



# **Horizons International**

## **CFG/IPM Service Pack Installation**

**Latest code compatible with GP 18 (2018)**

# Installing a service patch

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When installing a service patch where no upgrade process is required, complete the following steps before loading the new code. To determine if no upgrade is needed, compare the old version with the new code being installed. If the CFG/IPM main version number is the same, then no upgrade is required. Example: The old version was 11-81.sp1.1.1 and the new version is 18 85 spRTM.1.xx. The version '85' is the same, so no upgrade is required.

A test environment is one that is completely separate from your live environment, not just a separate 'test' company in your live environment. If you install Horizons code in your live environment, even if you are only logging into the test company, all other users in the system will be prompted that an upgrade is required.

To properly test the new code, any customizations (modified forms, reports, vba) should be disabled first, test that the new code performs as expected, and then put the customizations back in place one by one to verify their compatibility with the new CFG/IPM code.

## 1. Verify GP version compatibility

Determine the current version and service pack of Dynamics GP. The current release of CFG/IPM is 18 85 spRTM.1.xx for GP 18 (2018).

Verify that the code you've downloaded from Horizons is specified for the GP version.

If the GP version and service pack are not the ones required by the Horizons code you've downloaded as specified on the website and in the changes documentation, you will need to do one of two things:

- a. Contact Horizons to see if you can get code for the version you are on. If you want to install a Microsoft service pack that has been available for less than 90 days, we might not have yet issued our code for the new service pack and you will need to wait until we release. **SINCE THERE IS USUALLY NO WAY TO REVERSE A GP SERVICE PACK INSTALLATION DO NOT INSTALL THE SP UNTIL YOU HAVE VERIFIED THAT CFG/IPM IS COMPATIBLE.**
- b. If you are on an older service pack from Microsoft (more than 90 days old), then you will need to upgrade your Dynamics GP data to the current service pack (as specified with the CFG/IPM code you downloaded) before installing our new code.

## 3. Create a list of ALL workstations in the organization

Every user *must* have the same CFG/IPM code installed.

Also, make a list of any separate HZCFRPTS.DIC (report dictionaries for CFG/IPM), as each dictionary will need to be upgraded by following the steps in #4 below. If all users access a central report dictionary, then it will be upgraded with the first workstation.

#### **4. Install the code on the first workstation**

- a. Get ALL users out of Dynamics GP (not just Horizons users)
- b. Unzip the file that you downloaded and extract the \*.cnk file to the root of the Dynamics install on the workstation. This is the same directory as the 'dynamics.exe'.
- c. Launch GP and respond 'yes' to the prompt to include new code'.
- d. NOTE: if you are not prompted, then the cnk file is not in the proper location (or you forgot to unzip it). Double check the dynamics.set file to verify the location of the dynamics.exe.
- e. Proceed to log into Dynamics GP as 'sa'.

#### **5. Verify the tables**

- a. This step is performed to ensure that you did not inadvertently install a version that will require an upgrade.
  - For Configurator, open the CFG File Maintenance window. (from the Sales homepage, Transactions > Configurator > Setup and Utilities > File Maintenance).
  - For IPM, open the IP File Maintenance window (from the Inventory homepage, Transactions > Item Pricing Matrix > Setup and Utilities > File Maintenance).
- b. Toggle the 'Show:' field to 'Physical Files'.
- c. Click the 'Insert All>>' button
- d. If all the tables insert without error, then you may assume that all tables are verified and close the File Maintenance window. Do NOT perform any file maintenance procedures--simply close the window. If any tables fail, you have installed a version that requires an upgrade. You may 'back out' of the code install by putting in the old cnk file and repeating the above steps, or copy the entire Dynamics GP directory from another workstation to replace the dictionary and other required files with the older version.

#### **6. Install the code on all other workstations**

- a. Copy the cnk to the root of Dynamics GP on each workstation.
- b. Log in as any user to include the code.