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# *Technical Guide*

Oct 2001

**To Great Plains version 6.0**

*by Richard Prior*



# Consultants Technical Guide to Installations of Great Plains

4<sup>th</sup> October 2001 By Richard Prior

## Introduction

My Intention here is to give the support and implementation crew involved in Great Plains an overview of what they can expect to see while they are on site or working with support. When referring to Dynamics throughout this document the inference is also made to Great Plains eEnterprise and is used interchangeably.

## Workstation Installation

### **Dynamics**

#### Program Location

Each workstation requires the software to be installed on the local drive. With workstations with only one logical drive this is usually referred to as "C:". In most instances, Dynamics is installed into C:\program Files\Dynamics, or with Great Plains eEnterprise version 5.5 and later it is usually installed into c:\program files\eEntrprs. A consistent install path for all workstation is important for ease of installation and support.

#### Launch File

The aim of customising the Dynamics launch file (Dynamics.set) is to have the modified dictionaries for all dexterity products in a non shared path while keeping the pathname the same for all workstations. If the modified dictionaries are shared corruption will inevitably occur and halt access to Dynamics until the problem is found and the modified dictionary fixed.

The Dynamics.set has the path to the program dictionary for each dexterity product pointing to the installed path of Dynamics which is normally c:\Program Files\Dynamics. The lines in Dynamics.set that specify the modified dictionaries path usually also point to this same path unless it is an installation on Citrix or Windows Terminal Server. Where the site employs Citrix or Terminal server the above pathnames will result in shared modified dictionaries for the users on the Citrix or Terminal server. For this reason if a site users Citrix or Terminal Server the lines in Dynamics.set which specify the modified dictionaries path should point to the users home folder using a mapped drive.

#### Defaults Files

Amongst the entries in dex.ini are the paths to the help and online information. If during the initial installation of Dynamics the help and online files are installed into a shared network location then subsequent installations need not load the help and online files. With shared help and online documentation the workstation needs only to have the correct dex.ini to access this information.

Also in the dex.ini is a path to OLE data. Within Dynamics is the ability to attach notes and comments to windows and against individual items like debtor, creditor, inventory items etc. As well as being able to attach text notes, items such as graphics, sounds and others can also be attached using OLE. This OLE data is stored in the specified shared location assessable to all users.

## **FRX**

### Versions 4.7 – 5.5

With version 4.7, 5.0 and 5.5 FRx was usually installed as a shared network application which is specified in the readme.wri file relating to the site. Shared Network installations of FRx were chosen as they allowed the following advantages:

- Simple update when service packs are released,
- Centralised location of the report catalogue and current specification sets,
- Same ODBC and operating environment across the enterprise,
- Simple and fast installation on each workstation,
- Standard launching method from within Dynamics,
- Ease of backup.

The main disadvantage of a shared Network Installation is the launch speed of FRx

### FRX version 6.0

However with FRx version 6.0 the installation of a new thin client appears to right over some of the previously installed network application files. We have found FRx more consistent and reliable to now install FRX 6.0 as a thick client with shared sysdata folder. For this reason FRx is installed into a sub folder off the local Dynamics application folder, normally this will be C:\Program Files\Dynamics\FRXWin. The location of the shared Sysdata and io\_data is specified in the readme file relating to this site.

Dynamics needs to know where the application FRx lives so it can be launched from within the Dynamics application. FRXdyn.ini in the workstation Dynamics folder has the complete pathname details that Dynamics will look up at the time FRx is selected from Reports – Financial – FRx. For ease of duplication with the clients site it is important for ease of duplicating the installation the location where FRx is installed is the exactly the same on each workstation, the location should be specified in the readme.wri file relating to the site.

## **Network Configuration for shared files**

For Dynamics and FRx to operate both need space on a file server that is shared for all users. This space is used for financial information, reports, report programs (FRx and Crystal), modified dictionary masters, documents relating to the setup of the site, common SQL scripts and files for installation of new workstations. If the Dynamics database is either Ctree or Btrieve this may also be here.

### **NT File server**

The preferred method is to create a separate share on the NT server with the name "Finance or Gtplains". Note: The share name "Dynamics" should NEVER be used. This location is then accessible in UNC format as [\\server\Finance](#).

The location of where on the NT server's drives to create this share should be under the direction of the IT staff. This share should also have full rights to users of Dynamics and FRx. If Btrieve is used as the database type and the Btrieve database occupies space within this share then the user "System" will also need full access. Access to the Btrieve database from Dynamics should be done in UNC format not mapped drive letter. The type of access to the database can be found by checking the pathnames from within Dynamics confirming UNC or Drive letter. With FRX being 32 bit from version 5.5, mapped drives are unnecessary and unc pathnames are preferable. If FRX is configured to use unc paths for the thin client application, sysdata and io\_data paths then a mapped drive will serve no purpose other than to allow quick navigational access to these folders.

### **NetWare File Server**

The preferred method is to create a separate drive letter mapped to the path on the NetWare Server. Under consultation with the IT staff, a folder with an agreed path should be created with the name "Finance or Gtplains". Note: The folder name "Dynamics" should NEVER be used. A user group should be created within "Directory Services" which has all rights except "Access Control and Supervisor" to this folder. Users of Dynamics and FRx should be included as members of this group. The "NetWare Login Script" should include the "IF Member Of" and "Map Root" command to map a drive letter to the path where the folder has been created. These commands will create the drive letter mapped to the correct path and do it only if the user is a member of that group. The drive letter the login script maps to should be reserved for the Dynamics users. Access to the Btrieve database from Dynamics should be done in mapped drive format not UNC.

The advantage of using the NetWare Login Script is consistency, each time the user logs in the logical disk drive letters will be restored to where they should be. Also if space becomes a problem, the folder holding all the files which has the drive letter mapped to it can be moved to a new disk volume or even a new server. Directory Services is then updated including the NetWare Login Script, the user then logs in and starts Dynamics as before as if nothing has changed except now there is more free space.

### **Shared Path**

On some sites the IT staff may already have a drive mapped or a shared path operational sometimes with a drive mapped to it for all users. In this instance if a separate share or mapped drive letter is not permitted by the IT staff, a folder with the name "Finance or Gtplains" can be created on an existing path and full rights given to those users who need it.

With the network configuration set as above, we will now look at what is in this shared files area. In all installations we have off the root of the shared path the following 2 folders:

- Dynamics
- Frxwin

The "Frxwin" folder has the shared network FRx data files, these files are in 2 sub folders "Io\_data" and "SYSdata".

The "Dynamics" folder will hold the database if the database type is Ctree or Btrieve. With or without the database the following folders should be present off the "Dynamics" folder

- Masters
- Documentation for eEnterprise or Online if Dynamics
- Install
- Workstation Stuff
- OLEnotes
- Scripts (where the database is SQL)

The "Masters" folder contains the latest (most up to date) modified dictionaries for all Dexterity products. The dictionaries residing here are available for distribution or copying to the location specified in the "Launch File". When a dictionary is modified with "Modifier" or "Report Writer" the modified dictionary will need to be copied to this shared "Masters" folder. The launch file of any workstation should never point directly to dictionaries in this "Masters" folder.

Within the "Documentation" folder is kept the Install Log files (if used) and "Readme". The readme usually has the site name as part of the file name e.g. "readme AMI.wri". The readme is in Windows Write (WordPad) format and the install log is in Notepad text format. "Write" is chosen as all workstations with Windows can edit, view and print this file type as well as many sites do not have access to Word from the Desktop of the NT server because MS Office is not installed. "Install log.txt" uses Notepad because of the automatic date / time logging function.

The readme and install log files should be available on the Version 6.0 shortcut menus from within Dynamics with the "sa" user. The short cut will also have the Documentation from third party products when logged in as the "sa" user.

Additional Software including service packs is included in the "Install" folder. The contents can vary from site to site depending on what software the site is running. Some examples of what you will find are:

1. Integration Manager updates as the CD version is not operational
2. Latest 3<sup>rd</sup> Party code in distribution format i.e. zipped
3. Service packs which are not included on the distribution CD
4. 3<sup>rd</sup> party applications like WinZip and Drivers for Iomega zip and jazz drives
5. Dynamics CD (Sometimes the CD is copied here if the File server has adequate file space)

If you are onsite to install additional third party software or a service pack, make sure the details of what is done is in the install log. If the software is not easily accessible from CD a copy of the download or email attachment with instructions should be put in here. Use descriptive folder names to put the additional files into. Refer below to section "Additional Dexterity Software Installation".

Where a site has had the Online and help files installed into a shared network location, the folder "Documentation" will be used. The dex.ini will have lines

pointing to where the Dynamics application can find the Online help. This option is chosen as it allows for:

- faster installation per workstation
- saves space on the workstation
- It also removes local path information from the dex.ini.

The removal of the local path information in the dex.ini is particularly useful where a site has the local Dynamics folder in more than one place. On a site the workstations may have Dynamics installed into C:\Program Files\Dynamics, D:\Program Files\Dynamics, and if Citrix or Terminal server is used another drive e.g. M:\Program Files\Dynamics may be used (we have sites just like this). With the Dex.ini pointing to the shared network location for the online help the dex.ini on all workstations can now be the same across the Enterprise. This is because if the workstation has the online help on its local drive, the entries to this location in the dex.ini will be the only entries pointing to the local drive.

Note: because the online help is kept on a shared location it does not mean Dynamics can be installed into just any path. The discipline of staying with an agreed location across all workstations in the enterprise should still be adhered to as detailed above in the section "Workstation Installation".

The "Workstation Stuff" folder is created to make duplication of workstations running Dynamics consistent, reliable and easy. The files in this folder are copied to the local workstations Dynamics folder after the CD installation of Dynamics is completed. All files in the Local Dynamics folder will be overwritten / replaced with those in the "Workstation Stuff" folder.

For sites where there is more than one location where Dynamics is installed, there will be extra folders off the "Workstation Stuff" Folder to put specific files required for each of the different installed locations. E.g. If a site has workstations on the LAN and a Citrix server, with the workstations local folder being C:\Program Files\Dynamics and the Citrix local folder M:\Program Files\Dynamics, then 2 folders will be off the "Workstation Stuff" Folder. These will be using folder names like "Files for Cee Drive" and "Files for Mmm Drive" for the example just used. Within these folders are dex.ini and Dynamics.set. If more than one location is being used across the enterprise the Dynamics.set and the dex.ini will reside in this sub folder and not in the root of the "Workstation Stuff" folder because the Dynamics.set and the Dex.ini have entries to local pathnames. If the site has the Online help on a shared network location usually only the Dynamics.set will be present. The file or files in this sub folder also will be copied to the local Dynamics folder replacing those with the same name

The "OLENotes" folder is created as the shared path Dynamics will use to store attached notes and data. The dex.ini has the entry "Olepath" to point Dynamics to this path on each workstation.

If the database type is SQL, there will be a "scripts" folder with the files from the Dynamics CD and other third party products including FRx. The files here contain scripts for working on the SQL database using iSQL-W

## **Installing Dexterity Service Packs**

This section applies only to dictionary patching not dictionary replacement although both are very similar and the rules are the same. A patch requires the original dictionary to be present and available to Dynamics by virtue of the Launch file. The patch will be distributed as a chunk file, and will usually be small with respect to the dictionary it is patching. Also a patch will usually update the forms and reports dictionaries as part of the inclusion process when Dynamics is launched.

Be sure the service pack is saved into a folder within the "Install" folder that is appropriately named. Read the instructions that come with the service pack and follow the instructions. There may be other procedures to be run as well.

When including a patch watch the process on screen. If the forms and reports dictionaries for the product are also updated, then it is important the newly updated forms and reports dictionaries are copied from the location specified in your Dynamics.set to the Masters location. The newly patched program dictionary should now be copied to the "Workstation Stuff" Folder. These two steps ensure the fixes in the service pack are available to all workstations. Note: the dictionary from the "Workstation Stuff" folder will need to be copied to each workstation for the fix in the service pack to take effect.

Some Service packs are in effect complete code replacement and not a Patch. Recent examples of this are UK cheque and Apop. With new code the same procedure can apply as above. The new code must initially be saved within the "Install" folder for future reference, the instructions read, associated procedures run if applicable, code included, newly created program dictionary copied to Workstation Stuff and old dictionary replaced. If the forms and reports dictionaries associated with the program dictionary are also updated these will need to be copied to the "Masters" folder.

Don't forget to record all the steps you do in the install log

## **Additional Dexterity Software Installation**

Additional third party product can be installed after the installation of Dynamics is in place and operational, Before starting, make a copy of the dex.ini and the Dynamics.set and put these into a "backup" folder off the local Dynamics folder. If the distribution of the software is on CD and there is space on the file server then a copy of the CD in the "Install" folder would be a good idea. Check how much data is on the distribution CD as sometimes only a few megabytes are used. Where the size of the data is small especially if it is a download or email attachment then put the software into a folder with a descriptive name within the "Install" folder. Read the instructions with the software, establish what steps are required and try the following.

Try installing the software into a blank folder to establish what files the install process is putting into the local Dynamics folder. Note some software has an installation process which amounts to nothing more than copying the chunk file into the local Dynamics folder. The installation process should install a chunk file and may include help files and others. If it is more than just a chunk file you will need to establish the purpose of the extra files. The extra files may include the following: help file, data files which will be used to populate the software's tables with data in TWO database, SQL scripts if this is a SQL database and sample files.

Follow the instructions supplied to include the new code, run the SQL scripts, complete registration, and create palettes and tables as applicable. There may also be instructions to insert sample data into the TWO lesson company. If this is a SQL database the script "grant.sql" may need to be run.

With the third party product installed and operational on the first workstation the extra files may need filling away and the "Workstation Stuff" folder updated for distribution across the enterprise. To this end examine the dex.ini and compare it to the backup looking for references to the new product just installed.

If there are references to the path for the location of the help files for this product in the dex.ini you need to decide where the help files will reside for the enterprise. If the Dynamics help lives in a shared path in the "Documentation" folder then this location can be chosen for this products help file as well. The help file should be moved into the "Documentation" folder, the dex.ini entry referring to the help file for this product should be altered to the "Documentation" path eg. \\server\finance\Dynamics\Documentation\product.hlp. Launch Dynamics and confirm the help is assessable from the shared "Documentation" folder. Copy the dex.ini to the "Workstation Stuff" Folder for enterprise distribution.

If there is a help file for this product but there are no entries for it in the dex.ini, then the help file can copied to the "Workstation Stuff" folder for enterprise distribution. This also applies if Dynamics is not using the "Documentation" folder for the shared location for the help files

File any SQL scripts for this product into a descriptive folder in the "Scripts" folder. File Docs into the "Documentation" folder.

The purpose of the sample files will need to be established. References to these may be in the dex.ini. If there are references to these files in the dex.ini, move the files to a sub folder in the "Documentation" folder. Alter the dex.ini to point to the sub folder in the "Documentation" folder, launch Dynamics to confirm they are assessable, then copy the altered dex.ini to the "Workstation Stuff" folder for enterprise distribution.

If there are data files used to populate the TWO company and this has been done, no further action as far as other workstations on the enterprise is needed.

Last step is to examine the Dynamics.set on this workstation. The references to the Modified forms and reports for this product will have been set to the default path when the chunk file was used to create the dictionary. The default path will be the local Dynamics folder. The path to the modified forms and reports should be edited so it is the same as the other Dexterity products in the enterprise, refer section "Launch File" second paragraph from the very beginning of this document above. Copy the launch file to the "Workstation stuff" folder or to the appropriate sub folder.

Don't forget to record all the steps you do in the install log.

## **Auto updating modified dictionaries**

On each site there will need to be a procedure to allow for the updating of the modified dictionaries on each workstation. For very small sites (2 – 3 users) this can be done manually with Windows Explorer or with a manually executed dos batch file. Larger sites can have this done with the Network login script or by launching Dynamics with a Batch file "Dynamics.bat". The details of this batch file or login script vary from site to site but basically achieve the following single requirement.

The latest modified forms and reports dictionaries from the "Masters" folder for all dexterity applications will be copied to the local dynamics folder and replace those with the same name. Note the importance of having the local Dynamics folder the same on each workstation. Information regarding how the site achieves this should be gleaned from the install log and the readme.

For specific examples on how this is done as well as other "techy" information please refer to the url on the last page below.

## **Installing New Workstations**

### **Dynamics**

With the install of Dynamics, on the window "select to install server or client" choose client, in the "select Dynamics application components screen" select "Dynamics Application" only, and the destination folder change to "c:\Program Files\Dynamics". If the PC has 2 partitions and C drive is short on space install into d:\Program Files\Dynamics". The correct location should be in the readme.

In the "Dynamics Online Help components screen" the choice of installing or not installing the help should be in the readme. If the online help and manuals are in the shared path deselect all options but still put in the path to the shared location as specified in the readme. In "Create Client Template Installation" select "NO" don't create a template, the template options does not simplify the installation process enough to make it worthwhile.

In "Select Program Folder" it is YOUR choice if you want to install a shortcut on the desktop, the program folder can be left as default as "Great Plains". In "Verify Settings" take a moment to read through the list and confirm "Program Path", server path and online help are correct is as specified in the readme, the Country is New Zealand and the database is the correct type for the site. Choosing next will set the install process of Dynamics in motion. Note: If the country is not New Zealand this usually indicates the default country is incorrect in the regional setting from control panels.

On arrival at the additional products screen, select and install VBA even if marked as already installed. The installer should now be exited and Dynutils NOT run.

### **FRX**

Up until version 5.5 FRx is usually installed as a shared network application specified in the readme file relating to the site. However with FRx version 6.0 the installation of a new thin client appears to write over some of the previously installed network application files. We have found FRx more consistent and reliable to now install FRX 6.0 as a thick client with shared sysdata folder. For this reason FRx is installed into a sub folder off the local Dynamics application folder, normally this will be C:\Program Files\Dynamics\FRXWin. When asked for the Sysdata folder specify the shared location on the network. Once again if the

server where the shared data is located is an NT server then specify the path in unc format eg. [\\server\share\path](#). If the server is a NetWare Server the path to the data should have a drive letter mapped to it by the NetWare login script and the path will be "n:\path" where n: is the mapped drive letter. Any service packs should now be applied to FRX with reference to the readme which should specify the current service pack level.

An ODBC data source will need to be configured according to the instructions in the following section with the heading "ODBC". Before launching Dynutils the local Dynamics application folder and sub folders should be emptied. Once emptied all files from the workstation stuff folder should be copied into the local Dynamics folder. A check of installed dex software from within Dynamics should confirm 3<sup>rd</sup> party apps and Dynamics are now operational.

Launch FRx from the installed shortcut to confirm the client install, then from within Dynamics – Reports – Financial – FRx, confirm FRx launches without error. Problems with launching could indicate and incorrect frxdyn.ini.

### **ODBC**

For Dynamics and eEnterprise 6.0 using Microsoft SQL 7.0 and SQL 8.0 the version of ODBC needs to be 3.70x or later. If unsure how to setup refer Partnersource titled "ODBC Setup for Dynamics 5.51 on Microsoft SQL 7.0"

#### ODBC 3.70 and later Setup for Dynamics

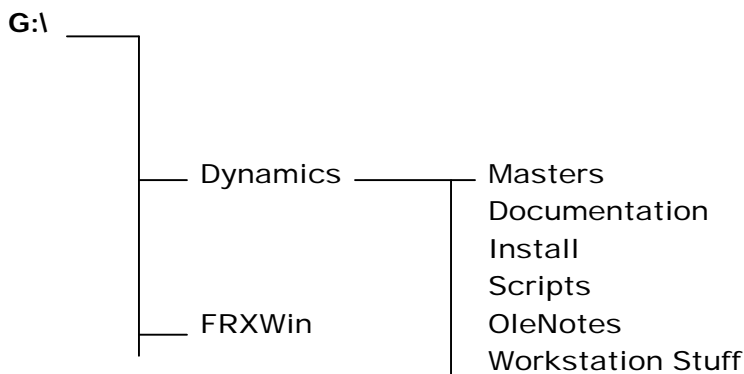
1. Open the ODBC Data Source Administrator window by choosing Start - Settings - Control Panel - ODBC Data Sources. Choose the System DSN tab and choose Add.
2. In the Create New Data Source window, select SQL Server from the list and choose Finish.
3. In the first Create a New Data Source to SQL Server window, enter the following information, then choose Next
4. The name you want to use for the data source should be specified in the readme, however it will most likely be eEnterprise or Dynamics. This name will be stored in the ODBC.INI file. Use the same name for the 32-bit ODBC data source for Dynamics for all clients and process servers. This is important if using FRX on more than one workstation.
5. Enter a description of the data source.
6. Enter the name of the NT Server the SQL database lives on, choose next
7. In the window "Create a New Data Source to SQL Server" mark "With SQL Server authentication" option and enter the Login ID sa with the password. Choose the Client Configuration button.
8. Choose TCP/IP as the Network library. The port stays at 1433, choose OK to close the window, and then choose Next.
9. In the third "Create a New Data Source to SQL Server" window, unmark the following options: Use ANSI quote identifiers, Use ANSI quote identifiers, Use ANSI nulls, paddings and warnings. MAKE SURE ALL SELECTIONS ARE UNMARKED in this window, Choose Next.
10. In window "Microsoft SQL Server DSN Configuration", unmark the option "Perform translation for character data". MAKE SURE ALL SELECTIONS ARE UNMARKED in this window, choose Finish.
11. 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 close the window.

## Readme

The readme contains specific information about the site. It should be understood before contemplating work. For access to the readme and its actual resting place, refer paragraph "Documentation" in the "Shared Path" section above.

The following entries should be present in the readme:

1. Name of the File server
2. Name of the SQL server if different from above
3. Location of this readme and the log
4. Location of the Local Dynamics folder
5. Modified Dictionaries path in launch file
6. The shared path for OLE data referenced as OLEpath in the dex.ini
7. The type of install and location of FRx application and shared folders
8. The location of the shared data in UNC format
9. The drive letter mapped to the shared data
10. Locations of the "Masters" folder for master copies of the modified dictionaries
11. Network login and password
12. sa users password
13. Password for Dynamics – Setup - System
14. Location of the "Install" folder
15. Location of the Online / help if it is shared
16. Location of the "Workstation Stuff" folder
17. List of service packs applied
18. Is Dynamics installed on the desktop of the server
19. Shared location of SQL server scripts
20. FRx login and password
21. When is the SQL maintenance set to run and what path is the backup going to
22. Location of the SQL / Btrieve / Ctree databases
23. Whose registration keys are being used
24. The shared data path for Integration Manager
25. Recommended name for the ODBC datasource
26. Location for casual SQL backups
27. Manual or automatic update of forms and reports



Note: url for technical info [www.geocities.com/rtprior/greatplains](http://www.geocities.com/rtprior/greatplains)