Active Documents Installation/upgrade

Important Information prior to Installation
Please ensure that you have read and understood all of the notes listed below prior to starting the product installation.

Take a Back-up
Take a full back up of your System and Company databases and the Dynamics GP Client before installing m-hance Active Documents.

Use Experienced Consultants for Implementation
It is strongly recommended that the installation of m-hance Active Documents is performed by an experienced staff member.
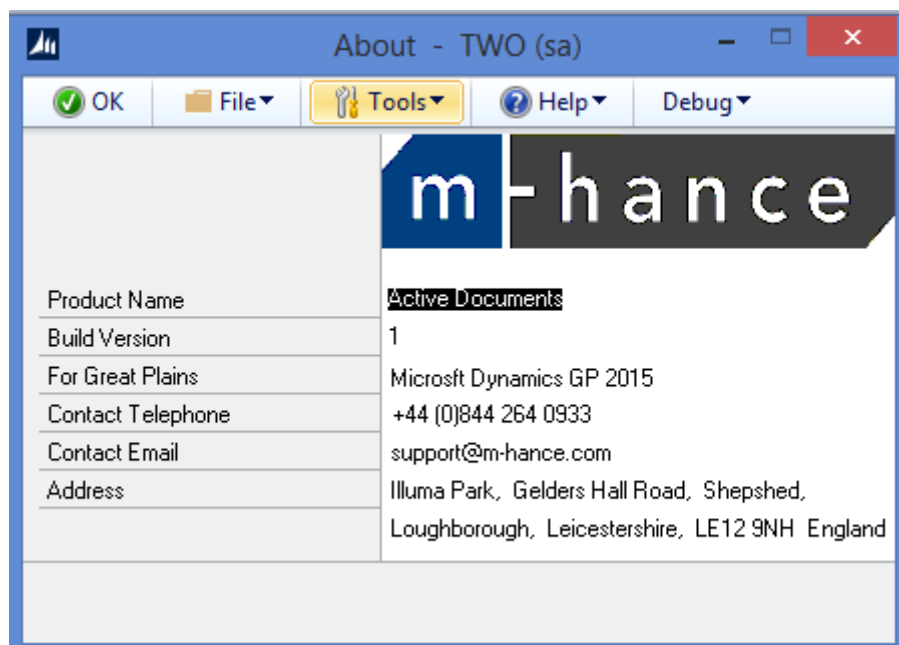
Administration Rights
The user installing m-hance Active Documents should have full Administrator rights on the machine.

Checking and Confirming the Build Number
It is important to note the current Build Number of m-hance Active Documents, this can be found in the following locations within Dynamics GP.

Alternatively, you can goto the *About m-hance Active Documents window* click on the

help button [icon] and goto help about

Future versions may be released and therefore you are likely to see the Build Number changing as existing files are updated. Our support team may also ask you to check the Build Number of m-hance Active Documents if you have any product related questions or are attempting to log a support call with our helpdesk.

1.1   Client/SQL Server Installation

Log out of Dynamics GP
Before attempting to install Active Documents, first ensure all users are logged into Dynamics GP.

Copying the Install Shield Wizard for Active Documents
Copy the Install Shield onto the preferred drive of your machine. This should ideally be the directory where Dynamics GP is located. If you are unsure which directory you should be copying the Active Documents files into please contact your Dynamics GP support representative before continuing.

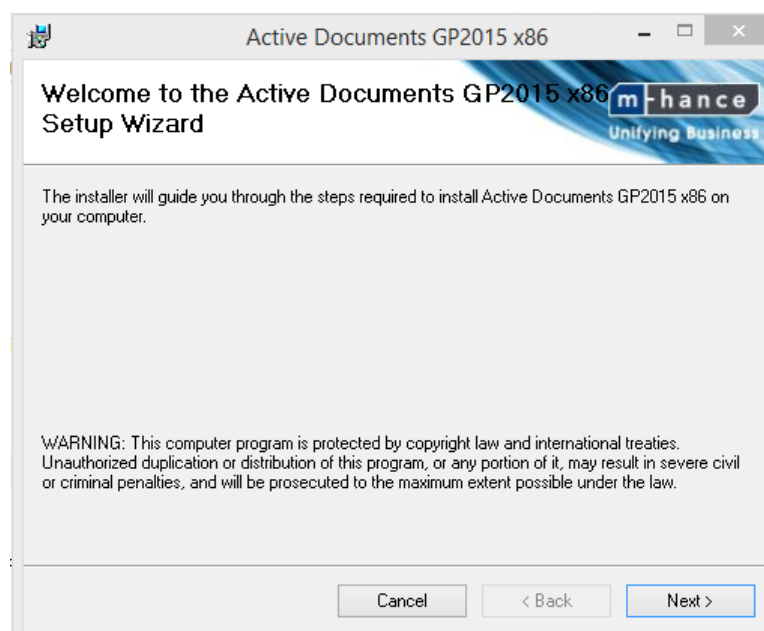**Run the Install Shield Wizard for Active Documents**
Once the files have been saved within your required directory then you can begin the installation process by double clicking the setup.exe file to start up the Install Shield wizard.

Name	Type	Compressed size
ActiveDocsGP2015x86.msi	Windows Installer Package	612 KB
setup.exe	Application	206 KB

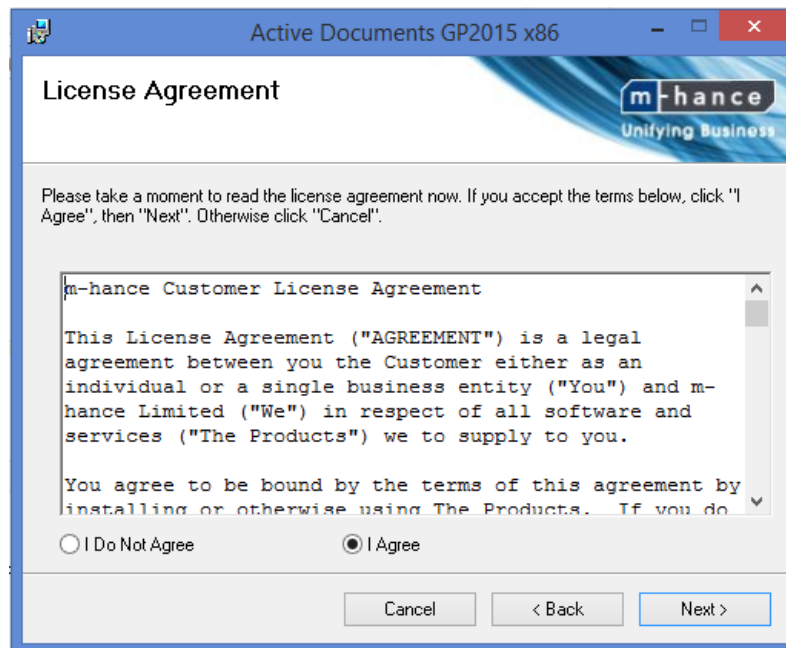*NB. Depending on security settings it may be necessary to right click on the exe and 'Run as Administrator'*

Welcome to the Install Shield Wizard for Active Documents
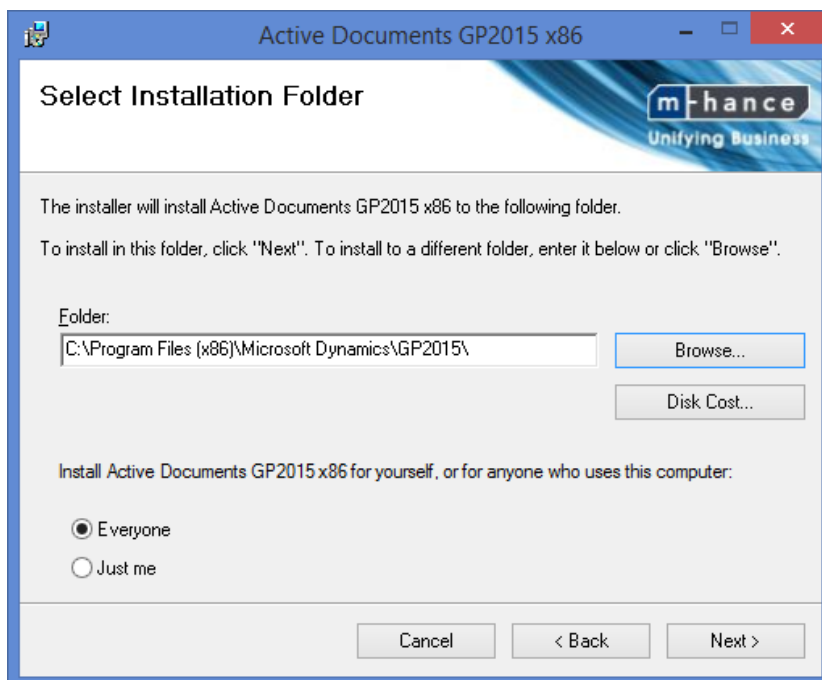Click "Next" if you wish to continue with the Active Documents Install Shield Wizard.

License Agreement
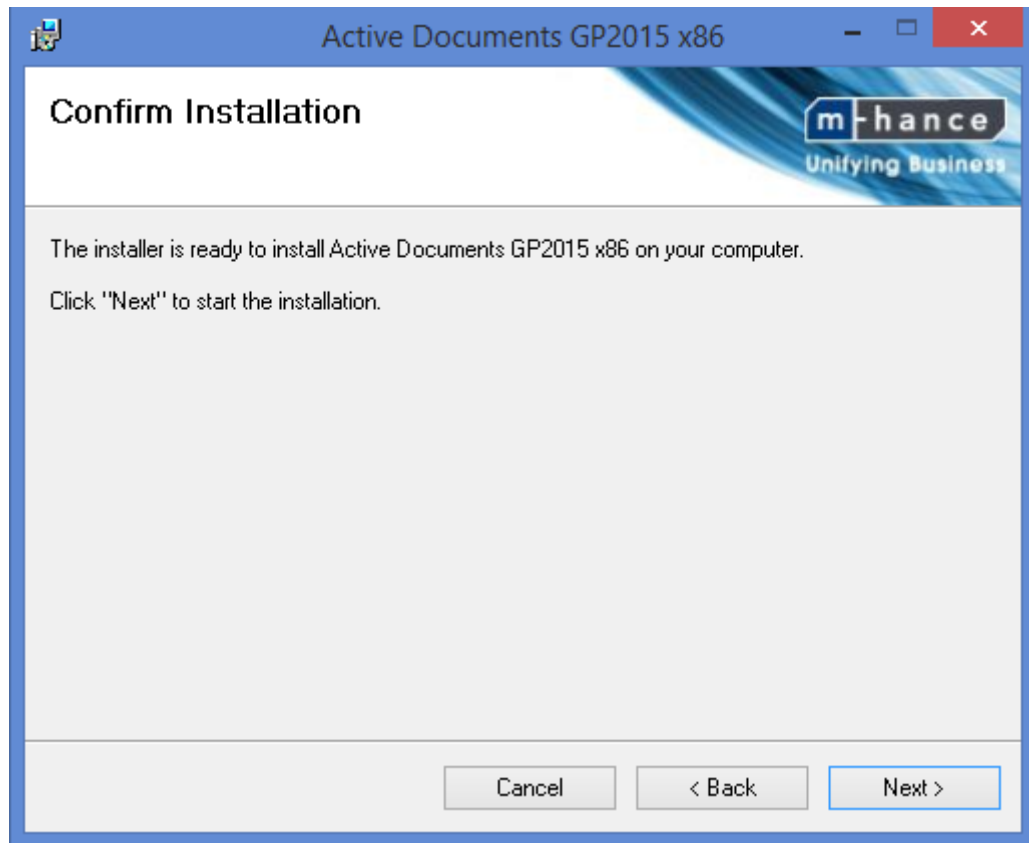Please read and accept the License Agreement if you wish to continue.

Select File Location
The default file location of your Dynamics GP directory will be shown within the Destination Folder section. When the "Next" button is clicked then this will be the exact location that Active Documents files will be saved to.
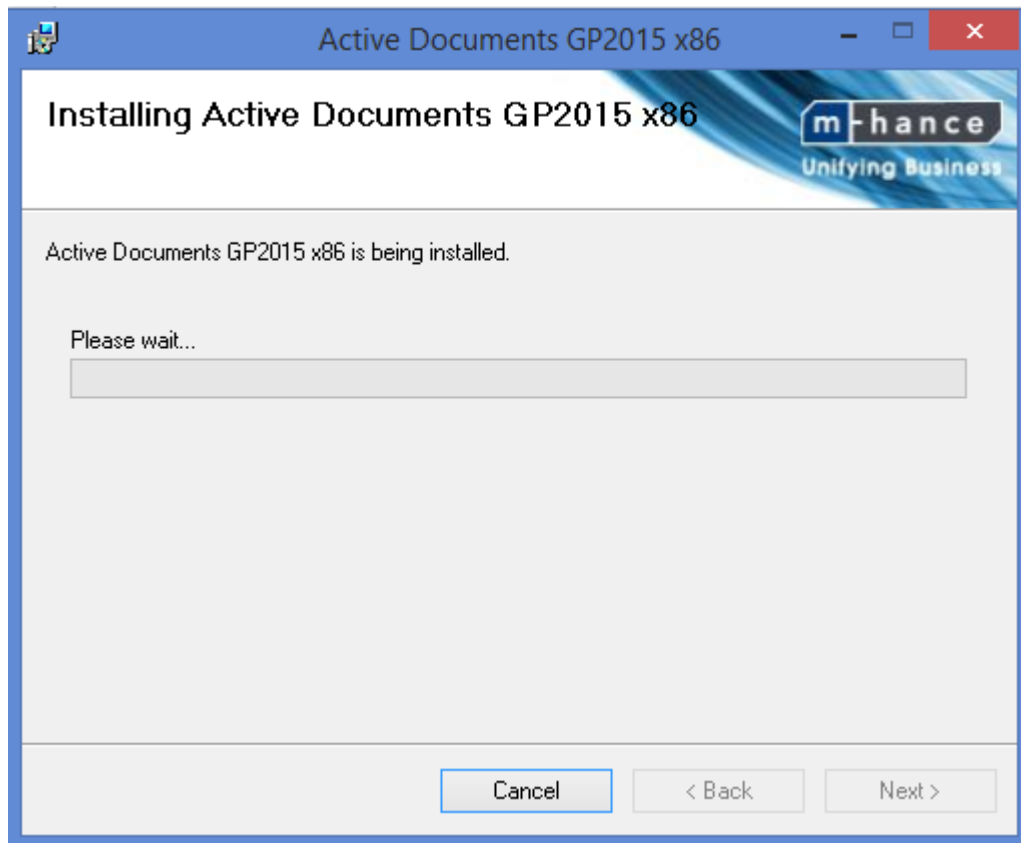
If the folder shown is NOT the correct Destination Folder then this reference can be changed by clicking on the "Browse" button and directly locating the required folder. You can also choose whether the installation of Active Documents will be for your sole use only or for anyone who logs onto this client.

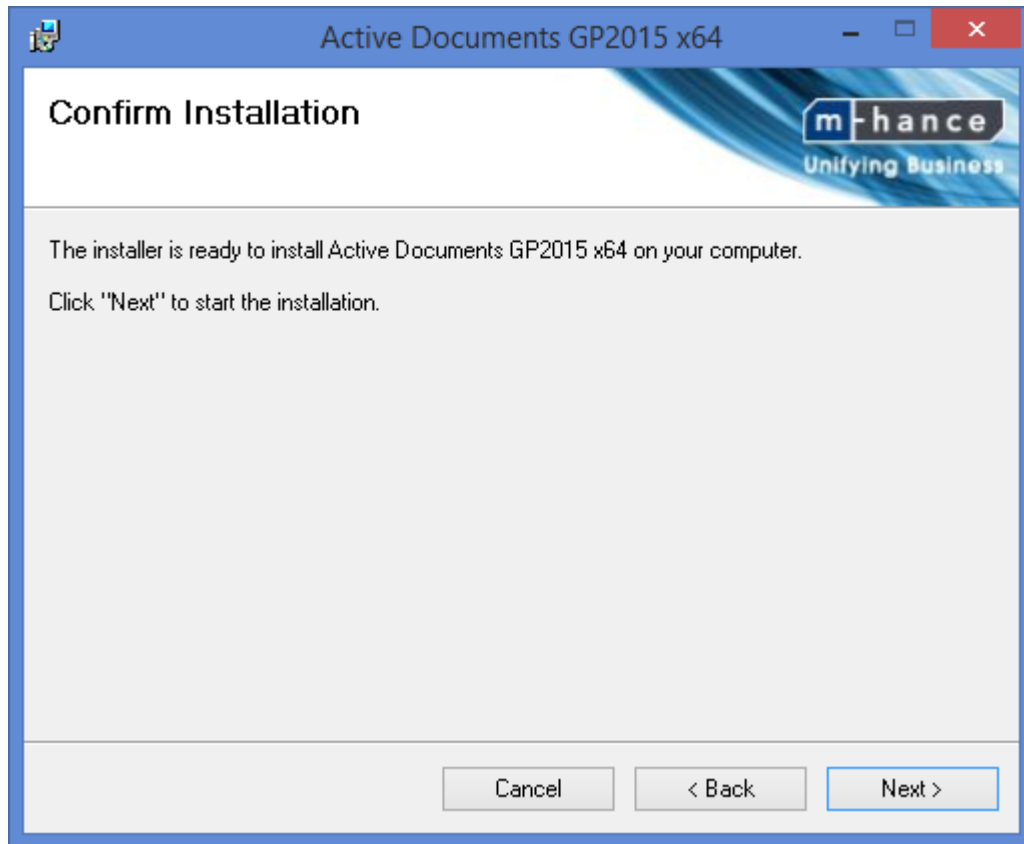Click the "Next" button to continue with the installation once this stage has been completed.

Start Copying Files
The final stage of the Install Shield Wizard for Active Documents is to start copying the files into the directories that have been identified.
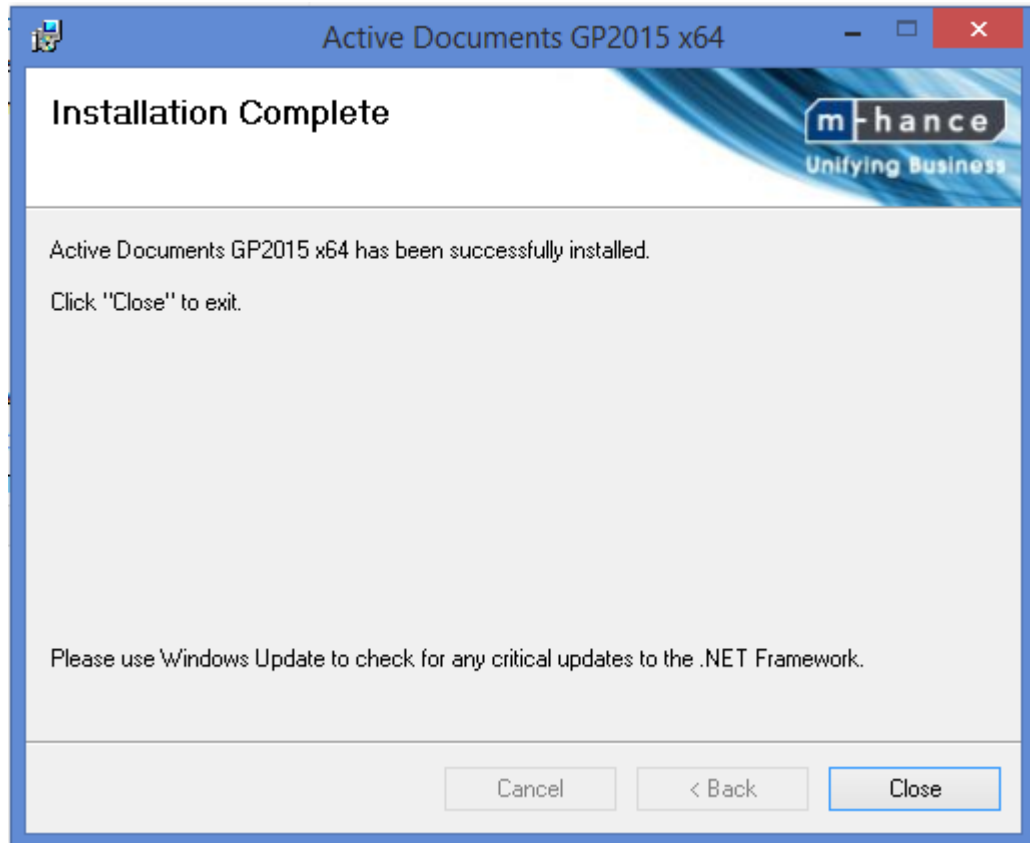
Click "Back" to work your way back through the setup pages, or alternatively, select the "Next" button in order to start copying these files. While the files are being copied you will also receive a "Setup Status" window that details the progress of the Install Shield Wizard. Once the Setup Status bar has reached 100% complete you will automatically be taken to the Install Shield Wizard Complete window as detailed below.

NB With the exception of the "Extracting Files" and "Welcome" install page, please note that the "Back" button can be used at any time during the installation process in order to return to the previous screen within the product set up. Click the "Cancel" button at any time during the process to abandon the installation.
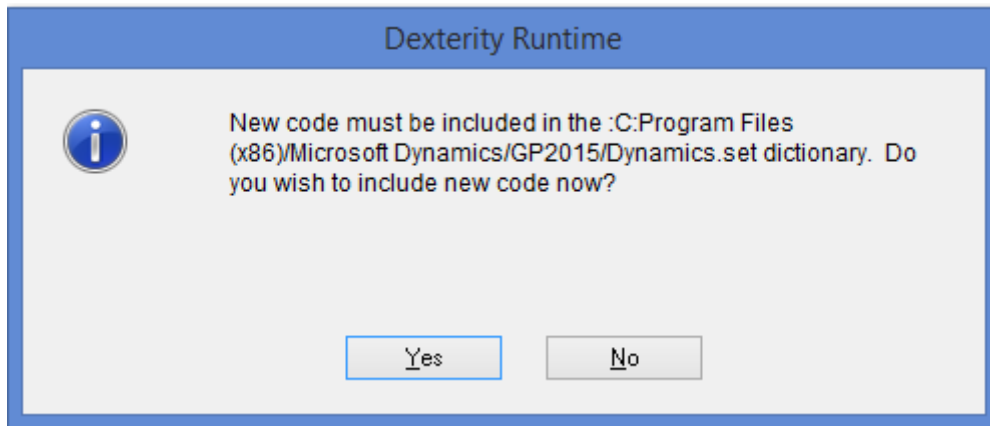
InstallShield Wizard Complete
The Client installation process is now complete. Please click on the Close button to end
the InstallShield Wizard.

Launch Dynamics GP
Once the Active Documents files have successfully been copied into your chosen
directory, you will now need to launch Dynamics GP as normal. You will now be asked if
you want to include the new code, answer "Yes" to this question. It may be necessary to
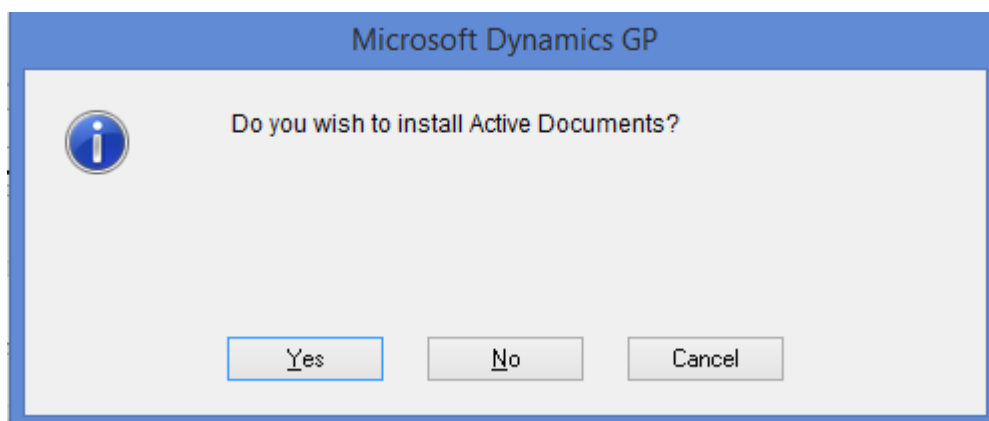'run GP as administrator' in order to install the new code.

Log into Dynamics GP

At the standard Dynamics GP User Log in window, ensure that you log in under the "sa" ID (Systems Administrator) and then select the required company.

Completing the Auto Install Routine

Upon entering Dynamics GP you will then be presented with the Active Documents Auto Install window. The available options are detailed as follows:

Option 1   Yes

Choosing "Yes" to install Active Documents will immediately open the "Install Product" routine as detailed later in this document.

Option 2   No

Choosing "No" will halt the installation process temporarily. Each subsequent time, that you enter Dynamics GP you will be prompted with these options until the product is either installed or the "Never" option is selected.

Option 3 Never (only available if installing for the first time)
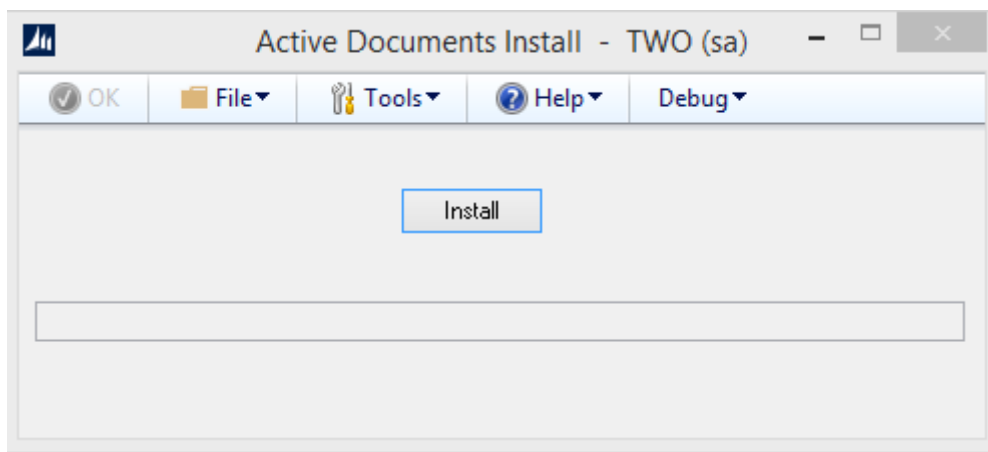
If "Never" is selected then you will not be prompted to run the installation process again. If at a later date you decide to install the product, you will need to create the "Install" option manually. This process is detailed later in this document.

You may choose to log into other companies that will not be using Active Documents and selecting 'Never' so that this message will not appear when users log in.

Please note that The Active Documents Auto Install window will not appear if the tables and stored procedures have been previously installed.
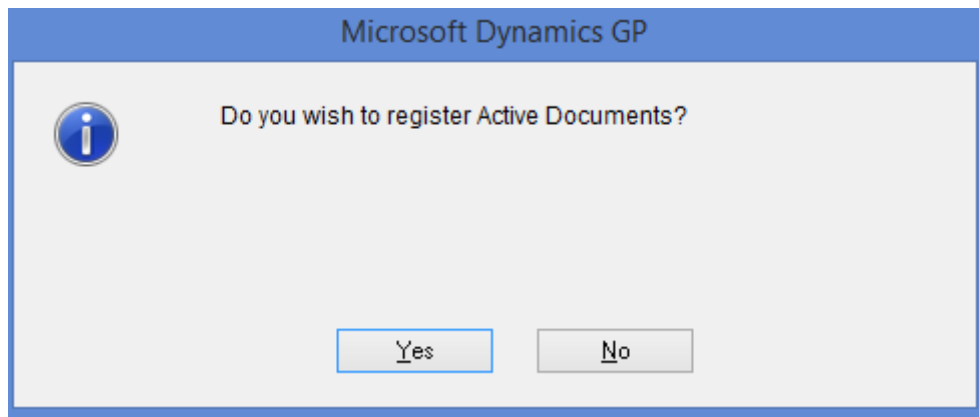
Running the Product Installation Process

After clicking "Yes" to install Active Documents then the process will begin automatically. Once this process is fully completed then the message "Update Complete" will appear within the progress indicator section. Next click the "OK" button to close the window. To manually run the install if necessary, select 'Active Documents Install' from Tools >> Setup >> Company.

Completing the Auto Registration Window

Having successfully completed the installation of Active Documents you will now automatically be prompted to "Register" the product. Answering "Yes" at this stage will automatically open the "m-hance Registration" window where you can enter the registration keys as supplied by m-hance.

Selecting "No" will mean that you will only be able to use the Active Documents product in the Fabrikam company until the registration details have been correctly entered. You can manually Register Active Documents via the Register m-hance product window *(Tools >>Setup >>System>>Registration Additional])*

Enter the Company Registration Keys
After selecting "Yes" to register Active Documents you will automatically be taken to the m-hance product registration window. If you have placed an order for Active Documents then you should have already received your unique registration keys that will unlock the product within the specified company. If you have not yet received your registration keys then you should contact m-hance directly.

In order to avoid   problems using Active Documents it is very   important that the

keys are entered correctly into the available key fields. To begin using Active Documents click the "OK" button once you have finished entering the registration keys. If you are using the sample company database Fabrikam, Inc. then you will not be required to enter any registration keys within this window.

N.B. It is not usually necessary to enter the registration keys for other companies within GP that will be used with Active Documents. However, security settings may mean you need to re-enter these keys. Please go to 'install>> registered >> enter registration keys' to add this information.

The installation and registration process is now complete and you should consult the Active Documents User Guide before attempting to use the product. If you have any problems completing these processes you can review the "Troubleshooting" notes later in this document.

Manually Registering Active Documents within Dynamics GP

The following instructions are ONLY intended for use where the full product install has already been fully completed as detailed earlier in this document, however, the auto registration process has been by-passed. If you are in anyway unsure about the following installation notes then please contact us at admin@m-hance.com.
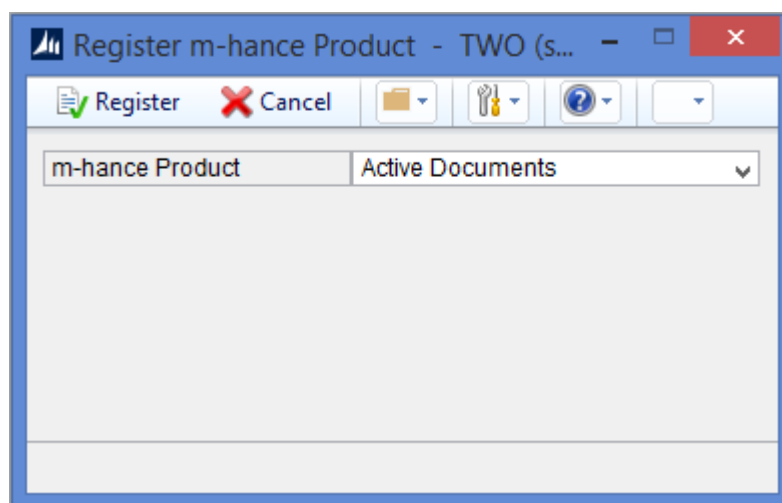
Log in to Dynamics GP
At the standard Dynamics GP User Log in window, ensure that you log in under the "sa" ID (Systems Administrator) and then select the required company of your choice.

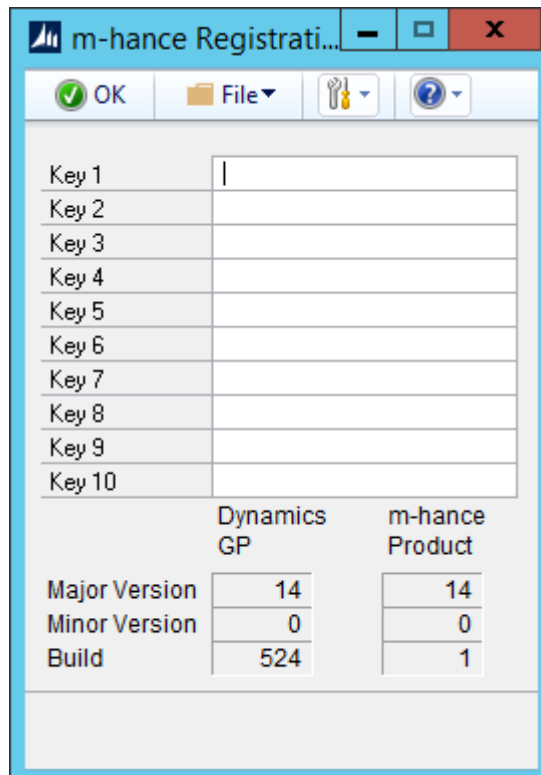**Registering the Active Documents product**
Once you have received your company specific registration keys from m-hance you can first select the product that you wish to register by following the link to the "Register m-hance Product" window *(Tools >>Setup>> System>> Registration)*. Then select 'Additional' from the toolbar and select 'm-hance registration'.

You must then select "Active Documents" from the available dropdown list and then click on the "Register" button to proceed.

Enter the Registration Keys

Upon entering the Registration window you can then enter the keys in exactly the same format that they have been supplied from m-hance. If you have placed an order for Active Documents then you should have already received your unique registration keys that will unlock the product within the specified company. If you have not yet received your registration keys then you should contact m-hance directly at admin@m-hance.com.

In order to avoid problems using Active Documents it is very important that the keys are entered correctly into the available key fields. To begin using Active Documents click the "OK" button once you have finished entering the registration keys. If you are using the sample company database Fabrikam, Inc. then you will not be required to enter any registration keys within this window.

The registration process is now complete and you should consult the Active Documents User Guide before attempting to use the product. If you have any problems completing these processes you can review the "Troubleshooting" notes for more information.