Deployment & Configuration Guide

Purchase Requisition Management

Enabled with ERPConnect Services

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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 is 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:

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 to 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](image-url)
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

![Create Site Dialog](image)

**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.
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](image)

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.

![SharePoint Management Shell](image)
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](image1.jpg)

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](image2.jpg)
6. 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.

![Figure 10 - Successful Installation](image)

7. 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](image1)

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](image2)
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](image-url)
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

![Solution Application Page URL](image1)

Figure 14 - Solution Application Page URL

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

![Edit Page](image2)

Figure 15 - Edit Page
3. From the Web Part menu of the **Purchase Requisitions** Web Part, select **Edit Web Part**.

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

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.

![Purchase Requisition Solution](image)

**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)