



Horizons International Manufacturing Suite

*Life Sciences, Batch Processing and High Tech Manufacturing Software
for Microsoft Dynamics GP*

Dynamics GP Version: GP 14 (2015)

Horizons Version: HMS 14 83 sp0

Latest code (v 83) is only compatible with GP version 2015

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Before you Start

System Requirements

Horizons Manufacturing Suite (HMS) is designed to integrate with Microsoft's Dynamics GP Accounting system. In addition to the system manager, the inventory module is also required. The Purchase Order and Sales Order modules are optional, but not using them will cause certain modules to have reduced functionality.

As with any system, it is recommended that you have appropriate backup and recovery measures in place before starting this installation. HMS does not have specific requirements for backups--any solid plan that is developed to safeguard Dynamics GP data will automatically include core HMS data.

HMS system requirements for hardware and network considerations are the same as for Dynamics GP. Keep in mind that these requirements are minimums. In your production environment, your requirements may be substantially higher. Please refer to CustomerSource for the most recent system requirements:

MBS.Microsoft.com | [Sign in to CustomerSource](#) | [Support](#) | [Solution Center: Dynamics GP](#) | [Documentation](#) | [System Requirements](#)

Preparation

Horizons code is distributed as a dictionary. A chunk file will be included for new installations that has only the minimum code necessary to add info to the Dynamics set file. It will not contain any code to run the Horizons product. For new installations, load the chunk file, then click Cancel when the GP login window comes up. Copy the Bom.dic that is in the installation package to the GP directory and overwrite the install dictionary. This process must be done on all work stations that will be using HMS.

Following is a checklist to assist with preliminary steps that should be complete to ensure the smooth installation of Horizons Manufacturing Suite.

There have been some registration changes for Serial Lot--be sure to examine your registration keys to verify if you are registered for 'Enhanced S/L' (this is in addition to the basic module called 'Serial/Lot') so you can obtain the new .Net Component Serial/Lot Select window. If you are certain that you should be registered for Enhanced S/L but you don't see it on the reg keys that were emailed to you, please contact our office.

- Hardware requirements are met
- Networking requirements are met
- Latest code (v 83) is only compatible with GP version 2015
- HMS 14 83 sp0 has been downloaded from the web. If you are registered for Enhanced S/L, be sure to download the 'ESL' code set on the web.

- (Call Horizons @ 800/287-8014 Ext 1 for link and passwords or email support@hzs.com)
- Proper Horizons Manufacturing System registration keys (Call Horizons or email support@hzs.com to obtain them by email)
- Verified backup is done and available
- List of workstations

Preparation

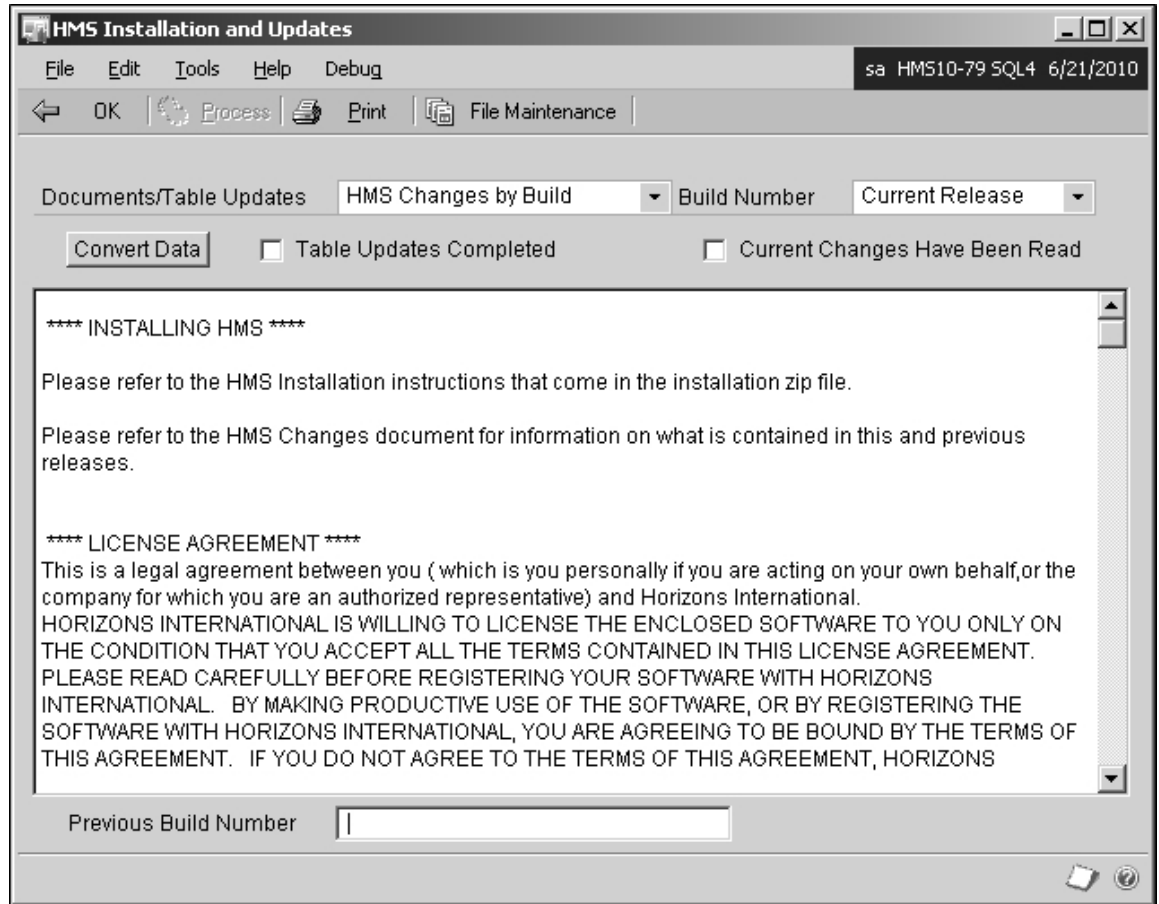
1. Make sure all users are completely out of Dynamics GP (not just the manufacturing users). This is important as the installation will not work properly otherwise.
2. Verify that you have a backup.
3. Unzip the code that was downloaded from the web to the workstation's Dynamics GP folder. This will copy several files to the workstation:
 - a. A Dynamics Chunk file—this is the New Installation chunk file, called Install.chunk, which is in the file 'HMS_New_Install_Chunk.zip'. It is not the full HMS code, but is used to update the Dynamics set file. It is important that the Chunk file is in the same location as the Dynamics.set and the Dynamics.exe.
 - b. PLEASE NOTE - if there are errors logging into GP with the new HMS Bom.dic it is likely because the code was corrupted during the unpacking process, especially if Windows zip application is used. The files have been compressed using AL Zip which can be downloaded from ALtools.com.
 - c. A Bom.dic file that is zipped up and named with the current version. It will be in the current format - HMS1181sp2-3.2.53.zip. The following are the meaning of the numbers from left to right:
 - Great Plains version - **11**
 - Horizons version - **81**
 - GP Service Pack compatibility - **sp2**. If the code works for more than one continuous GP service pack version then it will appear like **2-3**, which means it works for Service Packs 2 to 3.
 - CSLS/Lot Holds compatibility number - **2** (Did not exist in earlier versions)
 - Build Number - **53**
 - a. One or more word documents, including the net changes document which contains a summary list of all the latest changes to the code. To view all changes to the code, please see 'History of Enhancements and Changes' in the on-line help file
 - b. Smartlist Data Installer.sql. Please see the Optional Install topic.
 - c. Quantity Recalc stored procedure: Recalc_v1_38.sql.
 - d. The online help file: HMS_On-Line_Help.zip. In this file is the HMS Online help file .chm and a 'readme'. Please review the readme before installing the help file on the workstations.

- e. The Report Viewer (RV)executable install: RV_2.0.0.0 - for Dot Net 4.0; RV_1.0.8.0 - for Dot Net 4.5 and later.zip
- f. The RV report definitions and scripts: RV_Scripts_Reports.zip

Install the Code on the Server

1. Copy the Install chunk file to the root GP directory. Log in to Great Plains. A dialog box will appear. Click on 'Yes' to install the code. When the GP login window appears, choose Cancel. This process updates the Dynamics Set file. The chunk file has no code in it to run HMS. Next copy the Bom.dic that is in the HMS code download to the root GP directory and choose to overwrite. PLEASE NOTE - if there are errors logging into GP with the new HMS Bom.dic it is likely because the code was corrupted during the unpacking process, especially if Windows zip application is used. The files have been compressed using AL Zip which can be downloaded from ALtools.com.
2. After the Bom.dic is installed, proceed to log in to Dynamics GP as 'sa'. The tables will automatically be created and default values bound. Depending on the speed of the system, network traffic, etc., this may take anywhere from a few seconds to several minutes (or longer). It is very rare for the system to actually 'hang', so be patient and let the process continue until it is complete. After it is complete, you will get a series of confirming messages and warnings—click OK to each.

3. After the confirming messages and warnings, you will see the HMS Installation and Updates window.



4. Click on the Current Changes Have Been Read box.
5. Since this is a new installation and there are no table conversions required, mark the Table Updates Completed. A warning will follow—simply click on Continue. Then click OK to close the HMS Installation and Updates window.

Registration

Open the Horizons Registration window (Setup | Inventory | HMS Setup | Registration) and enter your Registration Keys that you obtained from the Horizons office. Verify that the proper modules are registered for your company. Click on OK to close the window.

On-Line Help

Verify that the On-line help file can be opened. Because of security features of XP service pack 2 and later windows operating systems, downloaded files have to be verified before they will run properly. Using windows explorer, double-click on the HMS_On-Line_

Help.chm file. If you receive a security warning, un-check the 'ask each time' box and then open the file. It will now open properly from within HMS.



Once you have the help file verified, you can copy it to each workstation as you install the code. Please see the section Workstation Installation in this manual.

Smartlist Installation

Using SQL Management Studio or a SQL Query, run Smartlist Data Installer.sql (found in the zip file you downloaded with the code) against the DYNAMICS database.

Quantity Recalc Stored Procedure

Using SQL Management Studio, open a SQL Query and run Recalc_v1_xx.sql (found in the zip file you downloaded with the code) against the company database. Repeat for each company that uses HMS.

NOTE: This stored procedure is used in multiple places in the HMS code to update the Quantities used in MRP and in the HMS Quantities Inquiry window.

Workstation Installation

All workstations that will be accessing companies that use Horizons Manufacturing System must be running the same version of HMS code. HMS should be on work stations for users that use SOP so that new sales orders are updated to the MRP Schedule immediately. This is not absolutely necessary because the SOP records will be brought into the schedule when MRP is run. Any work station that will be running a Inventory reconcile must have the HMS code loaded when any items track either serial or lot numbers. There are two steps to installing each workstation: The actual code install and the help file.

Install Code

Copy the Install chunk file to the root GP directory. Log in to Great Plains. A dialog box will appear. Click on 'Yes' to install the code. When the GP login window appears, choose Cancel. This process updates the Dynamics Set file. The chunk file has no code in it to run HMS. Next copy the Bom.dic that is in the HMS code download to the root GP directory and choose to overwrite. Launch GP as a non-sa user.

Install On-Line help

Copy the HMS_On-Line_Help.chm to the root GP directory. Please be sure that you have followed the steps in the Server Installation section of this manual to verify that the .chm can be opened.



Optional Installation Steps

Additional Company

When installing Horizons Manufacturing Suite (HMS) and you need to add the tables to other companies, simply log into the additional company as 'sa' to automatically create the tables and complete the remaining steps in the Server Installation topic. The only other steps that need to be completed are Security setups and the Report Viewer installation.

Using two manufacturing packages

Since there may be confusion and issues with running two manufacturing packages on the same machine and in the same GP company, plan on loading them only on the individual work stations where they each will be used. This means that you cannot load them both on a Terminal server and somehow separate them per user. Even if user security makes it impossible for a user to access the windows of a package, the triggers in the package will still be running. Follow the Work Station install instructions for HMS only for those computers that will be using HMS exclusively. Do not install the other manufacturing package on those machines. For convenience you can load both on the main server when no users will be accessing GP on it.

Install Quantity Recalc Stored Procedure

Recalculating all quantities for all items and sites in HMS Quantities Inquiry can be very time-consuming. For companies with a very large item database and the need to recalculate all quantities at once (as in when performing an MRP calculate, or for other reporting reasons), an optional stored procedure may be installed in the company database to speed the process.

The most recent version of the SQL query to install this stored procedure is included in the zip file with code downloads. To obtain it separately, email support@hzs.com.

1. Open Query Analyzer and log into your company database.
2. Open the query.
3. Click 'Execute Query'.
4. If the stored procedure installation was successful, you will see the following message:

'The command(s) completed successfully.'

For additional information, please see the Qty Recalc Stored Procedure section in on-line help.

Install Smartlist

A SQL query to populate the required tables in the DYNAMICS database has been included in the code download titled 'Smartlist Data Installer.sql'. Run this against the DYNAMICS database.

Smartlist Setup

Before setting up Smartlist, the installer should have been used to create the proper data in the SQL tables. Please refer to the Server Installation topic.

The installation is pre-configured to install the most commonly requested tables. This installation process need only be done once to create the proper tables in SQL.

Adding the Smartlist Objects

1. In Dynamics GP, open the Smartlist window and leave it open until step 4 is completed.
2. Open HMS Smartlist Setup from the HMS Utilities menu.
3. Click the Add/Remove Tables button to open the Add/Remove Tables To/From Smartlist window.
4. Click Add.
5. After processing is complete, close the Add/Remove Tables To/From Smartlist window.
6. Close and reopen Smartlist to see the new tables.

Making Changes to Smartlist

1. In the Table Information window, use the lookup next to Table Name (or scroll through all tables using the 'VCR' buttons at the bottom left of the screen).
2. If you want to **Add New HMS Tables**, click on the Initialize Table Info button. Click on the Fill In Table Info button. When the process is complete, close the window and lookup the table you want to add. It defaults to 'Do Not Include This Table'. Unmark that checkbox and Save. Click on the Add/Remove button at the top to Add the selected tables.
3. The checkbox in the middle of the screen that is labeled Do Not Include This Table is what controls whether a specific table will be in Smartlist.
4. Click on the Add/Remove Tables button.
5. Click on either 'Add' or 'Remove'
6. To the dialog "Do you want to remove all tables for this product from the Explorer or only the ones marked 'do not include'. Click 'Marked'.

Removing Smartlist

1. In the Table information window, click on the Add/Remove Tables button.
2. Click the Remove button
3. To the dialog "Do you want to remove all tables for this product from the Explorer or only the ones marked 'do not include'. Click 'All'.

Troubleshooting

Bad Datatype detected for operation

The HMS data for that table is probably corrupted.

1. To check the table fields, go to HMS Utilities – Smartlist Setup. Lookup and select the table. Sometimes the Smartlist name is different than the table name. Look for something like IV_Production...and the rest of the name. Once the table is found, click on the Add Missing Fields button. Select Continue on the next message and then Current on the next window.

2. Next mark the checkbox in the middle at the top of the HMS Smartlist Setup window – Do Not Include This Table. Save the record using the Save button at the top left.

Click on the Add/Remove button at the top. Mark the checkbox – Remove Unmarked Fields Only From Included Tables. Click the Remove button and then Continue. This will remove the table. After that is finished, open the table again in Horizons Smartlist Setup and unmark the Do Not Include This Table checkbox and Save.

3. Open the Add Remove window using the Add/Remove button at the top of the Horizons Smartlist Setup window. Make sure the GP Smartlist window is open and then click the Add button. This should add the HMS table to the list. Close and reopen GP Smartlists to see if this took care of the problem. Sometimes you may not see any data because the first few fields are empty. Scroll over to the right to see the records.

Security

Windows and Forms

HMS 14 83 sp0 for Dynamics GP 14 (2015) follows the same security model as core GP. No users (other than the 'Power Users') will have access to HMS unless you set it up using tasks, roles and User Security.

During the installation, the following task and role was created that you can assign to your users to give complete access to HMS:

- Task: ADMIN_HMS_AllAccess_01
- Role: HMS COMPLETE ACCESS

If limited access to HMS is desired for some users, do NOT make changes to the default task and role, as any changes you make will be overwritten the next time you install code or service packs from Horizons. Instead, copy each one to a new task and role and make the desired changes there.

Alternate Forms and Reports

The alternate forms and reports for HMS may be added to the DEFAULTUSER that is available in GP, but we recommend that you first COPY the DEFAULTUSER ID to a new ID and modify that one.

By default, no user has access to Horizons alternate GP windows and reports. To give access, use either Advanced Security or Regular Security to give access to individual users or user classes.

Be aware that many 3rd party applications use alternate windows and may use the same alternate windows as Horizons. The alternate windows used in Horizons are only for user convenience and are not required for full product functionality.

For a complete list of the alternate forms and reports available in HMS, please see the Alternate Dynamics GP Windows topic.

Smartlist

After Smartlist is installed and set up (see Server Installation and Smartlist Setup), access may be controlled using the same methods as for Dynamics GP.

By default, no user (other than the 'Power Users') will have access to HMS Smartlist Objects. To provide access to Smartlist for users:

1. Create a task for users to have access to the HMS Smartlist objects:
 - a. Create a new task (from the Administration page, click on 'Security Tasks').
 - b. In the 'Security Task Setup' window, select the following:

- c. Category: Company
 - d. Product: SmartList
 - e. Type: SmartList Object
 - f. Series: SmartList Objects
 - g. In the Access List, mark the desired HMS objects (they all start with 'HMS')
2. Once the task is created, it may now be added to any role.

CSLS Installation

Overview

Component Serial/Lot Select (CSLS) is only available for HMS users registered for the Enhanced Serial/Lot module.

- If HMS is already installed, you may open the Horizons Registration window (in the 'Setup' section of the Manufacturing homepage. The Enhanced S/L module will be listed as 'Enh S/L'. (NOTE--this is in addition to the basic S/LT module you will also see in your registration window.)
- If HMS is not yet installed, you may look at the registered modules in the email you were sent. 'Enhanced S/L' is listed separately from the basic 'Serial/Lot' window.

If you are certain that you should be registered for Enhanced S/L and you don't see it in your registration, please contact our office.

CSLS for GP 11 (2010) requires Dot Net 3.5. To see if this is installed on your workstation, look in Add/Remove Programs (XP) or Programs and Features (Windows 7). To install this version of Dot Net, please visit the Microsoft web site to download it.

CSLS for GP 12 (2013) requires Dot Net 4.0. This is normally installed with Windows 8, but if it is not then the CSLS Install should prompt you to install it during the CSLS Install process. Otherwise, you will need to install it manually.

The installation of CSLS requires Windows Installer 4.5 or higher. The installation will automatically install it for you, but be aware that a re-boot of the workstation may be required. To see if Windows Installer 4.5 is already on the machine, go to Start > Run > msiexec.exe.

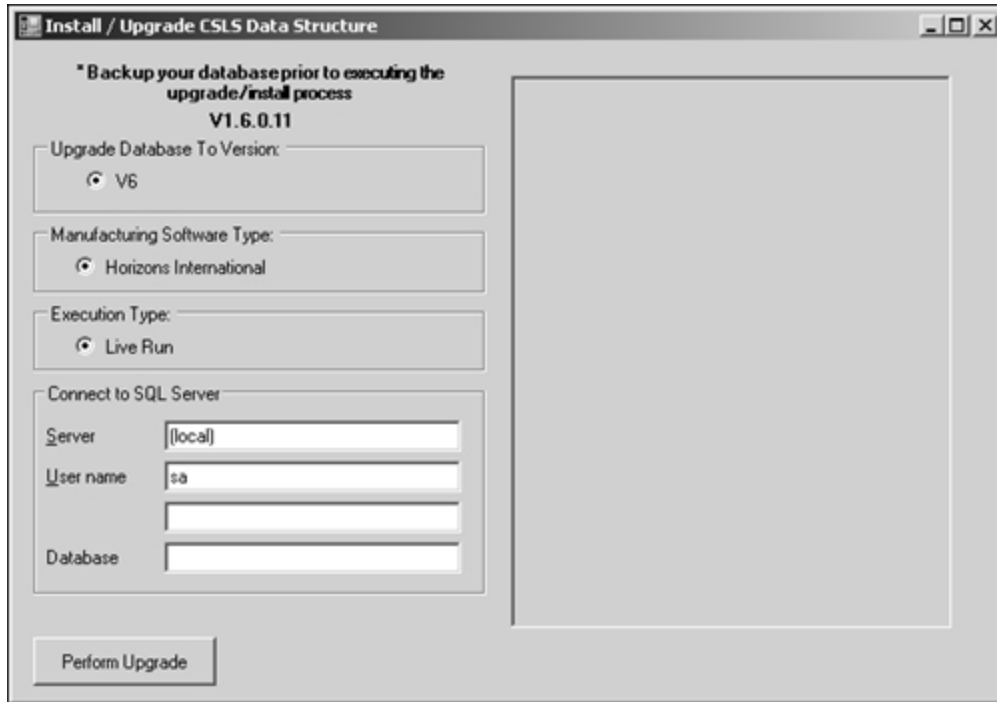
Server

To update the server, unzip the CSLS zip file. Make sure you have the correct version of CSLS for the GP version and Service Pack (sp number). In this zip you will find two more zip files:

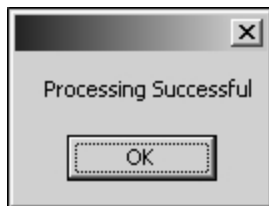
- The CSLS version must match the HMS version. This is the second to the last number in the version. For example in 11.81.01.86, the CSLS version is 1 (01). This must match the same digit (second to last) in the HMS version - like HMS1181sp1.1.55. The CSLS version is 1 (1.55). Also make sure the first number (the GP version) and the second one (the HMS version) are the same. For HMS 11.81 the CSLS version on the zip file name would be CSLS.....V11.81. To see the

current version loaded, go to the Dynamics/AddIns directory and hold your mouse over the ComponentSerialLotSelect.dll. The version is called File Version. This only works with Microsoft Windows Explorer.

- CSLS_AppSetup_xx.xx.xx. This will be used in the next section to install CSLS for every workstation that will be using HMS.
 - CSLS_DatabaseInstaller_xx.xx.xx. Run CSLSInstaller.exe. The Installer is used both for initial installations and for upgrades and only need be run one time on the server. It will create the required stored procedures in the company database, create a HZS_User and grant appropriate permissions. NOTE: The HZS_User is the same user required by the Horizons Quality Essentials Suite and the password is encrypted for security. Do NOT attempt to change the password in SQL or CSLS will not be able to connect to the database.
 - **Multiple Companies** - CSLS can be used for multiple companies without having to have a separate config file for each. Once CSLS is working properly with the first company, simply run the Database Installer on any other company databases that you want to use CSLS with. When logging into another company than the one set in the config file, CSLS automatically pulls the required information for that company.
1. Unzip the CSLS Database Installer to a directory on your workstation. There are a number of files and dlls, so you may want to create a folder on your desktop for these install files.
 2. Double-click 'CSLSInstaller.exe'.
 3. In the Install/Upgrade CSLS Data Structure window, enter the servername/instance (e.g.Myserver\GP2010), enter the 'sa' password for SQL and enter the company database ID.



4. Click the 'Perform Upgrade' button to launch the process.
5. When the process is complete, a dialog box will appear. (This may take several minutes.) Click OK and then close the Install/Upgrade CSLS Data Structure window.
6. When installing CSLS for more than one database, follow the above process for each database.



Workstation

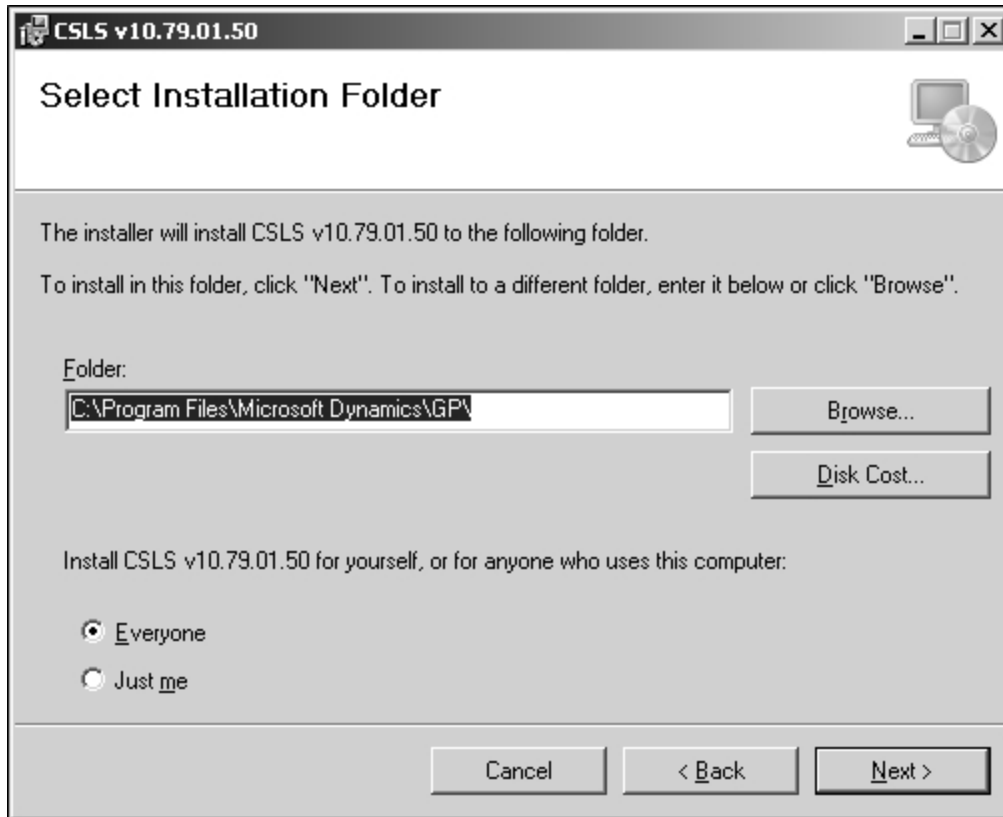
This installation must be done for each workstation that will be using CSLS. It is not necessary to install this on workstations in the organization that will NOT be using CSLS or posting manufacturing transfers.

If CSLS is already installed on the computer you may get an error when running the AppInstall that a version of CSLS is already installed. You must then go to Control Panel -

Programs and uninstall 'Horizons CSLS'. It is a good idea to uninstall the previous version regardless. Afterwards, proceed with the installation as follows.

Install the Application

1. Log onto the workstation as an Administrator.
2. Unzip the 'CSLS_AppInstall_xx.xx.xx' files to a directory on the workstation.
3. Double-click the 'setup.exe' to launch the installation. You might be prompted to install the latest version of Windows Installer. That process must complete before continuing with the CSLS install. This might entail a re-boot of the machine.
4. The CSLS Setup wizard will start. Click 'Next'. Click 'Next' again.
5. The standard path for Dynamics GP will default. If needed, use the browse button to change the directory where Dynamics GP is installed on the workstation. You must choose the same location as the dynamics.exe.



6. Click Next. The installation will begin.
7. When the installation is complete, click 'Close' on the Installation Complete window.
8. Verify that the files and dlls are in the correct locations:

- A Number of dlls will have been installed in the AddIns directory.
- Two files at the root of Dynamics GP: AppHelper.dll and IdeaBlade.ibconfig

Set the source

1. Open IdeaBlade.ibconfig in the Dynamics root directory using notepad or another test editor.
2. The section that controls the connections for CSLS is 'rdbkey' under </logging>. There are two of them listed. Make sure they are both updated the same.
3. Find the 'Initial Catalog =' statement and enter the database name like 'XYZ'. The statement would read 'Initial Catalog=XYZ'. This establishes the primary database for the SQL Instance selected, but it is not the only database that can be used with CSLS. When logging into GP, CSLS will automatically change the connection to any database the user selects.
4. Confirm that the Data Source is your SQL Server Instance. If your instance name is (local), enter just the name of the computer. That is found on the 'My Computer' window - right click on 'My Computer' and choose properties.

Example:

```
<rdbKey name="HZS" databaseProduct="Unknown">
<connection>Provider=SQLOLEDB.1;Integrated Security=SSPI;Persist Security
Info=False;Initial Catalog='XYZ';Data Source=HMS_Server\GP_11</connection> <probeAssemblyName>HMS_CSLS_Model</probeAssemblyName>
</rdbKey>

<rdbKey name="HZSIH" databaseProduct="Unknown">
<connection>Provider=SQLOLEDB.1;Integrated Security=SSPI;Persist Security
Info=False;User ID=HZS_User;Initial Catalog=XYZ;Data Source=HMS_Server\GP_
11</connection>
<probeAssemblyName>InvenHoldAddIn</probeAssemblyName>
</rdbKey>
```

If you have more than one workstation to install CSLS on, first test that you can connect properly by opening a work order in HMS and select Cpnt S/L Select from the Production Entry Go-To. Note: if you already have work orders in the system that have all been transferred using the original HMS windows, you will not be able to open CSLS. If that is the case, create a new work order, calculate it and then open CSLS. Delete your test work order.

Copy the IdeaBlade.ibconfig that you completed on the first workstation and replace it on each workstation after the Application Installation is complete.

Troubleshooting

Error after logging into GP that CSLS could not be loaded.

This is usually because the entries in the IdeaBlade.ibconfig file are not correct or the Users in SQL Security are not installed correctly. Under Security - Users, for each database , delete the HZS_User. Under the Security for the SQL Server - Logins, delete the HZS_User there. Run the Database Installer for CSLS again.

A second reason for this error can be that the GP directory does not have write access for the user. CSLS writes debug information to that directory and will give this error if it cannot do so.

Report Viewer Installation Overview

New Tables Required

Five new tables are used for Horizons Report Viewer:

- BOM50703, HMS Reports
- BOM50705, HMS_Report_Params
- BOM50706, HMS_Report_User_Params
- BOM50707, HMS_Report_Options
- BOM50804, HMS Distribution

They may be initialized one of two ways:

1. They are automatically created by installing Horizons Manufacturing Suite. If the tables are already present in the company database (use SQL Enterprise Manager or SSMS), then no further action need be taken. This method is the standard method and should be adequate for all new installations of HMS.
2. Using the Great Plains SQL Maintenance window (File > Maintenance > SQL). This method is provided ONLY in the event that file corruption has occurred and the tables need to be re-created at a later time.
 - a. Database field: Choose your company database (it will default to DYNAMICS so you will need to change it)
 - b. Product field: Choose 'Horizons Manufacturing System'
 - c. Choose the new tables and select to drop and create the tables and the auto procedures. Note that the tables will be listed in alphabetical order and therefore will not be grouped together in the SQL Maintenance window
 - d. Before clicking Process, be absolutely certain that the correct table is chosen in the SQL Maintenance window. This procedure will delete data if the wrong table is chosen. After clicking Process, a dialog box will appear to confirm. Click, a dialog box will appear to confirm. Click Yes.
 - e. After the process is completed, close the SQL Maintenance window.



Report Viewer Installation Preparation

System Requirements

Server

Server must be running SQL Server 2000 (sp3) or higher.

To determine if the server is at the appropriate service pack, run the following query against the MASTER database:

```
SELECT SERVERPROPERTY('productversion') Version, SERVERPROPERTY('productlevel') Service_Pack, SERVERPROPERTY('edition') Edition
```

If the Service_Pack column does not say 'SP3' or higher, then you can download it from Microsoft's site:

<http://www.microsoft.com/downloads/details.aspx?FamilyID=90DCD52C-0488-4E46-AFBF-ACACE5369FA3&displaylang=en>

Workstation/Client

NOTE: Because Dot Net 4.5 and later is not compatible with applications developed in Dot Net 4.0 we have made the older version of the Report Viewer available on our web site on the HMS 82 (GP 2013) page. If you have a Dot Net version installed that is 4.5 or later please install the older version. It requires Dot Net 1.1 that can be downloaded from Microsoft.

The workstation must be able to run Microsoft's .Net Framework 1.1 or 4.0. The hardware and software requirements are:

- Processor 90-megahertz (MHz) Intel Pentium-class processor, or an AMD Opteron, AMD Athlon64 or AMD Athlon XP processor
- Operating System
 - Windows 7
 - Windows XP Professional
 - Windows XP Home Edition
 - Memory 32 megabytes (MB) of RAM, 96 MB recommended

To download the .Net Framework, visit the Microsoft download site or do a search in your Internet browser for the .Net version.

If the client workstation has internet access and a fast connection, it is easiest to use the Windows Update process available on the website under General Users.

If the client does not have both access and a fast connection, the code may be downloaded and installed from the Redistributable Package available under Developers.

The **Windows Regional Settings must be using a 4 digit year**. If it is set to use a 2 digit year, any reports having a date restriction will fail when a date restriction is not entered for a report.

Preparation

Following is a checklist to assist with preliminary steps that should be complete to ensure the smooth installation of the Remote Shop Floor Processing client:

- Hardware/Software Client requirements are met
- Server/System requirements are met
- Proper .Net Framework is downloaded (if Redistributable Package is required)
- Horizons Report Viewer code is downloaded (it is included in the main code download)
- Report definitions and install scripts are downloaded (they are included in the main code download)

Report Viewer Installation

Set up the 'Reporting' User

Note: These instructions are for SQL 2005. If you are on another version of SQL, please refer to your user documentation to create a user and grant permissions.

Create a User

All scripts and instructions assume you will create a SQL user called 'Reporting'. If you prefer another name, you must be sure to change it in all the provided scripts and in the setup instructions.

In SQL - SQL Server Security (not the security for a database), create a login called 'Reporting' that uses SQL Server Authentication, unmarking the 'Enforce Password Policy'. Give it a password of your choice.

In the User-mapping window, add the user to each company database that will be using Report Viewer and mark the DYNGRP role for each database in the window below.

Un-zip the required files

There are two zip files required for Report Viewer:

- Report Viewer Executable: For Dot Net 4.5 and later - RV_1.0.8.zip which can be downloaded from HZS.com - Horizons Manufacturing for GP 2013; Otherwise use RV_2.0.0.0.zip that is included in the HMS code download.
- Report definitions and install scripts: RV_Scripts_Reports.zip
- If using Service PO - ServicePO_Reports.zip. If using Cascading Work Orders - CascadingWO_Job_Reports.zip (both include the SQL scripts)

Report Viewer Executable

The Report Viewer executable code installation files (Setup.exe and Setup.msi) may be anywhere on the workstation. When you install, the default directory will be c:\Program Files\Horizons International\Report Viewer (this is also the report location). The directory on 64 bit machines will be the Program Files (x86) directory. If you want to install to a different path, you may change it during the installation. If one or more workstations are different from the others, you will need to manually set that path in the HMS Setup window for each workstation that is different. See the '64 bit' note below if you have a mix of 32 and 64 bit machines on your network.

NOTE FOR 64-BIT MACHINES. The installation path may default as c:\Program Files ((x86)\Horizons International\Report Viewer. Use the SQL scripts that have '64' in the name. If you have a mix of 32 bit and 64 bit work stations then install the **non 64** script and move the Horizons directory from the x86 Program Files directory on 64 bit machines to the Program Files directory.

Reports Directory and SQL Install Scripts

If the reports (.rpt files in the Report Viewer zip file) are to be installed on each work station, then copy the reports to the directory that you installed to above. If you are installing on all 64 bit machines you will need to use the SQL scripts that have 64 in the name. If you have a mix of 32 bit and 64 bit work stations then install the non 64 script and move the Horizons directory from the x86 Program Files directory on 64 bit machines to the Program Files directory. If the reports are to be server based or in another directory than the default you must edit the Report Directory Paths for each report in the BOM50703 table for each GP company. Or you can edit the SQL scripts before you install them.

Once the reports and scripts are installed on the SQL Server and you have determined to use either the 64 bit scripts or the non 64 scripts, go to the SQL Manager and select the Report Viewer SQL scripts from the directory and run the each one for the database(s) that the Report Viewer will be used on.

Contents

- *.rpt files. These are the Crystal Report definition files, and may be edited using Crystal Reports version 11 or higher (you must purchase a Crystal Reports designer license from Microsoft or direct from Business Objects to do this).
- .sql files — When run against your company database, inserts records into several tables to support the reports provided in zip file.

Run the queries in SQL Query Analyzer

NOTE: These queries contain default path information for the location of the *.rpt files. If you want to use a directory different than the default one, you must edit these scripts before running them. Run the scripts against your company database. For 64 bit stations use the scripts that end in 64.

Important Note for location of reports

These .rpt files do not need to be in the same location as the HZSReportViewer.exe on the workstation, but there is only one path available in SQL server that all users will access to run the reports. If you accept the standard path that defaults during the installation (c:\Program Files\Horizons International\Report Viewer) then each workstation must have a copy of the report in that same location.

If you prefer, you may use a network location (either drive letter mapped or UNC). If you use a drive letter, ALL workstations must have the exact same drive letter. If you choose to use a network location, you must manually change the path in the install scripts before running them against your company database.

Workstation Installation

Copy the Reports to the workstation (if using the default path)

RV_Scripts_Reports.zip contains all the standard reports listed above. You may copy all or just some to the workstation.

Install the Report Viewer executable

You must be logged onto the workstation as an administrator.

1. Double-click the Setup.exe to launch the Report Viewer Installation
2. Accept the License Agreement by clicking the 'I Agree' radio button and click Next.
3. Accept the default installation directory, or change it and click Next. If you change it, it should be a path that each workstation will be able to use locally, or you will need to manually edit that location on each workstation. An example would be if every workstation in your network has an e:\ drive that you use for installing programs and you would prefer to use that instead of the c:\ drive.
4. Confirm the installation and click Next. The code will be installed to the path specified.




Report Viewer Setup

[Tools](#) | [Setup](#) | [Inventory](#) | [HMS Setup](#) | [HMS Setup](#)

Path to HMS Report Viewer

If the path you chose during installation is suitable for all client workstations, enter that path in the field provided. Be certain that there is a backslash at the end of the path. The default path is c:\Program Files\Horizons International\Report Viewer. For 64 bit work stations the path is c:\Program Files (x86)\Horizons International\Report Viewer. If every workstation will have the report viewer exe *and* the reports (*.rpt) in that exact same location, then simply entering that path in the main field is fine--this is a *global* setting.

If your client workstations may have different paths (some may have the executable installed on 'D', instead of 'C'), then those workstations that are different from the norm may use the 'Unique Report Viewer Path' window that is accessed with the arrow icon  next to the field title.

Server Name/Instance

Enter the server name and instance in the SQL Server Instance field

- If you are running SQL locally and only have one (default) instance, enter 'local'.
- If you are running SQL locally and have more than one instance, enter 'ComputerName\InstanceName'
- If you are connecting to SQL on a network and there is only one instance, enter 'ServerName'
- If you are connecting to SQL on a network, enter 'ServerName\InstanceName'

RV SQL User ID and Password

Enter the SQL user that will be used for Crystal Report Viewer. This must be the same user and password that you added to SQL during installation--this is *not* a standard Dynamics GP user. Please refer to RV Installation for detail on adding this user to the SQL database.

Important security note: While this password is encrypted in the Dynamics GP user interface and in the database, Horizons recommends that you restrict user access to the HMS Setup window, Report Writer, and Customization Maintenance to prevent breaches of password security into your company database.

Troubleshooting

Automatic Table Creation/Binding Defaults Not Working

Q: I'm trying to install Horizons Manufacturing System. Why aren't the tables getting created?

A: In order to create the tables, you have to log in as 'sa'. No other user ID will trigger the automatic procedure.

Installation and Upgrade window always appears

Q: Every time my users log in, they get the 'Installation and Upgrade' window. How can I make this go away?

A: There are two issues to check:

- Be sure that you click the Table Updates Completed and the Current Changes have been read boxes.
- Also, be sure that ALL workstations have the exact same build. To see the build, look at the HMS Version window (HMS | About HMS). All information is relevant, including the date. If one user logs in with the incorrect version (even if they don't access to any Horizons screens) they will set a flag in a setup table, and then all subsequent users will get the screen.

Database Trigger On Source Table Failed - An Open Operation on the Table " Cannot Find The Table

Q: This error appears after I login to GP and after the HMS tables are created. What does it mean?

A: This is related to Smartlist Reminders setup in GP. Make sure the Smartlist Data for HMS is installed

Registration Issues

Q: Why can't I register my product?

A: There are a number of reasons that registration fails. Check the following:

- Are you in the test company, "Fabrikam" while accessing the registration screen? Instead, access it from your company database.
- Is the company name correct? Instead of trying to visually compare the name in the Horizons Registration window to that in the Dynamics GP Registration one, try copying the Horizons name and pasting it into the Dynamics GP screen.
- Sometimes copying and pasting from a word document (such as an email editor) will put unwanted, invisible characters into the keys. Instead, try copying the reg keys into notepad first.

If none of these work, call technical support as your keys may have been improperly generated.

Some Companies don't need HMS installed

Q: I have several companies, some of which don't need Horizons. How can I avoid creating tables when I log in?

A: Don't log in as 'sa'—that is the only user ID that will trigger the automatic table generation. If 'sa' accidentally logs into a company and the tables get created, having empty Horizons tables in a database won't harm anything. To prevent 'sa' from inadvertently creating tables, create a Dynamics.set launch file that does not include Horizons. Please refer to Dynamics GP documentation for further information on how to edit a launch file.

How to remove HMS tables from a company

Q: I accidentally logged into Dynamics as 'sa', and now I have HMS tables in a company that won't be using it. How do I get it uninstalled from just that one company, leaving the other company intact?

A: Follow the steps to uninstall the server in the topic below for 'Uninstalling Horizons Manufacturing System'.

Already have Configurator installed

Q: I have been using Horizon's Configurator for some time. Is there any special procedure to use while installing Horizon's Manufacturing?

A: Yes. To avoid table definition conflicts, using Enterprise Manager, drop all existing BOM tables and stored procedures before installing HMS. (Those are all tables that begin with 'BOM50---' and all stored procedures that begin with 'zDP_BOM50---')

Uninstalling Horizons Manufacturing System

Q: I want to uninstall Horizons, both from the workstations and from the server. What are the steps?

A: To un-install a workstation, the procedure is exactly like any other 3rd party product:

- Remove Horizons from the Dynamics.set file
- Reduce the number of products by 1 (that is the first line in the file)
- Remove the ID for Horizons and the title
--490
--Horizons Manufacturing System
- Remove the dictionary paths
--:C:\Program Files\GP ALT1\BOM.DIC
--:C:\Program Files\GP ALT1\BOMFORMS.DIC
--:C:\Program Files\GP ALT1\BOMRPTS.DIC

To uninstall from the server, follow the above steps for the client, plus remove all files and stored procedures related to Horizons:

- Using SQL Manager (please refer to Microsoft documentation if you are unfamiliar with how to use SQL Manager)
 - Open the table list for your company database
 - Highlight all tables that start with 'BOM' (be careful not to select any that start with 'BM')
 - Push the delete button on your keyboard. Answer 'Drop All' to the 'Drop Objects' dialog.
 - Open the Stored Procedures list for your company
 - Highlight all stored procedures that start with 'zDP_BOM'
 - Push the delete button on your keyboard. Answer 'Drop All' to the 'Drop Objects' dialog.
 - Open the table list for the DYNAMICS database
 - Find the HZ00100, HZ10000, HZ10100, HZ10200 & HZ10250 tables and delete them.
 - Open the stored procedures list for the DYNAMICS database and delete all stored procedures that start with 'zDP_HZ' and the number of the tables above.

Smartlist Installer won't run

Q: I'm following the instructions to install Smartlist on my 64-bit server but it won't run.

A: In the Smartlist Installer zip file that you downloaded with the code, there is a SQL script: Smartlist Data Installer.sql. You can run that manually in a query in SQL. Run it against the DYNAMICS database. This only needs to be done once.

Can't connect to CSLS during log in

Q: As I log into GP, I'm getting the following message:

'Horizons CSLS Not Connected! There is an issue with the connection information of XML key in the ibconfig file in the root GP Directory.'

A: The HZS_User is missing from SQL, or has inadequate permissions. The Upgrader portion of the install process either wasn't completed, or someone has changed the user or password. To correct this, open SQL Management Studio and remove the HZS_User from all company databases as well as the HZS_System database. Then remove the HZS_User login. Re-run the Upgrader to set the proper user and credentials.

This can also be caused by not having the correct connection strings in the ibconfig, or by having the dlls in some directory other than the 'addins'.



Can't include code

Q: I'm running a Vista/Windows 7 workstation and I'm getting an error when I try to include the code about 'File not found' or 'Privilege Error'.

A: There are two reasons this is happening:

1. You already are logged into Dynamics GP on the workstation (and therefore getting a privilege error because you can't write to the dynamics.set)
2. You have UAC (User Access Control) enabled and haven't provided the correct access to the user. To change that, right-click on the Dynamics GP folder (typically c:\Program Files\Microsoft Dynamics\GP) and give the user full rights to the folder. This will enable the installation of the code as well as the ability to run GP (this solution was provided by Microsoft as the ideal way to run Dynamics GP in Windows 7)

Customization

Any window or report in Horizons Manufacturing Suite may be customized using the standard customization tools available in Dynamics GP (Report Writer and Modifier).

If other customization is desired, the developer should refer to the appropriate documents from Microsoft for development for Dexterity.

