

# Purchase Management October Release Install Guide

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## 1. Prior to Installation

Please ensure that you have read and understood the pre-install document for Purchase Management from m-hance. This document has been designed as an aid to ensuring a smooth implementation. Please read carefully and provide all requested information to m-hance prior to your install date.

### 1.1 Two Installation Routines

There are two installation routines; one for installing web server components and the other for installing Microsoft Dynamics GP components. It is recommended that the GP install is run first.

## 1.2 Take A Back Up

It is strongly recommended that you take a full back up of your databases before installing Purchase Management or any other third party product within Microsoft Dynamics GP. It is recommended that you carry out a SQL Server database backup as well as a Dynamics GP applications backup.

When carrying out a SQL Server database backup, make sure to include the Dynamics database as part of your company database backups, since it can contain very valuable information, such as Business Portal data, custom SmartLists created using SmartList Builder, Analytical Accounting setup tables, and user access and GP security settings.

When carrying out Dynamics GP application backups make sure to backup all of your modified forms and reports dictionaries, the Dynamics.set file, VBA files, and any files installed in the AddIns and Data folders. An easy way to do this is to back up the entire Dynamics GP application directory. If you are using shared dictionaries that are stored in a different location, please ensure to backup those files as well.

## 1.3 Use Experienced Dynamics GP and IIS Experts for Implementation

m-hance would also advise that the installation of Purchase Management is performed by an experienced staff member with a good knowledge of Internet Information Services and Dynamics GP.

# 2. Client/SQL Server Installation

## 2.1 Log out of Dynamics GP

Before attempting to install Purchase Management, first ensure no one is logged into Dynamics GP.

## 2.2 Copying the Install Shield Wizard for Purchase Management

From installation files provided expand on the *Windows Client* folder.

Name	Date modified	Type	Size
 Windows Client	10/11/2015 20:48	File folder	
 D277734.cnk	10/11/2015 09:00	CNK File	6,281 KB
 IA&A12ErrorLog.xls	10/11/2015 14:44	Microsoft Excel 97...	220 KB
 mHanceSetup.msi	10/11/2015 14:46	Windows Installer ...	12,837 KB
 setup.exe	10/11/2015 14:46	Application	411 KB

And the x64 folder

Name	Date modified	Type	Size
 PurchMgtV12x64.msi	10/11/2015 20:47	Windows Installer ...	19,512 KB
 setup.exe	10/11/2015 20:47	Application	411 KB

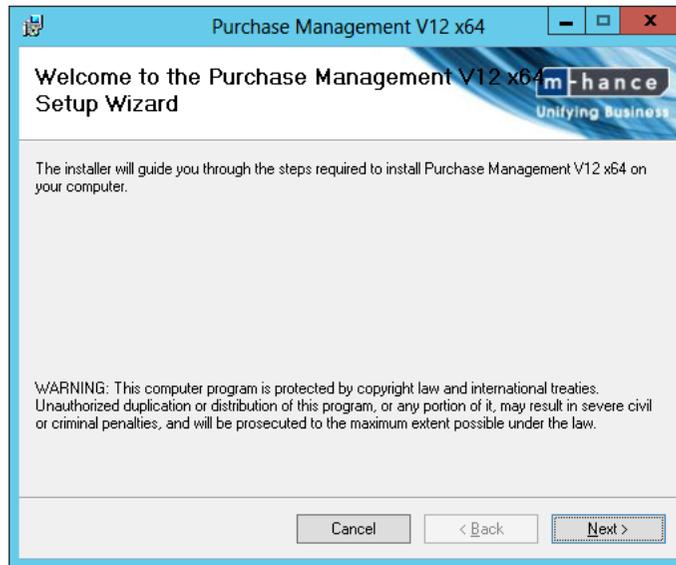
## 2.3 Run the Install Shield Wizard for Purchase Management

The double click on the Purchase Management 'exe' file which will start up the Install Shield wizard.

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

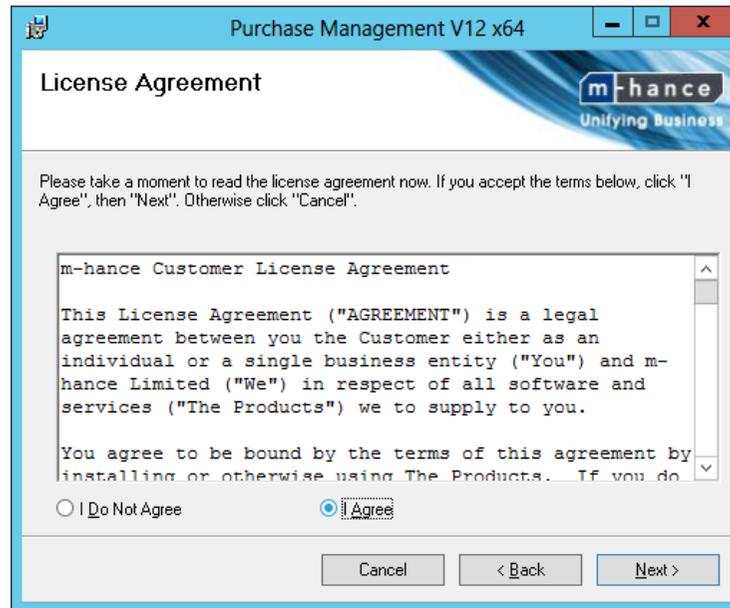
## 2.4 Welcome to the Install Shield Wizard for Purchase Management

Click "Next" if you wish to continue with the Purchase Management InstallShield Wizard.



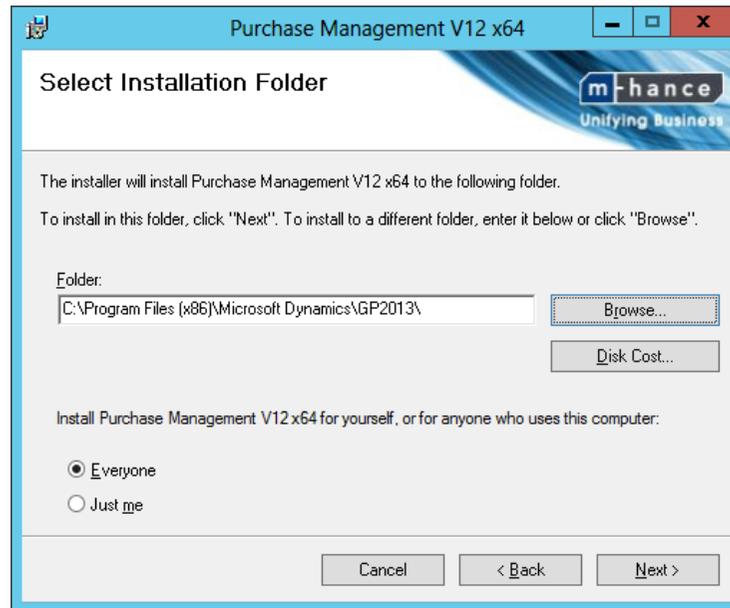
With the exception of the “Extracting Files” and “Welcome” install page, please note that the “Back” button can be used at any time during the installation process in order to return to the previous screen within the product set up. Click the “Cancel” button at any time during the process to abandon the installation.

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



## 2.5 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 Purchase Management files will be saved to.



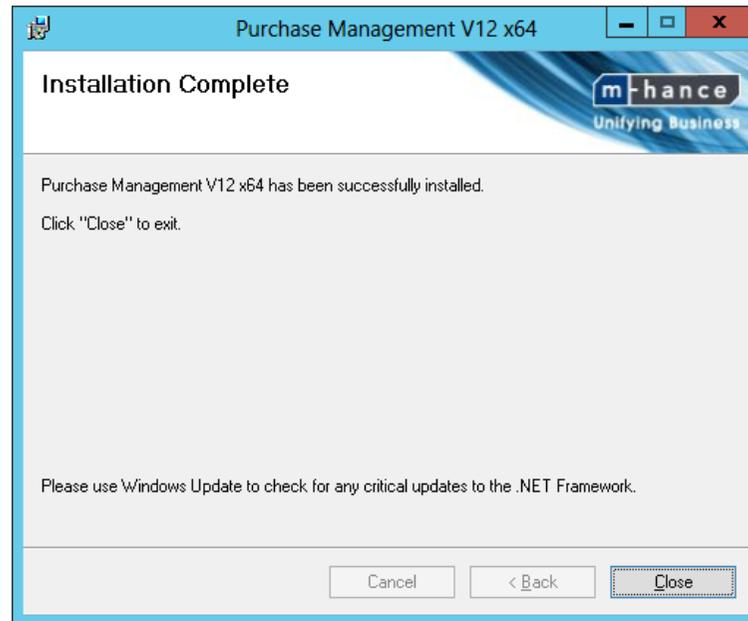
If the folder shown is NOT the correct Destination Folder then this reference can be changed by clicking on the “Browse” button and directly locating the required folder. You can also choose whether the installation of Purchase Management will be for your sole use only or for anyone who logs onto this client.

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

## 2.6 Start Copying Files

The final stage of the InstallShield Wizard for Purchase Management 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 InstallShield Wizard. Once the Setup Status bar has reached 100% complete you will automatically be taken to the InstallShield Wizard Complete window as detailed below.

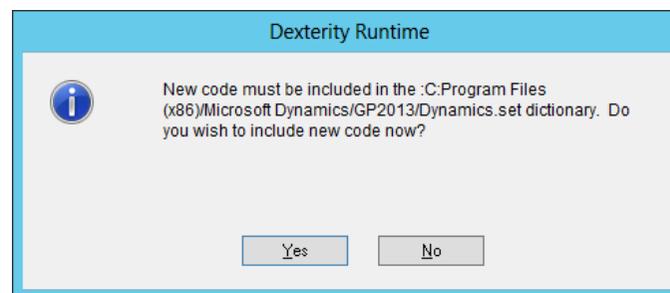


## 2.7 InstallShield Wizard Complete

The Client installation process is now complete. Please close the window and end the InstallShield Wizard

## 2.8 Launch Dynamics GP

Once the Purchase Management 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.

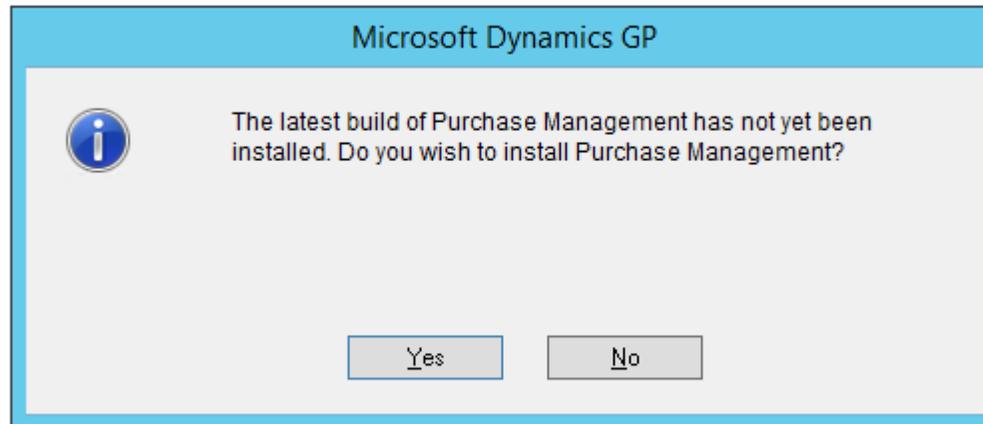


## 2.9 Log into Dynamics GP

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.

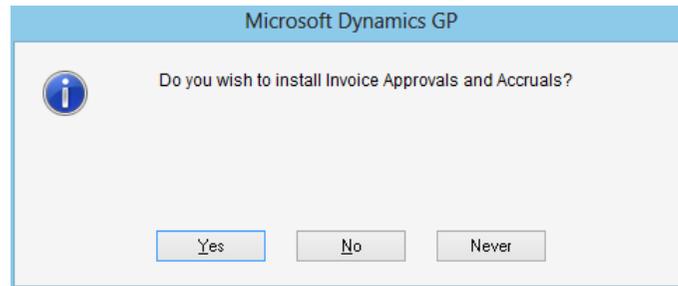
## 2.10 Completing the Auto Install Routine

If Purchase Management is already installed, you will receive the following message.



Click on Yes to open the Install window. The install process will automatically begin.

If Purchase Management is not already installed, upon entering Dynamics GP you will then be presented with the Purchase Management Auto Install window. The available options are detailed as follows:



#### Option 1 – “Yes”

Choosing “Yes” to install Purchase Management 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)

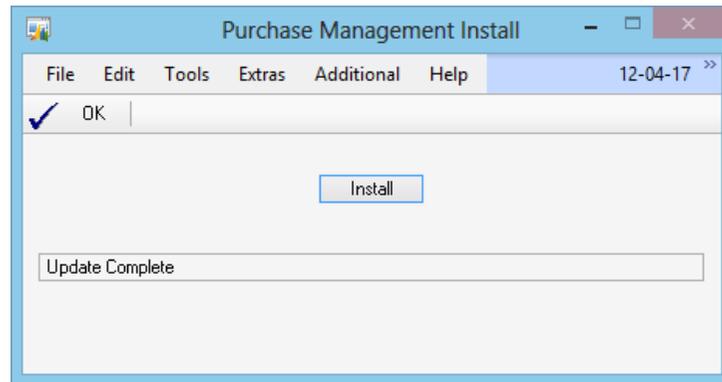
If “Never” is selected then you will not be prompted to run the installation process again. If at a later date you decide to install the product, you will need to create the “Install” option manually. This process is detailed later in this document.

You may choose to log into other companies that will not be using Purchase Management and selecting ‘Never’ so that this message will not appear when users log in.

Please note that The Purchase Management Auto Install window will not appear if the tables and stored procedures have been previously installed.

### 2.11 Running the Product Installation Process

After clicking “Yes” to install Purchase Management 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 ‘Purchase Management Install’ from Tools >> Setup >> Company.



## 3. Web Server Installation Procedures

### 3.1 Important Notes

Please ensure that you have carefully read and understood the important notes listed above in section 1.0 and any additional release notes prior to installation.

The following installation instructions are intended for the web server applications only.

### 3.2 Backup files

Prior to the running this install take a copy of the of the Virtual directory folder generally called (mhancePurchMgt folder normally located c:\inetpub\wwwroot). This folder contains you modified report layouts such as the Purchase Order report within Purchase Management. The install will overwrite these report.

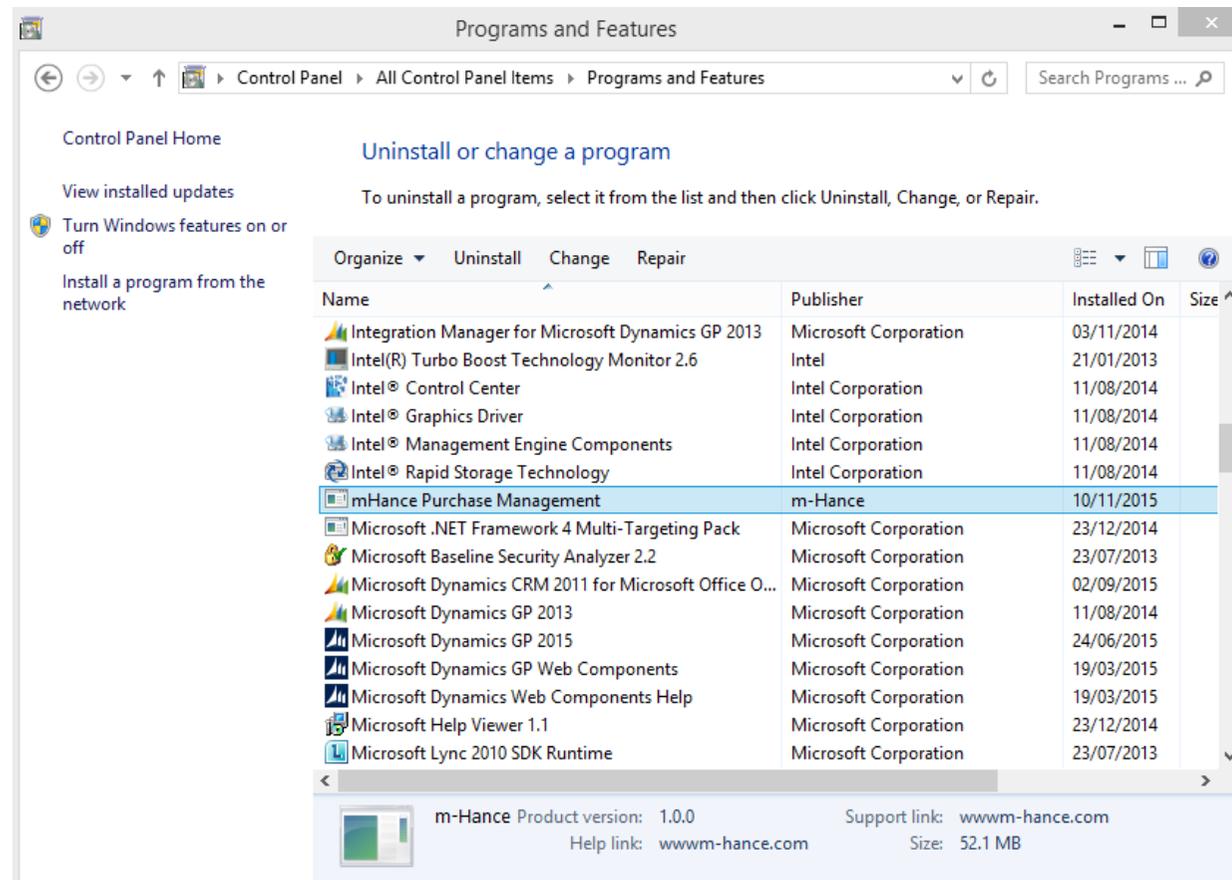
📁 This PC > OS (C:) > inetpub > wwwroot

Name	Date	Type	Size	Tags
aspnet_client	11/08/2014 18:08	File folder		
Images	20/10/2015 15:48	File folder		
<b>mhancePurchMgt2013</b>	22/07/2015 19:20	File folder		
mhancePurchMgt2013 - Copy	10/11/2015 15:13	File folder		
mhancePurchMgt2015	16/10/2015 13:40	File folder		
mhancePurchMgt2015 - Copy	09/11/2015 20:12	File folder		
bkg-blu.jpg	23/07/2013 16:05	JPEG image	284 KB	
clientaccesspolicy.xml	08/10/2014 17:06	XML File	1 KB	
iis-8.png	23/07/2013 16:05	PNG image	58 KB	
iis-85.png	12/08/2014 02:58	PNG image	97 KB	
iisstart.htm	12/08/2014 02:58	HTM File	1 KB	
msweb-brand.png	23/07/2013 16:05	PNG image	3 KB	
w-brand.png	23/07/2013 16:05	PNG image	10 KB	
web.config	14/10/2015 14:27	CONFIG File	1 KB	

### 3.3 Un-install Previous version

Prior to running the install you will need to uninstall the current version by going into Control Panel >> Programs and

Features right click on mHance Purchase Management and select uninstall.

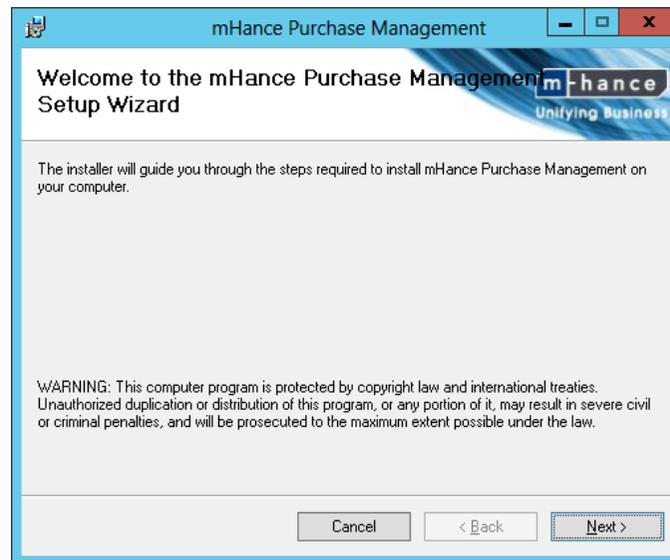


### 3.4 Run the Setup Wizard for Purchase Management

Double click on the setup.exe from the installation files

Name	Date modified	Type	Size
Windows Client	10/11/2015 20:48	File folder	
D277734.cnk	10/11/2015 09:00	CNK File	6,281 KB
IA&A12ErrorLog.xls	10/11/2015 14:44	Microsoft Excel 97...	220 KB
mHanceSetup.msi	10/11/2015 14:46	Windows Installer ...	12,837 KB
setup.exe	10/11/2015 14:46	Application	411 KB

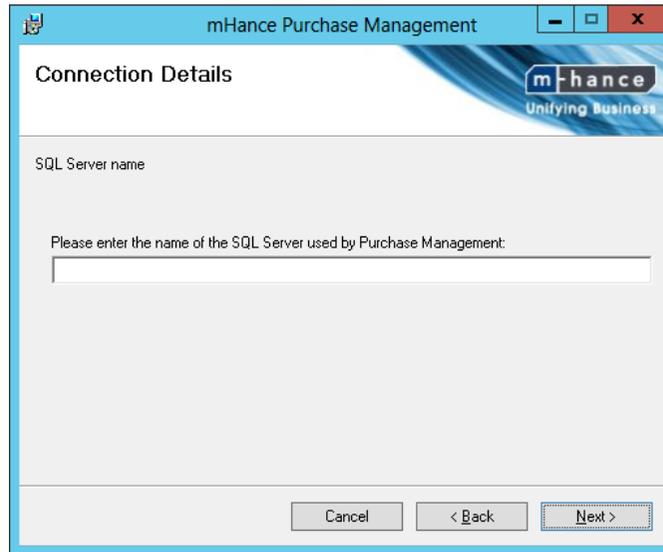
Welcome to the Setup Wizard for Purchase Management, select "Next" if you wish to continue with the Purchase Management Install wizard.



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

### 3.5 Purchase Management SQL Server Setup

At the Purchase Management SQL Server Setup window you are required to enter the exact name of your SQL Server. Click the "Next" button to proceed. The SQL Server Name will essentially be the server name from within Enterprise Manager/Management Studio.



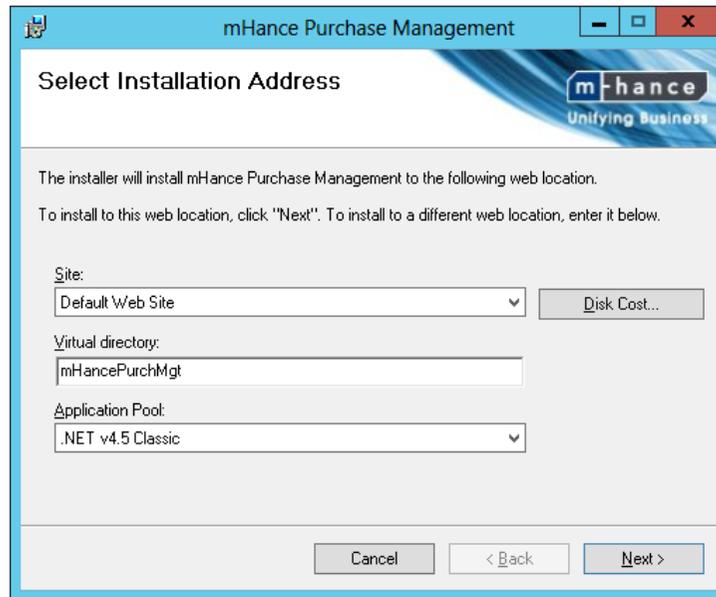
The SQL server needs to refer to the instance if a SQL instance is used (for example, SQLSERV01\GP), and an IP address can also be used instead of the server name

No validation is performed on the name entered at this point during the installation. The server name is stored in a configuration file and will then be referenced when the web application is used.

### 3.6 Approvals Virtual Directory and Application Pool Setup

This setup window requires you to enter a site name for the virtual directory that is going to be referenced by Purchase Management product when using the browser based approval pages.

It is also necessary to select **ASP.net 4 (or a later version)** as the Application pool by selecting it from the dropdown list at the bottom of this window.

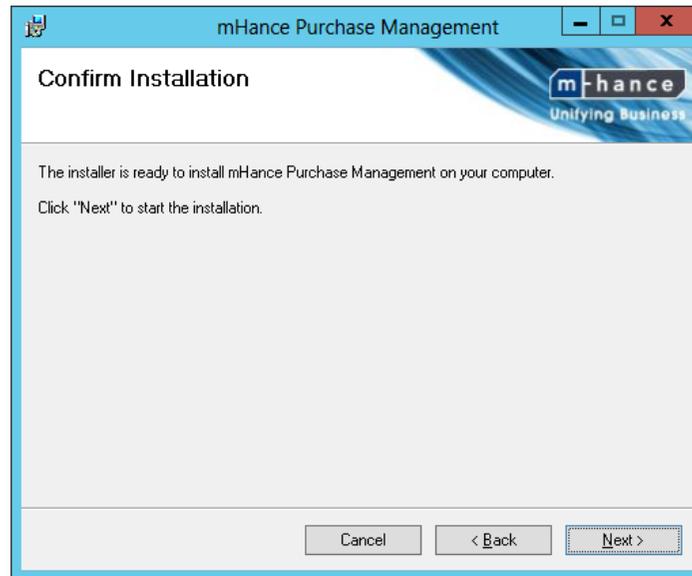


**n.b. If the latest version of ASP .NET is not accessible it may be necessary to run an ISS reset.**

It is also possible to manually select this as the application pool by entering IIS, going to the Purchase Management website within IIS and opening 'Advanced Settings'.

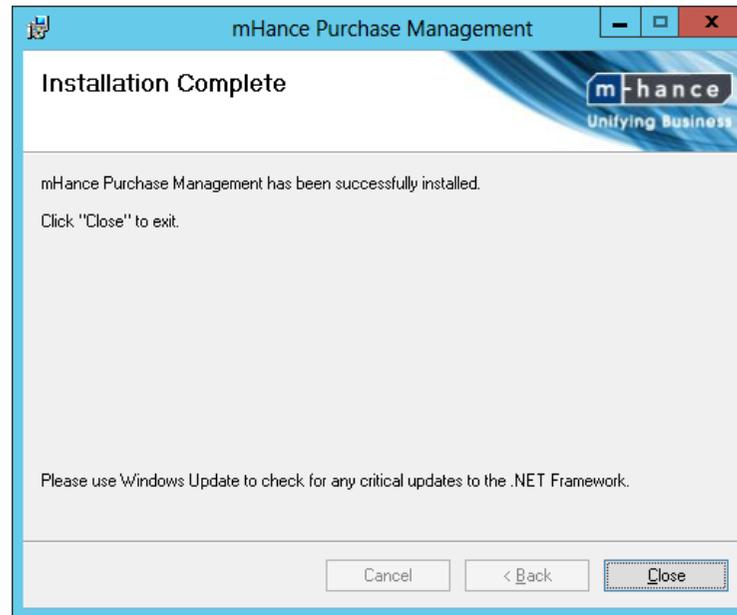
### 3.7 Start Copying Files

The final stage of the InstallShield Wizard for Purchase Management is to start copying the files into the directories that have been identified. Click Next to start the installation.



### 3.8 Setup Wizard Complete

The Web Server and Client installation process is now complete. Click the "Close" button to close the window and end the Setup Wizard.



The installation process is now complete and you should consult Purchase Management 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 for more information.