The EthoSeries
Installation Guide

For Microsoft Dynamics GP 2013

Contents

Product Overview

The EthoSeries is comprised of the following modules:
- Commission Plan
- Customer Service Collection
- Historical Serial and Lot Number Tracking
- Next Numeric Collection
- Quick Track
- Salesperson Enhancements

Please review the EthoSeries User Guide for a description of each module.

Hardware Requirements

The EthoSeries is supported on any hardware that is supported by Microsoft Dynamics GP 2013.

Operating System Requirements

The EthoSeries is supported on any operating system that is supported by Microsoft Dynamics GP 2013.

Installation Checklist

- Export modified EthoSeries forms and or reports*
- Print modified EthoSeries reports*
- Save screenshots of modified EthoSeries forms*
- Back up EthoSeries files*
- Review the EthoTech Software License
- Review the EthoSeries Release Notes
- Have all users exit Dynamics GP**
- Back up the system database and all company databases
- Set the database recovery model to Simple or Bulk-logged for the system database and all company databases (**important for large company databases**)
- Make sure the Dynamics.set path points to the appropriate EthoSeries files*
- Extract the contents of the EthoSeries zip file to the Dynamics GP application folder
- Launch Dynamics GP, choosing Yes when prompted to include new code
- Log into each company as "sa", choosing Yes if prompted to initialize the EthoSeries
- Back up the system database and all company databases if you were prompted to initialize the EthoSeries
- Set the database recovery model back to the original setting for the system database and all company databases
- Test modified forms and/or reports*
- If appropriate, edit the Dynamics.set file to reflect the network path to the modified EthoSeries forms and reports files
- Check each Dynamics GP client to ensure that the same EthoSeries build is installed

Step required only when updating an existing EthoSeries installation.
*** Note that throughout this guide, Dynamics GP will be used to mean Microsoft Dynamics™ GP.*

Install the EthoSeries

Pre Installation

1. If this is an update of an existing EthoSeries installation:

    a. If all Dynamics GP clients use a shared network location for EthoSeries modified forms and/or reports , perform the following on one Dynamics GP client; otherwise perform the following on each Dynamics GP client:

    Check for modified EthoSeries forms and reports using the Dynamics GP Customization Maintenance window. If modified forms (TAS1006F.DIC) or reports (TAS1006R.DIC) exist*:

    - Export the modified forms and/or reports using one export package for forms and another for reports.

    - Back up the TAS1006F.DIC and/or TAS1006R.DIC file(s).

    - Print modified reports.

    - Save screenshots of modified forms.

    b. Back up the TAS1006.DIC file.

2. Download the latest EthoSeries 2013 build from our website at www.ethotech.com. Save the downloaded EthoSeries 2013 zip file (EthoSeries2013_bXX.zip) to a network location accessible by all Dynamics GP clients.

3. Review the EthoTech Software License included in the EthoSeries 2013 zip file – installing the application confirms your acceptance to the terms described in the license.

4. Review the EthoSeries Release Notes included in the EthoSeries 2013 zip file.

5. Have all users exit Dynamics GP – **users should not be allowed to log in until after all Pre Installation, Installation, and Post Installation steps are complete**.

6. Back up the system database and all company databases.

* You may be required to recreate EthoSeries modified forms and/or reports if the existing versions do not update properly.

Installation

On Each Dynamics GP client:
If a Dynamics GP client exists on the SQL Server, EthoTech recommends installing first to this client.

1. If this is an update of an existing EthoSeries installation:

    a. If modified EthoSeries forms or reports exist, make sure the Dynamics.set path points to the appropriate TAS1006F.DIC and/or TAS1006R.DIC file(s).

2. Extract the contents of the EthoSeries 2013 zip file to the Dynamics GP application folder (the folder where Dynamics GP is installed).

3. Launch Dynamics GP, choosing **Yes** when prompted to include new code.
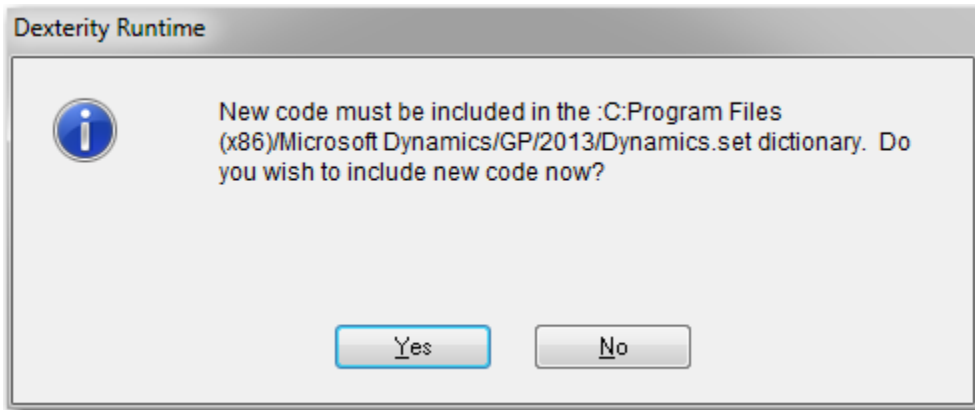
4. If this is an update of an existing EthoSeries installation:

    a. If modified EthoSeries forms (TAS1006F.DIC) and/or reports (TAS1006R.DIC) exist, they will be updated at this point.

    b. A file named TAS1006.DIC will be updated in your Dynamics GP application folder.

5. If this is a new EthoSeries installation:

    a. The Dynamics.set file will be modified to include the information required to run the EthoSeries.

    b. A file named TAS1006.DIC will be created in your Dynamics GP application folder.

6. Log into a company as "sa". If an older build of the EthoSeries has been installed on your system, you'll receive the following warning:
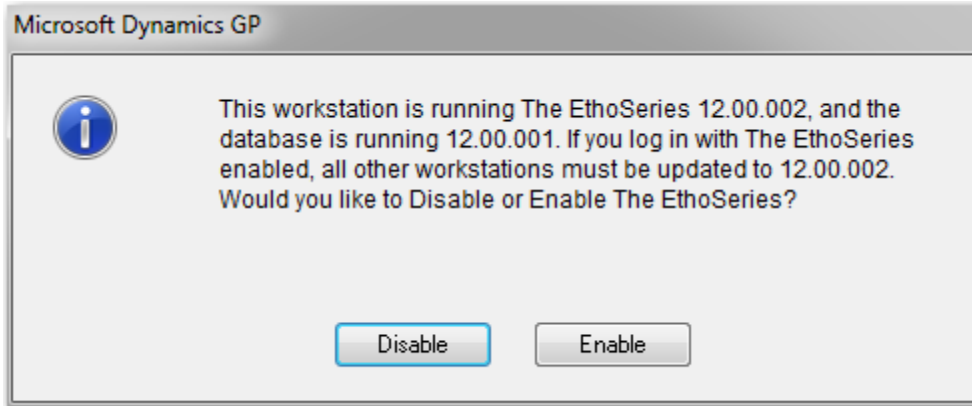
Choose Enable to proceed with the update, or Disable to cancel the update. If you cancel, skip the remainder of the instructions in this guide and restore the backups of TAS1006.DIC, TAS1006F.DIC, and/or TAS1006R.DIC file(s) that you made in the Pre Installation section of this guide.

7. Choose **Yes** if prompted to initialize the EthoSeries.
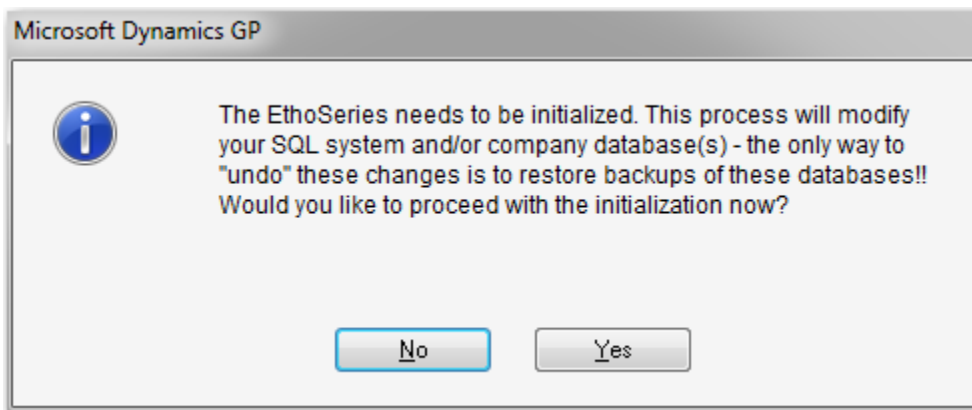
This process creates or updates objects in SQL Server and grants access to these objects for all users. To undo these changes (to revert to a previous EthoSeries build, for example), you'll need to restore backups of the system and/or company database(s).

!!!Perform system and database backups immediately prior to initializing tables!!!

This process may take some time to complete and will report a completion status of successful or unsuccessful. If you receive an unsuccessful message, contact your Microsoft Partner or EthoTech.

If you are prompted to initialize the EthoSeries and you choose Yes, the EthoTech SQL Object Initialization window will display the initialization progress. Once the initialization completes, the EthoTech SQL Object Initialization Log window will be displayed.
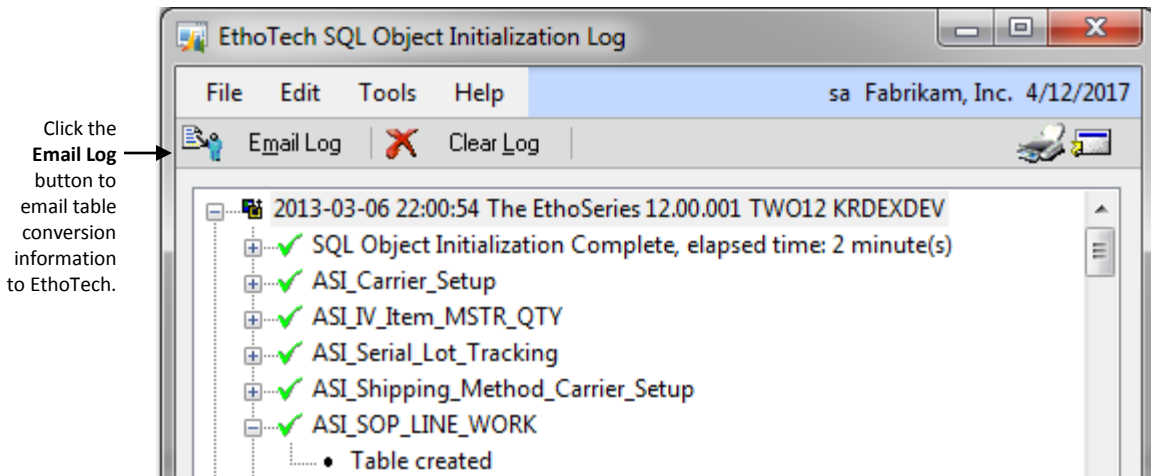
*The EthoTech SQL Object Initialization Log contains valuable update information. This information is used to troubleshoot table conversation issues. To email this log to the EthoTech Product Support team, click on the **Email Log** button.*

8. Log into each remaining company as "sa", choosing **Yes** if prompted to initialize the EthoSeries.

9. If this is an update of an existing EthoSeries installation:

   • Test modified forms and/or reports. If any issues exist, use the following steps to resolve the issues:

   a. Import the modified forms and/or reports using the export files you created before installing the new EthoSeries build. Test any modified forms and/or reports.

   b. If step a does not resolve the issues, exit Dynamics GP and rename/delete the TAS1006F.DIC and/or TAS1006R.DIC file(s). Using Report Writer, import the modified forms and/or reports using the backup of the TAS1006F.DIC and/or TAS1006R.DIC file(s) you made in the Pre Installation section of this guide. Test modified forms and/or reports.

   c. If step a or step b does not resolve the issues, exit Dynamics GP, rename/delete the TAS1006F.DIC and/or TAS1006R.DIC file(s), launch Dynamics GP, and re-modify the forms and/or reports.

   d. Once you're satisfied with your modified forms and/or reports, make a backup of the TAS1006F.DIC and/or TAS1006R.DIC file(s).

   • If you're upgrading from a previous Dynamics GP version, remove the EthoTech Documentation folder and its contents from the Dynamics GP application folder. The new EthoSeries documentation was created in the Dynamics GP application folder in step 2 above.

10. If this is a new EthoSeries installation:

   a. If appropriate, edit the Dynamics.set file to reflect the network path to the TAS1006F.DIC and/or TAS1006R.DIC file(s).

Post Installation

1. Check each Dynamics GP client to ensure that the same EthoSeries build is installed (*Help >> About Microsoft Dynamics GP >> Additional >> The EthoSeries AA.BB.CCC*, where AA.BB.CCC is the build number). You can also use the EthoTech Workstation Build Log window (*Inquiry >> System >> EthoTech Workstation Build Log)* to view the EthoSeries build installed on each workstation.

2. If a Dynamics GP client is running an earlier EthoSeries build, follow the instructions in the [Installation](#) section to update the client to the current build.

3. Use the EthoTech Database Build Log window (*Inquiry >> System >> EthoTech Database Build Log)* to ensure that each company database has been updated to the same EthoSeries build.

Register the EthoSeries

By registering your copy of the EthoSeries, you will enable us to keep you informed of all enhancements, improvements, and upgrades for the software. By communicating with you, we can gather information about additional Dynamics GP enhancements that will assist us in driving powerful, new features and enhancements into EthoTech products. Software registration can also eliminate unauthorized use of software without imposing restrictive copy protection.

EthoTech provides registration keys directly. For more information or to obtain your registration keys, please call (678) 384-7500 ext 1, email sales@ethotech.com or contact your Microsoft Partner.

To register the EthoSeries:

1. Start Dynamics GP and log in to your company.

2. If you receive a warning that you are running an unregistered version of the EthoSeries, click **Register**; otherwise, click The EthoSeries… link in the Additional Menu on the About Microsoft Dynamics GP window (Help > About Microsoft Dynamics GP > Additional > The EthoSeries...). The EthoTech Registration window will display.

3. Enter your registration keys.

   If you received the keys via email, simply copy and paste the keys into the appropriate field(s) on the form.

4. Click **Register**.*

   If you mistyped the keys, you will receive a warning message. Try again. If you still receive a warning, contact EthoTech for assistance. Registration keys will be invalid if the Dynamics GP version or site name is incorrect, or if the Dynamics GP System Manager user count is greater than the EthoTech user count.

5. If the module(s) you are registering now appears with a checkbox in the **Registered** column, close the EthoTech Registration window.

* If you are testing the EthoSeries within the Dynamics GP sample company and do not wish to receive registration messages when logging into production companies, clear the registration keys, mark the Suppress Registration Warning checkbox, and click Register.

Edit Hotkeys

Most EthoSeries modules utilize hotkey shortcuts to access additional functionality from Dynamics GP windows. Since multiple products installed on your system may use the same hotkey, the EthoSeries HotKey Setup window (*Tools >> Setup >> System >> EthoSeries HotKey Setup*) allows you to designate your desired hotkey per EthoSeries module for each associated Dynamics GP window.
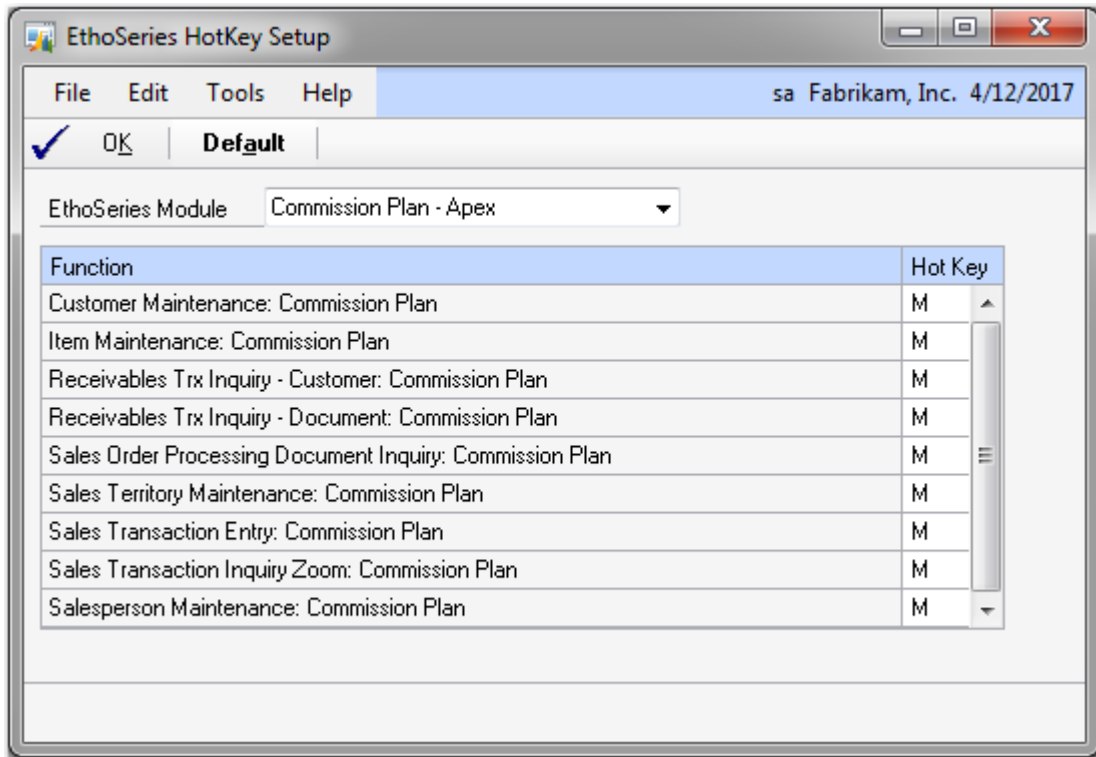
Select an **EthoSeries Module**, and the current hotkey setup is displayed for each Dynamics GP window utilized by that module. You can change or remove the hotkey for any window, or use the **Default** button to reset the hotkeys for the module to their default settings.

Any users currently logged into Dynamics GP will need to exit the system and then log back in for any hotkey changes to take effect.

Operational Checklist

Backups

All EthoSeries data is stored in the system database and each company database. Therefore, your normal backups of these databases will include all EthoSeries data.

Module Specific Operations

The EthoSeries User Guide includes detailed operation instructions for each module.

Uninstall the EthoSeries

Remove the EthoSeries Database Objects

If the EthoSeries will be removed from all Dynamics GP clients, use the following steps to remove the EthoSeries database objects:

1. Make sure all users have exited Dynamics GP.

2. Back up the system and all company databases.

3. Launch Dynamics GP and log into a company as "sa".

4. Open the EthoSeries SQL Utilities window (*Tools >> Utilities >> System >> EthoSeries SQL Utilities*).
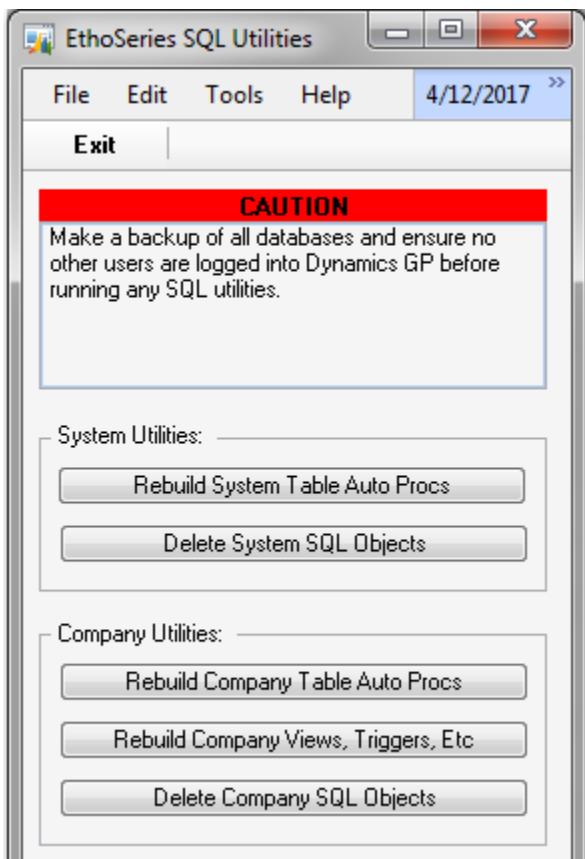

5. Click the Delete System SQL Objects button. When the utility completes, a report will be displayed if EthoSeries objects could not be removed from the system database.

6. Click the Delete Company SQL Objects button. When the utility completes, a report will be displayed if EthoSeries objects could not be removed from a company database.

7. Exit Dynamics GP.

Remove the EthoSeries SmartList Objects

If the EthoSeries will be removed from all Dynamics GP clients, use the following steps to remove the EthoSeries SmartList objects:

1. Open the EthoSeries Add/Remove SmartList Objects window (see Add SmartList Objects for details on accessing this window).
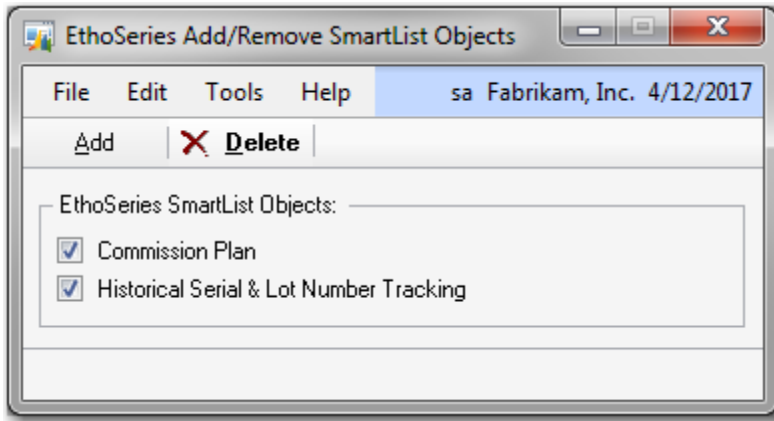
2. Select all SmartList objects.

3. Click **Delete**.

Remove the EthoSeries from each Dynamics GP Client

1. Remove the TAS1006.DIC file from the location specified in the Dynamics.set file. If the location is a shared network drive, other Dynamics GP clients may be using this file, in which case it should not be removed unless this is the last remaining EthoSeries installation on your system.

2. If EthoSeries modified forms exist, remove the TAS1006F.DIC file from the location specified in the Dynamics.set file. If the location is a shared network drive, other Dynamics GP clients may be using this file, in which case it should not be removed unless this is the last remaining EthoSeries installation on your system.

3. If EthoSeries modified reports exist, remove the TAS1006R.DIC file from the location specified in the Dynamics.set file. If the location is a shared network drive, other Dynamics GP clients may be using this file, in which case it should not be removed unless this is the last remaining EthoSeries installation on your system.

4. Remove the following files from the Dynamics GP application folder:

   - EthoSeries Installation Guide.pdf

   - EthoSeries User Guide.pdf

   - EthoSeries Release Notes.pdf

   - Commission Plan Integration Guide.pdf

5. If no other EthoTech products exist on the Dynamics GP client, remove the following file from the Dynamics GP application folder:

   - EthoTech Software License.pdf

6. Remove the EthoSeries from the Dynamics.set file:

- Reduce the first entry (the number of installed applications) by 1.

- Remove the "1006" and "The EthoSeries" lines.

- Remove the 3 lines ending in "TAS1006.DIC", "TAS1006F.DIC", and "TAS1006R.DIC".

Remove the EthoSeries Security Roles and Tasks

If the EthoSeries has been removed from all Dynamics GP clients, use the following steps to remove the EthoSeries security roles and tasks:

1. Use the Dynamics GP User Security Setup window to remove all roles beginning with ETI from each user in each company (if EthoTech SmartSort is installed, do not remove roles beginning with ETI SS).

2. Use the Dynamics GP Security Role Setup window to remove all roles beginning with ETI (if EthoTech SmartSort is installed, do not remove roles beginning with ETI SS).

3. Use the Dynamics GP Security Task Setup window to remove all beginning with ETI_ (if EthoTech SmartSort is installed, do not remove tasks beginning with ETI_SS_).