



# **Integrating Microsoft® Business Solutions Business Portal 2.x with Microsoft Office SharePoint® Portal Server 2003: A Natural Fit**

White Paper

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## **Abstract**

This document explores the scenarios where customers of Microsoft Business Solutions–Great Plains® and Microsoft Business Solutions–Solomon are using Microsoft Business Solutions Business Portal to manage their business information and could benefit from the added capabilities of Microsoft Office SharePoint Portal Server 2003. It also serves as a technical guide for integrating Microsoft Business Portal with SharePoint Portal Server.

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## Introduction

Microsoft Business Solutions Business Portal provides a role-based portal solution that gives employees access to business information and applications, with integration to Microsoft Great Plains and Microsoft Solomon. Because it is built on Microsoft Windows SharePoint Services, Business Portal also delivers the rich document and team collaboration capabilities, easy Web page construction, and other team-based activities inherent in Windows SharePoint Services.

Microsoft Office SharePoint Portal Server 2003 enables businesses to develop an intelligent portal that seamlessly connects users, teams, and knowledge so that people can take advantage of relevant information across business processes to help them work more efficiently. Also built on Windows SharePoint Services, SharePoint Portal Server's strength lies in its aggregation, personalization, and search functionality.

This shared core component—Windows SharePoint Services—makes the two solutions easy to integrate. Using SharePoint Portal Server as the corporate portal linking Business Portal centers and information pages, you can connect users who need to access Business Portal information as well as other Web sites, data sources, applications, and Web services. Many organizations can benefit from integrating Business Portal into SharePoint Portal Server, which offers additional aggregation, personalization, searching, and browsing capabilities.

By using Business Portal and SharePoint Portal Server together, you'll be able to manage more sites, data sources, and applications, and give your users greater abilities to customize their interactions with the system.

This paper describes the following information:

- Instructions for installing and configuring Business Portal and SharePoint Portal Server to work together
- A brief overview of the situations where you can benefit most from using the solutions together
- Detailed direction on how the solutions can be integrated to maximize the value of both

## How Business Portal and SharePoint Portal Server can work together

To fully integrate Business Portal and SharePoint Portal Server, both solutions must be installed and configured properly.

You can install Microsoft Business Portal and SharePoint Portal Server either on a single Web server, or on separate Web servers, depending on the amount of activity you expect. (Refer to the Windows SharePoint Services Administrator's Guide for more information on capacity planning.)

After both applications have been installed, you must configure the connection between Business Portal and SharePoint Portal Server, which is the first step of the integration process. You can also add Business Portal pages as listings within SharePoint Portal Server areas, and include Business Portal content in SPS searches. In addition, you can publish Business Portal content to employees' My Site. These integrations are described later in this white paper.

## Integration scenarios

In most integration scenarios, organizations will use the various centers in Business Portal to provide their team members with role-based access to back office (Great Plains or Solomon) business information. In addition, they'll use SharePoint Portal Server to give their employees access to other data sources, applications, and Web sites, along with the ability to personalize the portal.

Examples of situations where your organization could benefit from integrating the two solutions include:

- You use a number of Business Portal centers in addition to specific SharePoint Portal Server topic areas. You want to present aggregated information within a portal, including content managed in Business Portal centers, as well as content on Windows SharePoint Services sites, topic sites created by experts within the company, and other Internet or intranet sites.
- You want to organize your Windows SharePoint Services sites (including Business Portal) within the SharePoint Portal Server site directory. Sites can be sorted, filtered, and grouped, making them much easier to find and manage.
- You want to be able to search your Business Portal sites as well as other Windows SharePoint Services sites, Web sites, and network files (such as Exchange Public Folders and Lotus Notes) by using SharePoint Portal Server.
- You want to draw on SharePoint Portal Server's ability to send alerts to users when specific search criteria are met.
- You are using Business Portal, but you also want each of your users to have their own personalized "My Site," which allows them to aggregate and access the content, applications, and Web services they use every day, such as their Calendar, Inbox, key documents, and personally relevant links and news. You can also publish information, documents, and best practices to your organization on the public view of My Site.
- You want to be able to submit Business Portal information pages both to SharePoint Portal Server topic areas and to the My Site page. For example, you want benefits information permanently listed on a Human Resource topic area page, but you also want to highlight it on the My Site page as an announcement during your open enrollment dates.

When Microsoft Business Portal and SharePoint Portal Server are used together, SharePoint Portal Server can become the corporate portal your employees use to access your Microsoft Business Portal sites and lists, as well as multiple data sources outside the portal that are relevant to them and their roles. Integrating the two solutions can save your organization time and resources.

## Integration points

There are three key opportunities for integrating the two systems: navigation, search, and My Site.

**Navigation** Links to the Business Portal centers can become part of SharePoint Portal Server's site directory and can be accessed through SharePoint Portal

Server's role-based personalization capabilities and other rich navigation elements.

**Search** SharePoint Portal Server's search engine can index and aggregate multiple Business Portal centers and content sources. The relevancy ranking and best-bet technology in SharePoint can ensure that Business Portal content and pages are discovered quickly and efficiently.

**My Site** SharePoint Portal Server's My Site area, which provides personalized points of access for employees, can also be used as a window into Business Portal announcements and other time-critical information.

## Installing Business Portal and SharePoint Portal Server on the same server

The following procedures describe how to install Business Portal and SharePoint Portal Server on the same Web server. If you plan to install the products on separate Web servers, refer to each product's installation instructions.

**Install SharePoint Portal Server...**Refer to the SharePoint Portal Server installation instructions to install SharePoint Portal Server. The installation process automatically installs and extends the Windows SharePoint Services virtual servers.

When you install SharePoint Portal Server, you'll choose whether to install "With Database Engine" or "Without Database Engine." The "With Database" option will install the Microsoft SQL Server™ Desktop Engine database, which is typically for single use, test, and small environments. If you choose the "Without Database Engine" option, you will then choose which SQL Server database you would like to connect the portal to. Refer to the SharePoint Portal Server and Windows SharePoint Services product documentation to determine the best installation scenario for your needs.

**Create Business Portal Web site...**Because SharePoint Portal Server has been installed on the default Internet Information Services Web site on port 80, you must create a new Web site on a different port for Business Portal.

1. Open IIS Manager.  
**Start > Administrative Tools > Internet Information Services (IIS) Manager**
2. Expand the local computer node, then right-click the **Web Sites** node and click **New > Web Site** to open the Web Site Creation Wizard. Click **Next**.
3. Enter a description for the new Web site. We recommend calling the new site Business Portal. Click **Next**.
4. In the **IP Address and Port Settings** window, enter the TCP port you want this Web site to use. (Don't change the other settings on this page.) Click **Next**.
5. On the **Web Site Home Directory** window, click **Browse**. In the **Browse For Folder** window, browse to the Inetpub folder, then click **Make New Folder**. Enter a name for the home directory for this Web site (for example, wwwroot2). Click **OK**.

Unmark **Allow anonymous access to this Web site**, then click **Next**.

6. In the **Web Site Access Permissions** window, mark the **Read** and **Run scripts (such as ASP)** options and click **Next**, then click **Finish**.

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**Note:** When you create a new Web site on a different port, and then install Business Portal on that site, you need to include the port number in the URL, in the following format: *http://servername:nn* (where *servername* is the Web server name and *nn* is the port number). For example, if you create a new Web site on port 81 and install Business Portal on that Web site, the URL for Business Portal will be: *http://servername:81/Sites/BusinessPortal/bppagelibrary/home1.aspx*.

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**Extend Business Portal Web site...**Before installing Business Portal on this new Web site, you must extend it using SharePoint Portal Server Central Administration. Use the following procedure to do so.

1. Open SharePoint Portal Server's Central Administration.  
**Start > All Programs > SharePoint Portal Server > SharePoint Central Administration**
2. Click **Extend an existing virtual server from the Virtual Server List page** to open the **Virtual Server List** page.
3. Click **Business Portal** (this is the Web site you created in IIS Manager), to open the **Extend Virtual Server** page, then click **Extend and create a content database**.
4. On the **Extend and Create Content Database** page, select **Create a new application pool**. Enter a name for the application pool (we recommend BusinessPortal).
5. Select the security account you want the Business Portal application pool to use. We recommend that you use a domain account you create exclusively for this purpose. It must be a member of the IIS\_WPG Local Computer Group on the IIS server and have a SQL server login with server roles of Security Administrators and Database Creators. For more information, refer to the Business Portal Installation manual.
6. Enter the domain account and e-mail address of the site owner.
7. Unmark **Use default content database server**, then verify the database server name and enter the name for the content database (for example, BusinessPortal).
8. Leave the default entries for the remaining options.
9. Click **OK**.

**Install Business Portal...**After SharePoint finishes extending the Web site, you can install Business Portal on it. For more information, refer to the Business Portal Installation Guide.

## Configuring the connection between Business Portal and SharePoint Portal Server

Configuring the connection between Business Portal and SharePoint Portal Server allows Business Portal pages to be submitted as listings to SharePoint Portal Server topic areas, which is the first step in the integration process. Use the following procedure whether you have installed Business Portal and SharePoint Portal Server on the same server or separate servers.

1. In Business Portal, open the **Configure Connection to Portal Site** page. **Site Settings > General Settings > Configure Connection to Portal Site**
2. In the **Portal Configuration** area, mark **Connect to Portal Site**, then enter the URL of your SharePoint Portal Server and the portal name.

Home Help

BusinessPortal

### Configure Connection to Portal Site

Use this page to connect your Web site to a Windows SharePoint Services-compatible portal site. This connection will provide your users the ability to categorize lists, connect to user profiles, link to portal search, and more.

#### Portal Configuration

To connect to a portal site, enter the URL and a friendly name for the portal.  
[Show me more information.](#)

Do not connect to portal site  
 Connect to portal site

Portal Web Address:  
  
Example: http://server/portal/

Portal Name:

OK Cancel

3. Click **OK**.

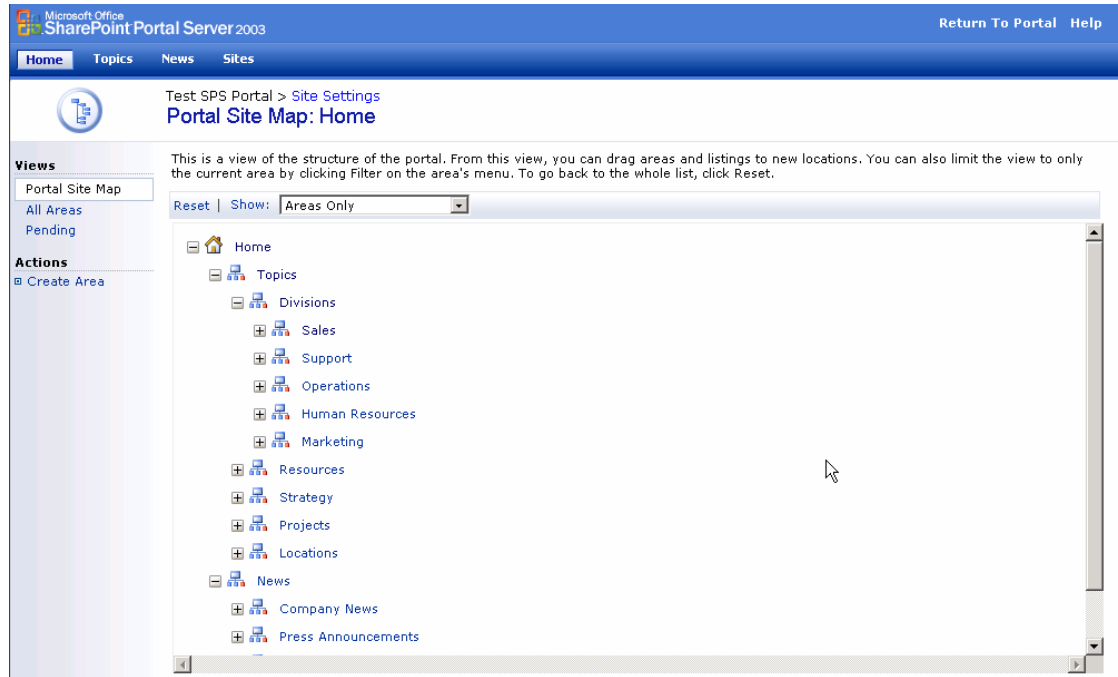
## Integrating Business Portal content with SharePoint Portal Server navigation

SharePoint Portal Server's navigation hierarchy is a collection of portal areas, and it is the first point of integration for the two systems. You can list any Business Portal page—centers, information pages, document libraries, or lists—in any portal area, thus making them available to users navigating the portal.

### SharePoint Portal Server areas and portal navigation

In SharePoint Portal Server, portal areas provide navigation for finding and browsing all types of content, ranging from single documents to any complete site. When you install SharePoint Portal Server, it provides a default set of portal areas.

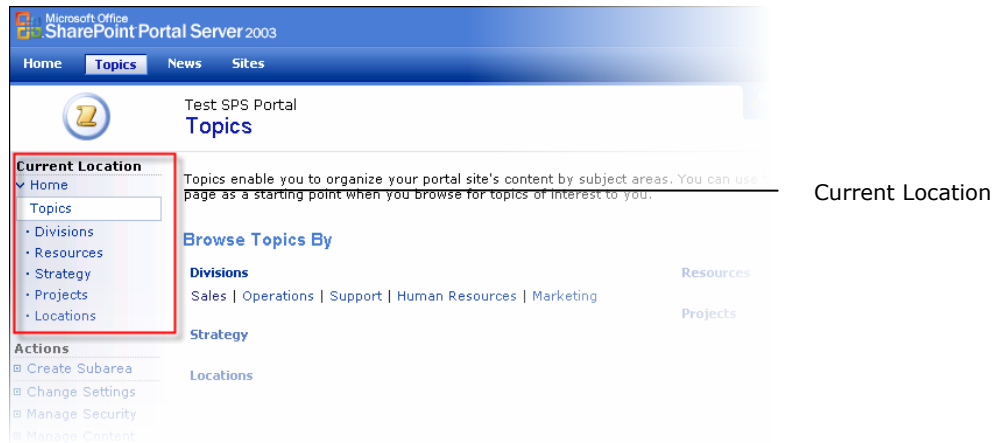
To view or modify this navigation hierarchy, click **Manage Portal Site** on the SharePoint Portal Server **Home** page to open the **Portal Site Map: Home** page.



By adding, moving, renaming, or deleting areas, you can change the view of the portal site for users. The top level of areas under the Home area forms the primary navigation for the portal site. These top-level areas appear on the SharePoint navigation bar.



Areas under the top-level areas appear as you navigate through the portal site. For example, if you click the Topics tab, the sub-areas under Topics appear in the Current Location area of the page.



You can use the portal site map to add, remove, move, or rename areas and listings to change the navigation structure or the content organization of the portal site. In addition, you can set security levels for these areas, selecting the users or site groups who have access to each area. For additional information, please refer to SharePoint Portal Server's online Help at <http://www.microsoft.com/technet/prodtechnol/office/sps2003/default.mspx>.

## Adding a Business Portal page to a SharePoint Portal Server area

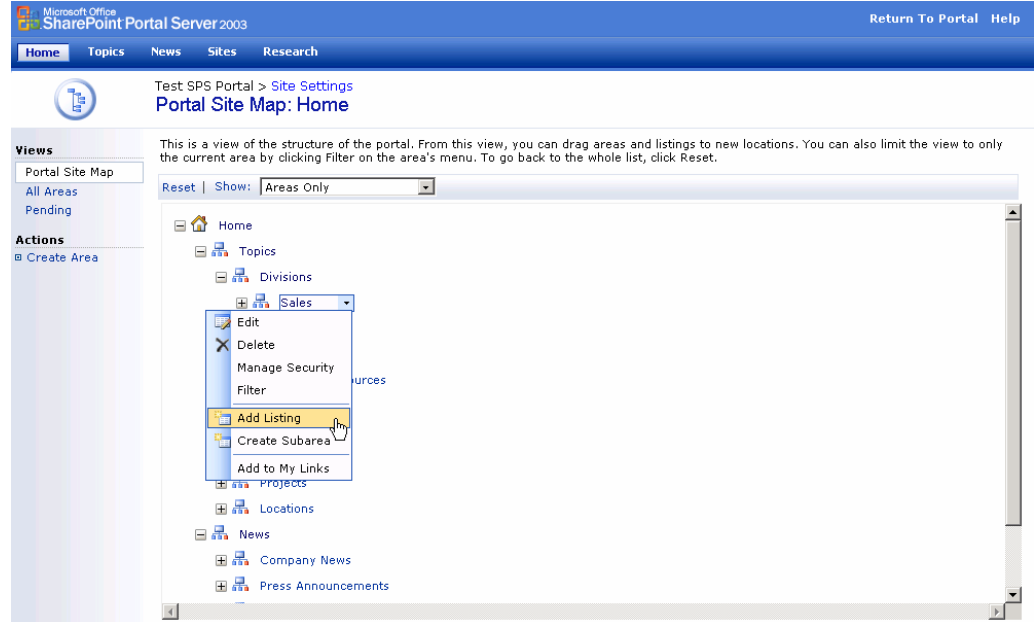
While you can add any Business Portal page to the SharePoint Portal Server navigation hierarchy, at a minimum, you should add Business Portal centers as listings in relevant areas. Users can then find these linked centers through the portal's navigation structure. In addition, users can search site links and area listings, and top-level Business Portal centers can appear as part of search results that might also include other content sources. In this way, Business Portal centers for specific topics such as Human Resources or Sales, can be discovered through the corporate portal.

There are a number of methods you can use to list a Business Portal page in a SharePoint Portal Server portal area. Many pages have a link in the **Actions** area for adding a listing to that page. For example, within the default **Sites** area, you can click **Add Link to Site** to add a listing for a Business Portal center page. Many pages also include a **Manage Content** link in the **Actions** area that you can use to add listings. Finally, you can use the portal site map to add listings to any of the portal areas. In all cases, the basic procedure is the same.

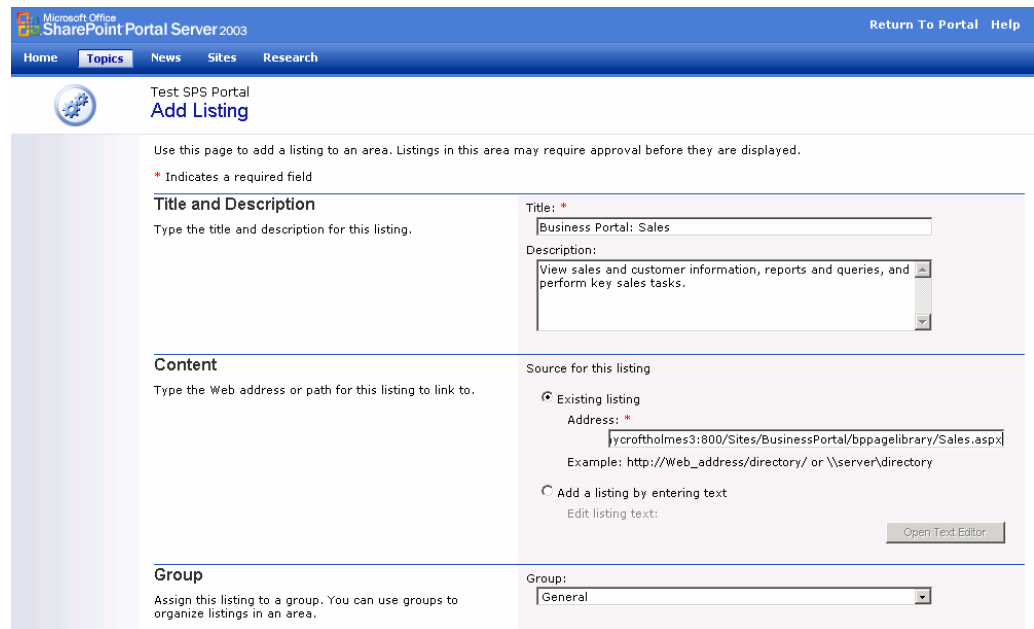
The following procedure describes using the portal site map to add a Business Portal page to the portal navigation hierarchy.

1. In SharePoint Portal Server, click **Manage Portal Site** in the **Actions** area of the page.
2. Expand the navigation hierarchy to display the area you want to add a Business Portal page to.

- Open the drop-down menu for the area and click **Add Listing**.

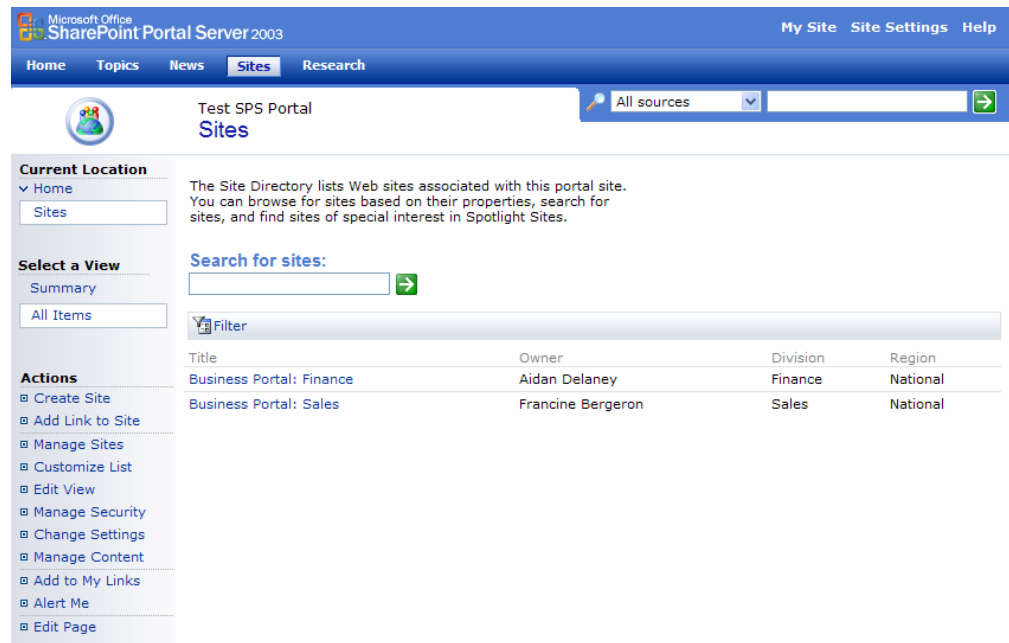


- The **Add Listing** page appears. Enter the title and description of the Business Portal page you want to add to the site directory, then mark **Existing listing** and enter the URL of the page.



- You can also assign this listing to a group and associate an image with it. For additional information, please refer to SharePoint Portal Server's online Help at <http://www.microsoft.com/technet/prodtechnol/office/sps2003/default.mspx>.

6. If you want to add this listing to more than the selected portal area, click **Change Location**.  
In the **Change location** dialog box, mark the areas you want this listing to appear in, then click **OK**.
7. Select the audience you want this Business Portal content targeted to, then click **Add**.
8. Click **OK** to add the page to the site area.
9. Verify that the Business Portal page has been added to the SharePoint Portal Server area you selected. For example, to check that you successfully added Business Portal pages to the Sites area, click the **Sites** tab in the Navigation bar, then click **All Items** in the **Select a View** list.



## Integrating Business Portal content with SharePoint Portal Server search

When you create listings in SharePoint Portal Server areas for Business Portal pages, the text of those listings is automatically included in SharePoint Portal Server searches, but the content of those Business Portal pages is not. To include Business Portal content in searches, you first need to establish Business Portal pages as SharePoint Portal Server content sources. Then, you must establish a search scope for the Business Portal pages.

**Note:** Because of security considerations, we recommend that you add only Microsoft Business Portal document libraries and lists as content sources. We do not recommend that you make information pages available through SharePoint Portal Server's search. The search crawler would have access based on the account specified for the search crawler, and it might display information in search results summaries that users are not authorized to view. For example, if you add the Customers page as a content source, unauthorized users might be able to

view customer data in a search summary, even though they don't have access to the Customers page.

## Establishing Business Portal document libraries and lists as content sources

While you can add individual pages as content sources, the following procedure shows how to establish Business Portal document libraries and lists as SharePoint Portal Server content sources.

1. From any SharePoint Portal Server portal site area, open the **Add Content Source** page.  
**Site Settings > Configure search and indexing > Add content source**

Microsoft Office  
SharePoint Portal Server 2003

Return To Portal Help

Home Topics News Sites Research

Test SPS Portal > Site Settings > Configure Search and Indexing > Manage content sources  
**Add Content Source**

Use this page to add a content source.

**Content Type**  
Select a content type.

Exchange Server public folder  
 File share  
 Web page or Web site

Any content, from a single Web page to an entire Web site. This includes SharePoint Portal Server portal sites and Windows SharePoint Services sites.

Next > Cancel

2. On the **Add Content Source** page, select **Web page or Web site** and click **Next**.

Microsoft Office  
SharePoint Portal Server 2003

Return To Portal Help

Home Topics News Sites Research

Test SPS Portal > Site Settings > Configure Search and Indexing > Manage content sources  
**Add Content Source: Web page or Web site**

Use this page to specify the options for this content source.

\* Indicates a required field

**Address and Description**  
Enter an address and description of the Web site to include in the content index.

Address: \*  
http://mycroftholmes3:800/Sites/BusinessPortal/\_layouts/1033/vic  
Examples:  
http://example.microsoft.com/my\_page.htm, or  
http://example.microsoft.com

Description: \*  
Business Portal's main document libraries and lists page

**Crawl Configuration**  
Page depth specifies how far to follow each series of links, starting from each link in the content source. Site hops, which occur when a link from one Web site leads to another site, can be also be limited.  
Note: The crawl configuration for SharePoint Portal Server portal sites and Windows SharePoint Services sites should use the default value, **This Site - follow all links for this site**.  
Including content in adaptive updates will make changes will show up more quickly in search results, but updates will use more server resources.

This site - follow links to all pages on this site  
 This page only  
 Custom - specify page depth and site hops:

Limit page depth:  
2

Limit site hops:  
1

Participate in adaptive updates

< Back Finish Cancel

3. In the **Address and Description** section, enter the URL of the main document libraries and lists page, for example:  
http://ServerName/Sites/BusinessPortal/\_layouts/1033/viewlsts.aspx.
4. In the **Description** field, enter a description.
5. In the **Crawl Configuration** section, click **Custom – specify page depth and site hops**.
6. Select the **Limit page depth** check box, and then type 2 to specify that only two links will be followed and indexed within this site.
7. Select the **Limit site hops** check box, and then type 1. This specifies that only one link to another site will be indexed.
8. To include this content source in adaptive updates, select the **Participate in adaptive updates** check box.
9. Click **Finish**. The **Created Web page or Web site Content Source** page will appear, where you can configure how the Business Portal content will be indexed. For more information, refer to the SharePoint Portal Server documentation.

## Specifying a search scope

To make it easier for users to specify what kind of information they want to search for, you can establish a search scope. When a user enters search terms, they can select one of the search scopes you've defined from the list next to the Search field, allowing for more tightly targeted searches. For example, if a user wanted to search for a particular keyword, but only within Business Portal document libraries, they would select "Business Portal document libraries and lists" as the search scope.

The following procedure shows how to set up a search scope for Business Portal document libraries and lists.

1. From any SharePoint Portal Server portal site area, open the **Add Search Scopes** page.  
**Site Settings > Manage search scopes>New Search Scopes**

2. On the **Add Search Scopes** page, enter the scope name.

Microsoft Office  
SharePoint Portal Server 2003

Return To Portal Help

Home Topics News Sites Research

Test SPS Portal > Site Settings > Manage Search Scopes  
**Edit Search Scope**

Edit Search Scope  
\* Indicates a required field

**Name**  
Type a name for this search scope.

**Topics and Areas**  
Select **Include all contents** if this search scope should include all areas and content source groups. Select **Include no topic or area in this scope** if this search scope should not include any area or topic contents. Select **Limit the search scope to items in the following topics or areas** and then click [Change areas](#) to select topics or areas for this search scope. The selected area and all of its subareas will be included in this search scope.

Include all contents  
 Include no topic or area in this scope  
 Limit the search scope to items in the following topics or areas  
Topics and Areas  
None  
[Change areas](#)

**Content Source Groups**  
Content sources outside the portal can be grouped into certain types, and you may want to limit your search scope to exclude or include particular content source groups.  
Select **Include all content sources** if this search scope is not limited to certain content source groups. Select **Exclude all content sources** to limit the search scope to only the default content source for this portal. To limit the search scope to particular content source groups, select

Exclude all content sources  
 Include all content sources  
 Limit the scope to the following groups of content sources:  
 Business Portal's main document libraries and lists page  
 Non-portal content  
 People

3. In the **Topics and Areas** section, select **Include no topic or area in this scope**.
4. In the **Content Source Groups** section, select **Limit the scope to the following groups of content sources**, and then click the check box for the content source name you defined in the previous procedure.
5. Click **OK**.

## Publishing Business Portal information on My Site

In SharePoint Portal Server, users can create personalized sites—called My Site—that provide a place to save and share their own work, a way to find other people in the organization and see their work, and a way for other people in the organization to find them and see their work. You access My Site by clicking My Site at the top of any SharePoint Portal Server site area. You can target information, including Business Portal pages, to specific audiences within SharePoint. Users can view the information targeted to their audience memberships on My Site.

Linking Business Portal information pages to My Site can help you target specific Business Portal content to personal sites. In turn, My Site users can rapidly identify time-critical information. For example, you might always want benefits information listed as a Human Resources topic area within SharePoint Portal Server, but you might also want to highlight the link to this page on users' personal sites during open enrollment periods. You can specify different publication or expiration dates for the two listings.

To include links within My Site for a Business Portal information page, complete the following steps:

1. From any SharePoint Portal Server portal site area, open the **Targeted Links on My Site** page.  
**Site Settings > Manage targeted links on My Site**
2. On the **Targeted Links on My Site** page, click **Add Listing**. The **Add Listing** page appears.

Microsoft Office  
SharePoint Portal Server 2003

Return To Portal Help

Home Topics News Sites Research

Test SPS Portal  
**Add Listing**

Use this page to add a listing to an area. Listings in this area may require approval before they are displayed.

\* Indicates a required field

**Title and Description**  
Type the title and description for this listing.

**Title:** \*  
Benefits Information for Open Enrollment

**Description:**  
The period for making changes to your benefits package will open soon. Refer to this site for more information about available benefits.

**Content**  
Type the Web address or path for this listing to link to.

**Source for this listing**

Existing listing  
Address: \*  
http://mycroftholmes3:800/Sites/BusinessPortal/bppagelibrary/Be  
Example: http://Web\_address/directory/ or \\server\directory

Add a listing by entering text  
Edit listing text:

**Group**  
Assign this listing to a group. You can use groups to organize listings in an area.

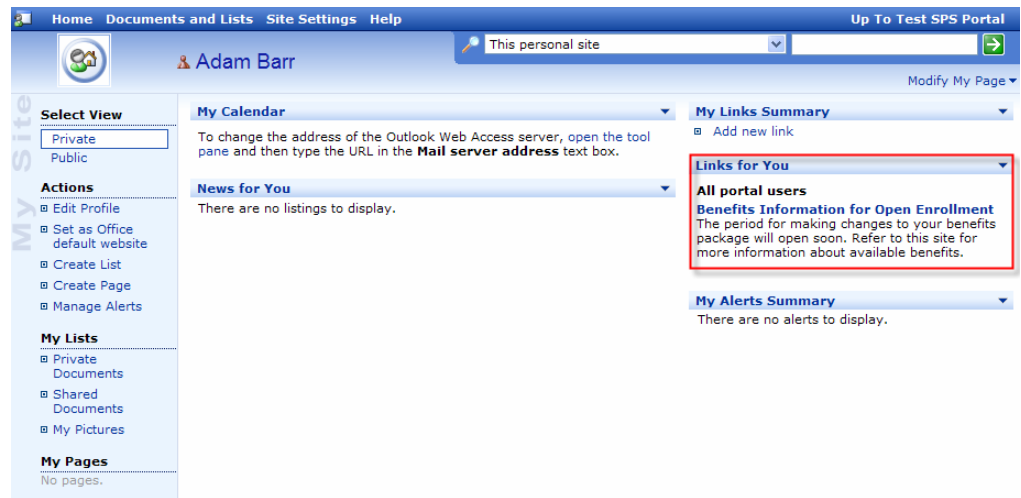
**Group:**  
General

3. Enter a title and description of the Business Portal page you want to add.
4. Click **Existing listing**, and then enter the URL of the Business Portal information page.
5. Select the audience you want this Business Portal content targeted to, then click **Add**.
6. Click **OK** to submit the item to My Site. The listing will now appear in the Links for You Web Part on the My Site page for users in the audience you selected.

By default, targeted links added to My Site do not display descriptions. If you want users to see descriptions, complete the following steps:

1. Go to My Site, click **Modify My Page** at the top of the page, and then click **Shared View**.
2. Click the arrow for the **Links for You** Web Part, and then click **Modify Shared Web Part**. The page opens in design mode with the selected Web Part outlined with a dotted yellow line. The properties for the **Links for You** Web Part are displayed on the right side of the page.

3. Change the Display Template property from **Minimum** to **Normal** and click **OK**. The link will now appear with its description on My Site for the targeted users.



For more information, please refer to SharePoint Portal Server's online help at <http://www.microsoft.com/technet/prodtechnol/office/sps2003/default.aspx>. Choose "Personalizing the Portal Site," then choose "Modify pages on My Site."

For more information on targeting links and audiences on My Site, please refer to "Working with Content in Areas," then "Working with News Items," then "About News."

## Related links

See the following resources for further information:

- Microsoft Windows SharePoint Services at <http://www.microsoft.com/WindowsServer2003/technologies/sharepoint/default.aspx>
- Microsoft Business Solutions Business Portal at <http://www.microsoft.com/businesssolutions/businessportal/default.aspx>
- Microsoft Office SharePoint Portal Server 2003 at <http://office.microsoft.com/home/office.aspx?assetid=FX010909721033>



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