describe how to add web services configuration information for a tenant:

1. Verify your login is a Service Admin

Verify you are using a login that has the Service Admin role in tenant services. If you are not a Service Admin, you will not be able to access the Tenant Properties window. The Service Admins are identified in the Users section of the Tenant Manager snap-in.

In addition, your login must have authorization to use the Microsoft Dynamics GP Web Management Console. Your login must be a member of the security group you specified during the install of the Tenant Manager.

2. Start the Web Management Console.

In a browser, open the Dynamics GP Web Management Console. To start the Web Management Console, you use a URL similar to the following:

```
https://ServerName:PortNumber/WebManagementConsole/
```

Replace ServerName with the name of the server that is running the Web Management Console. If the web site isn't using port 80, supply the PortNumber as well.

3. Click Tenant Manager.

Click Tenant Manager at the bottom of the navigation pane. The snap-in opens in the Web Management Console.

4. Click Tenants in the navigation pane.

The Tenant Manager shows the list of available tenants.

5. Click the tenant and then click Edit.

To add web services to a tenant, you first click the tenant and then click Edit in the ribbon of the Web Management Console. The Tenant Properties window opens.

6. Select Web Services for Microsoft Dynamics GP

In the Application Settings section, click the checkbox in the Selection column for Web Services for Microsoft Dynamics GP.

7. Specify the value for each web services application property.

When you click Web Services for Microsoft Dynamics GP, the web service application properties appear as a list. The following illustration shows the properties for Web Services for Microsoft Dynamics GP.

Tenant Properties

Name*

Description

Status ▾

Application Settings

Selection	Names
<input type="checkbox"/>	Microsoft Dynamics GP Web Client
<input checked="" type="checkbox"/>	Web Services for Microsoft Dynamics GP

Name	Value
DynGPSQLServer	sqlserver
DynGPSystemDB	DYN01
DynGPWebServiceURL	http://servername:48620/Dynamics/GPService
SecAdminServiceURL	http://servername:48621/
SecServiceDB	Tenant01_DynGPSecurity
SecServiceSQLServer	sqlserver

You have to specify the value for each application property. The following table shows the properties and describes how to specify a value for each property.

PROPERTY NAME	DESCRIPTION
DynGPSQLServer	Specify the name of the SQL Server where you installed Microsoft Dynamics GP for the tenant.
DynGPSystemDB	Specify the name of the Microsoft Dynamics GP system database for the tenant. The database has to be on the SQL Server that you specified in the previous property.
DynGPWebServiceURL	Specify the URL for the Dynamics GP service. The URL uses the following format: http://machine_name:port/Dynamics/GPService Replace machine_name with the name of the server onto which you installed Web Services for Microsoft Dynamics GP. The default port value is 48620. For example if the machine running the Dynamics GP service was named GPServer, the URL would be: http://GPServer:48620/Dynamics/GPService If this port value does not work to access the service, you will need to contact your administrator to find what port the Dynamics GP service is running on.

PROPERTY NAME	DESCRIPTION
SecAdminServiceURL	Specify the URL of the Microsoft Dynamics Security Administration service. The URL uses the following format: http://machine_name:port/ Replace machine_name with the name of the server onto which you installed the Microsoft Dynamics Security Administration Service. The default port value is 48621. For example if the machine running the Microsoft Dynamics Security Administration service was named GPWebService, the URL would be: http://GPWebService:48621/ If this port value does not work to access the service, you will need to contact your administrator to find what port the Microsoft Dynamics Security Administration service is running on.
SecServiceDB	Specify the name of the Microsoft Dynamics Security Administration service database for the tenant. The database will be created when you run the Web Services for Microsoft Dynamics GP Configuration Wizard. To identify the tenant associated with the security Administration database, you should include the tenant ID in the database name. For example, the name of the security administration service database for the tenant named Tenant01 would be Tenant01_DynGPSecurity.
SecServiceSQLServer	Specify the name of the SQL Server where want to add the database you specified in the previous property. The database can be on the same SQL Server you use for the Microsoft Dynamics GP or you can specify another SQL Server.

8. Click Save.

The values for the application properties are saved.

What to do next

Run the Web Services for Microsoft Dynamics GP Configuration Wizard, which can be found on the server where you initially installed web services. You need to run the wizard for each tenant that you configured to use web services. When you run the wizard, you will be asked to specify the tenant.

You can add the tenant users that you want to access web services for the tenant.

To enable a tenant user to access web services, you will also need to use the Dynamics Security Console to add the user, specify a company, and assign a security role.

Chapter 14: Configuring GP Services

This portion of the documentation describes how you use the Tenant Manager to make the Dynamics GP Service Based Architecture available for use with tenants. The documentation also describes how you provide information that is used to configure the web client for a specified tenant.

The following items are discussed:

- Before you start
- To add GP Services to the list of applications
- To configure the GP Services application for a tenant
- What to do next

Before you start

To add and configure the Dynamics GP Service Based Architecture for a tenant, you have to first complete the

following tasks:

- Install Tenant Services
- Install Microsoft Dynamics GP for the tenant
- Install the Web Management Console and the Tenant Manager snap-in

In addition, you should have already added the tenant. To add a tenant, you use the Tenant Manager snap-in.

To add the Dynamics GP Service Based Architecture to the tenant, you use the Tenant Manager snap-in to supply important configuration information. The following table shows the information you will need to gather:

FILE	DESCRIPTION
Dynamics.set	The Dynamics set file from the Microsoft Dynamics GP instance for the tenant. You need to specify the file and its location. For example: c:\Program Files (x86)\Microsoft Dynamics\GP2015\Dynamics.set
Dex.ini	The Dex initialization file from the Microsoft Dynamics GP instance for the tenant. You need to specify the file and its location. For example: c:\Program Files (x86)\Microsoft Dynamics\GP2015\Data\Dex.ini
SQLUserName	The name for the SQL login that was specified to be used for the web client when the web client runtime was installed for the Microsoft Dynamics GP instance.
SQLPassword	The password for the SQL login being used for the web client for the Microsoft Dynamics GP instance.
GPVersion	The major version from the Microsoft Dynamics GP instance for the tenant. The value for Microsoft Dynamics GP instances is 14.
GPInstanceName	The instance name from the Microsoft Dynamics GP instance for the tenant. The value will be DEFAULT if the Microsoft Dynamics GP instance was not a named instance.

To add GP Services to the list of applications

Before you can begin using the service based architecture with tenants, you have to add GP Services to the list of multitenant applications in the Tenant Manager snapin. If you previously added the default applications (GP Services, Microsoft Dynamics GP Web Client and Web Services for Microsoft Dynamics GP) to the list of applications, you do not need to repeat the steps in this section.

The following steps describe how to add the Microsoft Dynamics GP Service Based Architecture to the list of applications in the Tenant Manager snap-in:

1. Verify your login is a Service Admin Verify that your login has the Service Admin role for Tenant Services. You must be a Service Admin to add web client to the list of applications. The Service Admins are identified in the Users section of the Tenant Manager snap-in. In addition, your login must have authorization to use the Microsoft Dynamics GP Web Management Console. Your login must be a member of the security group you specified during the install of the Tenant Manager.
2. Start the Web Management Console. In a browser, open the Microsoft Dynamics GP Web Management Console. To start the Web Management Console, you use a URL similar to the following:
<https://ServerName:PortNumber/WebManagementConsole/> Replace ServerName with the name of the server that is running the Web Management Console. If the web site isn't using port 80, supply the PortNumber as well.

3. Click Tenant Manager. To open the snap-in in the Web Management Console, click Tenant Manager in the navigation pane.
4. Click Applications in the navigation pane. The Tenant Manager shows the multitenant applications that are available.
5. Click Add. Click the Add button in the ribbon of the Web Management Console. The Add Application window opens.
6. Click Add default applications. This adds GP Services, Microsoft Dynamics GP Web Client and Web Services for Microsoft Dynamics GP to the list of applications.
7. Click Save. To verify the changes, click Applications in the Tenant Manager navigation pane. You should see GP Services, Microsoft Dynamics GP Web Client and Web Services for Microsoft Dynamics GP in the list.

To configure the GP Services application for a tenant

You use the Tenant Manager snap-in to configure the service based architecture application for a tenant. If you do not provide the required configuration information, the service based architecture will not run. The following steps describe how to configure the service based architecture for a tenant:

1. Verify your login is a Service Admin Verify your are using a login that has the Service Admin role in tenant services. If you are not a Service Admin, you will not be able to access the Tenant Properties window. The Service Admins are identified in the Users section of the Tenant Manager snap-in. In addition, your login must have authorization to use the Microsoft Dynamics GP Web Management Console. Your login must be a member of the security group you specified during the install of the Tenant Manager.
2. Start the Web Management Console. In a browser, open the Dynamics GP Web Management Console. To start the Web Management Console, you use a URL similar to the following:
`https://ServerName:PortNumber/WebManagementConsole/` Replace ServerName with the name of the server that is running the Web Management Console. If the web site isn't using port 80, supply the PortNumber as well.
3. Click Tenant Manager. Click Tenant Manager at the bottom of the navigation pane. The snap-in opens in the Web Management Console.
4. Click Tenants in the navigation pane. The Tenant Manager shows the list of available tenants.
5. Click the tenant and then click Edit. To add web services to a tenant, you first click the tenant and then click Edit in the ribbon of the Web Management Console. The Tenant Properties window opens.
6. Select GP Services In the Application Settings section, click the checkbox in the Selection column for GP Services.
7. Specify the value for each gp services application property. When you click GP Services, the gp services application properties appears as a list. The following illustration shows the properties for Web Services for Microsoft Dynamics GP.

Tenant Properties

Name*

Description

Status

Application Settings

Selection	Names
<input checked="" type="checkbox"/>	GP Services
<input checked="" type="checkbox"/>	Microsoft Dynamics GP Web Client
<input checked="" type="checkbox"/>	Web Services for Microsoft Dynamics GP

Name	Value
DynamicssetLocation	C:\Program Files (x86)\Microsoft Dynamics\GP2015\Dynamics.set
DexiniLocation	C:\Program Files (x86)\Microsoft Dynamics\GP2015\data\dex.ini
SQLUserName	GPWebClient
SQLPassword	••••••••
GPVersion	14
GPInstanceName	DEFAULT
RequestLoggingEnabled	false
OperationTimeOut	

You have to specify the value for each application property. The following table shows the properties and describes how to specify a value for each property.

PROPERTY NAME	DESCRIPTION
Dynamics.set	The Dynamics set file from the Microsoft Dynamics GP instance for the tenant. You need to specify the file and its location. For example: c:\Program Files (x86)\Microsoft Dynamics\GP2015\Dynamics.set
Dex.ini	The Dex initialization file from the Microsoft Dynamics GP instance for the tenant. You need to specify the file and its location. For example: c:\Program Files (x86)\Microsoft Dynamics\GP2015\Data\Dex.ini
SQLUserName	The name for the SQL login that was specified to be used for the web client when the web client runtime was installed for the Microsoft Dynamics GP instance.
SQLPassword	The password for the SQL login being used for the web client for the Microsoft Dynamics GP instance.
GPVersion	The major version from the Microsoft Dynamics GP instance for the tenant. The value for Microsoft Dynamics GP instances is 14.
GPInstanceName	The instance name from the Microsoft Dynamics GP instance for the tenant. The value will be DEFAULT if the Microsoft Dynamics GP instance was not a named instance.

PROPERTY NAME	DESCRIPTION
RequestLoggingEnabled	Specify whether to enable logging for the application. To enable logging, set the property value to true. The default value is: false
OperationTimeOut	The amount of time a service request can run before it is terminated. The default value of 0.00:00:0 means the request is never terminated. You can change the value to specify the length of time before the session terminates. The format is days.hours.minutes:seconds. For example, the following sets the value to 20 minutes: 0.20:00:00

8. Click Save.

To save the application configuration information, click the Save button.

What to do next

You can add the users that you want to access the Service Based Architecture as tenant users for the tenant.

Appendix A: Scale Groups

The scale groups feature introduced in Microsoft Dynamics GP 2013 R2 works in conjunction with tenant services to provide enhanced flexibility when deploying several installations of the Microsoft Dynamics GP web client. The primary users of this feature will be organizations that host multiple installations of Microsoft Dynamics GP.

Information about scale groups is divided into the following sections:

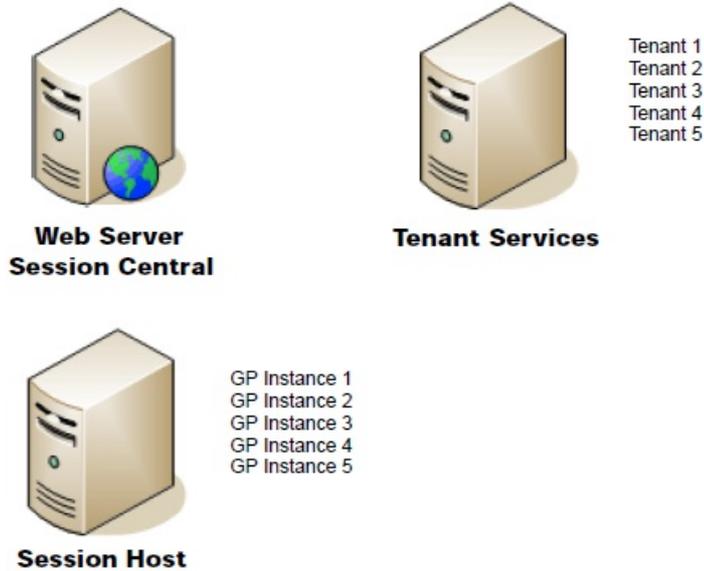
- What scale groups provide
- Default scale group
- Configuring scale groups

What scale groups provide

To better understand the functionality that scale groups provide, it's helpful to review how multiple installations of Microsoft Dynamics GP with the web client were hosted before scale groups were available.

Without Scale Groups

Microsoft Dynamics GP allows up to 51 instances of the application to be installed on a single machine. In a typical hosting configuration, one Microsoft Dynamics GP instance is assigned to one tenant. The following illustration shows how an installation with five tenants would be configured.



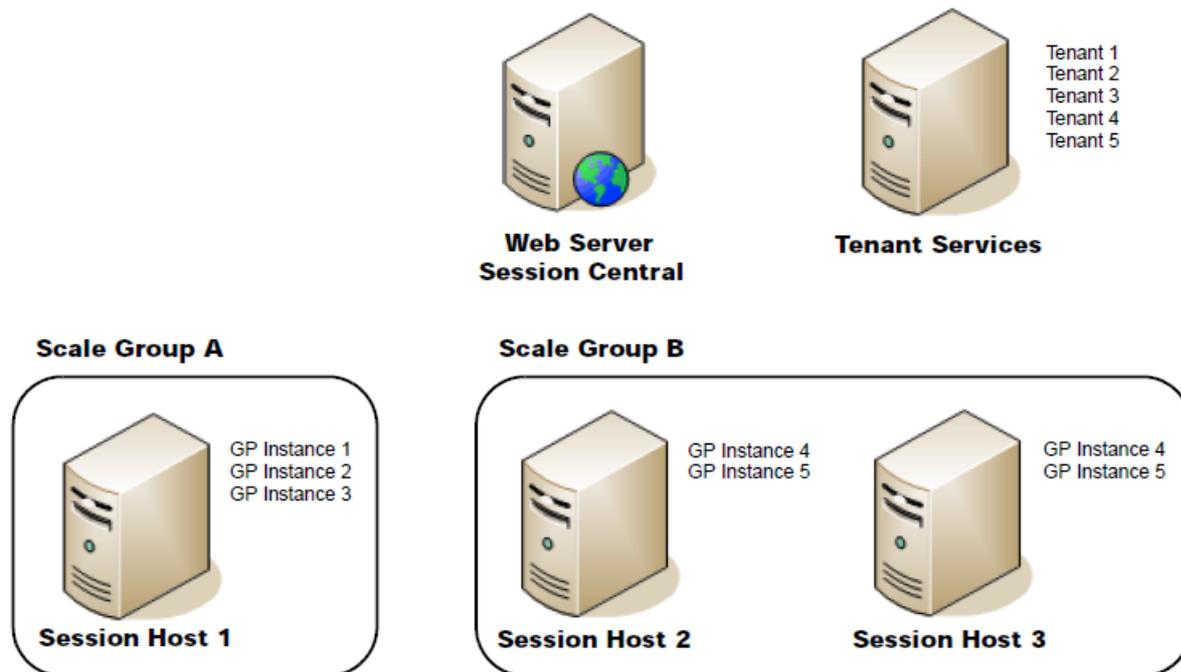
The Session Host server has the five instances of Microsoft Dynamics GP installed. The Tenant Services server has a tenant defined for each GP instance. When a user logs in to the web client, Session Central will direct the user to the appropriate GP instance, based on the tenant configuration specified in Tenant Services.

This configuration works well, but two issues are commonly encountered. The first issue occurs when the limit of 51 Microsoft Dynamics GP instances is reached on the Session Host server. The only solution is to install another deployment group consisting of a Web Server, a Session Central server, and a Session Host server.

The second issue occurs when a specific tenant has the requirement to support more concurrent web client sessions. You can address this need by adding additional Session Host servers. However, recall that each session host machine in the installation must have the same set of GP instances. That means that you must install and manage all of the GP instances on the additional session host machine, even though only one tenant requires the additional capacity.

With Scale Groups

Scale groups provide a way to logically group session host machines. Each tenant is assigned to a specific scale group. The session hosts in that scale group have the GP instances needed to support those tenants. The following illustration shows one way the previous hosting installation could be configured with scale groups.



In this example, two scale groups (Scale Group A and Scale Group B) are defined. Tenants 1, 2, and 3 are assigned to Scale Group A. Tenants 4 and 5 are assigned to Scale Group B. Scale Group A has one session host machine, while Scale Group B has two session host machines.

Let's examine how scale groups help to solve the two common issues encountered in the non-scale groups configuration. First, the 51 instance limit is no longer an issue. If a session host machine has reached the limit, you can simply create a new scale group and add another session host machine to the new scale group. The new tenant can be assigned to the new scale group. There is no need for an additional web server and session central server.

Scale groups also help solve the second issue because they provide flexibility when you need to scale out a tenant. In this example configuration, let's assume that Tenant 4 needed additional processing capability. An additional session host machine was added to Scale Group B. Because only tenants 4 and 5 are assigned to Scale Group B, the additional session host machine had to have only GP Instances 4 and 5 installed on it. Session Host 1 and the tenants assigned to it were unaffected by the change to scale out Tenant 4.

Default scale group

When the Session Central Service and Tenant Service are installed, there is always one default scale group that is available. This scale group is named "Default Group" and has the Id value 0.

When a session host machine is added to a Microsoft Dynamics GP web client installation, you can specify which scale group it is assigned to. If the session host machine is not assigned to a specific scale group, it will be considered part of the Default Group scale group. In a similar way, a tenant that you create is automatically assigned to the Default Group scale group.

By automatically considering new session host machines and tenants are part of the Default Group scale group, the default functionality of the system is the same as it was before scale groups were available.

Configuring scale groups

Dynamics GP 2013 PowerShell module. You can install this PowerShell module from the Microsoft Dynamics GP 2013 installation media. For details about installing the PowerShell module and using the cmdlets, refer to the

Connecting to the Session Central Service

After starting the Microsoft Dynamics GP 2013 PowerShell command prompt, the first command you must enter connects to the Session Central Service. All of the other cmdlets require this connection to work properly. The following example shows this cmdlet.

```
Set-GPSessionCentralAddress -Address http://gpweb.contoso.com:48650/SessionCentralService
```

Creating scale groups

To create scale groups, use the New-GPScaleGroup cmdlet. The following example shows how to create a scale group.

```
New-GPScaleGroup -ScaleGroupName "SG_A" -Description "Scale Group A"
```

Assigning session hosts to scale groups

After scale groups have been created, you can assign session host machines to the scale groups. Use the Update-GPSessionHost cmdlet to set the properties of the session host machine, including the scale group the session host is assigned to. The following example assigns the SessionHost1 session host to the SG_A scale group, which has the Id 1.

```
Update-GPSessionHost -SessionHostId "SessionHost1" -ScaleGroupId 1
```

Assigning tenants to scale groups

Use the Add-ScaleGroupTenant cmdlet to assign a tenant to a scale group. The following example adds Tenant01 to the SG_A scale group.

```
Add-GPScaleGroupTenant -ScaleGroupName "SG_A" -TenantName "Tenant01"
```

Retrieving configuration information

Several PowerShell cmdlets are available to retrieve information about the scale groups, tenants, and session hosts. For example, the following command lists all of the tenants that are assigned to the SG_A scale group.

```
Get-GPScaleGroupTenant -ScaleGroupName "SG_A"
```

Setting configuration options

Additional PowerShell cmdlets are available to set configuration options for scale groups, tenants, and session hosts. For example, the following command makes the scale group SG_A inactive.

```
Get-GPScaleGroup -ScaleGroupName "SG_A" | Update-GPScaleGroup -SetInactive
```

Removing assignments

Several PowerShell cmdlets are available to remove assignments that have been made. For example, the following command removes the scale group assignment for Tenant 01. Tenant 01 will then be assigned to the Default Group scale group.

```
Remove-GPScaleGroupTenant -TenantName "Tenant01"
```

Introduction

10/18/2018 • 2 minutes to read

Use this section to upgrade your Dynamics GP system. Review the introductory information about the resources available to you, then use the [Dynamics GP upgrade checklist](#) as your guide to the parts that apply to you.

To review new Dynamics GP features, refer to the [What's New section](#).

What's in this guide?

This upgrade guide provides guidelines for upgrading your Dynamics GP system to a newer version. It lists the latest system requirements, contains a step-by-step look at the upgrade process, and provides tips for troubleshooting your upgrade. The manual is divided into the following parts:

- Part 1, Preparation, contains information about preparing to upgrade your system to Dynamics GP.
- Part 2, Dynamics GP upgrade, describes the data conversion process for Dynamics GP and contains additional procedures to upgrade specific modules and integrating products.

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

CONVENTION	DESCRIPTION
<i>Creating a batch</i>	Italicized type indicates the name of a section or procedure.
File >> Print or File > Print	The (>>) symbol indicates a sequence of actions, such as selecting items from a menu or toolbar, or pressing buttons in a window. This example directs you to go to the File menu and choose Print.
tab### or enter###	All capital letters indicate a key or a key sequence.

Additional resources

A number of resources are available to help in addition to this document.

Knowledge Base

<https://mbs.microsoft.com/customersource/northamerica/search/Pages/resultskb.aspx>

Provides you with instant access to the same database our support engineers use. You can find answers to common questions, along with technical tips and performance recommendations.

eSupport

<https://mbs.microsoft.com/support/newstart.aspx>

For support requests that can be handled with e-mail. On average, the response time is nearly twice as fast as telephone support. That's a big benefit during the critical year-end season.

Community

<https://community.dynamics.com/gp>

Start a year-end discussion with other members of the Microsoft customer community. This database provides you with the opportunity to exchange information with other customers, which is perfect for providing tips and answers to year-end questions.

Dynamics GP support team

We have specialized support teams focused on providing service and support to our customers. If you have questions, dial toll free 888-GPS-SUPP (888-477-7877). Enter your 10-digit authorization code.

Send us your suggestions

We welcome comments regarding the usefulness of the Dynamics GP. If you have specific suggestions or encounter problems, let us know on the [Connect for Microsoft Dynamics](#) site. By offering any suggestions to Microsoft, you give Microsoft full permission to use them freely.

Upgrade checklist

10/31/2018 • 2 minutes to read

You can upgrade to Dynamics GP 2018 and later from specific versions of Dynamics GP. For the supported upgrade paths, see [Upgrading to Microsoft Dynamics GP 2018](#) (requires access to CustomerSource).

When to upgrade

Before upgrading, we recommend that you create a timetable of the entire upgrade process. This timetable can include the scheduling of a test upgrade, live upgrade, upgrade training, and implementation. Be sure that the scheduled time to upgrade takes place during a time that works best for all Dynamics GP users and for your information technology (IT) staff. You may not want to upgrade before processing payroll checks or closing a year.

Dynamics GP upgrade checklist

Use this checklist as your guide to upgrading to Dynamics GP.

STEP	FOR MORE INFORMATION
1. Verify the security of your system.	Download the Security Planning PDF file.
2. Refer to these Web sites for new or updated information relating to the upgrade.	System Requirements
3. Ensure that you have the latest version of the Upgrade Guide.	https://mbs.microsoft.com/customersource/northamerica/GP/learning/documentation/system-requirements/dynamicsgpresource#GP2018
4. View the Readme file and make a note of the items that pertain to you.	Media\GreatPlains\Documentation\GPReadme.chm
5. Obtain your new registration keys for Dynamics GP.	Contact your Dynamics GP partner before going to CustomerSource/My Account for registration keys for Dynamics GP. https://mbs.microsoft.com/customersource
6. Verify system requirements and expand your SQL database size, if necessary.	https://go.microsoft.com/fwlink/?LinkId=521785
7. Identify all integrating products and customizations and ensure that they are compatible with Dynamics GP.	Contact the provider of the integrating products and customizations.
8. Complete pre-upgrade procedures in the release of Dynamics GP that you are currently using and review known issues.	https://mbs.microsoft.com/customersource/northamerica/GP/learning/documentat20ion/system-requirements/dynamicsgpresource#GP2018
9. Install Dynamics GP on the server and upgrade your accounting data.	Installing Dynamics GP (first computer)
10. Complete post-upgrade procedures for Dynamics GP modules.	Module upgrades from Dynamics GP 2013

STEP	FOR MORE INFORMATION
11. Upgrade additional components and verify customized reports.	Installing an additional components
12. Install Dynamics GP on the clients.	Installing Dynamics GP (additional computers) Creating an installation package
13. Identify the sources of any errors.	Knowledge Base on CustomerSource

See also

[Microsoft Dynamics GP 2018 R2 and Year-End Upgrade Blog Series Schedule](#)

System Requirements

10/18/2018 • 9 minutes to read

This chapter contains a list of prerequisites and system requirement changes for Dynamics GP, as well as disk space requirements for SQL Server computers.

NOTE

Recommended system requirements depend on the number of users and transactions. If there will be many users performing concurrent tasks, such as depreciation, posting, or heavy reporting, enhancing your hardware and system software will improve performance.

Releases supported by the upgrade

You can upgrade to Dynamics GP from selected previous releases. To review whether or not you can upgrade your release, see [CustomerSource](#).

If you are upgrading to Dynamics GP, you must install the latest update or hotfix for Dynamics GP before starting Dynamics GP Utilities. See [CustomerSource](#) for the latest update information.

System requirement changes

The following changes are new with Dynamics GP. For a complete list of all system requirements, see <https://go.microsoft.com/fwlink/?LinkId=521785>. You may want to consider upgrading your hardware for improved performance.

Operating system requirement changes

Review the following table for supported client operating system changes.

OPERATING SYSTEMS SUPPORTED	EDITIONS
Windows 7	Pro
	Ultimate
	Enterprise
Windows 8 and 8.1	Pro
	Ultimate
	Enterprise
Windows 10	Pro
	Enterprise
Windows Server 2008 R2	Enterprise

OPERATING SYSTEMS SUPPORTED	EDITIONS
	Standard
Windows Server 2012, Windows Server 2012 R2, Windows Server 2016	Datacenter
Operating systems not supported	Editions
Windows XP	All editions
Windows Vista	All editions
Windows Server 2003	All editions

Database configuration changes

Microsoft SQL Server 2012, 2014, and 2016 Express, Standard, and Enterprise Editions are supported.

Previous versions of SQL Server are no longer supported.

Internet Explorer change

Internet Explorer 11 and Edge are the only supported. IE browsers.

Microsoft Office change

Microsoft Office 2013 and Microsoft Office 2016 are supported. All previous versions are no longer supported.

Home page prerequisites

To display metrics and reports in the Business Analyzer area on your home page, install and set up Microsoft SQL Server Reporting Services to use with Dynamics GP. The reports and metrics you want to display must be created in SQL Server Reporting Services. For more information about installing and setting up Reporting Services for use with Dynamics GP, go to the [Dynamics GP documentation resource Web site](#) for the most current documentation.

The following versions of SQL Server Reporting Services are supported.

- SQL Server 2012 Reporting Services
- SQL Server 2014 Reporting Services
- SQL Server 2016 Reporting Services

Word templates prerequisites

The following components must be installed before you can use Word Templates for Dynamics GP.

- Microsoft Word 2013 or later to make layout changes such changing the font size
- Open XML SDK 2.0 for Microsoft Office (installed as a Dynamics GP prerequisite)

If a component isn't installed, you can download the component from microsoft.com.

Additional components are required to modify templates.

- Dynamics GP Add-in for Microsoft Word
- Visual Studio Tools for Office Runtime 2.0 or later (Visual Studio Tools for Office Runtime 3.0 is installed with Dynamics GP Add-in for Microsoft Word.)

You can install Dynamics GP Add-in for Microsoft Word from the Dynamics GP installation media. Double-click the Setup.exe file and then click Dynamics GP Add-in for Microsoft Word.

Email requirements

Review the following requirements.

- You can send documents by email if you're using a MAPI-compliant e-mail service or Exchange 2007 Service Pack 1 or greater with Exchange Web Services.
- If you are using Exchange 2007 Service Pack 1 or greater with Exchange Web Services, the Autodiscover service must be enabled to connect to the Exchange server.
- The email functionality in Dynamics GP supports the following document types. Depending on the document type and the email service, Microsoft Word 2010 or later and Word templates for Dynamics GP are required.

FILE FORMAT	WORD 2013	WORD TEMPLATES	WEB CLIENT
XPS	Required for MAPI	Enabled	Not available
PDF	Required for MAPI	Enabled	Not available
DOCX	Not required	Enabled	Available*
HTML	Not required	Not required	Available*
*Email for Dynamics GP Web Client will only be available if Exchange is your server type in the System Preferences window.			

- Before you can send documents as DOCX, PDF, or XPS attachments, the Word template for the document must be enabled in the Template Configuration Manager window.
- The email functionality is supported on the 32-bit edition of Microsoft Office2013.
- The email functionality is supported on the 64-bit edition of Microsoft Office2013 if you are using Exchange 2007 Service Pack 1 or greater with Exchange Web Services and Exchange is your server type in the System Preferences window.
- Depending on the file format you choose to send your documents in e-mail, your customers and vendors must be using the following components to view their documents.

FILE FORMAT	COMPONENT
XPS	Microsoft XPS Viewer
PDF	Adobe Reader
DOCS	Microsoft Word Viewer
HTML*	Internet Explorer 11 and Edge

FILE FORMAT	COMPONENT
*If you are using Dynamics GP Web Client only for your customers and vendors must be using HTML to view their documents.	

SQL Server Reporting Services requirements

Before you deploy Dynamics GP Reporting Services reports, you must install and configure SQL Server Reporting Services, and then set up security for SQL Server Reporting Services reports. Review the following table for the version of SQL Server Reporting Services and the report type available for that version.

SQL SERVER REPORTING SERVICES VERSION	REPORT TYPE AVAILABLE
Reporting Services 2012 Standard or Enterprise Reporting Services 2014 Standard or Enterprise Reporting Services 2016 Standard or Enterprise	SQL Server Reporting Services reports

Charts and key performance indicators (KPIs) Map charts |

Modify the Report Server web.config file

To deploy the SQL Server Reporting Services reports, you must modify the Report Server web.config file for the timeout execution and the maximum request length. If you don't update the Report Server web.config file for the timeout execution, you might receive an error that states that the operation has timed out. If you don't update the Report Server web.config file for the maximum request length, you will receive an error that the deployment has exceeded the maximum request length allowed by the target server.

NOTE

You must be an administrator to modify the Report Server web config file.

To modify the Report Server Web config file:

1. Create a backup copy of the web.config file located in the ReportServer folder. (The ReportServer folder is located in C:\Program Files\Microsoft SQL Server\MSSQLSERVER\Reporting Services\ReportServer where Reporting Services is installed.)
2. Open the Report Server web.config file using a text editor, such as Notepad.
3. Search for `<httpRuntime executionTimeout="9000" />`.
4. In that line, change `executionTimeout="9000"` to `executionTimeout="19000"` and add the value `maxRequestLength="20960"`.

```
<httpRuntime executionTimeout="19000" maxRequestLength="20960"/>
```

1. Save and close the Report Server web.config file.

Dynamics GP CRM requirements

You must be using SQL Server 2012 Reporting Services or later and Microsoft Dynamics CRM 2011 or later to deploy SQL Server Reporting Services reports and metrics that includes CRM data. Microsoft Dynamics CRM supports only the native mode of deployment of SQL Server Reporting Services.

If Microsoft Dynamics CRM and Dynamics GP are using different report servers, you must install the Microsoft

Dynamics CRM Reporting Extensions on the Dynamics GP report server to render reports.

About remote access

You can use Windows Server 2012 Remote Desktop Services, Windows Server 2012 R2 Remote Desktop Services, and Windows Server 2016 Remote Desktop Services. Citrix Xenapps can also be used with most database configurations to provide remote access to Dynamics GP in a Wide Area Network (WAN) environment.

A Windows Server 2008 Terminal Server is supported only as a client. You also can use Remote Desktop Services.

For more information about system requirements see <https://go.microsoft.com/fwlink/?LinkId=521785>. You also should refer to the documentation provided by Citrix for more information.

Determine disk space for the upgrade process

For the upgrade process, be sure that you have enough disk space before you begin. To determine the disk space required for the upgrade, you need to find the size of the largest table for all Dynamics GP databases. To determine disk space, use Microsoft SQL Server Management Studio for Microsoft SQL Server.

NOTE

You can download an upgrade preparation script that will help you determine the disk space requirements from https://mbs.microsoft.com/customersource/northamerica/GP/support/hot-topics/HOT_TOPIC_MDGP2018Upgrade.

To determine disk space for the upgrade process using Microsoft SQL Server Management Studio:

1. Download and open the Table_Size.txt script.
1. Copy all of the contents of the script.
2. In Microsoft SQL Server Management Studio, select a Dynamics GP database, click New Query and paste the contents. Then, execute the query.
3. Run the script for each Dynamics GP database.
4. The largest table will be the first record in the result set. You will need to convert the table size from kilobytes to megabytes by using the following calculation. This will determine the amount of space that will be allocated to the data file (MDF) and the transaction log file (LDF) for each database.

$(\text{table size in KB}/1024) = \text{table size in MB}$

The table size in megabytes of the largest table from all the databases is the amount of disk space you will need to allocate to the data file of the TEMPDB.

In the following example, the largest table is the SOP30300 in the company database. The TEMPDB will need 176 MB allocated for the data file.

DATABASE	TOTAL SIZE KB	ROWS	NAME	MB
DYNAMICS	33913.171873	180872	98075	33
TEST	180608.280270	98075	SOP30300	176

1. Calculate the total amount of hard disk space that is needed by adding the space needed for the data file and transaction log file of all databases.

For the company databases and the DYNAMICS database, both the data file and transaction log file will be

increased to the size of the largest table. For the TEMPDB, only the data file will be increased to the size of the largest table out of all databases.

In following example, TEST, DYNAMICS and TEMPDB are the databases and both the data file (MDF) and transaction log (LDF) file are located on the same hard disk.

FILE	MF
TEST data file	176
TEST log file	176
DYNAMICS data file	33
DYNAMICS log file	33
TEMPDB data file	176
Total hard disk space needed	594

If the data files (MDF) are located on a different hard disk than the transaction log (LDF) files, the total space needed would be calculated for each hard disk. For example, assume that the data files are on the E drive and the transaction log files are on the D drive. The following hard disk space would be needed for each drive.

FILE	DRIVE E: MB	FILE	DRIVE D: MB
TEST data file	176	TEST log file	176
DYNAMICS data file	33	DYNAMICS log file	33
TEMPDB data file	176		
Total hard disk space needed	385		209

1. Verify that the space is available for each drive by using File Explorer. In Windows Explorer, right-click each drive and select Properties to view free space available. By using the information in the previous table, drive E would need at least 385 MB available and drive D would need at least 209 MB available.
2. Use Microsoft SQL Server Management Studio to manually increase the space allocated for the data file and the transaction log file for the DYNAMICS database and each company database.
 - Right-click each database in Microsoft SQL Server Management Studio and select Properties.
 - In the properties window for each database, choose Files and add the additional space needed for the size of the largest table for that database to the Initial Size column. When adding additional space, you are increasing the space for the data file (MDF) and the transaction log file (LDF) as well.
 - Repeat for the remaining Dynamics GP databases.
 - Right-click the TEMPDB database and select Properties. Choose Files and add the additional space needed for the size of the largest table of all Dynamics GP databases to the Space Allocated (MB) column. When adding additional space, you are increasing the space for the data file (MDF) and the transaction log file (LDF) as well.

NOTE

If the database size is not manual configured, the time needed to upgrade the databases will increase because the database data, transaction log and TEMPDB files will all have to increase.

Data preparation

10/18/2018 • 3 minutes to read

We recommend that you complete the steps in this section to prepare your data before you upgrade your system. After you've completed these steps, see [System preparation](#), for instructions to prepare your system before upgrading to the latest version of Dynamics GP. Be sure to review the known issues before upgrade.

Payroll

If you're upgrading to Dynamics GP or Dynamics GP 2018 R2, you need to determine whether the payroll tax update tables are current. To do so, check the Last Tax Update field in the Payroll Tax Setup window (Tools >> Setup >> System >> Payroll Tax). If your tax tables are not current, update them after you upgrade to Dynamics GP. Review the latest tax update documentation for the date of the last tax update.

Tax tables are not included on the Dynamics GP media; to update tax tables, you must download them from CustomerSource [US Payroll](#); [Canadian Payroll](#). Choose Tax and Regulatory Updates. Follow instructions for installing the tax update to ensure that clients and servers are updated properly.

1099 amounts in Payables Management

After you upgrade, the 1099 amounts might be transferred to a different month if you have transactions that are posted in one month and applied in another month after you upgrade. You might have to make adjustments to your 1099 amounts so that the 1099 amounts aren't overstated or understated.

For example, you enter and post the following transaction in December.

- An invoice for \$100.00 that has a 1099 amount of \$100.00.
- A credit memo for \$75.00 that has a 1099 amount of \$75.00.
- A payment for \$25.00.

You apply all three documents together in January. The 1099 amount is \$25.00 for December.

You upgrade to Dynamics GP in February and reconcile your data. The 1099 amount of \$25.00 is moved from December because the later of the apply date or posting date is used to update the 1099 amount.

Direct Debits and Refunds

You must process or delete existing Direct Debits and Refunds batches before upgrading from an earlier release of Direct Debits and Refunds (DDR).

Field Service Series

You must ship and post all inventory transfers that have a partially shipped, shipped, or partially received status before you upgrade.

Workflow for SharePoint

Workflow for SharePoint is no longer available for GP. There is no upgrade from Workflow for SharePoint to the new Workflow feature in Dynamics GP. Workflow types that were created in SharePoint-based workflow feature do not upgrade. Any workflows that you created in the SharePoint-based workflow feature will need to be re-

created in the new workflow feature after the upgrade is complete. Note that some workflow types that were available in the SharePoint workflow feature are not yet available in the new workflow feature.

Posting open transactions

Before you upgrade, you should post all single-use batches. We recommend that you post all transactions that can affect your purchase receipts and sales transactions. For some integrating products, the upgrade process removes and re-creates work tables, which will cause open transactions to become corrupted. In addition, if errors are encountered during the upgrade, troubleshooting is easier if there are no unposted transactions.

If you are using Analytical Accounting, be sure to post all saved batches that you created using the Collection and Payment Methods – Withholds, Perceptions, Tax Administration Purchasing, or Tax Administration Sales modules. You can then use the Analytical Adjustment Entry window to enter analysis information for the posted transactions.

Reconciling

You may want to reconcile your accounting records before upgrading to Dynamics GP to verify that your accounting records are accurate. Refer to the documentation of the modules you are using for specific information.

Before reconciling, back up your company's accounting data.

Backups

You should make at least one complete backup of all your databases before upgrading. It's a good idea to make a backup before completing table maintenance procedures, in case you encounter any problems in that process. You also should make a backup of your modified forms and reports, eConnect pre and post procedures and your existing Integration Manager database.

If you are upgrading a company that has previously deployed SQL Server Reporting Services reports and Microsoft Excel reports, the deployed reports are automatically upgraded. If you have modified reports, those reports will be overwritten during the upgrade. Be sure to make a backup of your reports.

Reports you should print

Before you upgrade, it's a good idea to print the following reports to a printer or to a file. You can use them to verify that your system was upgraded properly or to re-create modifications.

MODULE	REPORTS
System	Process Server Setup List
General Ledger	Detailed Trial Balance

System Preparation

10/18/2018 • 11 minutes to read

We recommend that you complete the steps in this chapter before you upgrade your system. Be sure to follow the instructions on how to prepare your data in [Data preparation](#) before preparing your system. After you've completed the steps in this chapter, see [Installing Dynamics GP on the first computer](#) for instructions to upgrade Dynamics GP.

Updates

We recommend that you check for and install the most current Dynamics GP update for the release you are upgrading to. For the latest update information, see [CustomerSource](#).

Be sure that you have installed the most current updates for your Dynamics GP system before using Dynamics GP Utilities to upgrade your databases. If you don't install the update before using Dynamics GP Utilities, the fixes will not take effect. After upgrading your database, install the update on your client computers.

You can't log in to Dynamics GP on a client computer if a Dynamics GP feature or additional component installed on the client has different version information than the server. For more information about upgrading Dynamics GP features and additional components, see [Additional features and components upgrade]additional-features-and-components-upgrade.md).

Reviewing the Readme file

To view additional information, use the Readme file on the Dynamics GP media. Be sure to review the Readme file (GPReadme.chm) before installing Dynamics GP.

Installing components on all client computers

We recommend that you install each registered Dynamics GP feature and additional components on all client computers. If you're using Project Accounting, you should install Project Accounting on every computer that you have installed Dynamics GP on. You must install Bank Management on all clients for Direct Debits and Refunds to work properly.

Upgrading Integration Manager

Before you install Integration Manager 2018, we recommend that you make a backup copy your existing Integration Manager database (usually called IM.mdb) and then remove any previous versions of Integration Manager. You can remove earlier versions of Integration Manager, but it's not required.

To remove Integration Manager, use your system's Add/Remove Programs utility, and select Integration Manager.

After you install Integration Manager 2018, you must convert the database you backed up. After you convert your SQL Optimized data to Integration Manager

2018 for the eConnect adapter, review your destination settings and verify that they are correct. For more information about installing Integration Manager and converting a database, refer to the Integration Manager User 's Guide.

Upgrading in a test environment

It is recommended that you use a test environment to practice the process of upgrading Dynamics GP, additional

components, modified forms and reports, and customizations. By using a test environment, you can resolve any potential issues that may occur before you upgrade your current release of Dynamics GP. You also can estimate the time it will take to upgrade your current release to Dynamics GP. A test environment also allows users to test their day-to-day tasks to ensure that processes are working properly, and to learn the new features and modules in Dynamics GP.

A test environment can be a single server or a server with one or more client computers where an upgrade takes place. The client computers can be used for testing and training purposes. There isn't a required number of computers that need to be involved in a test environment.

Backups

You should make at least one complete backup of all your databases before upgrading. You also should make a backup of all your modified dictionaries as well. It's a good idea to make a backup before completing table maintenance procedures, in case you encounter any problems in that process. You also should make a backup of eConnect pre and post procedures and your existing Integration Manager database.

If you are upgrading a company that has previously deployed SQL Server Reporting Services reports and Microsoft Excel reports, the deployed reports are automatically upgraded. If you have modified reports, those reports will be overwritten during the upgrade. Be sure to make a backup of your reports.

Database maintenance

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

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

NOTE

It's a good idea to make a second backup after performing table maintenance, but before upgrading to a new version. If you have this backup and an expected problem occurs while upgrading, you won't have to repeat the table maintenance step.

Known issues

Review the following known issues before upgrading to Dynamics GP. To be sure that you review the most current known issues, download the latest version of this manual from [CustomerSource](#).

Records that aren't valid in purchase order tables

If records that aren't valid exist in the Purchase Order Line table (POP10110), or in the Purchase Order Line History table (POP30110), or in both tables, the upgrade can fail.

You can download an upgrade preparation script that will help you determine the disk space requirements from [CustomerSource](#).

To verify purchase order tables:

1. Download and open the Invalid_Records_POTables.txt script.
2. Copy all of the contents of the script and paste the contents of the script into Microsoft SQL Server Management Studio.
3. Run the script against all company databases.

4. If results aren't returned after running the script, invalid records don't exist. You can upgrade to Dynamics GP.

If results are returned after running the script, invalid records exist and you can use Microsoft SQL Server Management Studio to remove these records. You also can check links in the Purchasing series before upgrading to Dynamics GP to remove invalid records.

Microsoft SQL Server 2012 database compatibility level

If you have upgraded to Microsoft SQL Server 2012 before upgrading to Dynamics GP, be sure to change your database compatibility level to SQL Server 2012 (110) for all your databases.

To change the database compatibility level:

1. Open the SQL Server Management Studio. Log in to the server.
2. In the Object Explorer, expand the databases.
3. Right-click on a database and click Properties to open the database properties window.
4. Select Options in the Select a Page pane.
5. In the Compatibility level field, select SQL Server 2012 (110) as the level.
6. Repeat steps 4 through 6 until all the databases have been changed.

Microsoft SQL Server 2014 database compatibility level

If you have upgraded to Microsoft SQL Server 2014 before upgrading to Dynamics GP, be sure to change your database compatibility level to SQL Server 2014 (120) for all your databases.

To change the database compatibility level:

1. Open the SQL Server Management Studio. Log in to the server.
2. In the Object Explorer, expand the databases.
3. Right-click on a database and click Properties to open the database properties window.
4. Select Options in the Select a Page pane.
5. In the Compatibility level field, select SQL Server 2014 (120) as the level.
6. Repeat steps 4 through 6 until all the databases have been changed.

Microsoft SQL Server 2016 database compatibility level

If you have upgraded to Microsoft SQL Server 2016 before upgrading to Dynamics GP, be sure to change your database compatibility level to SQL Server 2016 (120) for all your databases.

To change the database compatibility level:

1. Open the SQL Server Management Studio. Log in to the server.
2. In the Object Explorer, expand the databases.
3. Right-click on a database and click Properties to open the database properties window.
4. Select Options in the Select a Page pane.
5. In the Compatibility level field, select SQL Server 2016 (120) as the level.
6. Repeat steps 4 through 6 until all the databases have been changed.

The Server drop-down list is blank in Welcome to Dynamics GP window

If the Server drop-down list is blank in the Welcome to Dynamics GP window after you upgrade, you must set up an Open Database Connectivity (ODBC) data source using SQL Native Client 10 or SQL Native Client 11 on your computer.

If you are using a 64-bit operating system, you must set up a 32-bit ODBC data source. For instructions on how to set up a data source for a 64-bit operating system, see Microsoft Knowledge Base article, [How to set up an ODBC Data Source on SQL Server for Dynamics GP](#).

To set up an ODBC data source using the SQL Native Client 10 driver:

1. Open the ODBC Data Source Administrator window.
2. Select the System DSN tab and choose Add.
3. In the Create New Data Source window, select SQL Native Client 10 from the list and choose Finish.
4. In the first Create a New Data Source to SQL Server window, enter the following information.

FIELD	VALUE
Name	Enter the name to use for the data source. This name will be stored in the Odbc.ini file.
Description	Enter a description of the data source.
Server	Enter the name you assigned to the SQL Server when you installed Microsoft SQL Server.

Choose Next.

5. In the second Create a New Data Source to SQL Server window, select With SQL Server authentication using a login ID and password entered by the user option as how to verify the login ID.
6. Enter sa as the login ID and enter a password. Choose Next.
7. In the third Create a New Data Source to SQL Server window, be sure that all the options are unmarked and choose Next.
8. In the fourth Create a New Data Source to SQL Server window, be sure that all the options are unmarked. Choose Finish.
9. In the ODBC Microsoft SQL Server Setup window, verify your settings and choose OK. You can also choose the Test Data Source button to test it before choosing OK.

To set up an ODBC data source using the SQL Native Client 11 driver:

1. Open the ODBC Data Source Administrator window.
2. Select the System DSN tab and choose Add.
3. In the Create New Data Source window, select SQL Native Client 11 from the list and choose Finish.
4. In the first Create a New Data Source to SQL Server window, enter the following information.

FIELD	VALUE
Name	Enter the name to use for the data source. This name will be stored in the Odbc.ini file.

FIELD	VALUE
Description	Enter a description of the data source.
Server	Enter the name you assigned to the SQL Server when you installed Microsoft SQL Server.

Choose Next.

- In the second Create a New Data Source to SQL Server window, select With SQL Server authentication using a login ID and password entered by the user option as how to verify the login ID.
- Enter sa as the login ID and enter a password. Choose Next.
- In the third Create a New Data Source to SQL Server window, be sure that all the options are unmarked and choose Next.
- In the fourth Create a New Data Source to SQL Server window, be sure that all the options are unmarked. Choose Finish.
- In the ODBC Microsoft SQL Server Setup window, verify your settings and choose OK. You can also choose the Test Data Source button to test it before choosing OK.

Tables contain incorrect account framework information

If the following tables contain incorrect account framework information, the upgrade will fail. You must run the following script in each company to correct the issue.

TABLE PHYSICAL NAME	TABLE DISPLAY NAME
GL10110	Account Current Summary Master
GL10111	Account Summary History
GL70500	General Ledger Report Options
GL70501	General Ledger Report Options Temporary
GL00200	Budget Master
GL00201	Budget Summary Master

NOTE

You can download an upgrade preparation script that will help you determine incorrect account framework information from https://mbs.microsoft.com/customersource/northamerica/GP/support/hot-topics/HOT_TOPIC_MDGP2018Upgrade.

To verify account framework information in tables:

- Download and open the Account_Framework_Validation.txt script.
- Copy all of the contents of the script and paste the contents of the script into Microsoft SQL Server Management Studio.
- Run the script against any database.
- If results aren't returned after running the script, the tables are in the correct format.

If results are returned after running the script, the tables do not match the account framework information. Contact the Dynamics GP Update Technical Support Team for instructions before upgrading. You can contact Dynamics GP Technical Support using one of the following methods.

- Create a [Support request](#).
- Contact by telephone at 1-888-477-7877.

Dynamics GP Utilities not responding

During the upgrade process, the Dynamics GP Utilities might appear as not responding and a Dynamics GP Utilities window might appear as white. Do not cancel Dynamics GP Utilities. Dynamics GP Utilities is still processing.

Budget date records in Analytical Accounting

The AA Budget Tree Balance (AAG00904) table contains the records for each budget in Analytical Accounting. If there are budget date records in the AAG00904 table that do not exist in the aaDateSetup (AAG00500) table, the upgrade will fail and the following error occurs.

```
AAG00904 135 [Microsoft][SQL Server Native Client 10.0][SQL Server]Cannot insert the value NULL into column'YEAR1', table 'XXX.dbo.AAG00904'; column does not allow nulls.UPDATE fails.
```

To validate budget date records in the Analytical Accounting:

1. Copy the following script and paste it into Microsoft SQL Server Management Studio.

```
select distinct(a.PERIODDT) from AAG00904 a, AAG00500 b where a.PERIODDT not in (select b.date1 from AAG00500 b)
```

2. Run the script against the company database.
3. If results aren't returned after running the script, you can upgrade to Dynamics GP.

If results show that there are budget date records that do not exist in the AAG00500 table, continue with the next step.

4. Run the following script to see if there is a fiscal or calendar year set up in the SY40101 (Period Header) table for the budget dates.

```
select * from SY40101
```

5. If there a fiscal or calendar year isn't set up for the date, you must set up the fiscal or calendar year for those budget record dates before you can upgrade.

If there is a fiscal or calendar year set up for the date, the records are missing from the AAG00500 table. Complete the following steps.

6. Run the following script to back up the AAG00500 table.

Install Dynamics GP on the first computer

10/18/2018 • 4 minutes to read

Use the information in this chapter to install Dynamics GP.

Installation overview

In a multiuser local area network environment, Dynamics GP applications are typically installed on a server, and then on each client. However, Dynamics GP is not required to be installed on the server. You must install the Dynamics GP databases on one computer first. After the Dynamics GP databases are installed on that computer, you'll be using the Dynamics GP installation media or using an installation package to install on all remaining clients. For more about creating an installation package for your clients, see [Installation package](#).

The program files of the previous release aren't removed by the Dynamics GP upgrade process.

Installing Dynamics GP (first computer)

Before you begin, be sure you've completed the preparation steps listed in [Data preparation](#) and [System preparation](#). You must be logged in to Windows as a user with system administrator privileges.

To install Dynamics GP (first computer):

1. From the Dynamics GP installation media, double-click the Setup.exe file to open the Dynamics GP installation window.
2. If one or more of the following components isn't installed on your computer, the Dynamics GP Bootstrapper Setup window opens and you can choose to install the missing component or components.
 - Dexterity Shared Components 18.0
 - Microsoft Application Error Reporting 11.0
 - Microsoft Lync 2010 SDK Runtime
 - Microsoft SQL Server Native Client 10.0
 - Microsoft Windows Installer 4.5
 - Microsoft .NET Framework 3.5
 - Microsoft .NET Framework 4.6
 - Open XML SDK 2.0 for Microsoft Office
 - Visual C++ 2015 Runtime Libraries
 - Visual Basic for Applications Core

After all the components are installed, you may need to restart your computer before continuing the installation of Dynamics GP.

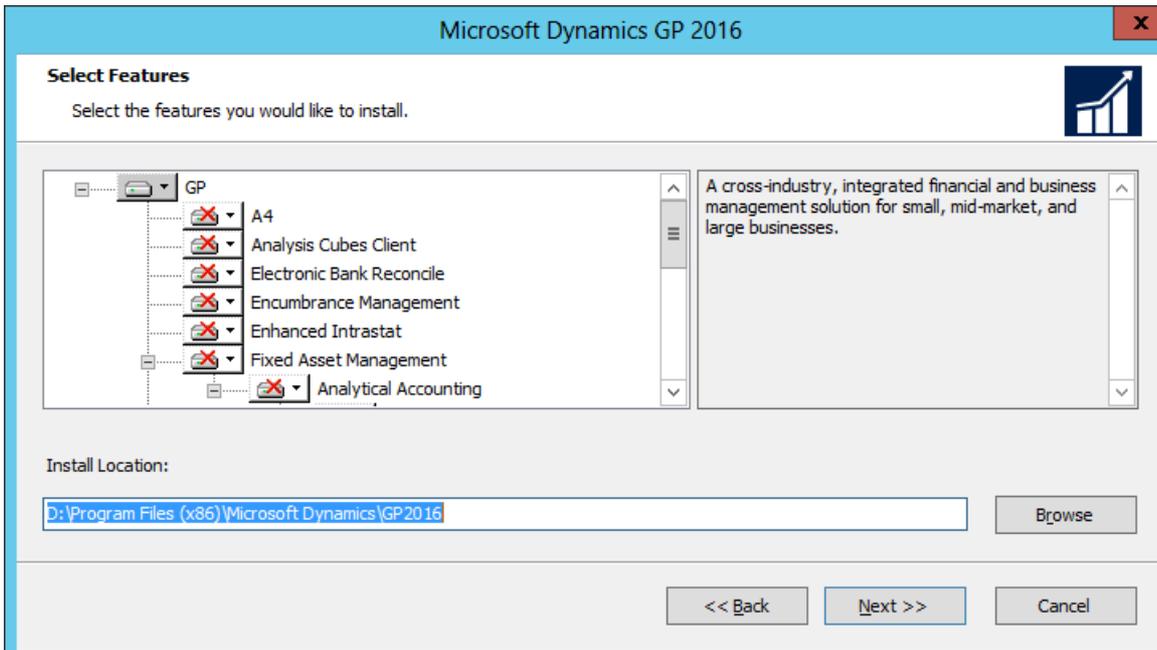
3. Click Dynamics GP.

The installation program verifies that your system has the minimum operating system required to run Dynamics GP. If your system does not meet requirements, the installation will not continue.

4. Select the primary country or region where you do business in the Country/ Region Selection window.

Click Next.

- Follow the instructions in the screen to accept the software license agreement. To install Dynamics GP, you must accept this agreement and click Next.
- In the Select Features window, select the features to install.



When you click a button for a feature, a pop-up menu of options appears. Refer to the table for more information about each option.

OPTION	WHAT HAPPENS
 Run from My Computer	The selected feature will be installed on the local hard disk. (This option installs the feature, but not sub-features.)
 Run all from My Computer	Will install the feature and all of its sub-features.
 Not Available	Will not install the selected feature or sub-feature.

If you've installed a feature in a previous release, be sure that you've selected to install that feature in the Select Feature window. You can review the DYNAMICS.SET file for a list of features you have installed.

- Specify a new folder where the Dynamics GP files should be installed. To select a different folder, click Browse.

After you have specified the installation location, click Next.

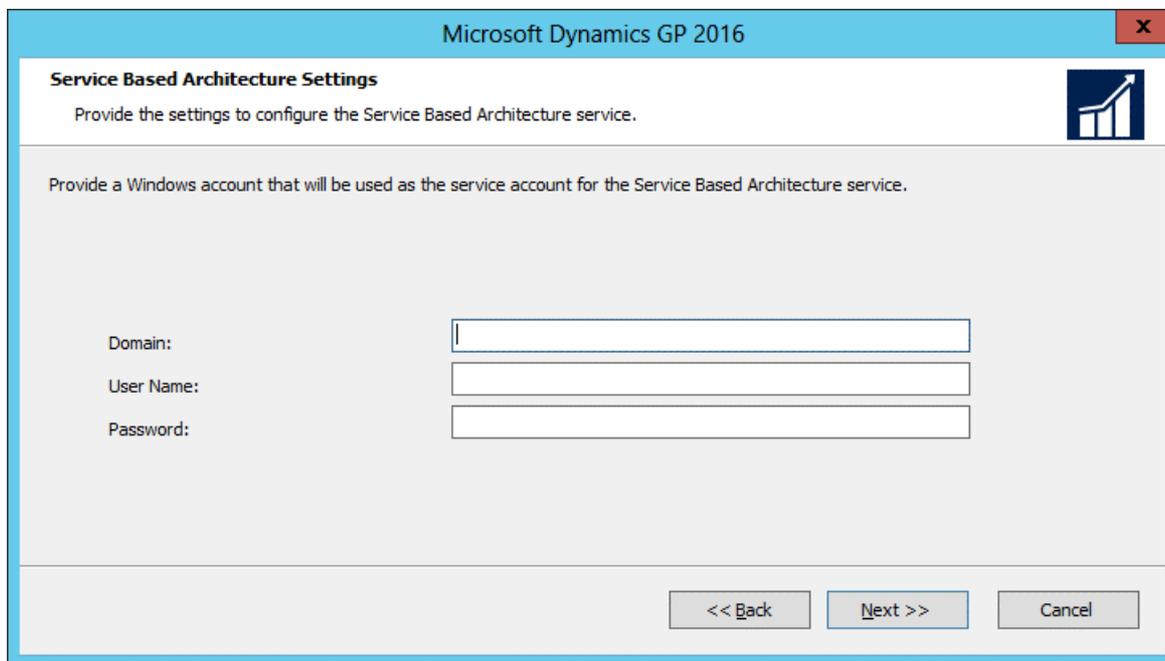
- In the SQL Server window, you can set up an ODBC data source in the SQL Server window by entering the name you assigned to the SQL Server when you installed Microsoft SQL Server.

If you don't want to set up an ODBC data source, mark the Do not create a data source option.

- Select the system database name that you are upgrading.

Click Next.

- If you have selected to install the Service Based Architecture feature, provide the Windows account that will be used as the service account for the Service Based Architecture service.



The Service Based Architecture feature will create a Windows service on the computer. The Windows account provided will be the identity used for this service.

11. In the Install Program window, click Install.
12. The Installation Progress window appears, where you can view the status of the installation.
13. In the Installation Complete window, click Exit.
14. Before you start Dynamics GP Utilities, check for and install the most current Dynamics GP update for Dynamics GP. See [CustomerSource](#) for the latest update information.

NOTE

To start Dynamics GP Utilities, you must have appropriate privileges. Typically this means being part of the Administrators group or the Power Users group. If you are using an operating system that has User Account Control, (UAC) enabled, you will be prompted to run the program as a user with administrative privileges. Refer to your operating system documentation for more information.

15. After installing Dynamics GP and the most recent update, you can perform the following steps.
 - Start Dynamics GP Utilities.
 - Follow the instructions in the Dynamics GP Utilities windows to upgrade tables on your server, upgrade your companies, and upgrade modified forms and reports. See [Company data conversion](#) for more information.
 - After using Dynamics GP Utilities, you can install additional component applications on the server computer. See [Creating an Installation package](#) or [Installing an additional component](#) for more information.

Additional features and components upgrade

10/18/2018 • 6 minutes to read

Depending on your organization's needs, you may have purchased additional features or components that add specialized functionality to your Dynamics GP system. After you've installed Dynamics GP and upgraded your data using Dynamics GP Utilities, you can install additional features and components that integrate with Dynamics GP.

Dynamics GP features

After you've upgrade Dynamics GP, you may decide to purchase an additional feature or remove a feature. Some features add a single function to your Dynamics GP system while some, such as Manufacturing, allow you to complete a range of related business and accounting tasks that use one or more modules. Dynamics GP Utilities upgrades the tables for the features along with the Dynamics GP tables. If you choose to add a feature, we recommend that you install each registered Dynamics GP feature and additional component on all client computers. You can use the Select Features window to install or uninstall a feature. See the **Adding or removing additional features** section for more information.

The following table lists the Dynamics GP features. The features available depends on the country or region you selected when installing Dynamics GP

For all countries and regions:

A4	MANUFACTURING
Analysis Cubes Client	Multilingual Checks
Analytical Accounting	Payment Document Management
Date Effective Tax Rates	Professional Services Tools Library
Electronic Bank Reconcile	Project Accounting
Encumbrance Management	Revenue/Expense Deferrals
Enhanced Intrastat	Safe Pay
Fixed Asset Management	Service Based Architecture
Grant Management	VAT Daybook
Web Client Runtime	

For all countries and regions except Canada and the United States:

BANK MANAGEMENT	SCHEDULED INSTALLMENTS
Direct Debit Refunds	

For the United States:

Human Resources and Payroll suite	
-----------------------------------	--

For Belgium and France:

Export Financial Data	
-----------------------	--

Adding or removing additional features

Use the installation wizard to add or remove features from your Dynamics GP installation. You also can use the Program Maintenance window, opened from the Add or Remove Programs control panel, to add or remove features. You should make a complete backup of your data before adding or removing features. Removing a feature does not remove tables from the database. Dynamics GP Utilities upgrades the tables for the feature along with the Dynamics GP tables.

You can't log in to Dynamics GP on a client computer if a component installed on the client has different version information than the server. You can use the GP_LoginErrors.log file in your temporary directory to help resolve the version information issue. The log file will contain the product name, along with the dictionary version and the database version.

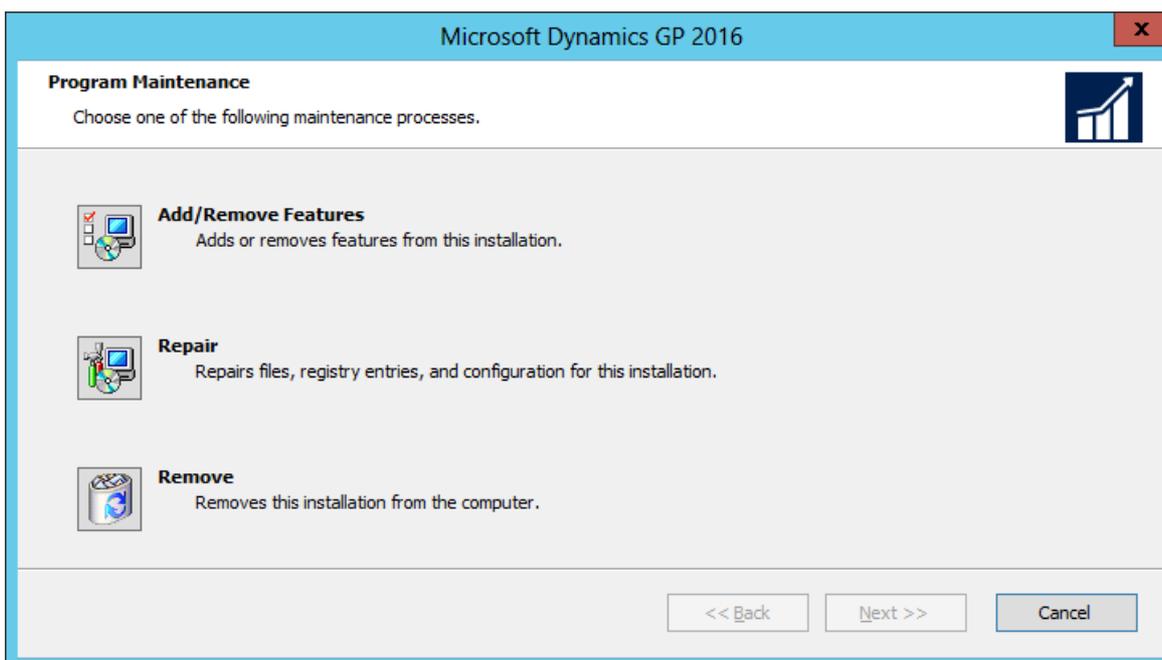
To add or remove additional features:

1. Start the installation wizard. You can use either of the following methods.

- From the Dynamics GP media, double-click the Setup.exe file. Click Dynamics GP. Select the existing instance of Dynamics GP in the Instance Selection window and click Next.

—or—

- Open the Control Panel > Programs and Features or Uninstall a program. Select Dynamics GP. Click Change to open the Program Maintenance window.



2. Click Add/Remove Features.

3. In the Select Features window, select the features to install or uninstall. When you install a new feature, you won't reinstall features that have been installed previously.

When you click a button for a feature, a pop-up menu of options appears. Refer to the table for more information about each option.

OPTION	WHAT HAPPENS
 Run from My computer	The selected feature will be installed on the local hard disk. (This option installs the feature, but not sub-features.)
 Run all from My computer	Will install the feature and all of its sub-features.
 Not available	Will not install the selected feature or sub-features.

After you have specified the feature or features, click Next.

4. In the Install Program window, click Install.
5. The Installation Progress window appears, where you can view the status of a feature.
6. In the Installation Complete window, click Exit.
7. Start Dynamics GP Utilities.

To start Dynamics GP Utilities, you must have appropriate user privileges. If you are using an operating system that has User Account Control (UAC) enabled, you will be prompted to run the program as a user with administrative privileges. Refer to your operating system's documentation for more information.

8. The Welcome To Dynamics GP Utilities window opens when you are logged into the server you selected. Read the message and click Next.
9. Follow the instructions in the Dynamics GP Utilities windows. Depending on the feature and whether you're installing the feature on your server or a client, you may have to upgrade tables and upgrade your companies and register the feature. You do not have to reapply the update for the features you selected.
10. After the upgrade process is finished, the Additional Tasks window opens, and you can perform additional tasks, start Dynamics GP, or exit the installation. See [Company data conversion](#) for more detailed information about each task in the Additional Tasks window.

Additional components

A smaller set of additional products or components are separate installations available on the Dynamics GP media. These additional components are listed in the main Dynamics GP installation window. For more information about accessing this window, see the **Installing an additional component** section.

The following table lists the additional components.

ADDITIONAL COMPONENTS	DESCRIPTION
Analysis Cubes Server	Installs Analysis Cube Server configuration wizards for SQL Server 2012, SQL Server 2014, and SQL Server 2016.
Dynamics GP Add-in for Microsoft Word	Installs the code necessary to enable template mapping so you can create and modify Word templates for Dynamics GP.
eConnect	A document integration tool that enables high volume, high speed programmatic integration to and from applications and the Dynamics GP back office solution.

ADDITIONAL COMPONENTS	DESCRIPTION
Integration Manager	Allows you to perform a one-time data conversion from your existing system to Dynamics GP products, or to perform ongoing integrations from other applications.
Tenant Service	A service that will provide tenant and user configuration information to applications. This service is required if you are setting up Dynamics GP Web Client for multiple tenants.
Web Client	The web server components that will provide browser access to Dynamics GP.
GP Web Resource Cache	Install on each session server to improve performance by enabling web client caching.
Web Services Runtime	The runtime engine that adds a Web Services interface to Dynamics GP. Install this component if you want to run integrations that access Dynamics GP data through Web Services. Several prerequisites must be met before you can install this component. Refer to the Web Services Installation and Administration Guide for more details.
Web Services Management Tools	Installs the Security Console and Exceptions Management Console, which you can use to administer security and exception information for Web Services for Dynamics GP. Install this component if you want to manage Web Services from a workstation separate from where the Web Services Runtime is installed.
Companion Application Services	A tool that enables you to connect your Dynamics GP application to a data source.
GP PowerShell	PowerShell cmdlets that perform various configuration tasks for a Dynamics GP web client installation.
OData Services	

There are some additional components that are released only on the [CustomerSource Web site](#).

Installing an additional component

Use this procedure to install an additional component after you've installed Dynamics GP and upgraded your company data using Dynamics GP Utilities. Before installing additional components, you should make a complete backup of your data.

Each additional component has its own installation instructions and documentation that you can access before you install the component. After you review the documentation you can install the component.

To install an additional component:

1. From the Dynamics GP media, double-click the Setup.exe file.
2. Click the additional component you want to install and then click View Documentation.
3. After you review the documentation, install the component by clicking the additional component you want to install and then clicking Install.

4. Depending on the component you installed, you may be instructed to restart your computer.
5. When installation of the additional component is complete, you can either install another component or close the main Dynamics GP installation window.

Installation package

10/18/2018 • 5 minutes to read

Instead of physically going to each client computer to install Dynamics GP, you can use an installation package to install Dynamics GP on multiple client computers. An installation package stores the files required to install a custom configured installation in a shared network location you set up. How Dynamics GP is installed on the client computer using the installation package depends on the tools and applications you use.

Installation package overview

You can use a client installation package to install Dynamics GP on additional client computers without having to physically go to each client computer and use the Dynamics GP installation wizard. When you create an installation package, the installation package stores the files required to install a Dynamics GP installation. To install Dynamics GP, your package can install Dynamics GP using the GreatPlains.msi file or the Setup.exe.

We recommend that you install the following components on each client computer. You can install these components from the Dynamics GP media.

- Microsoft Windows Installer 4.5
- Microsoft .NET Framework 3.5
- Microsoft .NET Framework 4.6
- Microsoft SQL Server Native Client 11.0
- Microsoft Dexterity Shared Components 18.0
- Microsoft Application Error Reporting 11.0
- Microsoft Lync 2010 SDK Runtime
- Open XML SDK 2.0 for Microsoft Office
- Visual C++ 2015 Runtime Libraries
- Visual Basic for Applications Core

These components aren't installed for you if you set up your installation package to install Dynamics GP using the GreatPlains.msi file. If these components are not installed on the client computer, Dynamics GP won't be installed. These components are installed for you if you set up your installation package to install Dynamics GP using the Setup.exe.

When creating the installation package, you'll select the shared network location where the installation package will be created, select Dynamics GP features, and enter a location where Dynamics GP will be installed on each client computer.

The installation package must be created in a shared network location that each client computer has access to. The location where Dynamics GP will be installed must be a valid location for each client computer.

After the installation package is created, it can be run from the shared network location to install the Dynamics GP client without the user having to make installation decisions. A progress window shows how the process is progressing. After Dynamics GP is installed and the user on the client has started Dynamics GP, the user may have to include new code and use Dynamics GP Utilities to synchronize the account framework.

How Dynamics GP is installed on the client computer using the installation package depends on the tools and

applications you use. You can send an e-mail with a link to the installation package. The user can click the link to install Dynamics GP. Or, you can create a deployment package using a software distribution tool such as Systems Management Server so that Dynamics GP is automatically installed after the user logs into his or her computer.

Creating an installation package

You can use an installation package to install Dynamics GP on your client computers. An installation package contains all the information required to install Dynamics GP.

To create an installation package:

1. Create a shared network location or verify that the client computers have access to a shared network location.
2. From the Dynamics GP media, double-click the Setup.exe file.
3. Click Create Installation Package.
4. In the Installation Location window, enter or select the folder where the installation package will be created. We recommend that you use a Universal Naming Convention (UNC) path or a mapped drive letter that is common across all targeted computers. The network location must be accessible from any computers that will have Dynamics GP installed on them using the installation package.

Click Next.

5. In the Country/Region Selection window, select the primary country or region where you do business. Click Next.
6. In the Select Features window, select the features to install.

We recommend that you install all the features that you are registered to use on all your client computers.

When you click a button for a feature, a pop-up menu of options appears. Refer to the table for more information about each option.

OPTION	WHAT HAPPENS
 Run from My computer	The selected feature will be installed on the local hard disk. (This option installs the feature, but not sub-features.)
 Run all from My computer	Will install the feature and all of its sub-features.
 Not available	Will not install the selected feature or sub-features.

7. Specify the location on the client computer where you want the Dynamics GP files installed. If you don't enter the location, the default location is \Program Files\Microsoft Dynamics\GP on the hard disk that has the operating system installed.

Be sure that the location is a valid location for every computer on which the installation package is used to install Dynamics GP.

After you have specified the installation folder, click Next.

8. To set up an ODBC data source, enter the name you assigned to the SQL Server when you installed Microsoft SQL Server.

If you don't want to set up an ODBC data source, mark the Do not create a data source option.

9. Select the system database name.

Click Next.

10. Specify the location of the Reports dictionary and the Forms dictionary. The location where dictionaries are must be a valid location for each client computer. The locations are written to the Dex.ini file. Click Next.
11. Specify where to store the OLE Notes files and Letter Wizard files. Click Next
12. In the Install Program window, click Install to create the package.
13. The Installation Progress window appears, where you can view the status of creating the installation package.
14. In the Create Installation Package Complete window, click Finish.

The installation package is installed in the shared network location you specified. The installation package stores the files, such as Great Plains.msi and Setup.exe, required to install a custom configured Dynamics GP installation.

15. How Dynamics GP is installed on the client computer using the installation package depends on the tools and applications you use. You can send an e-mail with a link to the installation package. Or, you can create a deployment package using a software distribution tool such as Systems Management Server so that Dynamics GP is automatically installed after the user logs into their computer.

We recommend that you install the following components on each client computer if you set up your installation package to install Dynamics GP using the GreatPlains.msi file. You can install these components from the Dynamics GP media.

- Microsoft Windows Installer 4.5
- Microsoft .NET Framework 3.5
- Microsoft .NET Framework 4.6
- Microsoft SQL Server Native Client 11.0
- Microsoft Dexterity Shared Components 18.0
- Microsoft Application Error Reporting 11.0
- Microsoft Lync 2010 SDK Runtime
- Open XML SDK 2.0 for Microsoft Office
- Visual C++ 2015 Runtime Libraries
- Visual Basic for Applications Core

Install Dynamics GP on subsequent computers

10/18/2018 • 4 minutes to read

Use the information in this chapter to install to Dynamics GP on each client computer. You also can use Dynamics GP Utilities to synchronize the Dynamics GP dictionary on each additional client with your account framework.

Installing Dynamics GP (additional computers)

Use the information in this section to install a client in a multiuser system after you've installed Dynamics GP on the first computer, and created company data using Dynamics GP Utilities.

To install Dynamics GP (additional computers):

1. From the Dynamics GP media, double-click the Setup.exe file.
2. If one or more of the following components isn't installed on your computer, the Dynamics GP Bootstrapper Setup window opens and you can choose to install the missing component or components.
 - Dexterity Shared Components 18.0
 - Microsoft Application Error Reporting 11.0
 - Microsoft Lync 2010 SDK Runtime
 - Microsoft SQL Server Native Client 11.0
 - Microsoft Windows Installer 4.5
 - Microsoft .NET Framework 4.6
 - Microsoft .NET Framework 3.5
 - Open XML SDK 2.0 for Microsoft Office
 - Visual C++ 2015 Runtime Libraries
 - Visual Basic for Applications Core

After all the components are installed, you may need to restart your computer before continuing the installation of Dynamics GP.

3. Click Dynamics GP.

The installation program verifies that your system has the minimum operating system required to run Dynamics GP. If your system does not meet requirements, the installation won't continue.

4. Select the primary country or region where you do business in the Country/ Region Selection window. Click Next.
5. Follow the instructions in the windows to accept the software license agreement. To install Dynamics GP, you must accept this agreement.
6. In the Select Features window, select the features to install. We recommend that you install all the features that you are registered to use on all client computers.

When you click a button for a feature, a pop-up menu of options appears. Refer to the table for more information about each option.

OPTION	WHAT HAPPENS
 Run from My computer	The selected feature will be installed on the local hard disk. (This option installs the feature, but not sub-features.)
 Run all from My computer	Will install the feature and all of its sub-features.
 Not available	Will not install the selected feature or sub-features.

If you've installed a feature in a previous release, use the Select Features window to install that component. See [Dynamics GP features](#) for a list of Dynamics GP features.

7. Specify the folder where the Dynamics GP files should be installed. To select a different folder, click Browse.

After you have specified the installation folder, click Next.

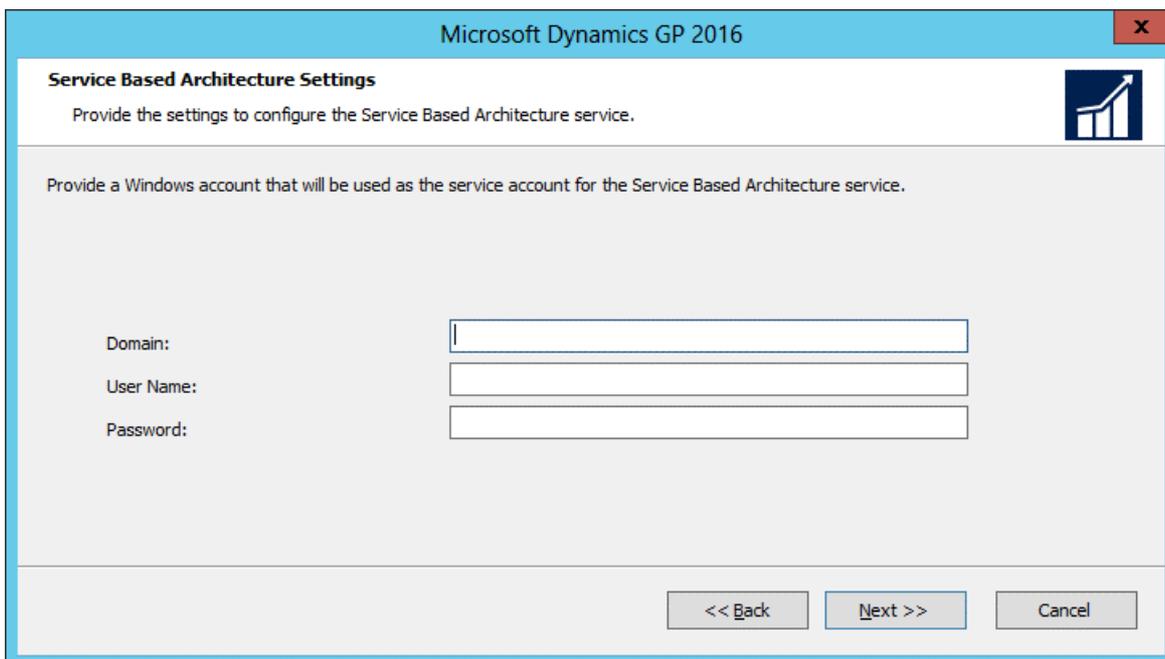
8. To set up an ODBC data source, enter the name you assigned to the SQL Server when you installed Microsoft SQL Server. Click Next.

If you don't want to set up an ODBC data source, mark the Do not create a data source option.

9. Select the system database name you are upgrading.

Click Next.

10. If you have selected to install the Service Based Architecture feature, provide the Windows account that will be used as the service account for the Service Based Architecture service.



The Service Based Architecture feature will create a Windows service on the computer. The Windows account provided will be the identity used for this service.

11. In the Install Program window, click Install.

The Installation Progress window appears, where you can view the status of the installation.

12. In the Installation Complete window, click Exit.

13. Before you start Dynamics GP Utilities, check for and install the most current Dynamics GP update for Dynamics GP. See CustomerSource

(<https://mbs.microsoft.com/customersource/northamerica/GP/learning/documentation/system-requirements/dynamicsgpresource#GP2018>) for the latest update information.

14. After installing Dynamics GP and the most recent update, you can perform the following steps.

NOTE

To start Dynamics GP Utilities, you must have appropriate user privileges. Typically, this means being part of the Administrators group or the Power Users group. If you are using an operating system that has User Account Control (UAC) enabled, you will be prompted to run the program as a user with administrative privileges. Refer to your operating system's documentation for more information.

- Start Dynamics GP Utilities.
- Follow the instructions in the Dynamics GP Utilities windows to synchronize your account framework. See *Synchronizing a client's account framework* for more information about synchronizing your account framework.
- After using Dynamics GP Utilities, you can install additional component applications on the server computer. See the **Installing an additional component** section for more information.

Synchronizing a client's account framework

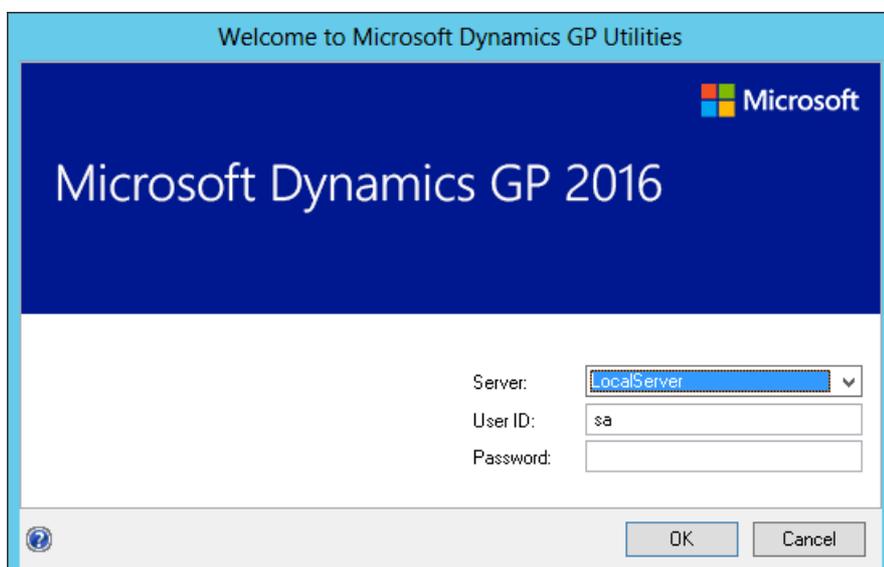
Synchronize the account framework of each client where you install Dynamics GP. Scripts and files installed previously on the server are used by Dynamics GP Utilities to complete the client setup.

NOTE

To start Dynamics GP Utilities, you must have appropriate user privileges. Typically, this means being part of the Administrators group or the Power Users group. If you are using an operating system that has User Account Control (UAC) enabled, you will be prompted to run the program as a user with administrative privileges. Refer to your operating system's documentation for more information.

To synchronize a client's account framework:

1. Start Dynamics GP Utilities.
2. In the Welcome to Dynamics GP Utilities window, verify your server name, and enter your User ID and Password. Click OK.



Microsoft Dynamics GP 2016

Server: LocalServer

User ID: sa

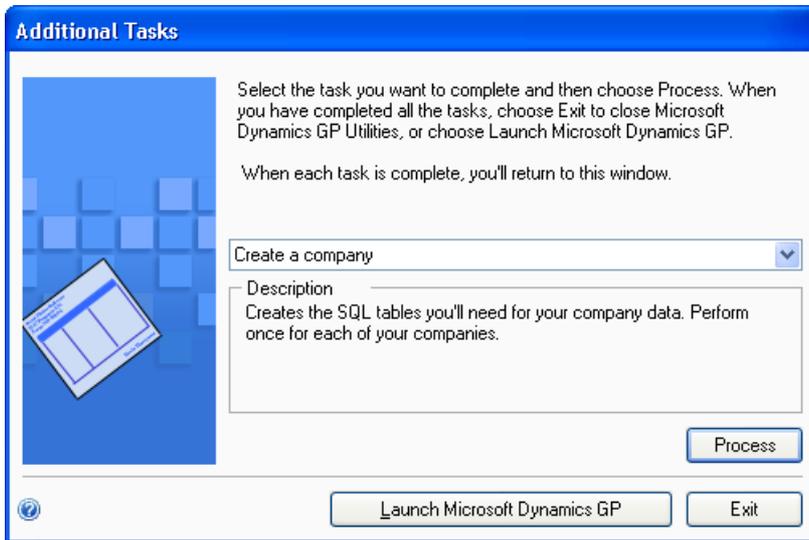
Password:

OK Cancel

3. In the Welcome to Dynamics GP Utilities window, click Next.

The Dynamics GP dictionary is synchronized automatically with your account framework.

4. After the account framework is synchronized, the Additional Tasks window opens. In the Additional Tasks window, you can choose to complete additional tasks, launch Dynamics GP, or end the installation. If you select any task, choose Process; otherwise, choose Exit.



Repeat the client installation process for each computer you'll use as a client or process server for Dynamics GP.

See Chapter 6, "Company data conversion," for more information about additional tasks using Dynamics GP Utilities.

Module upgrades from Dynamics GP 2013

Use the module upgrade information in this chapter to verify the upgrade from Dynamics GP Release 2013. The information in this chapter also provides information about module upgrades from Dynamics GP 2013 to Dynamics GP.

This chapter contains the following sections:

- [System upgrade](#)
- [Payables Management upgrade](#)
- [Purchase Order Processing upgrade](#)
- [Fixed Assets upgrade](#)
- [Payment Services for Microsoft Dynamics ERP upgrade](#)

System upgrade

The following change has been made in Dynamics GP. For more information, refer to your System User 's Guide (Help >> Contents >> select Setting up the system).

Posting Accounts Setup window

The Prepayment field has been added. This field will appear in the scrolling window if you select All or Purchasing in the Display field. If you are allowing prepayments for purchase orders, you can enter an account that will be used as the default entry for the prepayment if you didn't enter a default prepayment account in the Purchase Order Processing Setup window.

Audit Trail Codes Setup window

Purchasing Prepayments has been added as a new audit trail code. This audit trail code will appear in the scrolling window if you select Purchasing in the Display field.

Security Task Setup window

Purchasing Prepayments has been added to the Series Posting Permissions type for the TRX_PURCH_022 task ID for the Purchasing series.

Posting Setup window

Purchasing Prepayments has been added as an origin for the Purchasing series.

The Apply Documents Posting Journal has been added to the Receivings Trx Entry origin and Purchasing Invoice Entry origin in the Purchasing series.

Setup Checklist window

The name of the existing Workflow node in the Setup Checklist window has changed to Workflow for SharePoint. A new Workflow node has been added for the new Workflow feature in Dynamics GP. (Dynamics GP 2013 R2 and later.)

Message Setup window

All existing messages will be updated to have Standard as the message type in the Message Setup window. The

Standard message type is for messages that you send to customers or vendors when sending documents in e-mail. The new Workflow feature has Workflow Assignment and Workflow Action Completed as message types. (Dynamics GP 2013 R2)

Note window

You can use the Document Attachment Management window to attach documents to record level notes instead of OLE objects. If there is an existing OLE object is attached to a note record, the Attach button in the Note window is a drop-down list where you can select OLE Object or Document Attach. By selecting OLE Object, you can open the OLE container. If you select Document Attach, the Document Attachment Management window opens. A checkmark displays next to the option that has a file attached to the note.

If there isn't an existing OLE object is attached to the note, the Attach button in the Note window opens the Document Attachment Management window. (Dynamics GP 2013 R2)

You can use the OLE Notes Migration Utility to migrate the documents already attached to notes from OLE objects to the new document attachment functionality. For more information refer to Microsoft Dynamics CustomerSource or PartnerSource.

Payables Management upgrade

The following changes have been made. For more information, refer to your Payables Management documentation.

1099 address ID

The default 1099 address ID for a 1099 vendor is the primary address ID. The vendor address information assigned to the 1099 address ID is used when you print 1099 statements.

Additional 1099 information

Additional 1099 boxes and fields have been added for the 1099 tax types in the following windows.

1099 Setup window

TAX TYPE	1099 BOX NUMBER	MINIMUM AMOUNT
Dividend	10 Exempt Interest Dividends	0.01
	11 Specified Private Activity Bond Interest Dividends	0.01
	14 State Tax Withheld	0.01
Individual	13 State Tax Withheld	0.01
Miscellaneous	18 State Income	0.01

1099 Details window

TAX TYPE	1099 BOX NUMBER OR FIELD	AMOUNT
Dividend	10 Exempt Interest Dividends	0.00
	11 Specified Private Activity Bond Interest Dividends	0.00
	14 State Tax Withheld	0.00

TAX TYPE	1099 BOX NUMBER OR FIELD	AMOUNT
	Foreign Country or U.S. Possession	
	State Code	
	State Identification No.	0.00
Individual	13 State Tax Withheld	
	Foreign Country or U.S. Possession	
	Tax Exempt Bond CUSIP No.	
	State Code	
	State Identification No.	
Miscellaneous	18 State Income	0.00
	Payer Made Direct Sales of \$5,000 or more etc.	
	State/Payer's State No.	

Purchase Order Processing upgrade

The following changes have been made. For more information, refer to your Purchase Order Processing documentation.

Drop-ship or drop-ship blanket line items that track serial or lot numbers

If you have purchasing invoice receipts saved in a batch prior to upgrading to Dynamics GP 2013, drop-ship or drop-ship blanket line items that track serial or lot numbers assigned to the invoices will not be marked to track serial or lot numbers after you upgrade. You can track serial or lot numbers for these items by selecting each invoice in the Purchasing Invoice Entry window and marking the S/L option for each item.

Posting Accounts Setup window

The Prepayment field has been added. This field will appear in the scrolling window if you select All or Purchasing in the Display field. If you are allowing prepayments for purchase orders, you can enter an account that will be used as the default entry for the prepayment if you didn't enter a default prepayment account in the Purchase Order Processing Setup window.

Audit Trail Codes Setup window

Purchasing Prepayments has been added as a new audit trail code. This audit trail code will appear in the scrolling window if you select Purchasing in the Display field.

Security Task Setup window

Purchasing Prepayments has been added to the Series Posting Permissions type for the TRX_PURCH_022 task ID for the Purchasing series.

Posting Setup window

Purchasing Prepayments has been added as an origin for the Purchasing series.

The Apply Documents Posting Journal has been added to the Receivings Trx Entry origin and Purchasing Invoice

Entry origin in the Purchasing series.

Purchase order approval workflow

When you upgrade to Dynamics GP 2013 R2 or later, there will no longer be the option to use the Purchase Order Approval workflow type in Workflow for SharePoint.

If you were using the Purchase Order Approval workflow in Workflow for SharePoint, the workflow status for each purchase order with an Open status is updated to the Workflow Not Activated status in the new Workflow feature. After setting up a new the purchase order approval workflow in Dynamics GP, you can resubmit the purchase orders using the Purchase Order Entry window or the Purchase Order Transactions navigation list.

The workflow status for each historical purchase order is updated to the statuses used in the new Workflow feature. Review the following table for the new statuses.

WORKFLOW FOR SHAREPOINT STATUS	NEW WORKFLOW STATUS
Workflow Not Activated	Workflow Not Activated
Not Submitted	Not Submitted
Pending Approval	Pending User Action
Pending Changes	Recalled
No Approval Needed	No Approval Needed
Approved	Completed
Rejected	Rejected
Workflow Deactivated	Workflow Not Activated

If you were not using the Purchase Order Approval workflow in Workflow for SharePoint, the workflow status for each purchase order, including those in history, is updated to the Workflow Not Activated status in the new Workflow feature. (Dynamics GP 2013 R2)

Project Accounting upgrade

The following changes have been made. For more information, refer to your Project Accounting documentation.

The Exceed Total PO Quantity option has been removed from the PA Purchase Order Processing Setup window. An Overage field has been added in the Purchase Order Processing Setup, Item Class Setup window, and the Item Purchasing Options Maintenance window. If the item is a Sales Inventory or Discontinued item, you can allow quantity tolerances for overages for the quantity ordered.

If the Exceed Total PO Quantity option was marked in a previous release, the Overage option is unmarked in the Purchase Order Processing Setup window, Item Class Setup window, and the Item Purchasing Options Maintenance window.

If the Exceed Total PO Quantity option was unmarked, the Overage option is marked. You will have to enter a quantity tolerance percentage for the overage.

Fixed Assets upgrade

The following changes have been made. For more information, refer to your Fixed Assets documentation.

Fiscal calendar

If you have created a Fixed Assets fiscal calendar in a previous release, the following updates occur to the calendar.

- The calendar ID of DEFAULT is assigned to the calendar.
- The description of Default FA Calendar is assigned to the calendar.
- The Short/Long Year option is unmarked in the Fixed Assets Calendar Setup window for each year in the calendar.
- The Depreciation Percentage is 100% in the Fixed Assets Calendar Setup window for each year in the calendar.
- The DEFAULT calendar is assigned to the existing asset books.

Next Asset ID

The Next Asset ID field in the Fixed Assets Company Setup window is set to the highest asset ID value in the Asset General Information Master (FA00100) table plus 1. For example, if the highest value in the table is FA0001234, then the Next Asset ID field is set to FA0001235. If the highest asset ID value ends in alphabetic characters, such as 8050AC, then the Next Asset ID field in the Fixed Assets Company Setup window is blank.

Transfer records

Each existing transfer record in the Asset Transfer Master (FA00800) table is assigned the company ID of the company database as the originating company and destination company

Payment Services for Microsoft Dynamics ERP upgrade

The following changes have been made. For more information, refer to your Payment Services for Microsoft Dynamics ERP documentation.

Address verification is implemented in Payment Services providing an authorization process that validates the card holder billing address information with the merchant bank's record for the card holder to ensure the card is in the hands of the rightful owner. If the result of the verification is not accepted, the credit card transaction will be voided.

The numeric ISO code that is used to identify the country, rather than the entry in the Country Code field. Because various entries may have been made to identify a country - such as US or USA to identify the United States, the one standard number assigned by the ISO is used to verify the country. After the upgrade, you will have to associate countries codes with the correct countries.

After you upgrade

10/18/2018 • 6 minutes to read

We recommend that you complete the steps in this chapter after you upgrade all Dynamics GP databases. After you've completed these steps, see [Module upgrades from Dynamics GP 2013](#) to complete additional procedures that are necessary after you've upgraded Dynamics GP and your company data to the latest version of Dynamics GP.

Backups

You should make at least one complete backup of your system database and each company database after upgrading to Dynamics GP.

Reconciling financial data

Use the Reconcile Financial Information window to reset the summary amounts for each year.

To reconcile financial data:

1. Open the Reconcile Financial Information window. (Financial >> Utilities >> Financial >> Reconcile)
2. Select a year to reconcile.
3. Choose Reconcile.
4. Repeat steps 2 and 3 until all the years in General Ledger have been reconciled.

Checking links for currency tables

Use the Check Links window to check relationships among tables to find information that may be missing from one table within the relationship. You must check links for the Multicurrency Setup table even if you are not registered for Multicurrency Management.

To check links for currency tables:

1. Open the Check Links window. (Dynamics GP menu >> Maintenance >> Check Links)
2. In the Series list, be sure that Financial is displayed.
3. In the Logical Tables list, select Multicurrency Setup and choose Insert to insert it into the Selected Tables list.
4. Choose OK to check links.

Discontinuing the DexSQL.log

You should discontinue using the DexSQL.log file after the upgrade process. The DexSQL.log is a helpful tool that captures SQL operations and can provide information if there are issues during the upgrade process.

To discontinue the DexSQL.log:

1. Open the Dex.ini file in the Data folder of the Dynamics GP folder.
2. Change the following statements to FALSE.

SQLLogSQLStmt=TRUE

SQLLogODBCMessages=TRUE

SQLLogAllODBCMessages=TRUE

3. Save your changes.

Reports you should print after upgrading

After you upgrade, we recommend printing the following reports to a printer or to a file. You can use them to verify that your system was upgraded properly, or to re-create modifications.

MODULE	REPORTS	
System	Shortcut Bar	
General Ledger	Detailed Trial Balance	
Receivables Management	Aged Trial Balance with Option	
Payables Management	Aged Trial Balance with Option	
Inventory Control	Pricing Reports	
	Error Reports	
	Purchase Receipts	
Purchase Order Processing	Purchase orders	
	Purchase Order Status Report	
Payroll	Manual Check Edit	
	List Benefit Summary Deduction Summary	
	Department Wage Summary	
	FUTA Summary	
	Local Tax Summary	
	Payroll Summary	
	Pay Code Summary	
	Position Summary	
	State Tax Summary	
	SUTA Summary	

MODULE	REPORTS	
	Workers' Compensation Summary	
	Form 941	
	Form 941 Schedule B	
	Employee Pay History*	
	Transaction History Report*	
	Check History*	
Manufacturing	WIP Report	
	Manufacturing Order Summary	
	Standard Cost Pending	

Print this report only if you're keeping history.

Removing the previous release

You should remove the previous release from your computer by using your operating system's Add/Remove Programs utility. This includes the reports dictionary and program files for integrating products from the previous release. After removing the release, use Windows Explorer to find and delete the folder where the release was installed.

To remove Dynamics GP, use your operating system's Add/Remove Programs utility, and select Dynamics GP.

Security for Dynamics GP

Refer to the Planning for Security document (Help >> Printable Manuals >> select Planning for Security) or to the System Setup Guide (Help >> Contents >> select Setting up the System) for more information about security.

New users, by default, will not have access to any Dynamics GP data. You can use the default security roles and tasks that are available, or you can create your own security roles and tasks to fit your company.

Create security tasks

For new users, you must create security tasks for Workflow, purchase requisitions, Payroll timecards, and Project timesheets. You can use the Security Task Setup window to create those tasks. As a guide for the new tasks, review the following tasks that are created for new Dynamics GP installations.

FIELD	ENTRY
Task ID	ADMIN_COMPANY_013*
Task Name	Set up and maintain Workflow
Description	Set up Workflow access, calendars, and workflow definitions.
Category	Company

FIELD	ENTRY
Product	Dynamics GP
Type	Windows
Series	Company
Select the following resources	Copy workflow
	Workflow Email Notification Maintenance
	Workflow Maintenance
	Workflow User Selection
	Workflow Calendar
	Workflow Condition Editor
Description	View purchase requisition documents and purchase requisition items. Also includes the Purchase Requisition Transactions list and preview.
Category	Purchasing
Product	Dynamics GP
Type	Windows
Series	Financial
Select the following resource	PO Commitment for Document Inquiry Zoom
Type	Windows
Series	Purchasing
Select the following resources	Purchase Requisition Inquiry
	Purchase Requisition Inquiry Zoom
	Purchase Comment Inquiry Zoom
	Purchase Requisitions
	Purchasing Ship To Address Inquiry
Type	Windows
Series	Company

FIELD	ENTRY
Select the following resources	Attachment Properties
	Document Attachment Inquiry
	Document Attachment Status Inquiry
Type	Navigation Lists
Series	Navigation Lists
Select the following resource	Purchasing Requisition Transactions
Type	Navigation Lists
Series	Information Pane
Select the following resource	Purchasing Requisition Transactions

FIELD	ENTRY
Task ID	RPT_PURREQ_006*
Task Name	Approve Timecards
Description	View and approve submitted timecard data. Delegate approval.
Category	Payroll
Product	Dynamics GP
Type	Windows
Series	Payroll
Select the following resource	Timecard Entry
Type	Navigation Lists
Series	Navigation Lists
Select the following resource	Timecards Pending Approval
Type	Navigation Lists
Series	Information Pane
Select the following resource	Timecards Pending Approval
Type	Navigation Lists

FIELD	ENTRY
Series	Customize Lists
Select the following resource	Timecards Pending Approval

FIELD	ENTRY
Task ID	PTE_TIME_ENTRY_001*
Task Name	Self-service employee project time entry
Description	Ability to enter project time entry transactions.
Category	Project
Product	Project Accounting
Type	Windows
Series	Project
Select the following resource	PTE Timesheet Entry
	PTE Inquiry Zoom Timesheet
Type	Navigation Lists
Series	Navigation Lists
Select the following resource	PTE Timesheets
Type	Navigation Lists
Series	Customize Lists
Select the following resource	PTE Timesheets

Create security roles

For new users, you must create the following security roles for Workflow, purchase requisitions, Payroll timecards, and Project timesheets. As a guide for the new security roles, review the following tasks that are created for new Dynamics GP installations

To create security roles:

1. Open the Security Role Setup window. (Administration >> Setup >> System >> Security Roles)
2. Create the following new roles.

FIELD	ENTRY
Role ID	ESS PURCHASE REQUESTER*

FIELD	ENTRY
Role Name	Purchase Requisitions PO Preview
Role Description	Tasks include entering and reviewing purchase requisitions
Select the following tasks	DEFAULTUSER
	ADMIN_PURREQ_021*
	INQ_PURREQ_005

FIELD	ENTRY
Role ID	ESS EMPLOYEE*
Role Name	Employee Self Service Employee
Role Description	Tasks include entering payroll time and viewing reports.
Select the following tasks	DEFAULTUSER
	EMP_TIME_EMPLOYEE_001*

FIELD	ENTRY
Role ID	ESS EMPLOYEE MANAGER*
Role Name	Employee Self Service Manager
Role Description	Tasks include View and approve submitted timecard data and delegating approval.
Select the following tasks	DEFAULTUSER
	EMP_TIME_MANAGER_001*

HEADING	
Role ID	ESS PTE EMPLOYEE*
Role Name	Project Time and Expense Self Service Employee
Role Description	Can enter project time and expense transactions
Select the following tasks	DEFAULTUSER
	PAEFAULTUSER*
	PTE_TIME_Entry_001*

Security for SQL Server Reporting Services reports

After the upgrade, use Report Manager to grant access to additional reports deployed during the upgrade. You should also use the SQL Server Management Studio to assign user groups to the SQL Server database roles that correspond to the additional data connections and reports deployed during the upgrade. The user permissions assigned to the previous versions connections and reports are maintained during the upgrade process.

If you have deployed reports using the SharePoint integrated mode and have already assigned permissions to users, those same users will have access to report server items and operations immediately after you configure the integration settings between Microsoft SharePoint and a report server. You can use existing permissions to upload report definitions and other documents, view reports, create subscriptions, and manage items.

If you have not assigned permissions, assign user and group accounts to predefined SharePoint groups. You also can create new permission levels and groups or modify existing ones to vary server access permissions as specific needs arise.

You can deploy SQL Server Reporting Services reports for multiple Dynamics GP instances to a single Microsoft SQL Server Reporting Server. If you have deployed reports to a folder on a Microsoft SQL Server Reporting Server using the Native mode, you must to provide access to the folder.

Company data conversion

10/18/2018 • 16 minutes to read

After you've upgraded your software, you need to complete a number of additional procedures to upgrade your tables before you can use Dynamics GP. To do this, you'll use an application called Dynamics GP Utilities. Follow the instructions in this chapter to use Dynamics GP Utilities to upgrade tables on your server and client computers.

Before using Dynamics GP Utilities, be sure that you have installed the most current update for your Dynamics GP system. You also should make a backup of your databases.

NOTE

To start Dynamics GP Utilities, you must have appropriate user privileges. Typically, this means being part of the Administrators group or the Power Users group. If you are using an operating system that has User Account Control (UAC) enabled, you will be prompted to run the program as a user with administrative privileges. Refer to your operating system's documentation for more information.

Enabling a DexSQL.log

If an error occurs during the upgrade process, you should change several settings in the Dex.ini file so that a DexSQL.log file will record some SQL operations for one user from one client computer. The DexSQL.log file is a helpful tool that can capture SQL operations and provide information if there are issues during the upgrade.

To enable a DexSQL.log:

You'll have to restart Dynamics GP Utilities after you made the changes.

1. Open the Dex.ini file in the Data folder of the current Dynamics GP folder.
2. Change the following statements to TRUE.

```
SQLLogSQLStmt=FALSE
```

```
SQLLogODBCMessages=FALSE
```

```
SQLLogAllODBCMessages=FALSE
```

3. Save your changes.

Upgrading Dynamics GP tables

Use this procedure to upgrade Dynamics GP tables on your server computer using Dynamics GP Utilities. You will not need to complete all of these procedures on subsequent computers. When you start Dynamics GP Utilities for subsequent computers, the Additional Tasks window will immediately open, where you can complete additional tasks, such as upgrading your modified forms and reports. The process of upgrading tables may take some time.

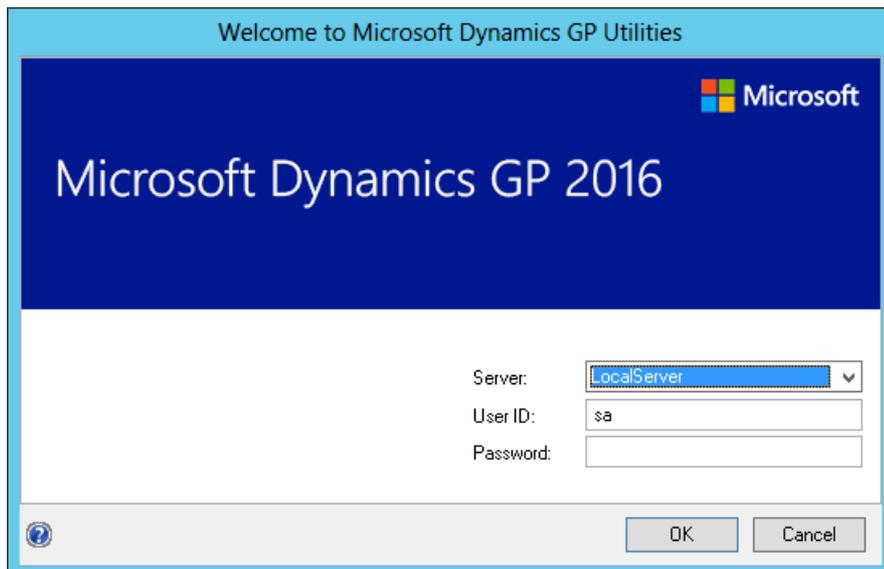
Detailed lists of the changes to all tables are available on the Dynamics GP media. To access the table changes lists, install the Software Developers' Kit from the Dynamics GP media.

WARNING

If you are using Connector for Microsoft Dynamics, you must stop the Microsoft Dynamics Adapter Service on the server before starting Dynamics GP Utilities. The company database upgrade will fail if the Microsoft Dynamics Adapter Service is not stopped. Connector is not supported for Dynamics GP, so it's not necessary to restart the service after the service after the upgrade is complete.

To upgrade Dynamics GP tables:

- 1 Back up your system database and all company databases.
2. Start Dynamics GP Utilities. (Start >> All Programs >> Microsoft Dynamics >> GP 2018 >> GP Utilities)
3. In the Welcome to Dynamics GP Utilities window, verify your server name, enter the system administrator user ID and password, and click OK.



NOTE

You must be logged in as a system administrator to complete database and system functions within Dynamics GP Utilities.

4. The Welcome To Dynamics GP Utilities window opens when you are logged into the server that you selected. Read the message and click Next.
5. In the Upgrade Dynamics GP window, click Next to upgrade your system database.

NOTE

The Company Detail window opens if errors occurred while upgrading your system tables. You can use this window to view the errors.

6. In the Upgrade these companies window, click Next. All companies are selected to be upgraded.

NOTE

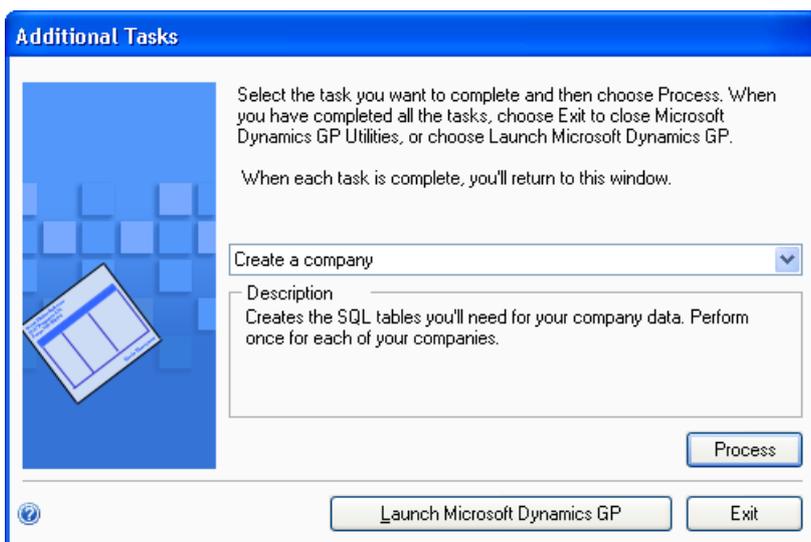
The process of upgrading tables might take some time.



7. In the Confirmation window, click Finish.

Dynamics GP Utilities upgrades your company databases. This process may take several minutes to complete. The Server Installation Progress window describes the process as it progresses.

8. After the upgrade process is finished and is successful, the Additional Tasks window will open, where you can upgrade your forms and reports dictionaries, start Dynamics GP, or exit the installation. To upgrade your forms and reports dictionaries, see [Upgrading modified forms and reports](#) for more information. See the following sections for more detailed information about each task.



If the upgrade process wasn't successful, the Update Company Tables window opens. See [Understanding upgrade warnings](#) for more information.

Additional upgrade tasks

You'll use the following selections from the Additional Tasks window to upgrade your Dynamics GP files.

- Re-add or Add sample company data
- Update modified forms and reports

For more information about upgrading forms and reports, see [Upgrading modified forms and reports](#).

Start Dynamics GP Utilities if you haven't already and follow the instructions in the Dynamics GP Utilities windows until you open the Additional Tasks window. The following procedures assume that the Additional Tasks window is open.

Re-adding sample company data

If you've upgraded the sample company from a previous release, you can add the sample data again. If you've used the sample data in a previous release, you may want to re-add the data to practice procedures in Dynamics GP. If a Dynamics GP feature is installed, the sample data for that feature will be included when adding or re-adding sample data. The process of reinstalling sample company data may take some time.

If you are adding sample data again and haven't previously deployed business components for the sample company, you can deploy business intelligence components, such as SQL Server Reporting Services reports.

To re-add sample company data:

1. Select the Re-add sample company data option in the Additional Tasks window and click Process.
2. A message will be displayed indicating that the lesson company (sample company) is installed. Choose to reinstall the lesson company.
3. In the Confirmation window, click Finish.

The Server Installation Progress window appears, showing the progress as the tables are loaded.

4. In the Business Intelligence Reports Setup window, select the business intelligence components to deploy. Click Next. The window that opens depends on the components you selected.

If you don't want to deploy business intelligence components, leave the components unmarked and click Next. The Additional Tasks window will reappear.

5. The SQL Server Reporting Services Reports Setup window appears if you marked to deploy Reporting Services reports. After selecting your report server mode, enter the locations to deploy the reports to.

Native mode location example:

LOCATION	EXAMPLE
Report Server URL	http://<servername>/ReportServer
Report Manager URL	http://<servername>/Reports

SharePoint Integrated mode location example:

LOCATION	EXAMPLE
SharePoint Site	http://<servername>/Reports

NOTE

Be sure that your URL locations don't end with a slash. You can use the Reporting Services Configuration manager to verify the Report Server Mode being and the URL locations.

If you have selected Native as the report server mode, you can enter the name of the folder to deploy the reports to. By using a folder, you can deploy Reporting Services reports for multiple Dynamics GP instances to a single Microsoft SQL Server Reporting Server. The default folder name is the name of the system database. If DYNAMICS is the system database name, the Folder Name field is blank. After deploying reports to the folder, you must provide access to the folder.

6. Click Next.

NOTE

If you don't have the appropriate permissions to deploy reports, a window opens where you can enter a domain\user name and the password you use to log in to Microsoft Windows.

- The CRM Reports Setup window appears, if you marked to deploy SQL Server Reporting Services reports with CRM data. Enter the CRM connection information. Microsoft Dynamics CRM supports only the native mode of deployment of SQL Server Reporting Services.

We recommend that you use Windows Authentication (Integrated Security). If you select to be prompted for credentials, you must mark the Use as Windows credentials when connecting to the data source option on the data source deployed.

- The Excel Reports Setup window appears if you marked to deploy Excel reports. Select the location to deploy the reports to.

If you have selected SharePoint as the location to deploy reports to, you can mark the Using SharePoint Online option if you are using Microsoft Office 365 and want to deploy Excel reports to a reports library in SharePoint Online 2010. Mark the Using SharePoint Online option to deploy reports only in the Dynamics GP desktop client. Reports will not be deployed for the Dynamics GP Web Client.

Be sure to use back slashes when you are entering the location for reports even if you are using a UNC path. You should also be sure that the location doesn't end in a slash.

Network share location example:

NETWORK SHARE	\\SERVERNAME\SHARENAME
SharePoint Site	http://<servername>/Reports
Data Connections Library	DataConnections
Report Library	ReportsLibrary

- Click Next.

NOTE

If you don't have the appropriate permissions to deploy reports, a window opens where you can enter a domain\user name and the password you use to log in to Microsoft Windows.

- The Verify SQL Server window appears. Confirm your selections. If the selections are correct, click Finish.

The Business Intelligence Deployment Progress window appears. This window displays the report deployment progress.

After the reports deployed, the Additional Tasks window will reappear.

Adding sample company data

If the sample company has never been installed before, you can add data for the sample company to your Dynamics GP system to practice procedures. If a Dynamics GP feature is installed, the sample data for that feature will be included when adding or re-adding sample data. The name of the sample company is Fabrikam, Inc. When you are adding the sample company, you can create LessonUser1 and LessonUser2 as sample users. These users will have access only to Fabrikam, Inc. The process of adding sample company data may take some time.

When you create the sample company, you can deploy business intelligence components, such as SQL Server Reporting Services reports. If you deployed reports for your system database, you can use the default report locations for the sample company.

To add sample company data:

1. Select the Add sample company data option in the Additional Tasks window and click Process.
2. In the Database Setup window, enter or accept the sample company database name and then select a default location for new files that will be created for the sample company.

TWO is the default sample company database name if the TWO database doesn't exist. You can only create LessonUser1 and LessonUser2 as sample users for the TWO sample company database using the Dynamics GP Utilities.

If the sample company database has a different name than TWO, you must use the User Setup window to create lesson users for the sample company and then use the User Access Setup window to set up user access to the sample company.

3. In the Create Sample Users window, enter a password that will be used by the sample users, LessonUser1 and LessonUser2, to access the sample company. Reenter your password exactly as you previously entered it. Click Next.

The Create Sample Users window appears if you are creating sample users for the TWO sample company database. If the sample company database is not the TWO database, you will not be able to create sample users using Dynamics GP Utilities.

4. In the Confirmation window, click Finish.

The Server Installation Progress window appears, showing the progress as the tables are loaded.

5. In the Business Intelligence Reports Setup window, select the business intelligence components to deploy. Click Next. The window that opens depends on the components you selected.

If you don't want to deploy business intelligence components, leave the components unmarked and click Next. The Additional Tasks window will reappear.

6. The SQL Server Reporting Services Reports Setup window appears if you marked to deploy Reporting Services reports. After selecting your report server mode, enter the locations to deploy the reports to.

Native mode location example:

LOCATION	EXAMPLE
Report Server URL	http://<servername>/ReportServer
Report Manager URL	http://<servername>/Reports

SharePoint Integrated mode location example:

LOCATION	EXAMPLE
SharePoint Site	http://<servername>/Reports

NOTE

Be sure that your URL locations don't end with a slash. You can use the Reporting Services Configuration Manager to verify the Report Server Mode being used and the URL locations.

If you have selected Native as the report server mode, you can enter the name of the folder to deploy the reports to. By using a folder, you can deploy Reporting Services reports for multiple Dynamics GP instances to a single Microsoft SQL Server Reporting Server. The default folder name is the name of the system database. If DYNAMICS is the system database name, the Folder Name field is blank. After deploying reports to the folder, you must provide access to the folder.

7. Click Next.

NOTE

If you don't have the appropriate permissions to deploy reports, a window opens where you can enter a domain\user name and the password you use to log in to Microsoft Windows.

8. The CRM Reports Setup window appears, if you marked to deploy SQL Server Reporting Services reports with CRM data. Enter the CRM connection information. Microsoft Dynamics CRM supports only the native mode of deployment of SQL Server Reporting Services.

We recommend that you use Windows Authentication (Integrated Security). If you select to be prompted for credentials, you must mark the Use as Windows credentials when connecting to the data source option on the data source deployed.

9. The Excel Reports Setup window appears if you marked to deploy Excel reports. Select the location to deploy the reports to.

If you have selected SharePoint as the location to deploy reports to, you can mark the Using SharePoint Online option if you are using Microsoft Office 365 and want to deploy Excel reports to a reports library in SharePoint Online 2010. Mark the Using SharePoint Online option to deploy reports only in the Dynamics GP desktop client. Reports will not be deployed for the Dynamics GP Web Client.

Be sure to use back slashes when you are entering the location for reports even if you are using a UNC path. You should also be sure that the location doesn't end in a slash.

Network share location example:

Network share	\\Servername\sharename
---------------	------------------------

SharePoint location example

SHAREPOINT SITE	HTTP://<SERVERNAME>/REPORTS
Data Connections Library	DataConnections
Report Library	ReportsLibrary

10. Click Next.

NOTE

If you don't have the appropriate permissions to deploy the reports, a window opens where you can enter a domain\user name and the password you use to log in to Microsoft Windows.

11. The Verify SQL Server window appears. Confirm your selections. If the selections are correct, click Finish.

The Business Intelligence Deployment Progress window appears. This window displays the report deployment progress.

12. After the reports deployed, the Additional Tasks window will reappear.

Upgrading modified forms and reports

You can use Dynamics GP to upgrade the following types of information for modified forms and reports:

- Fields where the data type has been changed are upgraded automatically on modified forms and reports.
- Fields that have been moved from one table to another are upgraded automatically on forms and reports that use those fields.
- Fields that have been removed from tables are removed from corresponding forms and reports.

In addition, similar changes are made to modified forms and reports for integrating applications. Consult the documentation for the integrating application for information about whether that application supports automatic form and report upgrades. If you are using Personal Data Keeper, see the Dynamics GP technical support for information about synchronizing forms and reports.

NOTE

If your forms and reports dictionaries are in a shared location, you need only to perform this procedure once.

To upgrade modified forms and reports:

1. Make a backup of each reports dictionary or forms dictionary to upgrade. The name of the reports dictionary for Dynamics GP is Reports.dic and the name of the forms dictionary for Dynamics GP is Forms.dic.
2. Open the Dynamics GP launch file (Dynamics.set) and verify that the paths to the modified reports and forms are correct. The paths must be the location of the reports dictionary and forms dictionary from the previous release.
3. In the Additional Tasks window, select Update modified forms and reports and click Process. The Locate Launch File window appears.
4. Select the Dynamics GP launch file (Dynamics.set) that you use to start Dynamics GP on this client, then click Next. The Update Modified Forms and Reports window appears.
5. Select Dynamics GP and any additional components whose modified forms and reports dictionaries you're upgrading.
6. For each component, choose the Details button, if necessary, to open the Product Details window, where you can select the location of the original dictionary, such as Dynamics.dic or HR.dic. Click OK in the Product Details window.

The original dictionary is the application dictionary from the previous release of Dynamics GP. After all forms and reports dictionaries have been upgraded, you can delete the original dictionary.

7. In the Update Modified Forms and Reports window, click Update.

Your modified forms and reports dictionaries are upgraded, and a report named Update2013.txt is generated, which contains information about upgraded modified forms. Be sure to review the report, located in the \Data folder, to verify that your modified forms have been upgraded correctly.

8. Click Next. The Additional Tasks window reappears.

Be sure to review the Update2013.txt and Update2013.log, for more information about the modified forms and reports upgrade.

Managing the Web Client SQL Server login

Use the Manage Web Client SQL Server Login window to create or modify a SQL Server login for Dynamics GP Web Client. By using the single Web Client SQL Server login, each web client user can access the web client by providing their standard Windows login credentials instead of using their own SQL Server login.

During the initial Dynamics GP installation, you can create the SQL Server login. Each web client session can use the login to access SQL Server.

To manage the Web Client SQL Server login:

1. Select the Manage Web Client SQL Server Login option in the Additional Tasks window and click Process.
2. In the Manage Web Client SQL Server Login window, specify the SQL Server Login and password for the Web Client SQL Server login.
3. If the login has an existing password, you can mark the Change password option to enter a different password.

Click Save. The Additional Tasks window reappears.

Understanding upgrade warnings

After the upgrade or if the upgrade fails, the Update Company Tables window will be displayed. This window indicates the status of a company by the icon displayed between the check box and the name of the company, as shown in the following illustration.

ICON	STATUS
	Company tables were upgraded successfully.
	Some company tables were not upgraded successfully. Contact Microsoft

Dynamics GP Technical Support for further assistance. | |  | Some company tables have warnings associated with them. |

|  | Not converted; someone at another client computer is currently upgrading this company. |

If no icon appears between the check box and the name of the company, the company needs to be upgraded.

If errors do occur, download the Failed_Tables_List.txt script from

https://mbs.microsoft.com/customersource/northamerica/GP/support/hot-topics/HOT_TOPIC_MDGP2018Upgrade, and save it to your hard disk. Copy all of the contents of the script and

paste the contents them into Microsoft SQL Server Management Studio. Run the script and save the results to a file before you contact Dynamics GP for further assistance.

You also should have the results of the DexSQL.log file ready, as well, if you decided to use the DexSQL.log file.

(The DexSQL.log file is located in the same folder as the Dex.ini file.)

If warnings appear for temporary files or for modules that the company does not currently use, the warnings can be ignored. If warnings appear for modules that the company currently uses, note the warnings. You can attempt the upgrade again or contact Dynamics GP Technical Support for further assistance.