Purchase Management
January 2016 Install/Upgrade Guide

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1 Installation Pre-requisites

1.1 Purchase Management Build Number

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.

If you are upgrading Purchase Management to the January 2016 build then you must ensure that the minimum builds shown below are currently installed. The new Purchase Management install routine will check that the current Purchase Management build and the installation process will be aborted if the current install is an older build than detailed below.

	Minimum Build No
Dynamics GP 2010	173
Dynamics GP 2013	166
Dynamics GP 2015	18

The Purchase Management build number can be located by logging into Dynamics GP go to the Help About window, select the Additional menu option and then the About Purchase Management option.

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 create 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.

1.4 Administration Rights

Installation of Purchase Management should be performed by a user with the administrator privileges on the servers and client workstations. Typically this would be "sa" (Systems Administrator).

SQL must allow access for executing SQL objects for the windows user that you are installing with. This may require you to alter access in SQL to do this. (e.g. windows user with DYNGRP and dbo roles turned on).

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1.5 Internet Information Server

To use Purchase Management, IIS version 6 or higher must be installed on the web server.

1.6 .net framework 4.0

Purchase Management requires the full version of ASP.net framework 4.0 or a later version to be installed on the web server. In additional all the functionality for .Net should be enabled

1.7 Web Server Configuration

The Web Server must be configured with Application Development files installed.

2 Installation Process

The Purchase Management software can be downloaded from the m-hance FTP site. Contact your m-hance account manager for the site details.

There are three stages to the Purchase Management installation routine.

- Installer   Installation of the Purchase Management SQL components
- Windows Client   Installation of the Dynamics GP Smartlist components
- Web   Installation of the web components

It is recommended that the Purchase Management install is performed in the above order.

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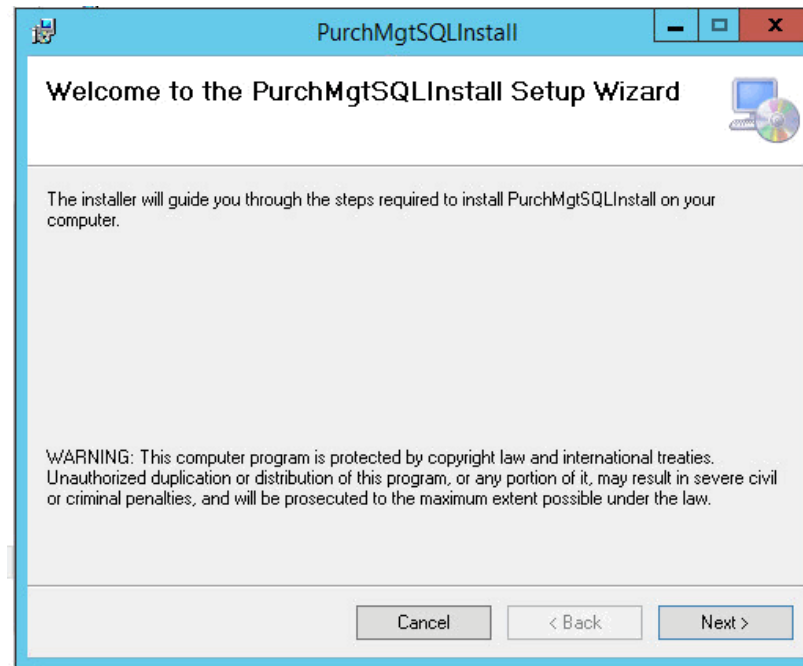
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2.1 Installer - Extracting and Installing the Purchase Management SQL Install

The Purchase Management SQL install will involve extracting the install files to a location on the SQL server and then running the Purchase Management SQL install.

2.1.1 The Purchase Management SQL install files are located in the Installer folder.

Name	Size	Packed	Type	Modified	CRC32
..			File folder		
PurchMgtSQLInstall.msi	5,519,360	4,525,810	Windows Installer ...	29/02/2016 10:59	052550C8
setup.exe	424,960	162,607	Application	29/02/2016 10:58	48AD3A92

2.1.2 Double click on the setup.exe file to start the Purchase Management SQL install.

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

The "Back" button can be used at any time during the installation process in order to return to the previous screen. Click the "Cancel" button at any time during the process to abandon the installation.

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2.1.4 Select the location of for the PurchMgtSQLInstall files to be extracted to on the SQL
       server (This doesn't have to be the same directory as your Dynamics GP Server client install).

Click the "Next" button to continue

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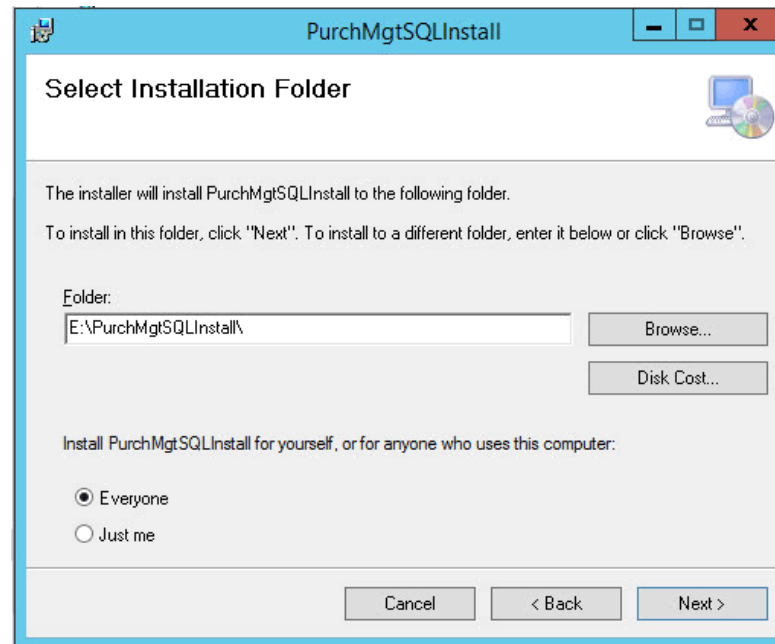
Click the "Next" to Confirm Installation
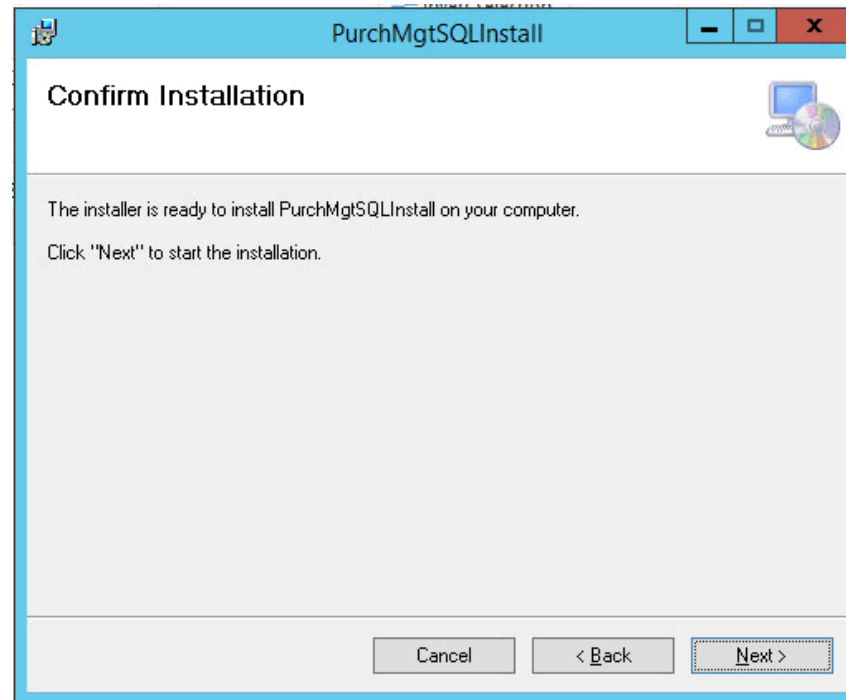
While the files are being copied a "Setup Status" window will display showing the progress of the Wizard.
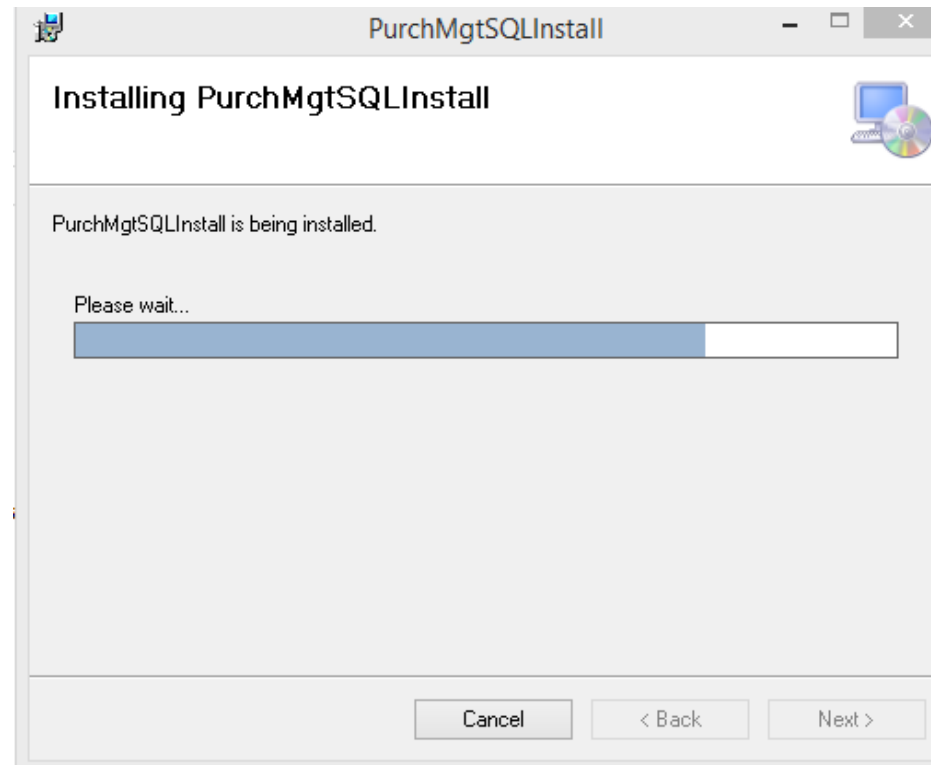
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Once the Setup Status bar has reached 100% complete you will automatically be taken to the Install Wizard Complete window as detailed below.

The Purchase Management SQL install has now been extracted to your selected location.

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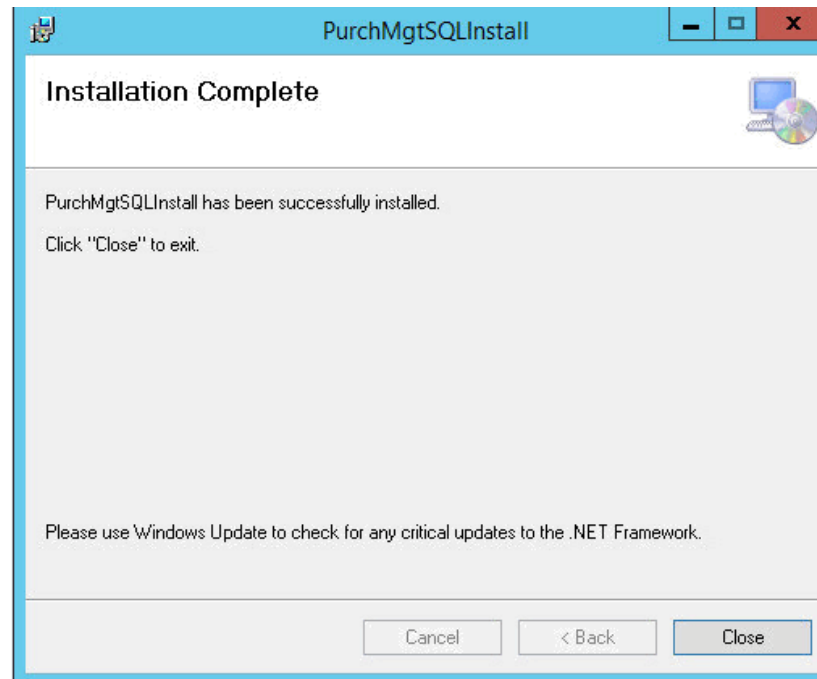
The current release of Purchase Management incorporates some significant improvements to the installation process.

The three main improvements are:

- A new installation screen for managing the installation. This screen offers more control by only activating subsequent stages when the current stage has successfully completed

- Additional screens which report in detail on the progress of the installation

- Installation reporting to log files which capture and record all aspects of the installation as text files

2.2 Purchase Management SQL Install

To start the installation of the SQL components, locate the PurchMgtSQLInstall folder and double click GP Installer.exe to open the m-hance GP Installer

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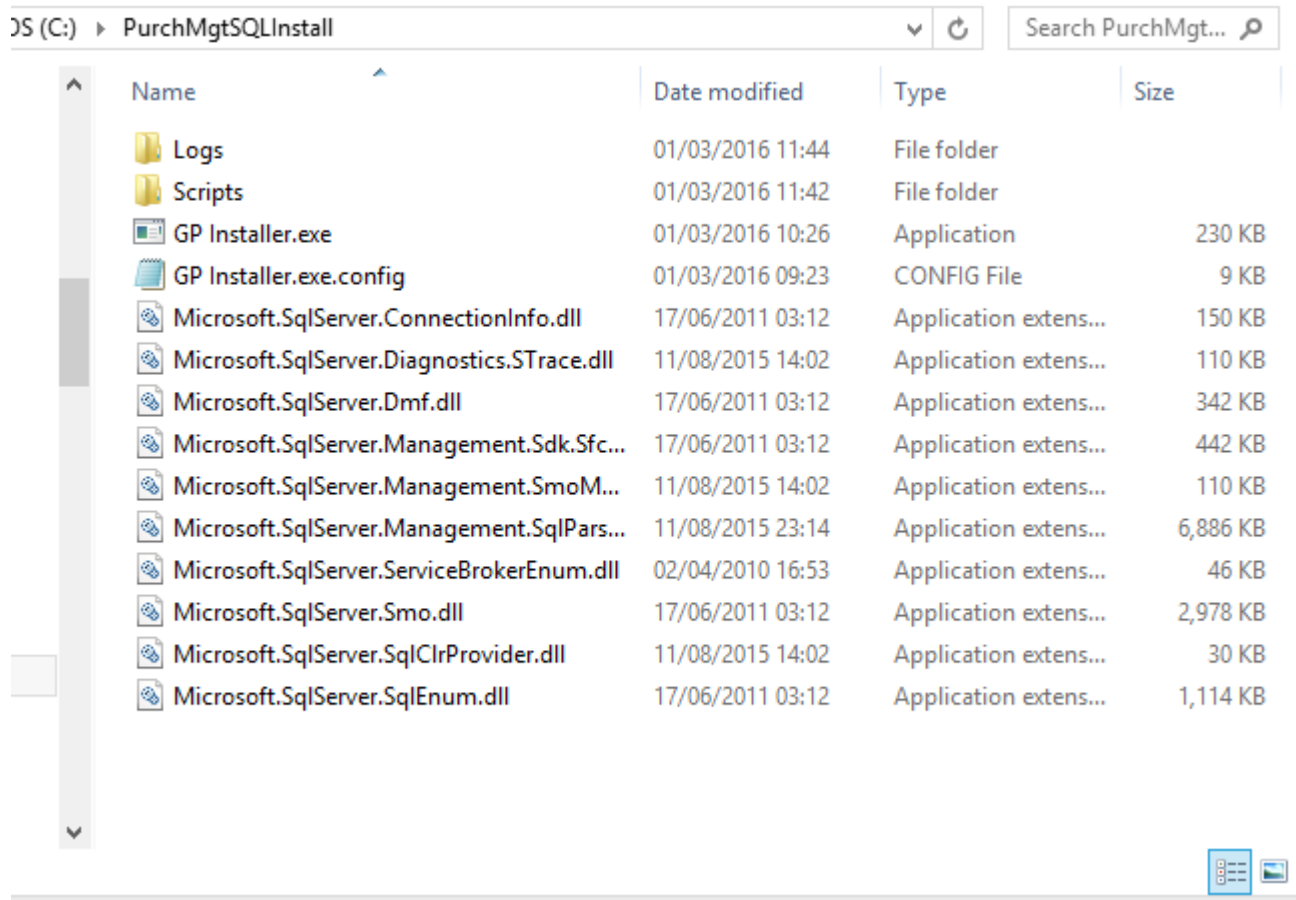
Double click on the GP Installer.exe to open the m-hance GP Installer window

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Manually enter the SQL server name   or click on browse button   [...]

To find the sql name

Enter the sa user name and password then click on the browse button   [...]
And select the System database for your Dynamics GP install.

Note: In later versions of Dynamics GP the system database might not be called DYNAMICS

Connect to the Database by Clicking the Connect button, [icon] to test and establish the connection to the database

If the connection is successful the next pane will be activated

Mark the Dynamics GP Company databases that Purchase Management is to be installed on

A list of company databases will appear, select the companies to install Purchase Management to

Click the Validate Database button, [Validate Database] to check the databases

If successful the third pane will be activated

Pane 3 – Purchase Management and Core Modules

Use the check boxes to select the Purchase Management modules to installed   you will also need to mark if m-hance
VAT management, Analytical Accounting and Project Accounting all installed on your Dynamics GP system

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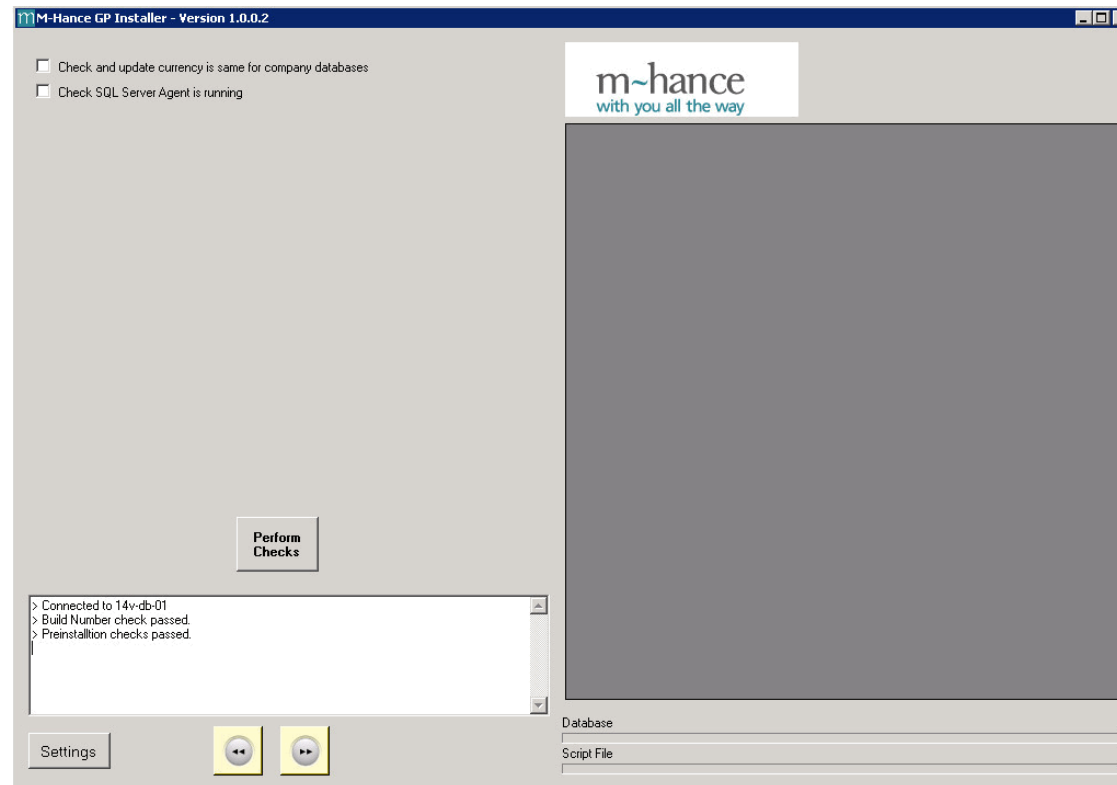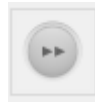
Click the button

And mark the options
> Check and update currency is same for company database
> Check SQL Server Agent is running and then select Perform check

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Click the button button to start the installation
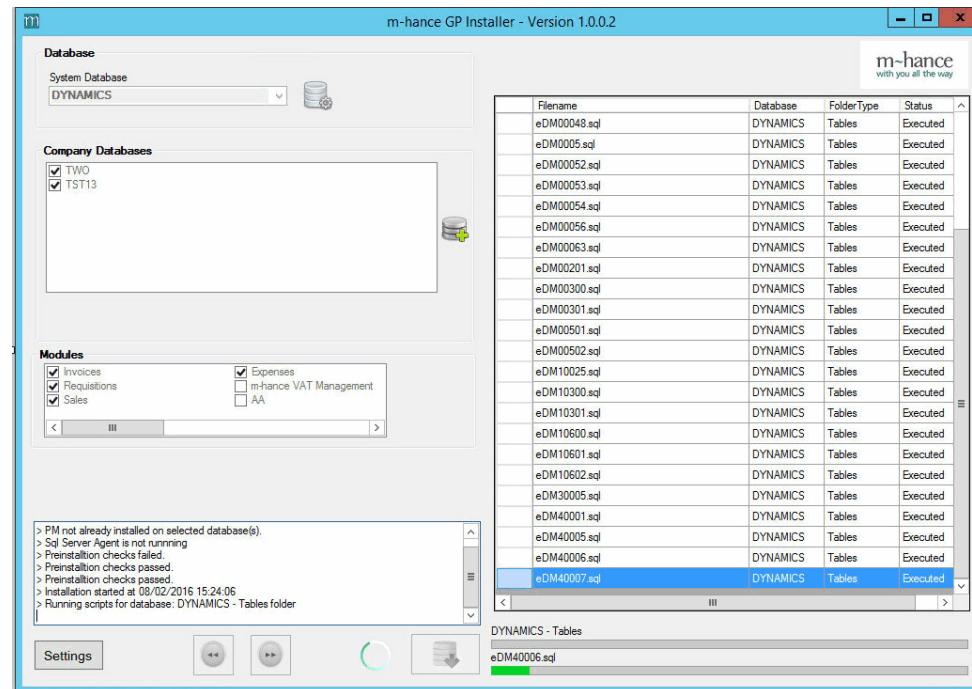
2.2.1 Completion

Once this stage of the installation is complete the routine will display a window confirming the installation was successful

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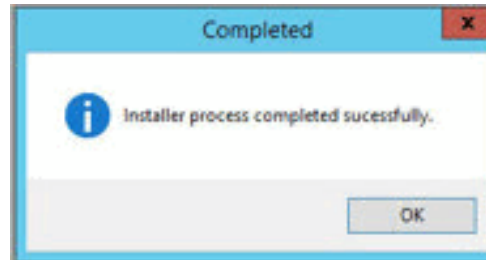
If the installation was unsuccessful then the text error log files for the SQL scripts that have failed during the installation process will created within the Logs folder. These log files should be sent to the m-hance support desk.
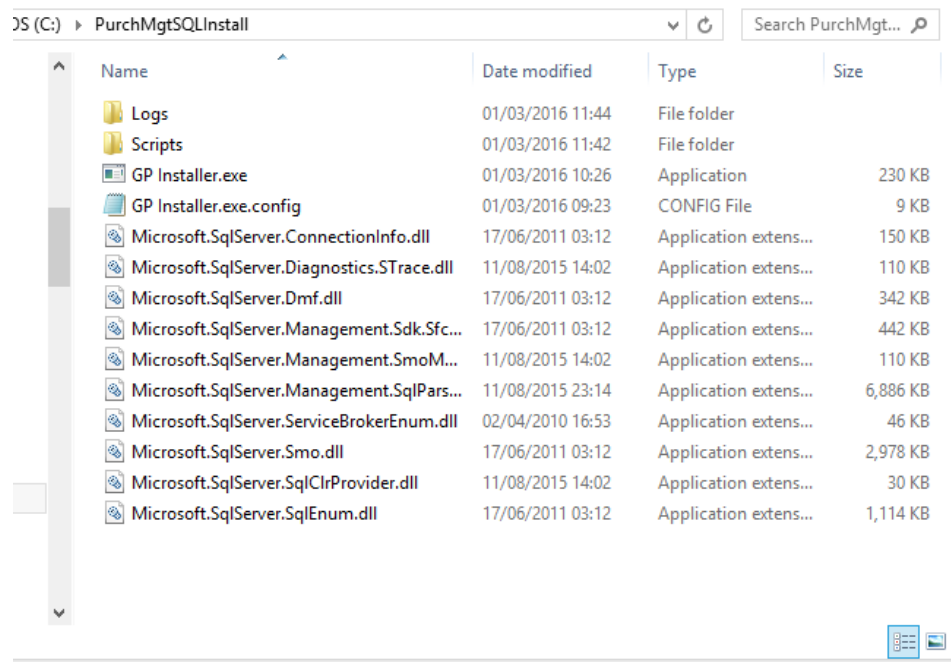
3 Windows Client - Dynamics GP Client/Server components

3.1.1 Log out of Dynamics GP

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

3.1.2 Copying the Install Shield Wizard for Purchase Management

Open the Windows Client folder from the install files

Name	Date modified	Type	Size
PurchMgtV12x86.msi	01/03/2016 16:53	Windows Installer ...	17,197 KB
setup.exe	01/03/2016 16:53	Application	411 KB

3.1.3 Run the Install Shield Wizard for Purchase Management

The double click on the setup.exe file which will start up the Install Shield wizard.

Note: Depending on security settings it may be necessary to right click on the exe and 'Run as Administrator'

3.1.4 Welcome to the Install Shield Wizard for Purchase Management
Click "Next" if you wish to continue with the Purchase Management InstallShield Wizard.

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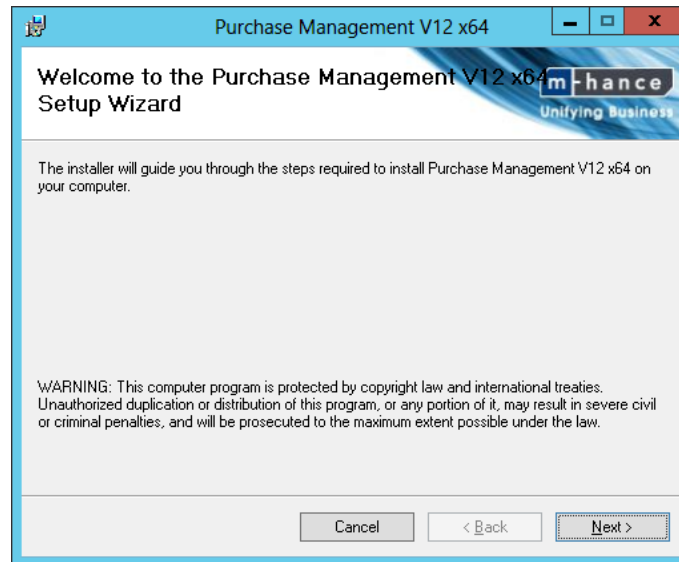
With the exception of the "Extracting Files" and "Welcome" install page, please note that the "Back" button can be used at any time during the installation process in order to return to the previous screen within the product set up. Click the "Cancel" button at any time during the process to abandon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

Please read and accept the License Agreement if you wish to continue
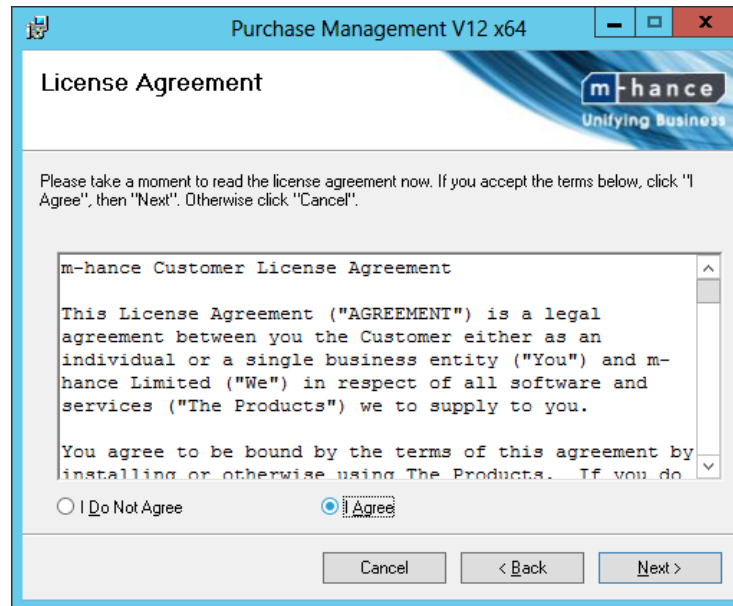
3.2 Select File Location

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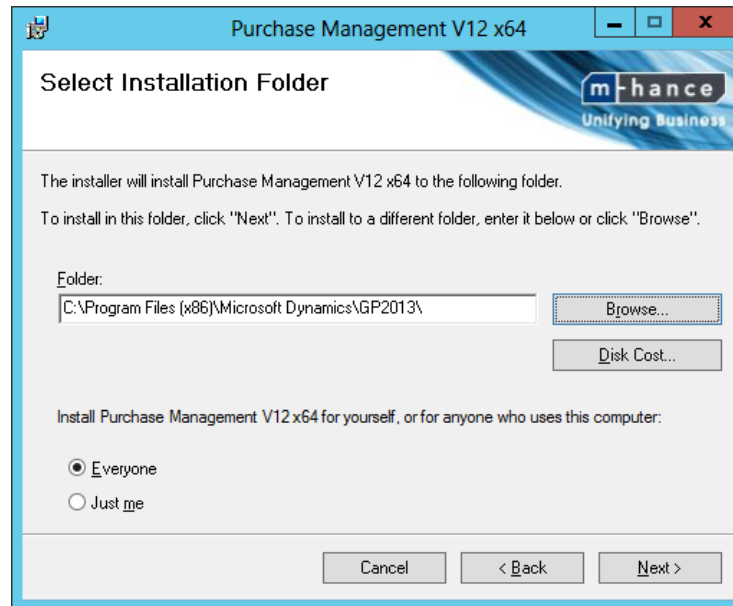
If the folder shown is NOT the correct Destination Folder then this reference can be changed by clicking on the "Browse" button and directly locating the required folder. You can also choose whether the installation of Purchase Management will be for your sole use only or for anyone who logs onto this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

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

3.2.1 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.

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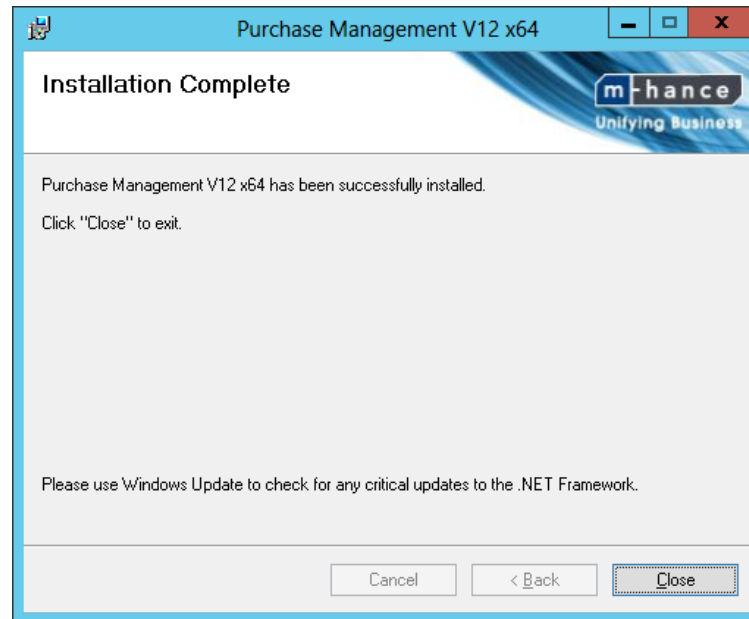
3.2.2 InstallShield Wizard Complete
The Client installation process is now complete. Please close the window and end the InstallShield Wizard

3.2.3 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.

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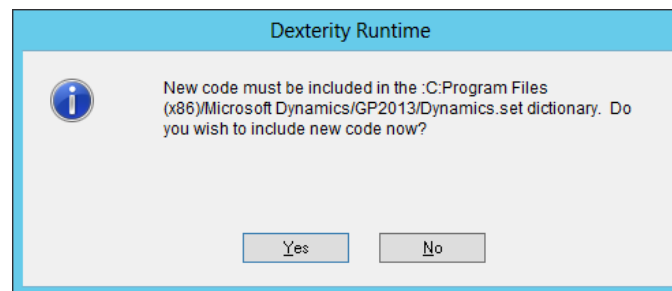
3.2.4 Log into Dynamics GP

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

3.2.5 Completing the Auto Install Routine

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

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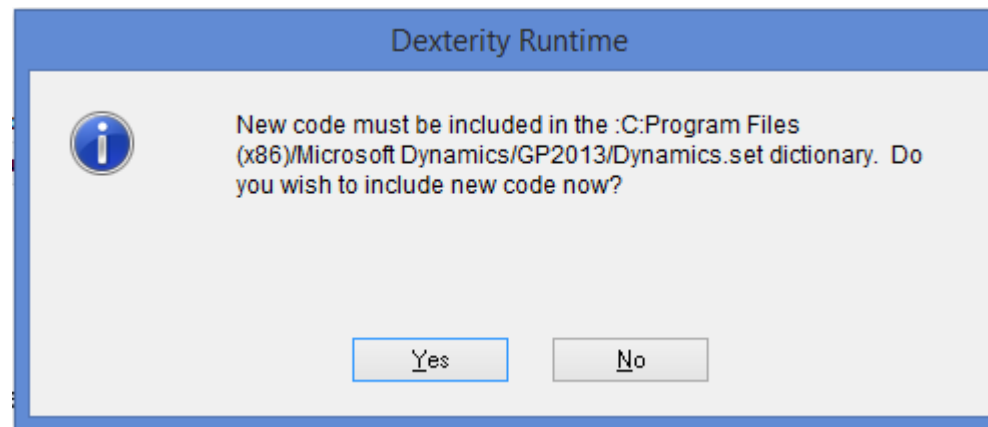
Choosing "Yes" to install the Purchase Management Smartlist components. Once this process is fully completed then the message "Update Complete" will appear within the progress indicator section. Next click the "OK" button to close the window.
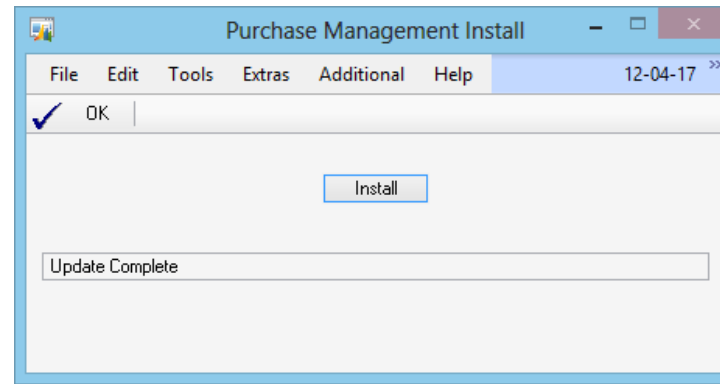
To manually run the install if necessary, select 'Purchase Management Install' from Tools >> Setup >> Company>>Purchase Management Install.

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.

Users will only be required to log into one Dynamics GP company.

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3.3 Additional Dynamics GP Clients
Steps 3.1 to 3.2 above will need to be done for each additional Dynamics GP client

4   Web Component Installation

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

4.1 Backup files

Prior to the running this install check in the folder at C:\inetweb\wwwroot for a subfolder called MhancePurchMgt. If this folder exists, or one like it, this means the Purchase Management Web components have already been installed. In which case take a copy of the of the virtual directory folder found above.

Then proceed to step 4.2, if the folder is not found take the backup recommended below and start the installation from step 5

If an existing Purchase Management folder is not found it is still recommended that a copy of the wwwroot folder be taken prior to starting the install of the Purchase Management Web components
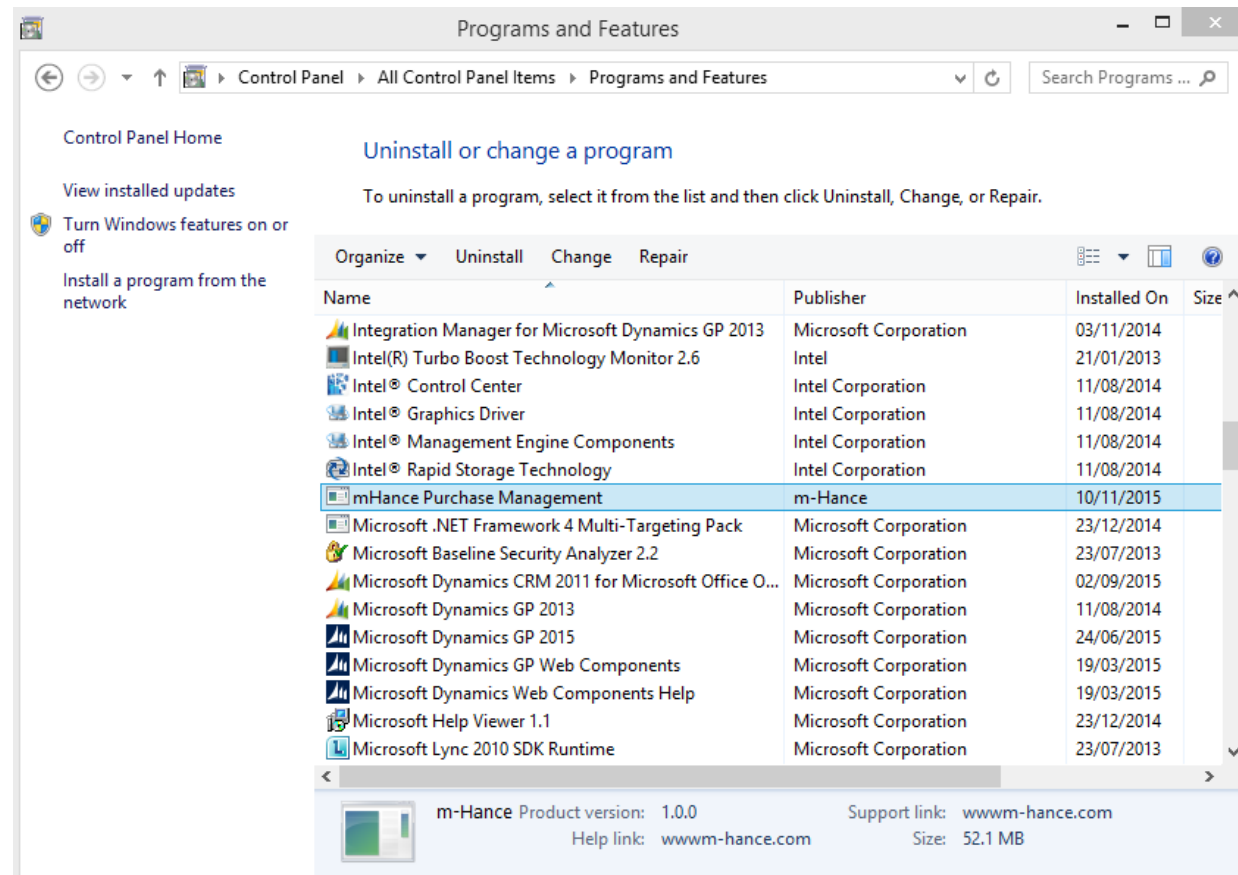
(mhancePurchMgt folder normally located c\inetpub\wwwroot). This folder contains your modified report layouts such as the Purchase Order report within Purchase Management. The installation/upgrade process will overwrite these report.

4.2 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.

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4.2.1 Copy the Install files onto the preferred drive of your machine

5 Run the Setup Wizard for Purchase Management

In the Window Client folder of the installation files double click on the setup.exe file.
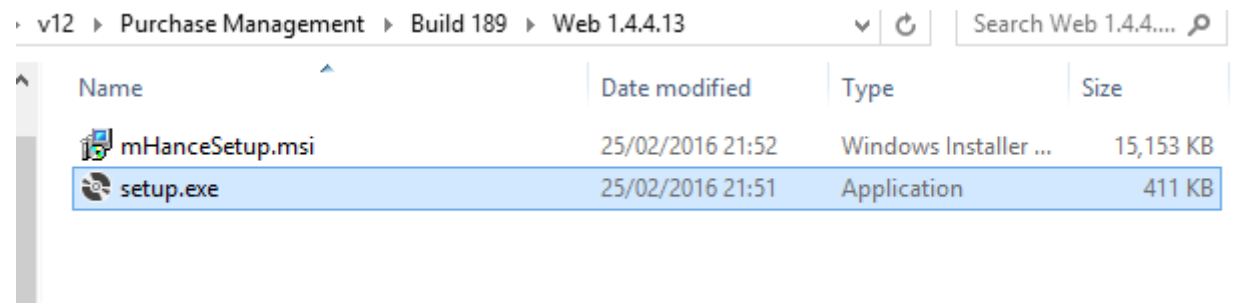
Welcome to the Setup Wizard for Purchase Management, select "Next" if you wish to continue with the Purchase Management Install wizard.

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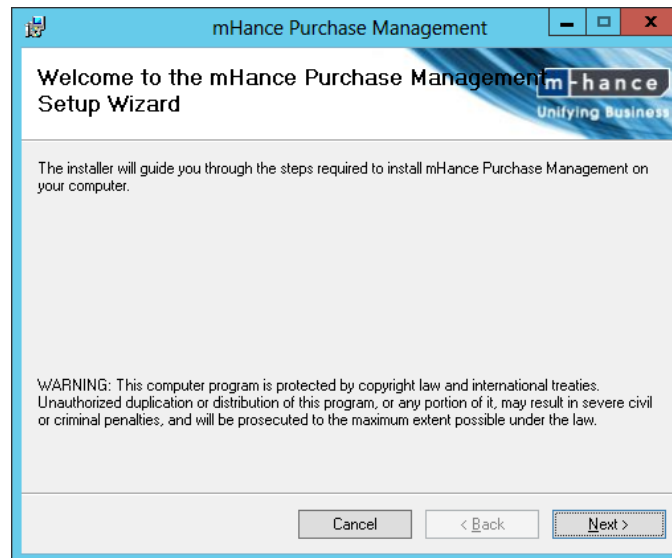
Please read and accept the License Agreement if you wish to continue.

5.1.1 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.
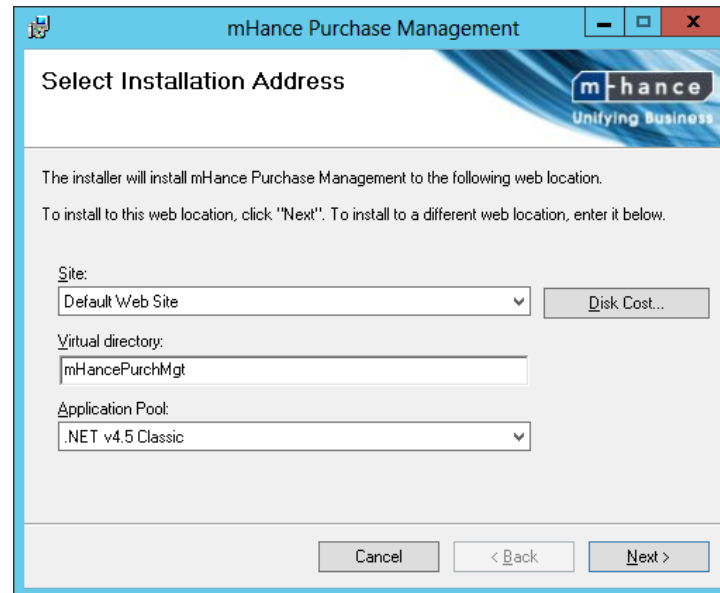
The SQL server needs to refer to the instance if a SQL instance is used (for example, SQLSERV01\GP), and an IP address can also be used instead of the server name

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.

5.1.2 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.
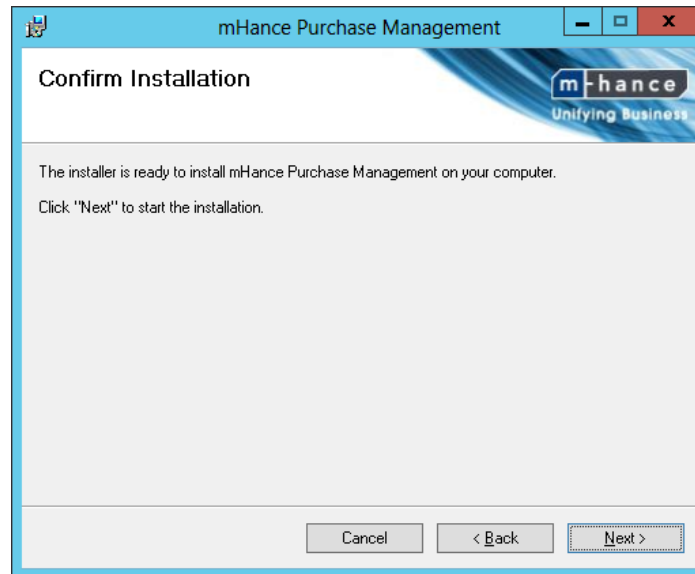
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Note: If the latest version of ASP .NET is not accessible it may be necessary to run an ISS reset.

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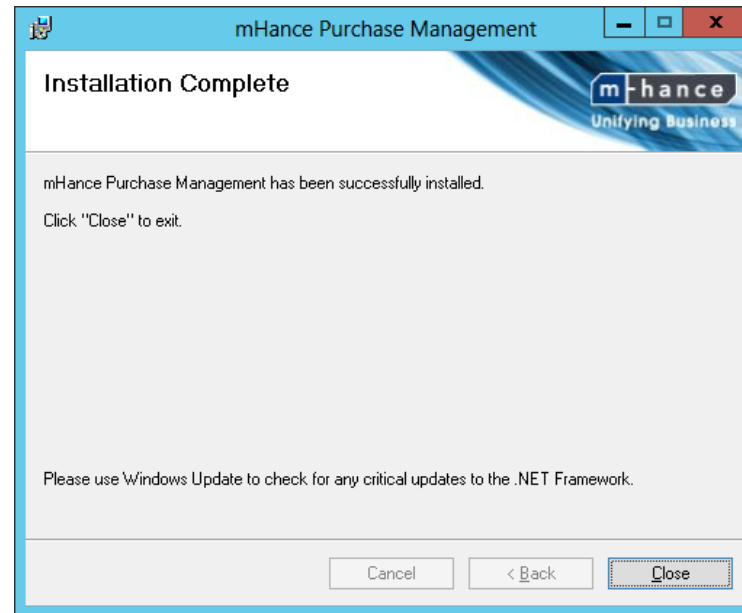
5.1.3 Start Copying Files
The final stage of the InstallShield Wizard for Purchase Management is to start copying the files into the directories that have been identified. Click Next to start the installation.

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5.1.4 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