



Horizons International Manufacturing Suite

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

Dynamics GP Version: GP 18 (2018)

Horizons Version: HMS 18 85

Latest code (v 85) is only compatible with GP version 2018

Installing a service patch

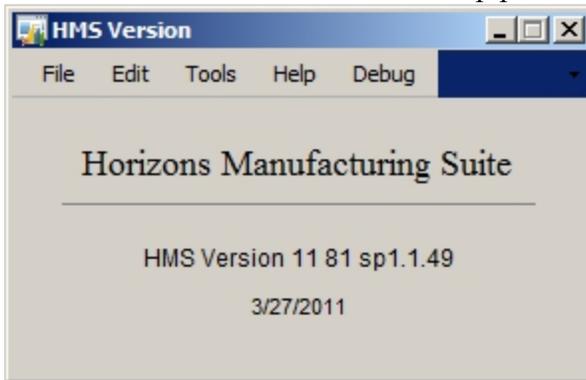
When installing a service patch where no upgrade process is required, complete the following steps before loading the new code. To determine if no upgrade is needed, compare the old version with the new code being installed. If the HMS main version number is the same, then no upgrade is required. Example: The old version was 85b1.148 and the new version is 85sp5.1.12. The version '85' is the same, so no upgrade is required.

1. Verify GP version compatibility

Determine the current version and service pack of Dynamics GP

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

- Determine the version and build of both Dynamics GP and Horizons Manufacturing prior to upgrading. To see the version for HMS, view the HMS Version window accessible from the bottom of the setup palette as About HMS.



The versions read from left to right are:

Great Plains version - **11**

Horizons version - **81**

GP Service Pack compatibility - **sp1** (This used to be a number only). If the code works for more than one continuous GP service pack version then it will appear like **2-4**, which means it works for Service Packs 2 to 4.

CSLS/Lot Holds compatibility number - **1** (Did not exist in earlier versions)

Build Number - **49**

The previous format for HMS versions was: HMS Version 10 79b1.139. The b1 was a number incremented when necessary because of major GP changes and not related to a specific GP service pack.

If the GP version and service pack are not the ones required by the Horizons code you've downloaded as specified on the web site and in the changes documentation (see below for the version format), 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 HMS 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 HMS code you downloaded) before installing our new code.

2. Test the new code in a test environment

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 HMS code.

3. Create a list of ALL workstations in the organization

Every user accessing Dynamics GP *must* have the same HMS code installed. This applies to ALL users in GP, not just those that use manufacturing.

Also, make a list of any separate HMSRPTS.dic (report dictionaries for HMS), 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.

If, after all workstations are installed and you are still seeing the HMS Install and Updates window, it means that you either missed a workstation, or you neglected to check the boxes (step 5e below).

4. Install the code on the first workstation

- a. Get ALL users out of Dynamics GP (not just Horizons users)
- b. If you are installing in a terminal server or Citrix environment, re-boot the server. This will release any SQL server locks that might prevent any required updates to stored procedures.
- c. **Make sure you have a current backup of the data** in case there are any issues with automatic table conversions that may be done after logging in.
- d. Rename the Bom.dic if it exists.
- e. For a new work station that does not have HMS installed, unzip the file that you downloaded and extract the Install.cnk file to the root of the Dynamics install on the workstation. This is the same directory as the 'dynamics.exe'.
- f. Launch GP and respond 'yes' to the prompt to include new code'. Click Cancel when the GP login window comes up.
- g. After loading the new install chunk or installing on a work station that already has had HMS installed, copy the new Bom.dic from the HMS download zip to the root GP directory and overwrite the existing dictionary created by the 'HMS new chunk' install (if that was done).
- h. If there are modified forms or reports for HMS then use GP Utilities to update them.
 - i. Proceed to log into Dynamics GP as 'sa'. This will initiate a table creation process that is looking for any new tables to add, but is not making any changes to pre-existing tables or the data they contain.
 - j. There may be automatic table conversions that are done when the code is installed. Answer 'Yes' to run each conversion. If there is a message that the conversion fails, it can be run again in the Install and Updates Convert Data window. Refer to the Upgrade manual - 'Update Server and Database' - to run the conversion.
- k. The process will end with the HMS Installation and Updates window open.

5. Verify the tables

- a. This step is performed to ensure that you did not inadvertently install a version that will require an upgrade.
- b. Open the HMS File Maintenance window by clicking the 'File Maintenance' button at the top of the window.
- c. Toggle the 'Show:' field to 'Physical Files'.
- d. Click the 'Insert All>>' button
- e. If all the tables insert without error, then you may assume that all tables are verified and close the File Maintenance window to return to the HMS Installation and Updates 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.

- f. Click both boxes ('Current Changes have been read' and 'Table Updates Completed'. Answer 'Continue' to any warning dialogs. Close the window.

6. Install the code on all other workstations

- a. Copy the Bom.dic to the root of Dynamics GP on each workstation.
- b. Log in as any user other than 'sa'. (if you log in as 'sa', you will trigger the automatic table creation again and it is not necessary to perform that more than once)

Trouble-shooting: 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 overwrite the Bom.dic)
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)