

THEOBALD
SOFTWARE

Deployment & Configuration Guide

Purchase Requisition Management

Enabled with



ERPConnect Services

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Gold Independent Software Vendor (ISV)
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1 Prerequisites

1.1 Prerequisite: SharePoint Server 2010

The Purchase Requisition solution requires that you have a SharePoint Server 2010 system installed and configured in your environment. To make use of Single Sign-On capabilities you need to have the Standard or Enterprise Edition of SharePoint Server 2010 installed.

On the SharePoint Server, a web application and site collection has to be configured. The Purchase Requisition solution will be installed in a subsite of the site collection. This guide will walk you through the process of creating a subsite and deploying the Purchase Requisition solution to that site.

1.2 Prerequisite: ERPConnect Services

The Purchase Requisition solution utilizes ERPConnect Services to communicate with your SAP ERP system. ERPConnect Services needs to be installed and configured on the SharePoint Server that will host the Purchase Requisition solution.

Detailed steps for how to install and configure ERPConnect Services can be found in the Theobald Software Online Help system at:

http://help.theobald-software.com/TheobaldSoftwareGmbH/default.aspx?pageid=ecs_en&skin=ECS_EN

1.2.1 ERPConnect Service Application (Required)

The Purchase Requisition solution will rely on the *default* ERPConnect Service Application on your SharePoint Server to communicate with the SAP system. Please ensure that an ERPConnect Service Application is configured and marked as *default* application.

1.2.2 Secure Store Application (Recommended)

In order to enable Single Sign-On (SSO) capabilities for the Purchasing Solution, a Secure Store Application has to be configured for use with ERPConnect Services. The Secure Store Application will map the SharePoint user identity to an SAP user account.

2 Deployment

The Purchase Requisition solution can be deployed in one of two ways:

- Using Visual Studio 2010 to deploy the solution directly to a SharePoint site
- Using the SharePoint Management Shell and the provided installation script

Before you deploy the Purchase Requisition solution, you need identify or create a subsite that you will deploy the solution to.

2.1 Creating a SharePoint Site

When you create a SharePoint site, you typically create a subsite either of the top-level Web site or of an existing subsite. Using the browser, navigate to a top-level Web site or existing subsite on your SharePoint Server. In order to create a new subsite, you need to have Full Control permissions on the parent site.

1. Open the browser and navigate to the parent site (top-level Web site or existing subsite)
2. From the **Site Actions** menu, select **New Site**.

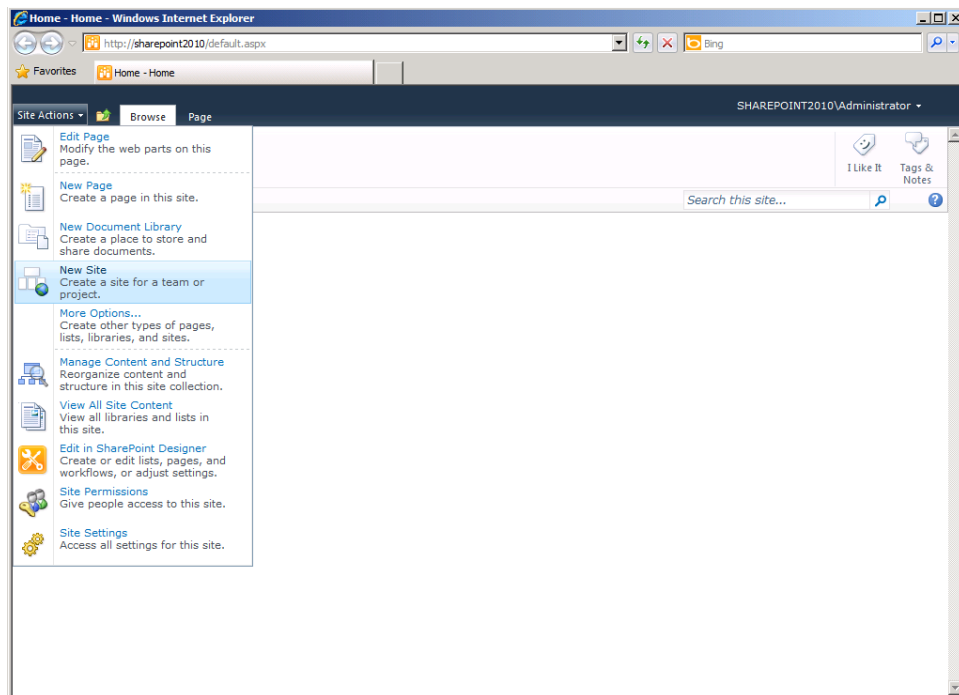


Figure 1 - New Subsite

In the **Create** dialog, select **Blank Site** from the available types.

3. Specify a **Name** and **URL Name** for the new site, for example
Name = Purchasing

URL name = purchasing

4. Select the **Create** button

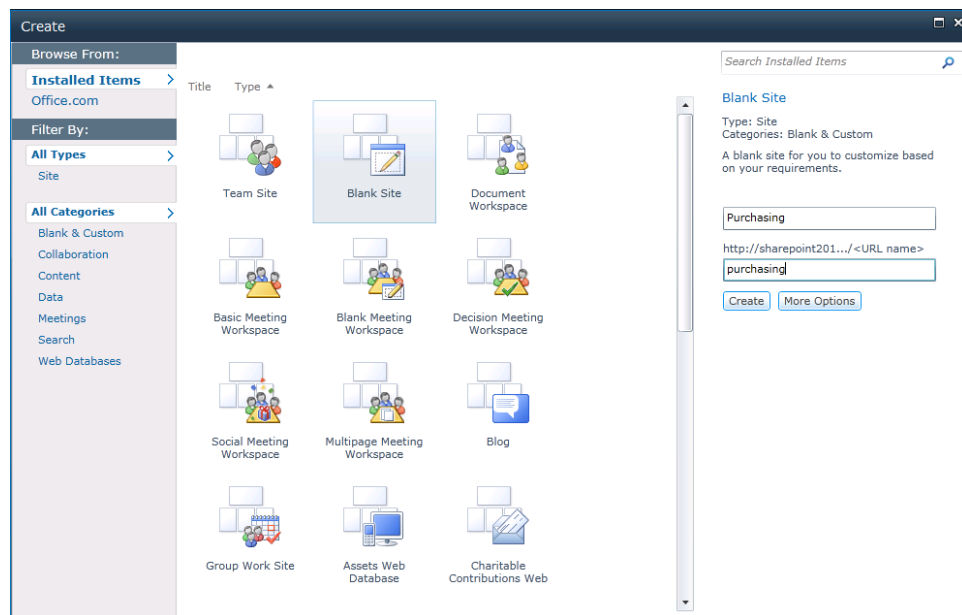


Figure 2 - Create Site Dialog

In our example, the site will have the URL <http://sharepoint2010/purchasing>

The new subsite will be created at the specified URL and the default page will be displayed in the browser:

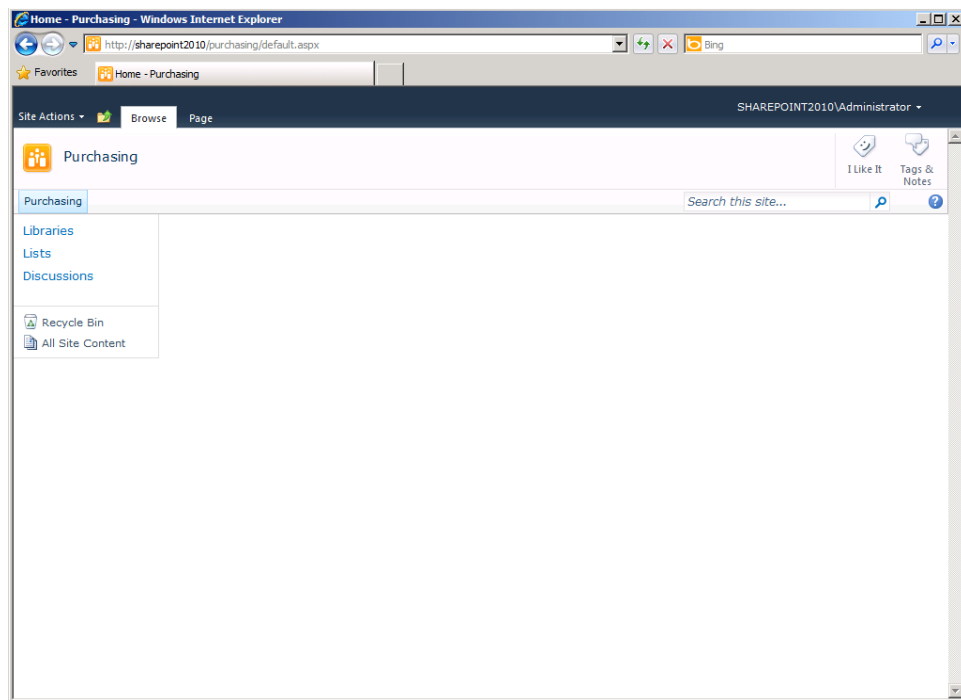


Figure 3 - New Subsite

2.2 Visual Studio Deployment

The Purchase Requisition solution is provided to you as a Visual Studio solution (BANF.sln). Using the deployment functionality in Visual Studio you can easily deploy the solution to your SharePoint server:

1. Open the solution file **BANF.sln** in Visual Studio 2010 on your development system (this can be your SharePoint Server or a separate SharePoint development system).
2. In the **Solution Explorer** window of Visual Studio, select the **BANF** project node. Underneath the BANF project node, you will find all the development components of the Purchase Requisition solution, including Web Part, Application Page or List definitions.
3. In the **Properties** window of Visual Studio, change the **Site URL** property to the URL of the subsite where you want to deploy the solution to. In our example it is <http://sharepoint2010/purchasing/>.

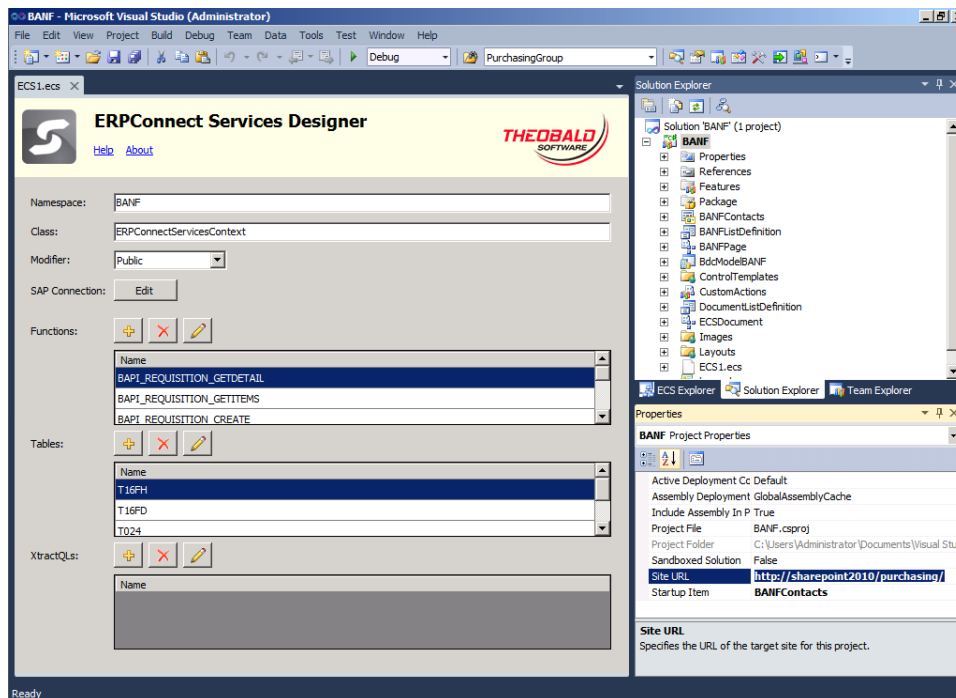


Figure 4 - Site URL Property

4. Right-click on the **BANF** project node and select **Deploy** from the context menu.

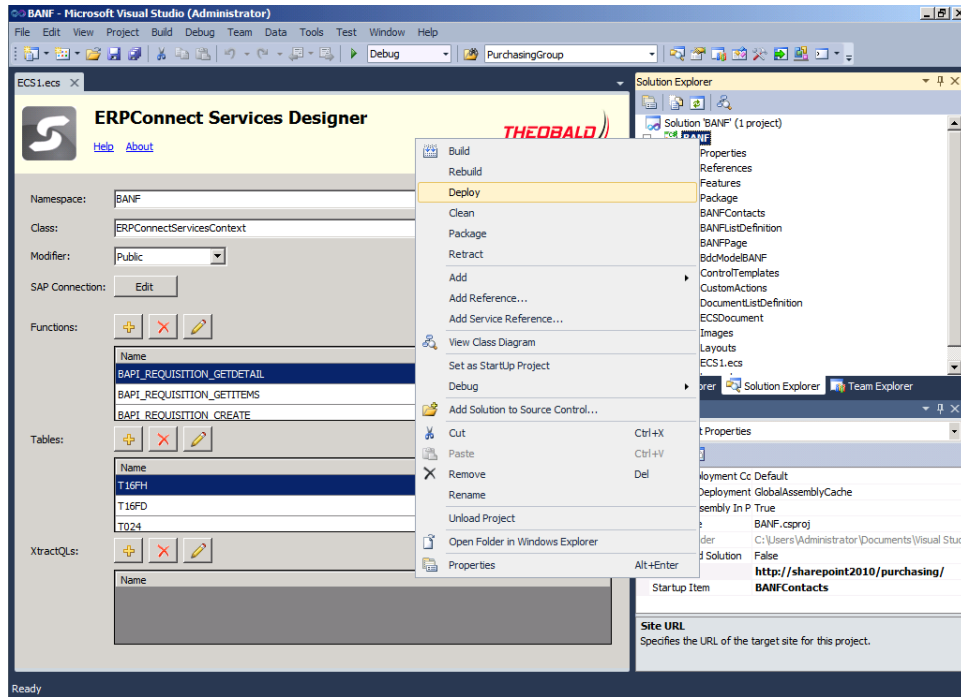


Figure 5 - Project Deployment

5. Use the **Output** window in Visual Studio to monitor the deployment progress or identify any potential errors during the deployment step. You can make the Output window visible from the **View** menu -> **Output**.
6. Ensure that the deployment process was successful as indicated by the **Deploy succeeded** confirmation message.

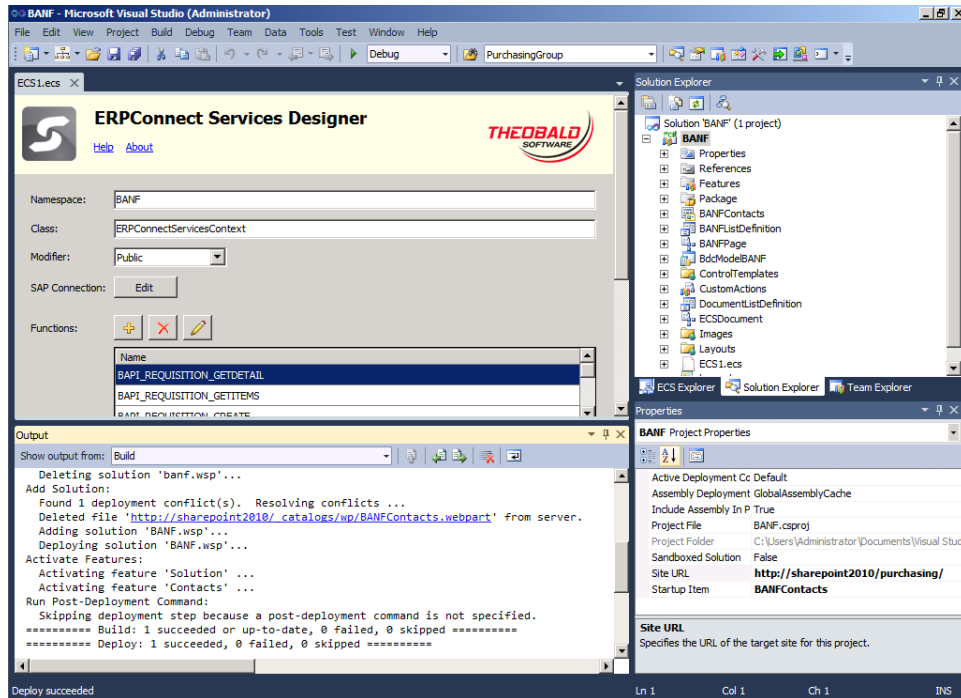


Figure 6 - Deploy Succeeded

The solution is now deployed at the specified subsite. Continue with the steps outlined in the Deployment Verification section of this document.

2.3 SharePoint Management Shell Deployment

The Purchase Requisition solution is provided to you as a SharePoint solution package (BANF.wsp), together with a Powershell script file (InstallBANF.ps1).

Using the SharePoint Management Shell and the provided script, you can easily deploy the solution to your SharePoint server:

1. Copy the files **BANF.wsp** and **InstallBANF.ps1** to a folder on your SharePoint server, e.g. c:\temp.
2. From the **Start** menu of your SharePoint server, launch the **SharePoint 2010 Management Shell**.

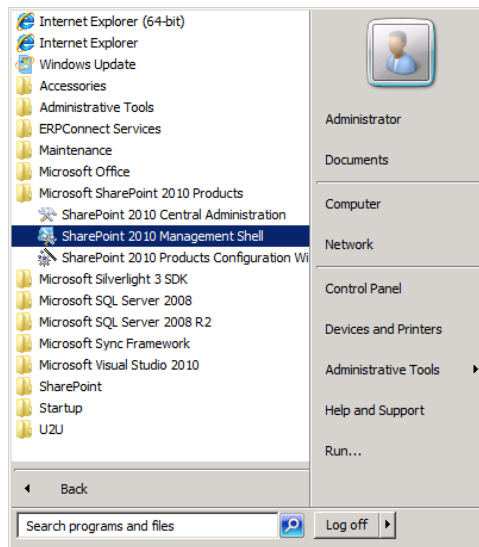


Figure 7 - SharePoint Management Shell

3. In the **SharePoint Management Shell** window, enter the full path of the **InstallBANF.ps1** script file and hit **[ENTER]** to execute the script file

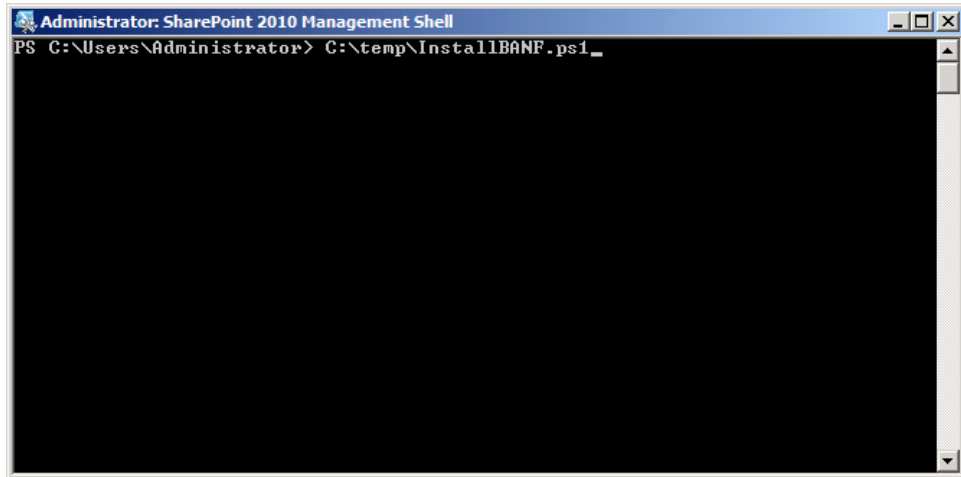


Figure 8 - Script File

4. The script will prompt you for the location of the BANF.wsp solution package file. Specify the full path, including the package file name and hit **[ENTER]**
5. The script will prompt you for the URL of the SharePoint site where you want to install the solution on. In our example this is `http://sharepoint2010/purchasing`. Enter the full URL of the subsite and hit **[ENTER]**

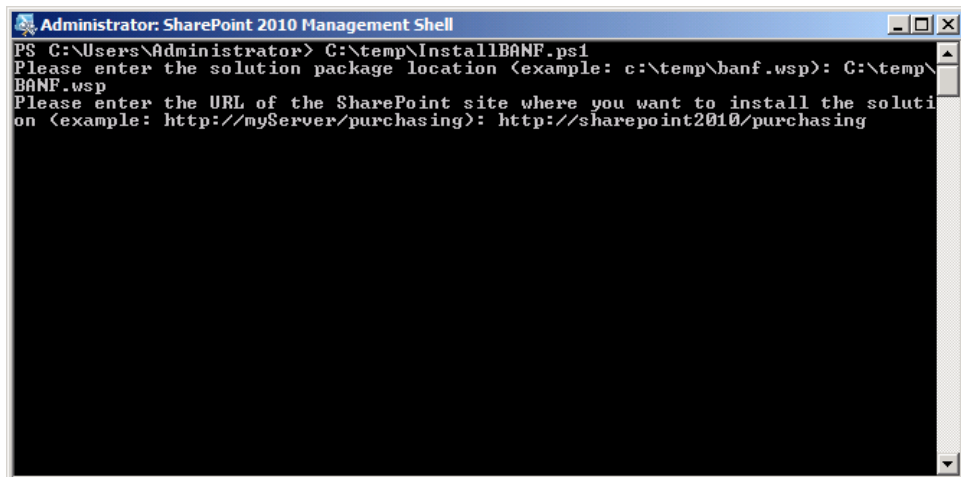
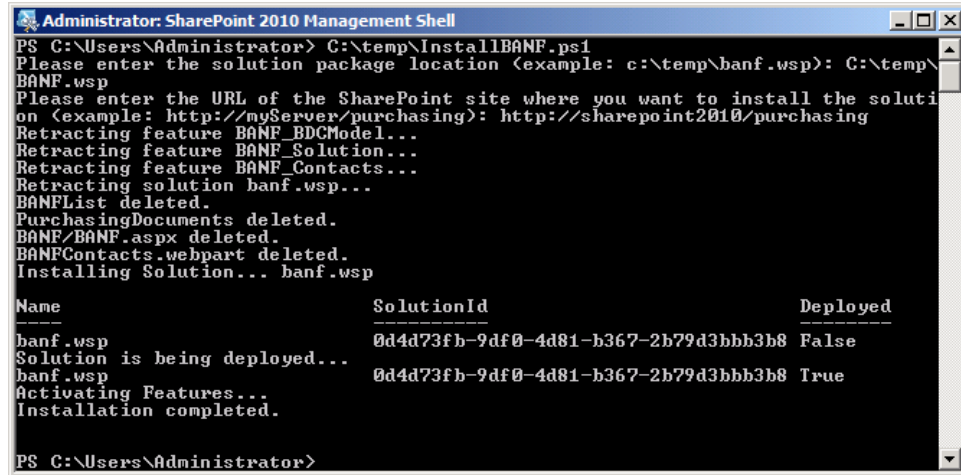


Figure 9 - Script Parameters

- The script will check for an existing deployment of the solution and will retract the solution if one is found. The script will then deploy and activate the solution at the specified subsite.



```
Administrator: SharePoint 2010 Management Shell
PS C:\Users\Administrator> C:\temp\InstallBANF.ps1
Please enter the solution package location (example: c:\temp\banf.wsp): C:\temp\
BANF.wsp
Please enter the URL of the SharePoint site where you want to install the soluti
on (example: http://myServer/purchasing): http://sharepoint2010/purchasing
Retracting feature BANF_BDCModel...
Retracting feature BANF_Solution...
Retracting feature BANF_Contacts...
Retracting solution banf.wsp...
BANFList deleted.
PurchasingDocuments deleted.
BANF/BANF.aspx deleted.
BANFContacts.webpart deleted.
Installing Solution... banf.wsp

Name                SolutionId                Deployed
----                -
banf.wsp             0d4d73fb-9df0-4d81-b367-2b79d3bbb3b8 False
Solution is being deployed...
banf.wsp             0d4d73fb-9df0-4d81-b367-2b79d3bbb3b8 True
Activating Features...
Installation completed.

PS C:\Users\Administrator>
```

Figure 10 - Successful Installation

- Verify that the installation completed and no errors occurred.

2.4 Deployment Verification

You can verify the successful deployment of the solution with the following steps:

1. Using the browser, navigate to the solution subsite (e.g. <http://sharepoint2010/purchasing>)
2. From the **Site Actions** menu, select **Site Settings**
3. On the **Site Settings** page, from the **Site Actions** group, select **Manage Site Features**
4. Verify that the **BANF Solution** feature is in status **Active**

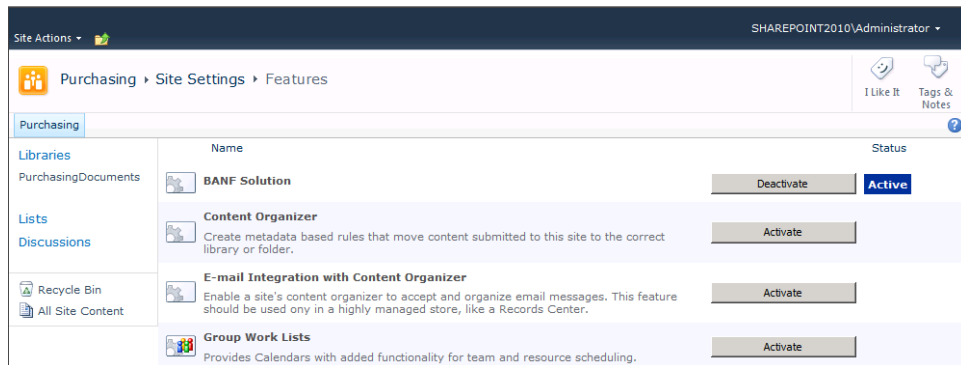


Figure 11 - Active Site Feature: BANF Solution

5. Navigate to the top-level site collection for your solution site (e.g. <http://sharepoint2010>)
6. From the **Site Actions** menu, select **Site Settings**
7. On the **Site Settings** page, from the **Site Collection Administration** group, select **Site Collection Features**
8. Verify that the **BANF Contacts** feature is in status **Active**

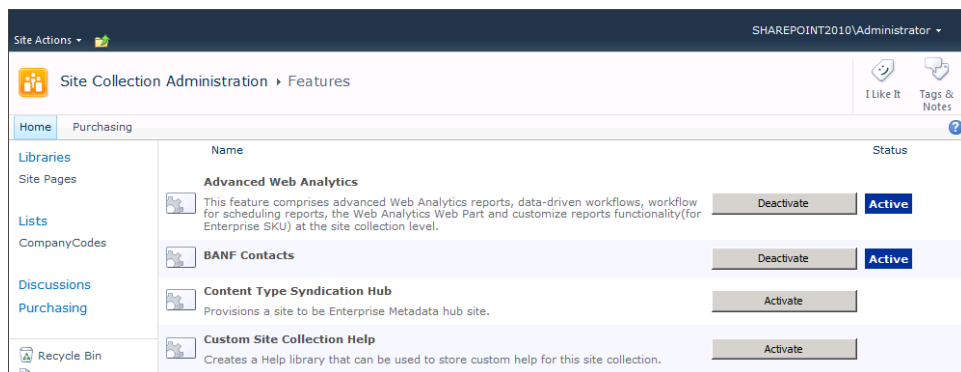


Figure 12 - Active Site Collection Feature: BANF Contacts

9. Launch **SharePoint 2010 Central Administration**
10. In the **Application Management** group, select **Manage Service Applications**
11. From the list of service applications, select **Business Data Connectivity Service** -> **Manage**
12. Verify the deployment of the four external content types **AcctAssignmentCat**, **BANF**, **DocumentType**, **PurchasingGroup**
13. Close **SharePoint 2010 Central Administration**

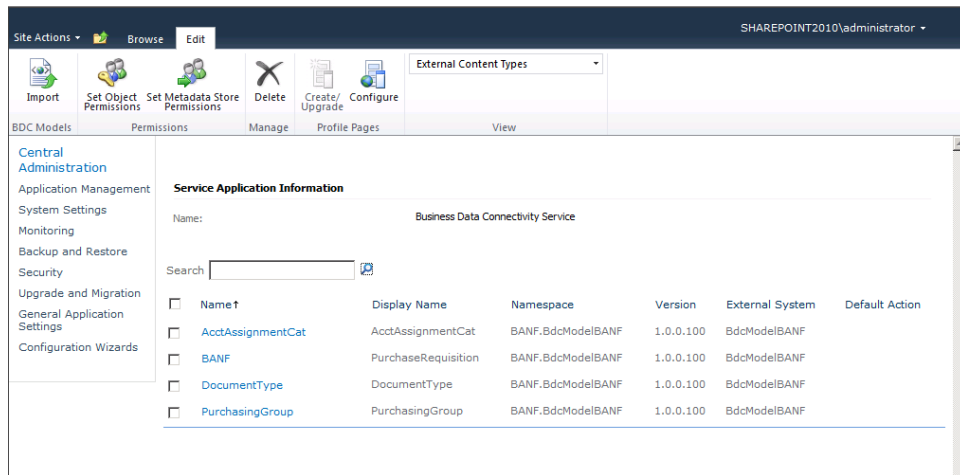


Figure 13 - External Content Types

3 Configuration

After the deployment of the solution, a few more steps are required before you can use the solution. For the following steps, you need to have **Full Control** permissions on the solution subsite.

1. After deployment, the main of the Purchase Requisition solution is available at `http://<server>/<site>/banf/banf.aspx`. Navigate to the solution URL, e.g. in this example `http://sharepoint2010/procurement/banf/banf.aspx`

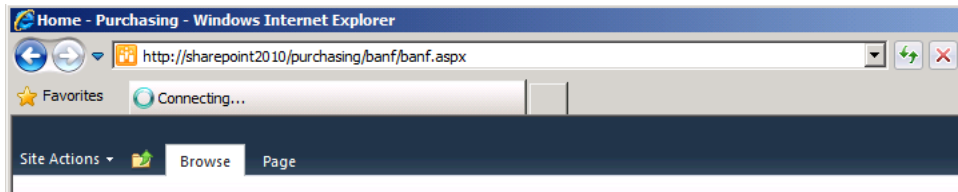


Figure 14 - Solution Application Page URL

2. From the **Site Actions** menu, select **Edit Page**

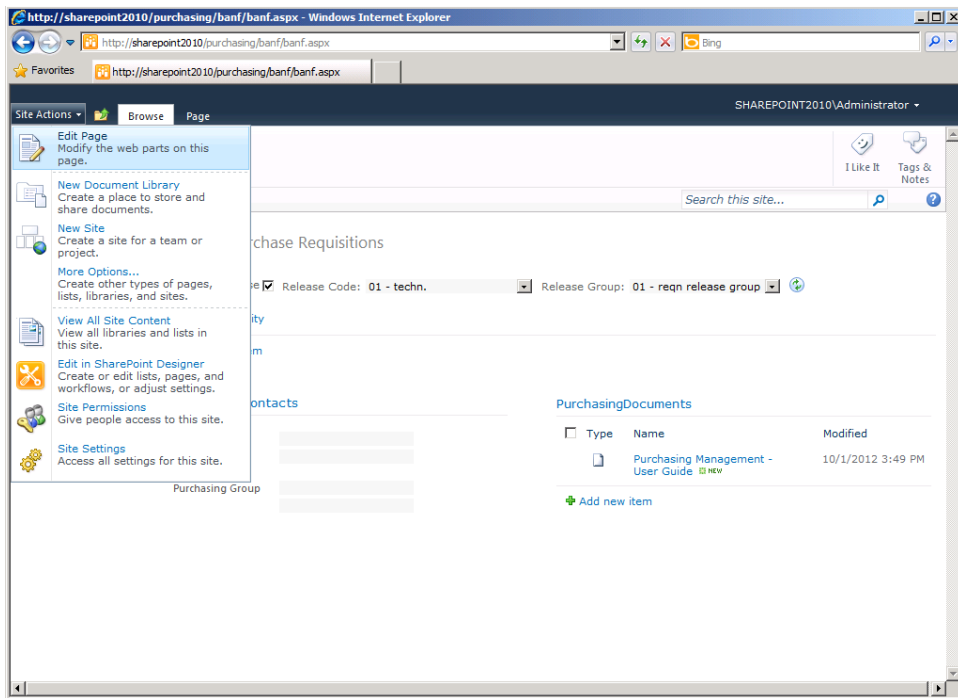


Figure 15 - Edit Page

- From the Web Part menu of the **Purchase Requisitions** Web Part, select **Edit Web Part**.

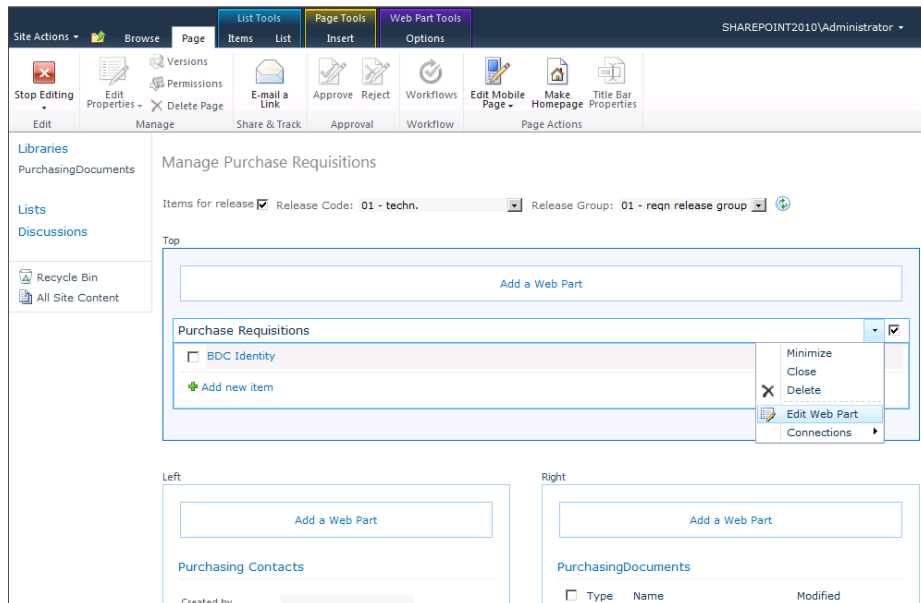


Figure 16 - Web Part Menu

- The Web Part properties panel will be shown on the right-hand side.
- Change the **Selected View** value to **ReadList**
- Select the **OK** button in the Web Part properties panel

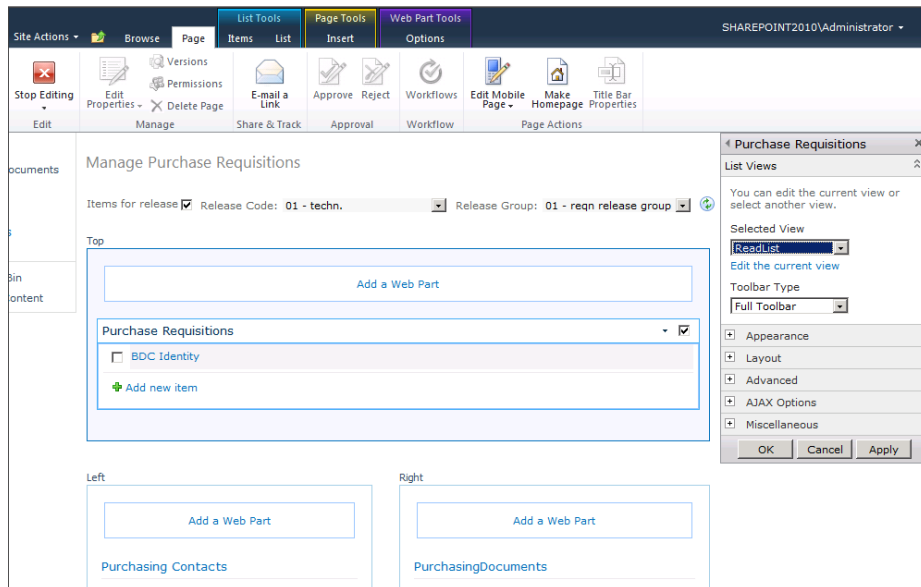


Figure 17 - Purchase Requisitions Web Part Properties

7. Still in **Page Edit** mode, from the Web Part menu of the **Purchasing Contacts** Web Part, select **Connections -> Get Row of Data From -> Purchase Requisitions**

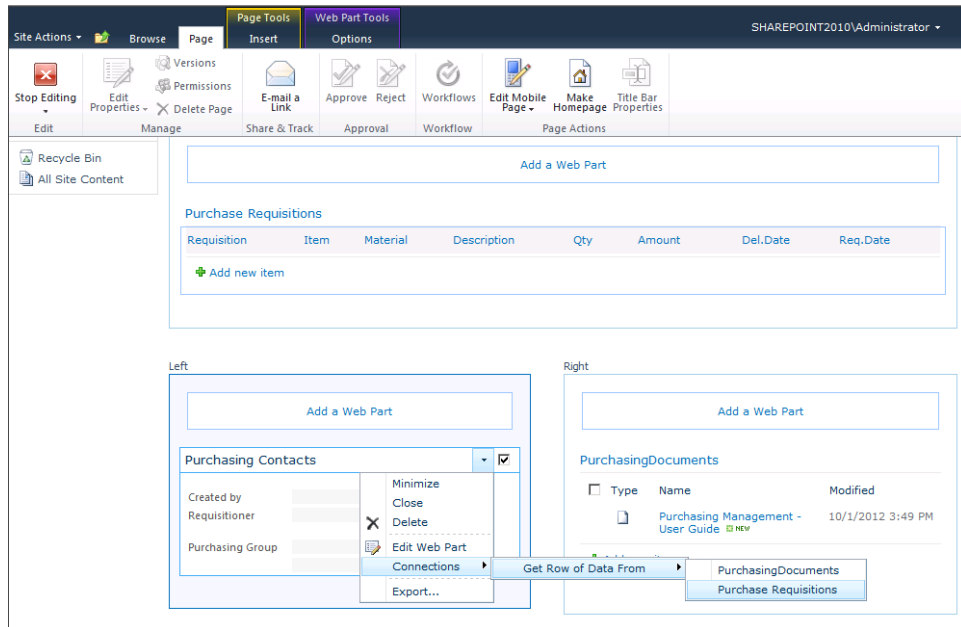


Figure 18 – Purchasing Contacts Web Part Connection

8. Select the **Stop Editing** button from the Page ribbon

9. Select a **Release Code** (e.g. **TD – Technical Division**) from the drop-down list at the top of the page, then the **Refresh** button next to the selected values.
10. The list of purchase requisitions from your SAP that will match the filter criteria will be shown. The related **Purchasing Contacts** information is shown below the list.

The screenshot displays the 'Manage Purchase Requisitions' page. At the top, there are filters for 'Release Code' (set to 'TD - Technical Division') and 'Release Group' (set to '01 - reqn release group'). A table lists five requisitions for 'Maxitec-R 3300 Professional PC'. Below the table, there are sections for 'Purchasing Contacts' and 'PurchasingDocuments'.

Requisition	Item	Material	Description	Qty	Amount	Del.Date	Req.Date
0010013842	00010	R-1003	Maxitec-R 3300 Professional PC	500	ST 1257.78	EUR 20120625	20120618
0010013844	00010	R-1003	Maxitec-R 3300 Professional PC	500	ST 1257.78	EUR 20120702	20120618
0010013848	00010	R-1003	Maxitec-R 3300 Professional PC	550	ST 1257.78	EUR 20120704	20120620
0010013849	00010	R-1003	Maxitec-R 3300 Professional PC	500	ST 1257.78	EUR 20120704	20120620
0010013857	00010	R-1003	Maxitec-R 3300 Professional PC	600	ST 1257.78	EUR 20120713	20120629

Purchasing Contacts

Created by Requisitioner	WF-MM-1
Purchasing Group	001 - Dietl,B. 069/5511

PurchasingDocuments

Type	Name	Modified
	Purchasing Management - User Guide NEW	10/1/2012 3:49 PM

Figure 19 - Purchase Requisition Solution

11. You are now ready to use the Purchase Requisitions solution. Please refer to the **User Guide** for additional information on how to use the solution

4 Additional References

- Purchase Requisition Management – User Guide (delivered with the solution)
- Online Help portal at <http://help.theobald-software.com>. Follow the ERPConnect Services link for detailed information on how to use ERPConnect Services.