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Microsoft Dynamics® GP

System Administrator’s Guide

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INTRODUCTION

Introduction

The System Administrator’s Guide is designed to give an experienced computer user the information that is needed to maintain Microsoft Dynamics® GP.

This introduction is divided into the following sections:

• [What’s in this manual](#Introduction)

• [Symbols and conventions](#I_N_T_R_O_D_U_C_T_I_O_N)

• [Resources available from the Help menu](#I_N_T_R_O_D_U_C_T_I_O_N)

• [Send us your documentation comments](#I_N_T_R_O_D_U_C_T_I_O_N_1)

What’s in this manual

This manual includes detailed information about maintaining data, optimizing databases, setting up printers, using the Distributed Process Server, and solving problems that may arise within Microsoft Dynamics GP.

Some features described in the documentation are optional and can be purchased through your Microsoft Dynamics GP partner.

To view information about the release of Microsoft Dynamics GP that you’re using and which modules or features you are registered to use, choose Help >> About Microsoft Dynamics GP.

The manual is divided into the following parts:

• [Part 1, Customization](#Part_1__Customization), describes how to set up the system password, routine

checklists, and default printers in Microsoft Dynamics GP.

• [Part 2, Routine maintenance](#Part_2__Routine_maintenance), describes how data is stored, and explains how to

help protect and maintain your data.

• [Part 3, Distributed Process Server, describes](#Part_3__Distributed_Process_Serv) how to set up and use the remote

processing features available with Microsoft Dynamics GP.

• [Part 4, Technical reference](#Part_4__Technical_reference), contains information about integrating products,

launch files, and defaults files.

• [Part 5, Troubleshooting, e](#Part_5__Troubleshooting)xplains how to detect data damage, and repair the

damage if necessary. It also contains solutions to commonly encountered

problems with location translations, launch files, process servers, and defaults

files.

2 S Y S T E M A D M I N I S T R A T O R ’ S G U I D E

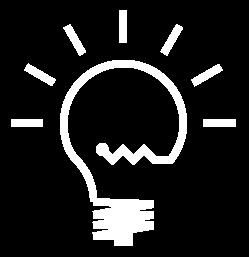
I N T R O D U C T I O N

Symbols and conventions

For definitions of unfamiliar terms, see the glossary in the manual or refer to the glossary in Help.

Symbol Description

The light bulb symbol indicates helpful tips, shortcuts and



suggestions.

The warning symbol indicates situations you should be especially

aware of when completing tasks.

This manual uses the following conventions to refer to sections, navigation and other information.

Convention Description

Creating a batch Italicized type indicates the name of a section or procedure. File >> Print or File > The (>>) or (>) symbol indicates a sequence of actions, such as Print selecting items from a menu or toolbar, or pressing buttons in a

window. This example directs you to go to the File menu and choose

Print.

TAB or ENTER All capital letters indicate a key or a key sequence.

Resources available from the Help menu

The Microsoft Dynamics GP Help menu gives you access to user assistance resources on your computer, as well as on the Web.

Contents

Opens the Help file for the active Microsoft Dynamics GP component, and displays the main “contents” topic. To browse a more detailed table of contents, click the Contents tab above the Help navigation pane. Items in the contents topic and tab are arranged by module. If the contents for the active component includes an “Additional Help files” topic, click the links to view separate Help files that describe additional components.

To find information in Help by using the index or full-text search, click the appropriate tab above the navigation pane, and type the keyword to find.

To save the link to a topic in the Help, select a topic and then select the Favorites tab. Click Add.

Index

Opens the Help file for the active Microsoft Dynamics GP component, with the Index tab active. To find information about a window that’s not currently displayed, type the name of the window, and click Display.

About this window

Displays overview information about the current window. To view related topics and descriptions of the fields, buttons, and menus for the window, choose the appropriate link in the topic. You also can press F1 to display Help about the current window.

S Y S T E M A D M I N I S T R A T O R ’ S G U I D E 3

I N T R O D U C T I O N

Lookup

Opens a lookup window, if a window that you are viewing has a lookup window. For example, if the Checkbook Maintenance window is open, you can choose this item to open the Checkbooks lookup window.

Show Required Fields

Highlights fields that are required to have entries. Required fields must contain information before you can save the record and close the window. To change the way required fields are highlighted, choose Microsoft Dynamics GP menu >> User Preferences >> choose the Display button, and specify a different color and type style.

Printable Manuals

Displays a list of manuals in Adobe Acrobat .pdf format, which you can print or view.

What’s New

Provides information about enhancements that were added to Microsoft Dynamics GP since the last major release.

Microsoft Dynamics GP online

Opens a Web page that provides links to a variety of Web-based user assistance resources. Access to some items requires registration for a paid support plan.

Customer Feedback Options

Provides information about how you can join the Customer Experience Improvement Program to improve the quality, reliability, and performance of Microsoft® software and services.

Send us your documentation comments

We welcome comments regarding the usefulness of the Microsoft Dynamics GP documentation. If you have specific suggestions or find any errors in this manual,

send your comments by e-mail to the following address: bizdoc@microsoft.com.

To send comments about specific topics from within Help, click the Documentation Feedback link, which is located at the bottom of each Help topic.

Note: By offering any suggestions to Microsoft, you give Microsoft full permission to use them freely.

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PART 1: CUSTOMIZATION

Part 1: Customization

This part of the documentation describes how to customize the Microsoft Dynamics GP system to fit your needs. The following topics are discussed:

• [Chapter 1, “System customization,”](#Chapter_1__System_customization) describes how to modify the system

password, routine checklists, and default printers in Microsoft Dynamics GP.

• [Chapter 2, “Printers,”](#Chapter_2__Printers) describes how to use named printers and how to set up

default printers for an entire system, for each user, or for each company.

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# Chapter 1: System customization

Microsoft Dynamics GP allows you to tailor routine checklists, and report printing to your business’s specific needs. This enables you to provide different access levels to Microsoft Dynamics GP and to work more efficiently.

The customization information contains the following sections:

• [Modifying a routine checklist](#Chapter_1__System_customization)

• [Printing reports without dialog boxes](#C_H_A_P_T_E_R___1______S_Y_S_T_E)

Modifying a routine checklist

Microsoft Dynamics GP allows you to modify existing checklists and to create customized checklists of routines for each series. You can specify the frequency with which each set of routines should be completed: daily, on payday, at the end of a period, month, quarter, fiscal year or calendar year, during setup, or at a frequency you choose. In addition, you can record macros and add them to your checklists.

While you can open the appropriate windows to perform the tasks from a checklist window, the actual tasks aren’t performed automatically.

The checklist of routines acts as a sort of audit trail, recording the time each task was selected, the date the task was completed and the user ID of the user who completed the procedure.

A checklist registers the ID of the user who performed a routine and when it was completed only if a user performed it by selecting the routine in the checklists window and choosing Open. The checklist will not be updated if a user performs a routine by opening a window any other way, such as from a menu.

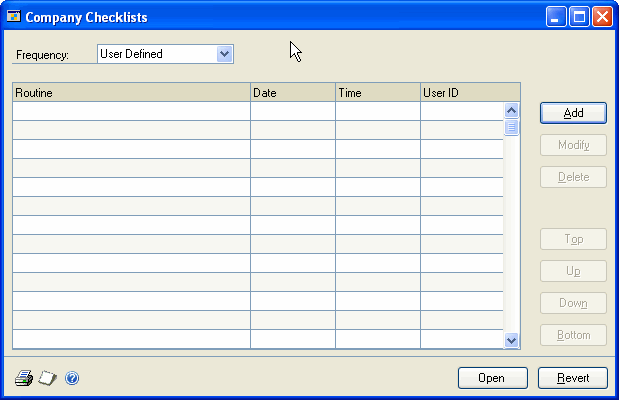
To modify a routine checklist:

1. Be sure that you are logged in to the correct company.

2. Open a checklists window.

(Microsoft Dynamics GP menu >> Tools >> Routines >> Select a series >>

Checklists)



3. Select a module within the series, if necessary.

S Y S T E M A D M I N I S T R A T O R ’ S G U I D E 7

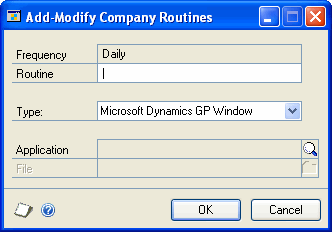
P A R T [1](#Part_1__Customization) [C U S T O M I Z A T I O N](#Part_1__Customization)

4. Select the frequency with which you want the routine to be completed.

5. Choose whether to add, modify, or delete a checklist. If you want to modify or

delete a checklist item, you must first select it in the checklist window.

6. If you are adding a routine, name the routine in the Add-Modify window.



7. In the Type list, specify the type of routine to add.

• Microsoft Dynamics GP window

• External task

• Microsoft Dynamics GP macro

8. Choose the Application lookup button to view the options for the type of

routine you selected in step 7.

The following table presents subsequent required actions for each option:

Option Action

Microsoft Dynamics GP The Select Microsoft Dynamics GP Window window Window appears. To add a window from an integrating product,

select it from the Product list.

Select the window’s series, then select the window to add.

Microsoft Dynamics GP A dialog box appears. Select the macro you want to add.

Macro

External Task A dialog box appears. Select the application file.

9. Choose OK to add the item to the list of routines.

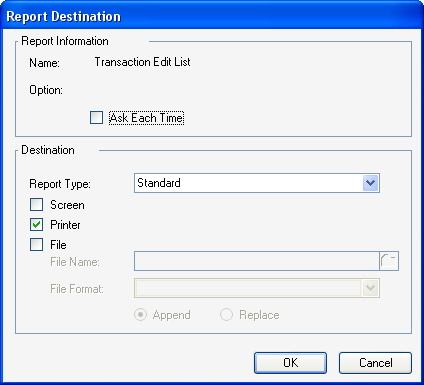
Choosing the Revert button in a list of routines removes all the additions and modifications you’ve made, and resets the list of routines to the Microsoft Dynamics GP default settings. The original settings are denoted by a 0/0/0 in the Date Done column and 12: 00: 00 AM in the Time column. Original settings don’t have an entry in the User ID column.

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C H A P T E R 1 S Y S T E M C U S T O M I Z A T I O N

Printing reports without dialog boxes

For reports you print to a printer, you can prevent the print dialog boxes from appearing; one copy of the report will be printed to the designated printer. If you print numerous reports to a printer at once, or if you post and print posting journals overnight, you may want to prevent the print dialog box from appearing. The dialog box is shown in the following illustration.



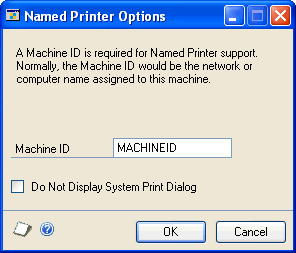
You need to complete these steps on each computer where you don’t want print dialog boxes to appear.

To print reports without dialog boxes:

1. Open the Named Printer Options window.

(Microsoft Dynamics GP menu >> Tools >> Setup >> System >> Named

Printers >> Machine ID link)



2. Mark the Do Not Display System Print Dialog option.

3. Choose OK.

If you haven’t set up the default printer, the Setup Named Printers window will

open along with the Microsoft Windows® Print Setup window. The default

printer is used if there is not a printer specified for the report or company. See

[Setting up printers for a workstation on page 13 for mor](#C_H_A_P_T_E_R___2______P_R_I_N_T)e information about setting

up the default printer.

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# Chapter 2: Printers

Microsoft Dynamics GP uses named printers to automatically print specific reports to assigned printers. You also can set up default printers for an entire system, for each user, or for each company.

This information includes the following sections:

• [Printer options](#Chapter_2__Printers)

• [Printer classes](#Chapter_2__Printers)

• [How printers are selected](#P_A_R_T___1____C_U_S_T_O_M_I_Z_A_1)

• [Reports you can use with named printers](#P_A_R_T___1____C_U_S_T_O_M_I_Z_A_1)

• [Setting up named printers](#C_H_A_P_T_E_R___2______P_R_I_N_T)

• [Setting up printers for a workstation](#C_H_A_P_T_E_R___2______P_R_I_N_T)

• [Adding a printer ID](#C_H_A_P_T_E_R___2______P_R_I_N_T_1)

• [Assigning named printers to reports](#P_A_R_T___1____C_U_S_T_O_M_I_Z_A_3)

• [Importing printer settings](#C_H_A_P_T_E_R___2______P_R_I_N_T_2)

• [Setting up a template user for named printers](#P_A_R_T___1____C_U_S_T_O_M_I_Z_A_4)

• [Changing printer ID settings](#C_H_A_P_T_E_R___2______P_R_I_N_T_3)

• [Changing machine ID settings](#P_A_R_T___1____C_U_S_T_O_M_I_Z_A_5)

• [Changing printer assignments](#P_A_R_T___1____C_U_S_T_O_M_I_Z_A_5)

• [Removing printer assignments](#P_A_R_T___1____C_U_S_T_O_M_I_Z_A_5)

Printer options

You have many choices when you print reports or documents in Microsoft Dynamics GP.

• You can select the printer each time you print a report.

• You can specify a default printer for all reports printed from a particular

workstation.

• You can specify certain printers for certain types of reports or forms. For

example, you may have one printer that’s only used for printing checks.

To get started, you first need to set up your printers and give them names. Then, you’ll assign those printers to the particular functions they’ll be used for.

Printer classes

You can use printer classes when you print reports or documents in Microsoft Dynamics GP.

System Printer IDs assigned to the System class will be available to all combinations of users and companies.

User Printer IDs assigned to the User printer class will be available to only a single user for all companies.

Company Printer IDs assigned to a Company class will be available to all users for a single company.

User & Company Printer IDs assigned to a User & Company class will be available only to a specified user and company combination.

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P A R T [1](#Part_1__Customization) [C U S T O M I Z A T I O N](#Part_1__Customization)

How printers are selected

The named printers settings will be used only if you have chosen to print the report to a printer.

• For posting journals, you must have either the Ask Each Time or Send to Printer

option marked for the report in the Posting Setup window.

• For analysis and activity reports that use a report option, one of the destinations

must be Printer for the report option.

For example, if you have marked only the Send to Screen option for a posting journal in the Posting Setup window, even though you have selected a printer in the Assign Named Printers window for the posting journal, the report won’t be sent to the printer, only to the screen.

In general, the printer class will be checked first. If the printer class is User, Company, or User & Company, the printer class will be used to determine the printer used. If no assigned printer is found, the company default printer is checked, and then the system default printer is checked.

Reports you can use with named printers

You can assign printers to the following documents and reports:

Module Report or document General Ledger Cross reference reports

Financial statements

Posting journals

Trial balances

Inventory Activity reports

Analysis reports

Posting journals

Stock Count forms

Invoicing Analysis reports

Invoices and returns

Posting journals

Receivables Management Aged trial balance reports

Analysis reports

Customer statements

Historical aged trial balance reports

Posting journals

Receivables documents

Sales Order Processing Analysis reports

Packing slips and picking tickets

Posting journals

Purchase Orders Generation Register

Quotes, orders, invoices, back orders, and returns

Payables Management Aged trial balance reports

Analysis reports

Computer checks and remittance

Historical aged trial balance reports

Posting journals

Payables documents

Transaction checks and remittance

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C H A P T E R 2 P R I N T E R S

Module Report or document Purchase Order Processing Analysis reports

Posting journals

Purchase orders

Payroll 1099-R and 1096 forms

Custom reports

Direct Deposit Statement of Earnings

Paychecks and Direct Deposit forms

W-2 and W-3 forms

Wages and hours reports

Setting up named printers

The first time you use named printers on each workstation, the Named Printer Options window will open and you must set up a machine ID for the workstation. Once you do this, the Assign Named Printers window will open when you choose Microsoft Dynamics GP menu >> Tools >> Setup >> System >> Named Printers.

After the setup process is complete and you choose to print a report, Microsoft Dynamics GP will print reports to the named printers assigned to specific tasks.

Setting up printers for a workstation

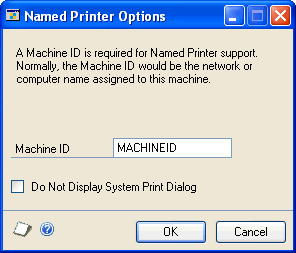
Use the Named Printer Options window to set up a machine ID for each workstation that will be used to print reports or documents. After setting up named printers, Microsoft Dynamics GP will always print to the named printers default printer, not the workstation’s default printer.

To set up printers for a workstation:

1. Open the Named Printer Options window.

(Microsoft Dynamics GP menu >> Tools >> Setup >> System >> Named

Printers)



If you have already set up printers for a workstation, choose Microsoft Dynamics GP

menu >> Tools >> Setup >> System >> Named Printers >> Machine ID link to open

the Named Printer Options window.

2. Enter a machine ID. The default ID is the workstation’s network or computer

name.

The machine ID is used to associate the named printer with the actual

workstation, not the user.

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P A R T [1](#Part_1__Customization) [C U S T O M I Z A T I O N](#Part_1__Customization)

3. You can choose not to display the print dialog box when printing reports. If you

print numerous reports to a printer at once, or if you post and print posting

journals overnight, you may want to prevent the print dialog box from

appearing.

4. Choose OK in the Named Printer Options window. You will receive an alert

message saying you need to select the default printer.

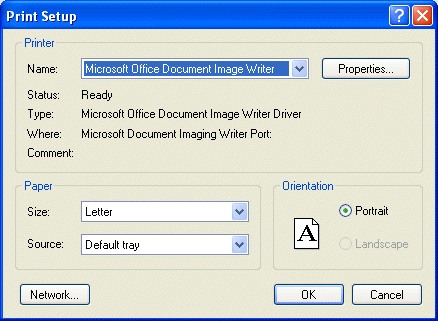
5. Choose OK. The Setup Named Printers window will open along with the Print

Setup window from Windows.

In the Print Setup window, the default printer from Windows will be the initial

selection. You can change the printer and its settings. Choose OK to save your

changes and close the Print Setup window.

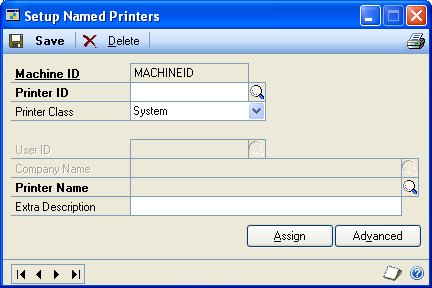


6. In the Setup Named Printers window, DEFAULT is entered as the printer ID

and the printer name automatically comes from the Print Setup window in Step

5. You can change the printer and enter extra descriptive information for the

printer.



7. Select a printer class.

For the default printer, the printer class must be System.

8. Choose Save. You can continue to set up the printer IDs you will need for this

workstation.

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C H A P T E R 2 P R I N T E R S

Adding a printer ID

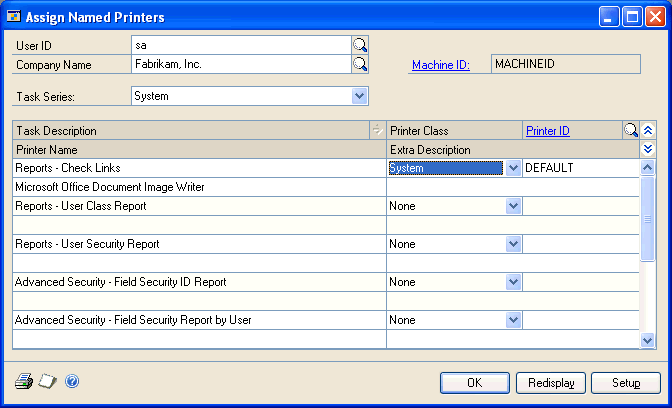
You can create an unlimited number of printer IDs. Also, you can create multiple printer IDs with different settings for the same printer. For example, you can create two printer IDs, one with landscape orientation and one with portrait orientation, for the same printer.

To add a printer ID:

1. Open the Assign Named Printers window.

(Microsoft Dynamics GP menu >> Tools >> Setup >> System >> Named

Printers)



2. Choose Setup to open the Setup Named Printers window.

3. Enter a printer ID and select one of the four printer classes:

System Printer IDs assigned to the System class will be available to all

combinations of users and companies.

User Printer IDs assigned to the User printer class will be available to only a

single user for all companies.

Company Printer IDs assigned to a Company class will be available to all

users for a single company.

User & Company Printer IDs assigned to a User & Company class will be

available only to a specified user and company combination.

4. If you select User, Company, or User & Company as the printer class, enter a

user ID, company name, or both.

5. Select the printer and settings. You also can enter an extra description for the

printer.

If you have the capability to send and receive faxes from a workstation, you can set up

the fax machine as a printer in Windows. This printer can be given a Printer ID and

used as a named printer.

6. Choose Save and close the window.

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P A R T [1](#Part_1__Customization) [C U S T O M I Z A T I O N](#Part_1__Customization)

Assigning named printers to reports

Once you have set up the printer IDs for the workstation, you can assign a printer to specific reports.

If you’re using advanced picking, you can use specify a default printer for a site. This is necessary only if you want a different printer to be used for a specific site.

You must specify a default printer for the System task series. You also can specify a default printer for a company by selecting Company as the task series and selecting the company name. Specifying a default printer for a company is optional and is necessary only if you want a different default printer to be used for a specific user, company, or user and company combination. When choosing the default printer for a company, you can’t use Any Printer or Manual Selection for the printer class.

The printer settings will be used only if you print the report to a printer. [See How](#P_A_R_T___1____C_U_S_T_O_M_I_Z_A_1)

[printers are selected on page 12 f](#P_A_R_T___1____C_U_S_T_O_M_I_Z_A_1)or more information.

To assign named printers to reports:

1. Open the Assign Named Printers window.

(Microsoft Dynamics GP menu >> Tools >> Setup >> System >> Named

Printers)

The user ID and company name you used to log in to Microsoft Dynamics GP

appear in the user ID and company name fields, but you can change them.

You also can assign a printer by choosing the Assign button in the Setup Named

Printers window.

2. Select a Sales task series.

Printers set up under each task series (such as Sales and Purchasing) will be

used for all printing for that series.

Printers set up under the Processes series will be used only by the process

server. If you want to send reports to the process server, you must select Process

as the task series. You should not leave the printer ID field empty or use the

Manual Selection printer class when using the process server. For information

about setting up the Distributed Process Server, s[ee Chapter 9, “Remote](#Chapter_9__Remote_processing_set_1)

[processing setup.”](#Chapter_9__Remote_processing_set_1)

3. Select a task description.

If you select one of the following descriptions, continue with step 4. Otherwise,

continue with step 6.

• Sales Orders - Bulk Picking Ticket

• Sales Orders - Packing Slips Printer - Blank

• Sales Orders - Packing Slips Printer - Short

• Sales Orders - Packing Slips Printer - Long

• Sales Orders - Picking Tickets Printer - Blank

• Sales Orders - Picking Tickets Printer - Short

• Sales Orders - Picking Tickets Printer - Long

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C H A P T E R 2 P R I N T E R S

4. Choose the Task Description expansion button to open the Assign Pick/Pack

Named Printers window.

5. Enter or select a site ID, a printer class, and a printer ID. Choose OK.

6. Select a printer class.

System If you selected the printer class of System and have assigned printer

IDs to this printer class, the Named Printers window will open. Only the

printers assigned to the printer class will be listed.

User, Company, or User & Company If you select the printer class of

User, Company, or User & Company, the user ID and company name in this

window must match the user ID and company name assigned to the printer

class, or the printer ID won’t be listed.

If you select the printer class of System, User, Company, or User & Company

but don’t select a printer ID, you can choose from any available printer ID in

that class set up on the workstation when you print the report.

Any Printer ID If you select Any Printer ID for the printer class, you can

choose from any available printer ID set up on the workstation when you print

the report. You can’t assign a printer to a task with the Any Printer ID class.

Manual Selection If you select Manual Selection for the printer class, you

won’t assign a printer to the task. Instead, when you print the report, the Print

Setup window will open and you can choose the printer and printer settings.

None This is the default entry, indicating that you haven’t selected a default

printer for the task.

7. Select a printer from the list and choose Select.

8. Continue selecting printers for each task in the series.

9. Choose OK close the window. The printer assignments are saved as they are

entered.

Importing printer settings

You can import the printer settings from one workstation to another. This allows you to set up a machine ID and printer settings on one workstation and duplicate the printer settings on other workstations in your system.

Because printer settings are not always compatible between different Windows platforms, we recommend that you import settings only from workstations that are running the same version of Windows and have identical printer configurations in the control panel settings.

S Y S T E M A D M I N I S T R A T O R ’ S G U I D E 17

P A R T [1](#Part_1__Customization) [C U S T O M I Z A T I O N](#Part_1__Customization)

To import printer settings:

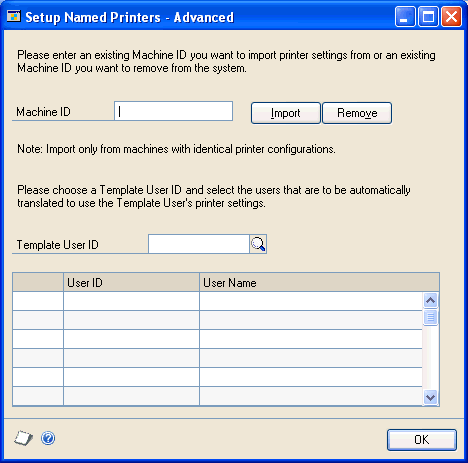
1. Open the Assign Named Printers window.

(Microsoft Dynamics GP menu >> Tools >> Setup >> System >> Named

Printers)

2. Choose Setup to open the Setup Named Printers window, then choose

Advanced to open the Setup Named Printers – Advanced window.



3. Enter the machine ID of the workstation you want to import the settings from

and choose Import.

4. Choose OK to close the window.

You also can remove the printer for a machine ID. This should be done only if

the workstation is removed from the system.

If the workstation is renamed on the network, you can change the machine ID

in the Named Printer Options window and all the existing settings will be

moved to the new machine ID. You don’t need to remove the old machine ID.

Setting up a template user for named printers

If you have many users that print from the same workstation, such as in a Terminal Server system, you can set up a template user. A template is used only for the User and User & Company class printer settings. If a user ID does not have a printer ID assigned, the printer ID from the associated template user ID will be used.

Once you create a template user and set up the named printers for that one user, you can link other users to the template. You also can have multiple templates, so if two sites of 20 people each use a single Terminal Server, instead of setting up 40 users, you need to set up only two.

The template user can be an additional user created only for named printers. This user does not require access to any companies. You also can select an existing user as the template user.

If you link a user to a template user, you can override the printer assignments for the template user by assigning a different printer to the user for a specific task. For example, User A is linked to the template user and will use the printers and settings

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C H A P T E R 2 P R I N T E R S

of the template user except for Sales Order Processing invoices. A different printer is assigned to this task for User A.

To set up a template user for named printers:

1. Open the Assign Named Printers window.

(Microsoft Dynamics GP menu >> Tools >> Setup >> System >> Named

Printers)

2. Choose Setup to open the Setup Named Printers window, then choose

Advanced to open the Setup Named Printers – Advanced window.

3. Select a user ID to use as the template. A list of all other users will appear in the

bottom of the window.

4. Mark the user IDs that will be linked to this template.

Visual cues help you distinguish the different types of users. The following

icons are used.

Icon Description

The user ID is linked to a template user.

index-25_1.png

The user ID is a template user.

index-25_2.png

5. Choose OK to save your changes.

Once a user ID has been assigned as the template user or has been linked to a

template user, its role can’t be changed unless the link is removed. To remove a

link, unmark the user ID in the Setup Named Printers – Advanced window.

Changing printer ID settings

Use the Setup Named Printers window to change printer ID settings.

To change printer ID settings:

1. Open the Assign Named Printers window.

(Microsoft Dynamics GP menu >> Tools >> Setup >> System >> Named

Printers)

2. Choose Setup to open the Setup Named Printers window.

3. Using the lookup button, select the printer ID.

4. Make your changes and choose Save.

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P A R T [1](#Part_1__Customization) [C U S T O M I Z A T I O N](#Part_1__Customization)

Changing machine ID settings

Use the Named Printer Options window to change machine ID settings.

If a workstation is renamed on the network, you can change the machine ID in the Named Printer Options window and all the existing settings will be moved to the new machine ID. You don’t need to remove the old machine ID.

To change machine ID settings:

1. Open the Assign Named Printers window.

(Microsoft Dynamics GP menu >> Tools >> Setup >> System >> Named

Printers)

2. Choose Setup to open the Setup Named Printers window.

3. Click the Machine ID link to open the Named Printer Options window.

4. Make your changes and choose OK.

Changing printer assignments

Use the Assign Named Printers window to change printer assignments.

To change printer assignments:

1. Open the Assign Named Printers window.

(Microsoft Dynamics GP menu >> Tools >> Setup >> System >> Named

Printers)

2. Select a task series. If you are using the User, Company, or User and Company

printer class, verify the user ID and company name.

3. Select the printer class assigned to the task description. Using the printer ID

lookup window, select the printer ID you want to assign to the task.

4. Choose OK to save changes and close the window.

Removing printer assignments

Use the Assign Named Printers window to remove printer assignments.

To remove printer assignments:

1. Open the Assign Named Printers window.

(Microsoft Dynamics GP menu >> Tools >> Setup >> System >> Named

Printers)

2. Select a task series. If you are using the User, Company, or User and Company

printer class, verify the user ID and company name.

3. To remove a printer assignment, change the printer class assignment to None.

4. Choose OK to save changes and close the window.

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PART 2: ROUTINE MAINTENANCE

Part 2: Routine maintenance

Completing the recommended maintenance procedures will help keep Microsoft Dynamics GP running smoothly. Making regular backups will help you to recover your data if an unexpected event occurs. You can use the Manage Automated Client Updates window to set up updates to be installed automatically on your client computers.

The following topics are discussed:

• [Chapter 3, “Microsoft Dynamics GP tables,”](#Chapter_3__Microsoft_Dynamics_GP) provides the basics of data storage

in Microsoft Dynamics GP.

• [Chapter 4, “Maintenance procedures,”](#Chapter_4__Maintenance_procedure) describes the steps you should take to

protect and maintain your data.

• [Chapter 5, “Database Maintenance Utility,”](#Chapter_5__Database_Maintenance_1) provides information about the

Database Maintenance Utility for Microsoft Dynamics GP so you can reload

database objects such as stored procedures and triggers.

• [Chapter 6, “Client updates,”](#Chapter_6__Client_updates_1) describes client updates and how to set up updates

to be installed automatically on client computers.

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# Chapter 3: Microsoft Dynamics GP tables

Review the following information about Microsoft Dynamics GP tables before attempting to use table maintenance procedures. This information will familiarize you with the basics of data storage in Microsoft Dynamics GP. Understanding the basic concepts associated with Microsoft Dynamics GP tables will give you better insight into how data is stored and how it flows through Microsoft Dynamics GP.

The tables information contains the following sections:

• [How records are stored in Microsoft Dynamics GP tables](#Chapter_3__Microsoft_Dynamics_GP)

• [Table groups and tables](#P_A_R_T___2____R_O_U_T_I_N_E___M)

• [Table names](#P_A_R_T___2____R_O_U_T_I_N_E___M)

• [Main table types](#C_H_A_P_T_E_R___3______M_I_C_R_O)

• [Subtable types](#P_A_R_T___2____R_O_U_T_I_N_E___M_1)

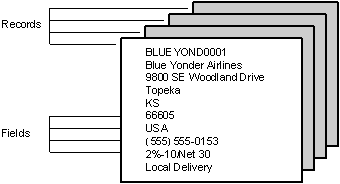
• [Passive record locking](#P_A_R_T___2____R_O_U_T_I_N_E___M_1)

• [Effects of denying table access](#C_H_A_P_T_E_R___3______M_I_C_R_O_1)

How records are stored in Microsoft Dynamics GP tables

As you enter transactions, accounts, and customer information in Microsoft Dynamics GP, you’ll make entries or selections for many individual fields. These fields represent the smallest unit of information stored by Microsoft Dynamics GP. All the fields that describe a transaction, account, or customer make up a record. Similar records are stored together in a table.

For example, assume you have a new customer, Blue Yonder Airlines. You’ll enter a customer ID, the company name, the city where the company is located, the phone number, and other facts about the company and your business relationship. Each of these facts is entered in a field, and together these fields make up the Blue Yonder Airlines customer record. All your customer records are stored together in a table group called the Receivables Customer Master Files. If you were entering a General Ledger transaction, that information would be stored in the Transaction Work table.



Just as windows you use to make entries (input) are linked to a particular table, the information displayed on reports and documents you’ll print (output) is drawn from specific tables.

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P A R T [2](#Part_2__Routine_maintenance) [R O U T I N E M A I N T E N A N C E](#Part_2__Routine_maintenance)

Table groups and tables

Tables are the basis of Microsoft Dynamics GP; they contain your data. Typically, two or more tables that are used to store related information are combined to make up a table group, also called a logical table.

For example, the General Ledger Transaction Work table is a table group, made up of four tables: Transaction Work, Transaction Amounts Work, Transaction Clearing Amounts Work, and Audit Trail Code Temporary. General information about each transaction, such as the audit trail code and date is stored in the Transaction Work table, and transaction amounts are stored in the Transaction Amounts Work or Transaction Clearing Amounts Work table, depending on whether you’ve entered a standard transaction or a clearing transaction.

Transaction Transaction Transaction Work table Amounts Clearing

Work table Amounts Work

table

Transaction Work table group

Note that the Transaction Work table group contains a Transaction Work table. Table groups typically include a table with the same name. In some cases, this may be the only table in the table group. In System Manager, for example, almost every table group contains only one table.

Table names

Each Microsoft Dynamics GP table has three names: a technical name, a display name, and a physical name. The technical name is used by the software and will appear instead of a display name in some Microsoft Dynamics GP alert messages. The physical name is the name that will appear for the table when you view it using Microsoft SQL Server ® Management Studio. The display name is the name that will appear in most alert messages and is the most commonly used name for a given table.

You can review the physical, technical, and display names of each table by choosing Microsoft Dynamics GP menu >> Tools >> Resource Descriptions >> Tables to display the Table Descriptions window. Refer to your Resource Description online documentation for detailed steps that can help you view technical table and field information using the resource description windows.

Tables in the Microsoft Dynamics GP system are divided into different categories based on how they’re used by Microsoft Dynamics GP and the information each stores. The purpose of each table can be determined by its name. Technical table names typically are composed of a two-character module abbreviation (such as GL for General Ledger), followed by a descriptive term for the main contents of the table, plus a 3- or 4-character main table type abbreviation (such as HIST for a history table). When appropriate, a subtable type abbreviation or description is used to further define the contents of the table.

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The following describes of some of the naming conventions used in the Microsoft Dynamics GP system.

Main table type Physical name Technical name abbreviation

abbreviation

Master 000 – 099 MSTR Work 100 – 199 WORK Open 200 – 299 OPEN History 300 – 399 HIST Setup 400 – 499 SETP Temp 500 – 599 TEMP Relation 600 – 699 REL Report Options 700 – 799 ROPT

The following table shows examples of table names in the Microsoft Dynamics GP system.

Main table type Physical name example Technical name example Master GL00100 GL\_Account\_MSTR Work GL10000 GL\_TRX\_HDR\_WORK Open GL20000 GL\_YTD\_TRX\_OPEN History GL30001 GL\_Account\_SUM\_ HIST Setup SY40300 SY\_Class\_Normal\_SETP Temp GL50900 GL\_Year\_End\_Closing\_TEMP Relation SY60100 SY\_User\_Company\_Access\_REL Report Options SY70200 SY\_Group\_Names\_ROPT

Main table types

Most of the information in Microsoft Dynamics GP is stored in one of the following types of tables. Knowing which type of table contains each type of information will help you find the data you need.

Setup tables These tables contain all the default settings and module options you’ve specified in the setup windows for each series.

Master tables These tables contain all the permanent data about your business, such as information about accounts, vendors, customers, and items.

Work tables Work tables contain unposted batches of transactions entered using windows that can be opened using the Transactions menu on the tool bar. These transactions are temporary and can be changed or deleted until they are posted to an open table.

Open tables Depending on the module, these tables may contain posted transactions for the open year. For example, the open tables in General Ledger contain posted transactions for any open year while the open tables in Payables Management contain unpaid posted transactions. How information in the open tables is moved to the history tables depends on the module as well. Transactions are moved to history when an open year is closed in General Ledger or the transactions are fully applied in Payables Management.

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History tables These tables contain paid transactions, or transactions from a previous year.

Subtable types

Subtable types are used to further define the main table types. When used in conjunction with one of the main table type abbreviations, a subtable type indicates the relationship a table has with another table in its table group. The subtable type abbreviation will always appear before the main type abbreviation and is used in instances where several tables are grouped to form a table group. For instance, the General Ledger Transaction Work table group is made up of three work tables, but each one has a specific function that’s indicated by its subtable type:

Table group Tables Transaction Work table Transaction Clearing Amounts Work

GL\_TRX\_Clearing\_WORK Transaction Work

GL\_TRX\_HDR\_WORK Transaction Amounts Work

GL\_TRX\_LINE\_WORK

The following table lists some of the more common subtable types used for tables. In many instances, a descriptive term is used rather than an abbreviation, such as “Clearing” for the GL\_TRX\_Clearing\_WORK table:

Subtable type Abbreviation Table Header FHDR Batch Header BHDR Serial Number SERL Header HDR Line Item LINE Tax HTAX Line Tax LTAX Address ADDR

Use the help to learn more about the type of table information that’s available in the resource description windows. Then follow the step-by-step instructions in the help to find the technical table information you need.

Passive record locking

There are a few instances when a single person must have exclusive access to a particular data table, or collection of similar records. Typically this is true only if the individual is performing a table maintenance procedure, such as clearing data.

Microsoft Dynamics GP manages records using optimistic concurrency control or passive record locking. Optimistic concurrency control enables many people to work with the same records—customer accounts, for example—without competing for records. Coworkers update records one field at a time, so two or more people can change a record simultaneously if they’re changing different fields. However, if they are changing the same field, the second person to save the record receives a message saying that changes have been made to the record since he or she accessed it. When the second person chooses OK in response to the alert message, the window is updated with the first person’s changes.

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C H A P T E R 3 M I C R O S O F T D Y N A M I C S G P T A B L E S

Effects of denying table access

Some types of information may be available on several reports. For example, the information in the Unit Accounts List also is available in the Accounts List. If you want to restrict access to certain types of information, be sure to restrict access to all of the reports that include that information.

Reports

If you set up security for a table, reports that use that table for printing will be affected by the security option. For example, if you are denied access to the Account Master table, you can still use financial cards and post transactions, but a message indicating a table security error will appear if you attempt to print a report using the Account Master table. If you don’t have access to a table, you won’t be able to use other applications to write data to that table.

SmartList

Removing access to tables may mean some SmartList objects won’t be displayed. Multiple SmartList objects may be affected by removing access to a single logical table. In some cases, multiple logical tables affect a SmartList object and removing access to any one of the logical tables will remove access to the object.

If the SmartList window is already open and access is removed from a table, the changes will not appear until the SmartList window is closed and reopened.

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# Chapter 4: Maintenance procedures

The Microsoft Dynamics GP system is designed to help ensure maximum accuracy and integrity of your accounting data. Occasionally, however, your data tables may become damaged. Hardware failures, power surges, and other problems can damage or destroy data.

While damage occurs infrequently, the factors that cause it are difficult to predict or control, and it’s necessary to take measures to protect your data. Regularly back up your accounting data and perform table maintenance to help minimize risk of data loss from table damage.

Maintenance information is divided into the following sections:

• [Backups overview](#Chapter_4__Maintenance_procedure)

• [Database backup procedures](#P_A_R_T___2____R_O_U_T_I_N_E___M_2)

• [When to perform a database backup](#C_H_A_P_T_E_R___4______M_A_I_N_T)

• [Backing up your data](#C_H_A_P_T_E_R___4______M_A_I_N_T)

• [Scheduling database backups](#P_A_R_T___2____R_O_U_T_I_N_E___M_3)

• [Updating statistics](#C_H_A_P_T_E_R___4______M_A_I_N_T_1)

• [Recompiling stored procedures](#P_A_R_T___2____R_O_U_T_I_N_E___M_4)

If you discover a problem with your accounting data tables during maintenance or

if a problem persists after performing maintenance, [see Chapter 15, “Data](#Chapter_15__Data_recovery_1)

[recovery,” for inf](#Chapter_15__Data_recovery_1)ormation on resolving the problem.

Backups overview

A backup is a copy of your SQL Server databases on another medium separate from the hard disk where you have the original databases. You can help prevent loss of your company’s data by making frequent, regular backups. Having a good set of backups is like having insurance—without it you risk losing your information and spending a great deal of time reentering it.

If you have Microsoft Dynamics GP installed on a server, you must back up your data on the server.

In addition to making backups of your tables, you should back up your transaction-related information by printing and storing posting journals and reports, or by sending them to a file. Then, if you need to restore a backup, finding and reentering the information that’s been entered since the backup will be much simpler and quicker. Also, keep all of the reports that you usually use, either as printed copies or in files. Detailed reports from open tables, tables containing current posted transactions, and history tables contain the most complete information.

To help ensure that you always have current backups, you should design and follow a formal backup schedule or create a schedule for automated backups. For

more information, see [Scheduling database backups on page 32.](#P_A_R_T___2____R_O_U_T_I_N_E___M_3)

Be sure to incorporate a rotation plan so that you aren’t copying over the same backup every day. This will eliminate the loss of data if damage isn’t detected for several days. Backups should be clearly labeled so that you can distinguish one set from another. We also recommend that you label daily, weekly, and monthly backups separately so that they don’t become mixed together.

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Database backup procedures

You should back up databases and transaction logs frequently, and you should save the backups.

The frequency and type of backups you do depends on two factors: the acceptable amount of work that can be lost due to media or other failure, and the volume of transactions that occur on the SQL server. For systems that have little update activity and that are used primarily for viewing data, weekly database backups might be sufficient. For high-volume environments, database backups may be needed daily and transaction logs hourly. The strategy chosen should fit your environment and provide adequate assurance of recovering needed data. See

[Scheduling database backups on page 32 for informat](#P_A_R_T___2____R_O_U_T_I_N_E___M_3)ion about creating a schedule for automated backups.

The following is an example of a typical backup schedule:

Item When to back up Minimum time to keep back up Transaction log Twice a day Two weeks Database and Every day Two months Transaction log

The following table lists which resources need to be backed up:

Item Items to back up

Forms.dic If your Microsoft Dynamics GP windows have been customized using

the Modifier, back up the Forms.dic when you install it, or monthly if

you use the Modifier to make additional customizations.

Reports.dic If you use Report Writer to modify or create reports, back up the

Reports.dic file monthly as part of your system backups, or more

frequently as changes are made.

Microsoft Dynamics GP Back up all tables in the database monthly as part of your system

database backup, or more frequently as changes are made. Each of your company Back up each company database daily. In addition, the documentation

databases for other procedures, such as table maintenance, may prompt you to

make a backup as well.

msdb database This is the database used by SQL Server Agent to store tasks. If you

use SQL Server Agent to schedule automatic tasks, back up this

database as part of your system backups.

If database backups are performed online, they should be scheduled for times when the server is not being heavily updated, because the backups will slow the server somewhat. In addition, the backups should be performed on a fixed schedule. By using a fixed schedule, users will always know when the backup is occurring and can expect a slight delay in performance, or they can plan to do other non- server-related tasks during that time.

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When to perform a database backup

It is important to back up a database either before or after the following procedures:

Creating a database

Each database should be backed up just after it is created, and on a fixed schedule thereafter. For example, if you create a database on Monday and wait until Friday afternoon to back it up, you risk losing a whole week’s work if there is a media failure on Friday morning.

Performing an operation that isn’t logged

You must back up a database any time you perform an operation that is not logged. If you don’t, the transaction log backup isn’t useful.

Database maintenance procedures

We recommend that you back up any affected tables before and after performing any database maintenance procedure that could possibly change your data. This includes Database Console Commands (DBCC) as well as the Update Statistics and Recompile functions within Microsoft Dynamics GP. Power fluctuation or hardware failure can cause detrimental damage to your data when performing these tasks.

Data recovery procedures

Back up all affected tables before and after performing data recovery procedures in case of power fluctuations or hardware failure during these processes. Back up data before restoring a backup in case you need to refer to it later or in case your current backup is damaged.

Updating or installing additional products

Back up your entire Microsoft Dynamics GP system before and after updating to a new version of Microsoft Dynamics GP or installing additional products. Power fluctuations and hardware failure can cause detrimental damage during an update. If your data is damaged before you update your system, you’ll need to restore the backup to fix any damage.

Backing up your data

Use the Back Up Company window to back up data. Complete this procedure for each company you’re backing up and for the system database.

Only a system administrator can open the Back Up Company window to make backups. If you have Microsoft Dynamics GP installed on a server, you must back up your data on the server.

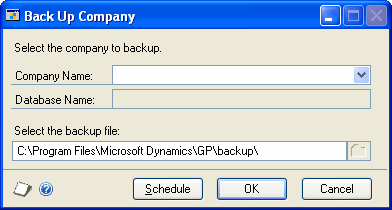
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To back up your data:

1. Open the Back Up Company window.

(Microsoft Dynamics GP menu >> Maintenance >> Backup)



2. Select the company you want to back up, or System Database to back up system

data.

3. The path and file name of the backup file are displayed. You can modify the

path and file name as needed.

4. Click OK to make the backup. The window will be closed and a message will

appear when the backup is complete.

Scheduling database backups

You can schedule backups for system and company databases to occur on the days and the times that you specify.

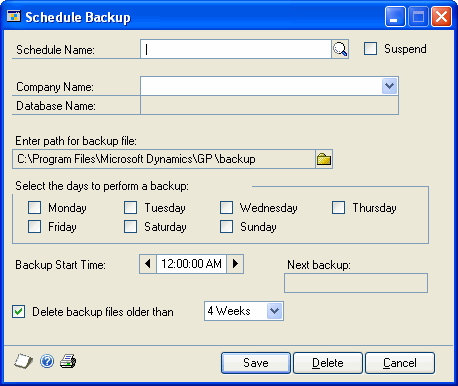
Only a system administrator can open the Schedule Backup window to schedule database backups. If you have Microsoft Dynamics GP installed on a server, you must back up your database using the server.

To schedule a database backup:

1. Open the Schedule Backup window.

(Microsoft Dynamics GP menu >> Maintenance >> Backup >> Schedule

button)



2. Enter a name for the schedule.

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3. Select the company to back up. The path where the database will be backed up

is displayed. You can modify the path, as needed.

The path where the database will be backed up must be local to the server.

4. Mark the days to back up the database.

5. Enter or select a time of day to back up the database.

6. Choose Save to save the schedule.

Print the Backup Schedule List to see a list of the schedules that you have created and

the status of each schedule. To print the Backup Schedule List, choose File >> Print.

Updating statistics

Use the SQL Maintenance window to reconfigure your data table keys for better performance.

Microsoft SQL Server can update statistics automatically. For more information, see your SQL Server documentation.

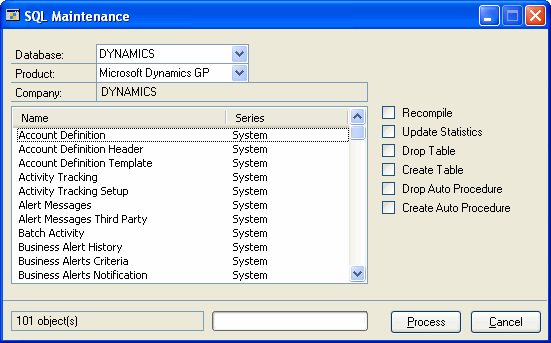
SQL Server and SQL Server Express uses statistics about key values to select which index or indexes to use to process queries. If there is a significant change in the key values in an index, you should update statistics for that index. You should also update statistics if a great deal of data in an indexed column has been added, changed, or removed.

A system administrator should update statistics monthly on every database, or more frequently whenever data significantly increases or decreases, such as when period consolidation is performed.

To update statistics:

1. Open the SQL Maintenance window.

(Microsoft Dynamics GP menu >> Maintenance >> SQL)



2. Select a database and at least one table, and mark the Update Statistics option.

3. Choose Process.

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Recompiling stored procedures

Use the SQL Maintenance window to adapt stored procedures to data tables with significant increases or decreases in data, resulting in better performance.

Microsoft SQL Server can recompile stored procedures automatically. For more information, see your SQL Server documentation.

As you make changes to your database that affect statistics, your stored procedures may lose efficiency. By recompiling the stored procedures that act on a table, you can optimize queries. This optimization happens automatically in some cases. However, if a new index is added, the stored procedure isn’t automatically optimized.

You should recompile stored procedures monthly on every database, or more frequently whenever you significantly increase or decrease data in tables, such as when you perform period consolidation.

To recompile stored procedures:

1. Open the SQL Maintenance window.

(Microsoft Dynamics GP menu >> Maintenance >> SQL)

2. Select a database and at least one table, and mark the Recompile option.

3. Choose Process.

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# Chapter 5: Database Maintenance Utility

You can use the Database Maintenance Utility for Microsoft Dynamics GP to reload database objects such as stored procedures and triggers.

This chapter contains the following sections.

• [Database Maintenance Utility overview](#Chapter_5__Database_Maintenance_1)

• [Reloading database objects](#Chapter_5__Database_Maintenance_1)

Database Maintenance Utility overview

You might be directed by the Microsoft Dynamics GP technical support team to reload database objects if, for example, a stored procedure was deleted. You can use the Database Maintenance Utility to reload database objects for selected databases and components.

A database contains tables that store data. A database also contains other database objects such as stored procedures, functions, views, and database triggers. You can use the Database Maintenance Utility to reload the following database objects.

Database object Definition View A view is a virtual table whose contents are defined by a query. Data for a

view comes from other tables in the database.

Trigger A database trigger is a special class of SQL stored procedure that

executes automatically when an update, insert, or delete statement is

issued for a table or view.

Stored procedure A stored procedure is a group of SQL statements that are compiled and

stored as a database object.

Function A function is a command that returns a value.

The process of reloading database objects deletes and reloads the objects in the selected databases and components. Any customizations you’ve made to objects, including Pre and Post procedures in eConnect for Microsoft Dynamics GP, are removed, as well. Before you reload database objects, you should make a backup of the system (DYNAMICS) and company databases. After reloading the database objects, you should reload your customizations.

Reloading database objects

Use the Database Maintenance Utility to reload database objects for selected databases and components. You might need to reload your database objects if, for example, a stored procedure is deleted.

To reload database objects:

1. Make a backup of the system (DYNAMICS) and company databases.

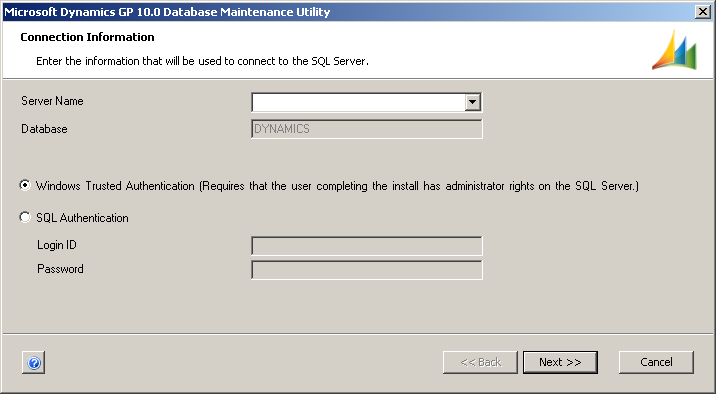
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2. Open the Connection Information window.

(Choose Start >> All Programs >> Microsoft Dynamics >> GP >> Database

Maintenance.)



You must be a member of the sysadmin fixed server role and be the only user connect to

the database to reload database objects. For more information about the sysadmin fixed

server role, refer to Microsoft SQL Server Books Online.

3. Enter or select the server you want to access and select the security mode used

to authenticate your server connection.

If you select to use the SQL Authentication option, enter your login ID and

password.

4. Choose Next.

5. In the Select Database window, mark the databases to reload database objects

for, and then choose Next.

6. In the Select Products window, mark the component or components to reload

database objects for, and then choose Next.

7. In the Select Database Objects window, mark the database objects to reload, and

then choose Next.

8. In the Confirmation window, review the selections you’ve made, and then

choose Next to reload objects.

9. The Progress window appears, where you can view the status of the database

objects.

10. In the Finish window, review the results of reloading database objects. If there

are no errors, close the utility.

After restoring database objects, you will need to reload any database object

customizations, such as Pre and Post procedures in eConnect.

If there are errors, such as the connection to SQL server failed, you should

verify that you are the only user connected to the database and select to reload

the objects for that database again.

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# Chapter 6: Client updates

You can install updates on your client computers automatically by using the Manage Automated Client Updates window. You must be an administrator to use this window.

Client update information is divided into the following sections:

• [Client update overview](#Chapter_6__Client_updates_1)

• [Setting up an update to install on client computers](#P_A_R_T_2____R_O_U_T_I_N_E___M_A_1)

• [Troubleshooting logging in to Microsoft Dynamics GP](#P_A_R_T_2____R_O_U_T_I_N_E___M_A_1)

Client update overview

When an update is available, you must install the update on the server before installing it on the client computers. An update can be a Microsoft Dynamics GP service pack or hotfix. An update also can be a .cnk file created by an independent software vendor or a customization developed by you or your partner. If an update is a service pack, you must use Microsoft Dynamics GP Utilities to update the database. If the update is a cnk file, you must start Microsoft Dynamics GP to include code.

If the update should be available to your client computers, you can place the update in a shared network location that each client computer has access to. Then, use the Manage Automated Client Updates window to set up the update to be installed automatically on your client computers. Multiple updates can be set up and applied to the client computers.

When a user logs in to Microsoft Dynamics GP on a client computer, the client version information is checked against the version information for the update. If an update is required, a message will instruct the user to install the update. By choosing Yes, Microsoft Dynamics GP closes and the update process will begin. If the update has a .msp file extension, a progress window is displayed to show the status of the update. After the update is installed, the user can start Microsoft Dynamics GP again. By choosing No, the update isn’t applied and Microsoft Dynamics GP closes. You can’t use Microsoft Dynamics GP on the client computer until it is updated.

If an update isn’t successfully installed on a client, a log file will be created that describes errors in the temporary directory for the client. The log file will use the name of the update file plus a .log extension. For example, if a service pack is named GP\_SP1.msp, the log file will be named GP\_SP1.log.

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Setting up an update to install on client computers

Use the Manage Automated Client Updates window to set up an update to be installed automatically on your client computers. Multiple updates can be set up and applied to client computers. You must be an administrator to use this window.

Before you set up an update to be installed on client computers, you must apply the update to your server.

To set up an update to install on client computers:

1. Open the Manage Automated Client Updates window.

(Microsoft Dynamics GP menu >> Tools >> Setup >> System >> Client

Updates)

2. Enter or select the update name.

3. Specify whether the update should be automatically installed on the client

computers the next time that users log in to Microsoft Dynamics GP.

4. Enter the Universal Naming Convention (UNC) path to where the update is

located. The update must be located in a shared network location that each

client computer has access to.

The file where the update will be installed must have either a .msp or .cnk

extension.

5. Choose Save.

When a user logs in to Microsoft Dynamics GP on a client computer and an

update is required, a message will instruct the user to install the update. When

the user chooses Yes, Microsoft Dynamics GP will close and the update process

will begin.

Troubleshooting logging in to Microsoft Dynamics GP

If you have issues logging in to Microsoft Dynamics GP after installing an update, review the following information.

Client version information and database setup

You can’t log in to Microsoft Dynamics GP on a client computer if a product installed on the client computer has different version information than the server. You can use the GP\_LoginErrors.log file in your temporary directory (typically C:\Documents and Settings\\Local Settings\Temp\ GP\_LoginErrors.log) to help resolve the version information issue. The log file will contain the product name, along with the dictionary and database versions.

To log in to Microsoft Dynamics GP or a company, the product must be installed on the server. If the database hasn’t been set up, you can use Microsoft Dynamics GP Utilities to complete the database setup. You can use the GP\_LoginErrors.log file in your temporary directory to determine which products aren’t installed.

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The following is an example of a GP\_LoginErrors.log file.

GP\_LoginErrors.log file

Product Name: Human Resources Error: Product is not installed to the database server Product Name: Fixed Assets Database Version 11.00.07 Client Version: 11.00.10

Updating Microsoft Dynamics GP with a .cnk file

An update for Microsoft Dynamics GP can be a .cnk file created by an independent software vendor or a customization developed by you or your partner. You can use the Manage Automated Client Updates window to set up a .cnk file to be installed automatically on your client computers. If the .cnk file has an .ini file, be sure that there is a carriage return after the build number in the .ini file. If there isn’t a carriage return after the build number, you may have problems starting or updating Microsoft Dynamics GP.

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PART 3: DISTRIBUTED PROCESS SERVER

Part 3: Distributed Process Server

Review this part of the documentation for information you need to set up and use the distributed processing features available with Microsoft Dynamics GP. The following topics are discussed:

• [Chapter 7, “Distributed Process Server overview,”](#Chapter_7__Distributed_Process_S_1) provides information on

how you can use the process server in your Microsoft Dynamics GP system.

• [Chapter 8, “Process server configuration,”](#Chapter_8__Process_server_config_1) provides information to help you

decide which computers you’ll use as process servers and how to set up your

clients, servers, and process servers.

• [Chapter 9, “Remote processing setup,”](#Chapter_9__Remote_processing_set_1) describes how to set up remote

processing.

• [Chapter 10, “Processing and monitoring remote processes,” desc](#Chapter_10__Processing_and_monit_1)ribes how to

start the process server, view tasks being completed, and view logged

information about remote processes.

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# Chapter 7: Distributed Process Server overview

Review this information to become more familiar with what the Distributed Process Server is and how you can use it in your Microsoft Dynamics GP system.

The overview information contains the following sections:

• [Understanding process servers](#Chapter_7__Distributed_Process_S_1)

• [Tasks that can be performed remotely](#Chapter_7__Distributed_Process_S_1)

• [Using the Distributed Process Server](#P_A_R_T___3____D_I_S_T_R_I_B_U_T)

• [Load balancing and services](#C_H_A_P_T_E_R___7______D_I_S_T_R)

• [How the Distributed Process Manager handles load balancing](#C_H_A_P_T_E_R___7______D_I_S_T_R)

• [Distributed Process Server files](#P_A_R_T___3____D_I_S_T_R_I_B_U_T_1)

• [Distributed Process Manager file](#P_A_R_T___3____D_I_S_T_R_I_B_U_T_1)

Understanding process servers

Distributed processing is the ability to send processes to other computers on a network. The Distributed Process Server, or DPS, helps you maximize the use of network processing power by allowing you to perform certain tasks that require a large amount of processing power on separate computers. This reduces the workload of client computers and improves Microsoft Dynamics GP performance. The client computer used for data entry will be immediately available to perform other tasks, so you don’t have to wait to continue working while the task is completed, or work more slowly while the task is completed in the background.

The computers where you’ll complete these processes are process servers, computers with high processing power. To take advantage of DPS, it’s important that your process server be a computer with a fast processor and sufficient RAM, so that tasks can be completed as quickly as possible.

A computer you use as a process server can be a dedicated process server—a computer used only for remote processing—or a client computer that’s also used for data entry or other tasks. However, to use the power of the process server as efficiently as possible, we recommend that process servers be dedicated. You can set up as many process servers as necessary, but may be limited by your network protocol.

To set up a computer as a process server, install the standard Microsoft Dynamics GP client applications. (Refer to the Installation Instructions documentation for more information.) Then you’ll specify which computers in your system are process servers, and which tasks will be completed on those process servers. Sending a task to a process server is called processing a task remotely, or remote processing.

Verify the data source name in ODBC. You must use the same data source name (DSN) in ODBC for all client workstations and process servers in order for distributed processing to work successfully. (A data source includes the data a user wants to access and the information needed to get to that data. An example of a data source is a SQL Server database.) For more information about setting up ODBC data sources, refer to your Microsoft Dynamics GP Installation Instructions documentation.

Tasks that can be performed remotely

Tasks within Microsoft Dynamics GP that have a specific start and end point and that you don’t need to continue monitoring by choosing a response in a dialog box,

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or by interacting with the process in other ways, can be processed remotely. Because you can’t interact with the process once it’s sent to a process server, any alert messages that may be generated during the process will be saved in the Process Server Activity Table.

After you’ve assigned processes to process servers, each user can then choose to perform remote processes locally, on the designated process server, or on a specified service (a group of one or more process servers).

To view all the tasks within Microsoft Dynamics GP that can be processed remotely, see the DPS Setup window (Microsoft Dynamics GP menu >> Tools >> Setup >> System >> Process Server).

Using the Distributed Process Server

The Dps.exe application is installed on each client computer when you install Microsoft Dynamics GP. If you’re using the load balancing feature, be sure the Distributed Process Manager application—Dpm.exe—is running, as well. The Dpm.exe application also is installed automatically on each client computer. For

more information see [Load balancing and services on page 45.](#C_H_A_P_T_E_R___7______D_I_S_T_R)

Complete the task, such as posting batches or printing reports, as you typically do. The task will be processed on the process server you’ve designated during setup.

(For more information, see [Designating process servers on page 52.)](#P_A_R_T___3____D_I_S_T_R_I_B_U_T_3) In the User Preferences window, you must select Remote as the Distributed Processes option to process tasks remotely. You can use the Process Monitor window on your client computer to view the tasks currently assigned to each process server. You also can use the Process Monitor window on the process server to view all processes being completed on that computer.

You don’t need to monitor a process while it’s being completed. Instead of displaying any dialog boxes that might appear if you were processing a task locally, DPS records the information about the message in a file, which you can view once the task is completed. If an interruption, such as a power outage, occurs while processing is occurring, DPS will record the error that occurred in an error log file.

If you want to record the start and end times of remote process activity in the Process Server Activity Table, mark the Track Start and End Times option in the DPS Setup window. If you didn’t mark the Track Start and End Times option, only alert messages will be recorded in the table.

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C H A P T E R 7 D I S T R I B U T E D P R O C E S S S E R V E R O V E R V I E W

Load balancing and services

When several computers on a network are running the process server, maximum processing power is achieved by evenly distributing the processing load to those computers. This concept is called load balancing.

If you use two or more process servers, you can use a service to take advantage of load balancing. A service is simply a group of process servers. When load balancing is implemented, you can send remote processes to a service rather than to a specific server. The Distributed Process Manager (DPM), the application that manages load balancing, will route the process to the server with the lightest processing load in the service.

A process server can be assigned to more than one service. (For more information,

see [Creating a service on page 53.) This](#C_H_A_P_T_E_R___9______R_E_M_O_T) allows you to direct more processes to the most powerful computers running the process server. For example, if a server is part of the Reports service and the Posting service, it will be used for processes sent to either service.

How the Distributed Process Manager handles load balancing

The Distributed Process Manager (Dpm.exe) is the application that manages the interaction between clients and process servers. The Dpm.exe application is installed automatically on the computers in your Microsoft Dynamics GP system. The following is a description of how DPM manages the load balancing process.

1. DPM is started. You must keep DPM on after you start it.

2. Process servers are started. When you start each process server, the server is

registered with DPM.

3. Clients are started. When each client machine is started, the setup information

for servers and services is read and registered with DPM.

4. Processes are sent to services. When a client sends a process to a service, it asks

DPM which server the process should be sent to. DPM examines the current

processing load for the servers in the specified service, and tells the client to

send the process to the process server with the lightest load.

If load balancing isn’t enabled or DPM isn’t operational, the process will be sent

to the first server in the specified service. If no process servers are available, the

process will be processed locally on the client.

5. Process servers and clients are shut down. When a process server is shut down,

it tells DPM that it is no longer available. When the process server is restarted, it

will re-register with DPM and be available for processing.

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Distributed Process Server files

When you install Microsoft Dynamics GP, the Distributed Process Server and the Distributed Process Manager are installed automatically on each computer. The following table lists the components of the process server.

Application files on each process

server

Dynamics.exe (runtime engine)

Dynamics.dic

Dex.dic

Dps.exe (Distributed Process Server engine)

Dpm.exe (Distributed Process Manager engine)

You can delete the Microsoft Dynamics GP runtime engine from the process server; however, we recommend that you leave it so that you can start Microsoft Dynamics GP on the process server, if necessary, to perform table maintenance or other procedures.

Microsoft Dynamics GP will allow multiple instances of the a process server to operate from the same client system. In a high-performance, multiprocessor system, this type of setup can increase performance dramatically. For more information, see

[Multiple instances of DPS on the same client on page 51.](#Chapter_9__Remote_processing_set_1)

Distributed Process Manager file

The DPM is the application that tracks activity on all clients and process servers. When a process is sent to a service, the DPM application determines which process server has the lightest processing load and assigns the process to that process server. When you install Microsoft Dynamics GP, Dpm.exe is installed automatically on each computer.

To use load balancing with Microsoft Dynamics GP, you must use the Distributed Process Manager application. The DPM computer can be a client, data server, or process server. We recommend that it be extremely reliable and not subject to processing interruptions; if the Dpm.exe application is shut down unexpectedly, all remote processes and process servers can be affected.

For more information on system requirements for the Distributed Process Manager, see the Installation Instructions documentation.

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# Chapter 8: Process server configuration

Use this information to help you determine the types of computers you’ll use as process servers and how to set up your Microsoft Dynamics GP clients, servers, and process servers.

For information about system requirements for process servers, see the Microsoft Dynamics GP Installation Instructions manual.

The process server configuration information contains the following sections:

• [Process server configuration guidelines](#Chapter_8__Process_server_config_1)

• [DPS using services](#Chapter_8__Process_server_config_1)

• [DPS on dedicated servers](#P_A_R_T___3____D_I_S_T_R_I_B_U_T_2)

• [DPS on the data server](#C_H_A_P_T_E_R___8______P_R_O_C_E)

• [DPS on a client](#C_H_A_P_T_E_R___8______P_R_O_C_E)

Process server configuration guidelines

The best way to set up process servers depends on a variety of factors, including the processing speed and RAM of all computers in your system, and network traffic. Each system has unique circumstances and requirements. Typically a configuration with one or more services, each containing three or more process servers, results in the fastest and most efficient processing.

The following information describes different ways you can set up process servers. If performance isn’t satisfactory in one configuration, you may want to try a different configuration, which may improve performance. You may find that a combination of these configurations works best for your circumstances. You can set up as many process servers as necessary—as many as your network protocol allows.

The possible configurations are as follows:

• [DPS using services](#Chapter_8__Process_server_config_1)

• [DPS on dedicated servers](#P_A_R_T___3____D_I_S_T_R_I_B_U_T_2)

• [DPS on the data server](#C_H_A_P_T_E_R___8______P_R_O_C_E)

• [DPS on a client](#C_H_A_P_T_E_R___8______P_R_O_C_E)

DPS using services

Typically, the best way to process tasks remotely is to use two to three or more process servers to form one or more services. If you simply assign processes to different process servers, one process server may have several processes in its queue while another process server is idle. With a service, you’ll use the Distributed Process Manager to determine which process server in a group the remote process should be sent to.

To decide how many computers to use in a service, evaluate the number of users who will be processing tasks remotely, the processing speed of the computers you’ll use, and the length of the tasks you want to complete, such as financial reports. In addition, consider whether it’s important that the tasks be completed as quickly as possible, or whether you simply want them to be completed on computers other than your client computers.

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For instance, if you have two Pentium class 2.8 GHz computers and two Pentium class 3 GHz computers, you may want to create two services, one containing the Pentium class 2.8s and one containing the Pentium 3s. You’d then send tasks that need to be done quickly and which typically take more time to the Pentium class 3 service, and other processes to the Pentium class 2.8 service.

If it doesn’t matter which tasks are completed more quickly, then you may want to create one service containing all four computers.

To determine how many process servers you’ll need, estimate how many process servers could be kept completely busy by the processes you’ll complete remotely, then add one computer to that number, and group them in one or more services.

The following illustration represents one service containing three process servers:

Distributed

Process Manager

Data Server Process Server Process Server Process Server

Network Protocol

Clients

DPS on dedicated servers

If you use one computer for your data server and separate computers for your process servers, processing power won’t need to be shared between data processing tasks such as data entry, and remote process tasks such as posting or printing.

The following illustration represents the DPS on a separate process server.

Data Server Process Server

Network Protocol

Clients

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C H A P T E R 8 P R O C E S S S E R V E R C O N F I G U R A T I O N

DPS on the data server

Network traffic will be reduced in this configuration, since data processing and remote processing will be performed on the same computer.

If the data server runs at capacity or close to capacity, you should set up separate process servers to decrease the data server load and complete remote processes more quickly.

The following illustration shows the DPS installed on the data server:

Process Server and Data Server

Clients

DPS on a client

You can use any client in your Microsoft Dynamics GP system as a process server, even if you use it for data entry. To make a client a process server, install the DPS engine and assign processes to it.

If you use this configuration, performance will likely be slower than in a system with dedicated process servers. The client you use as a process server shouldn’t be used for frequent data entry; if it’s used for data entry only during the day, for instance, you can use it for remote processes you complete overnight.

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# Chapter 9: Remote processing setup

When you set up remote processing for your system, you’ll specify which tasks will be completed on the process servers, and which process servers will be grouped in services.

The processing setup information is divided into the following sections:

• [Multiple instances of DPS on the same client](#Chapter_9__Remote_processing_set_1)

• [Designating process servers](#P_A_R_T___3____D_I_S_T_R_I_B_U_T_3)

• [Removing a server](#P_A_R_T___3____D_I_S_T_R_I_B_U_T_3)

• [Creating a service](#C_H_A_P_T_E_R___9______R_E_M_O_T)

• [Removing a service](#C_H_A_P_T_E_R___9______R_E_M_O_T)

• [Setting up remote processing](#C_H_A_P_T_E_R___9______R_E_M_O_T)

• [Enabling remote processes](#C_H_A_P_T_E_R___9______R_E_M_O_T_1)

• [Setting up printers for remote processing](#P_A_R_T___3____D_I_S_T_R_I_B_U_T_5)

• [Setting up report destinations for remote processing](#P_A_R_T___3____D_I_S_T_R_I_B_U_T_5)

• [Setting up reports dictionaries for remote processing](#C_H_A_P_T_E_R___9______R_E_M_O_T_2)

Multiple instances of DPS on the same client

Microsoft Dynamics GP will allow multiple instances of the process server to operate from the same client system. In a high-performance, multiprocessor system, this type of setup can increase performance of the system dramatically.

Each instance of the DPS on the client needs its own separate copy of the Microsoft Dynamics GP client code in its own directory:

First instance of DPS C:\DPS1 Second instance of DPS C:\DPS2 Third instance of DPS C:\DPS3

The following line must be added to the Dex.ini file in each of the above listed directories:

C:\DPS1\Dex.ini

DPSInstance=1

C:\DPS2\Dex.ini

DPSInstance=2

C:\DPS3\Dex.ini

DPSInstance=3

Once these changes are made, define the DPS instances in the DPS Setup window or the DPS Server Setup window. Each instance should be given the host name of the DPS machine, followed by the “#” symbol and the instance number.

Server1#1 (for DPS1)

Server1#2 (for DPS2)

Server1#3 (for DPS3)

The instances can then be assigned to a specific task, or to one or more services.

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Designating process servers

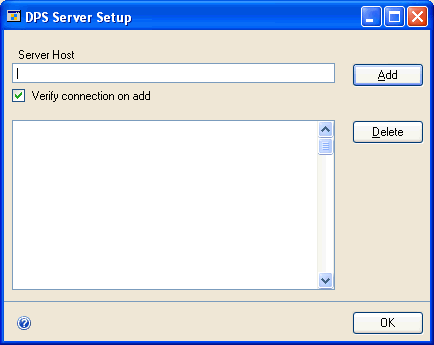
Use the DPS Server Setup window to enter the host names of the computers you’ll use as process servers. A host name is the unique name by which a computer is known on a network.

To designate process servers:

1. Open the DPS Server Setup window.

(Microsoft Dynamics GP menu >> Tools >> Setup >> System >> Process

Server >> Servers button)



2. Type the host name (sometimes known as the computer name) of a process

server you’ll use in the Server Host field.

3. Mark the Verify Connection On Add option to verify that you can connect to

that process server from the computer you’re currently using.

4. Choose Add.

If the connection is working and the process server is active, the server host

name will be added to the list. If not, a message will alert you that the computer

can’t be contacted. Verify that you entered a valid host name; if necessary, refer

to the network protocol information in your Installation Instructions

documentation and the documentation provided with your network protocol to

determine the cause of the problem.

If the Verify Connection On Add option isn’t marked, the server will be added to the list

even if you can’t currently contact the process server.

5. Repeat these steps to add the host name of each computer you’ll use as a

process server, then choose OK to return to the DPS Setup window.

Removing a server

To remove a server, select it in the DPS Setup window and choose Delete. It will be removed from the list and from any service it’s part of. If you make any modification to a service, such as deleting a server, restart the Distributed Process Manager.

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C H A P T E R 9 R E M O T E P R O C E S S I N G S E T U P

Creating a service

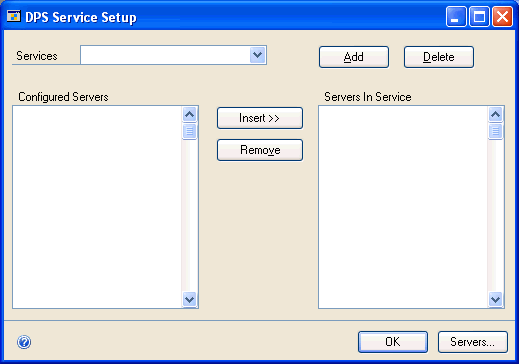
Use the DPS Service Setup window to create groups of process servers called services. Typically, the best way to process tasks remotely is to use two or more process servers to form services. With a service and Microsoft Dynamics GP, you can use the Distributed Process Manager to determine which process server in a service the process should be sent to.

To create a service:

1. Open the DPS Service Setup window.

(Microsoft Dynamics GP menu >> Tools >> Setup >> System >> Process

Server >> Services button)



2. Type the name of the service in the Services field.

3. Choose the Add button. The names of the process servers you’ve set up will be

listed in the Configured Servers list.

4. Select each process server you want to add to the service and choose Insert.

You can create as many services as you need. A server can belong to more than

one service. To create additional services, repeat steps 2 through 4.

5. Choose OK to return to the DPS Setup window.

Removing a service

To delete a service, open the DPS Service Setup window, select the service in the Services list and choose Delete. If you make any modification to a service, such as deleting a server, restart the Distributed Process Manager.

Setting up remote processing

Use the DPS Setup window to specify which processes you want to complete on process servers, such as batch posting and printing reports for each client.

Before you begin, be sure you’ve set up process servers and services. You can enter servers in the DPS Setup window without setting them up in the DPS Server Setup window, but the existence of those servers won’t be verified.

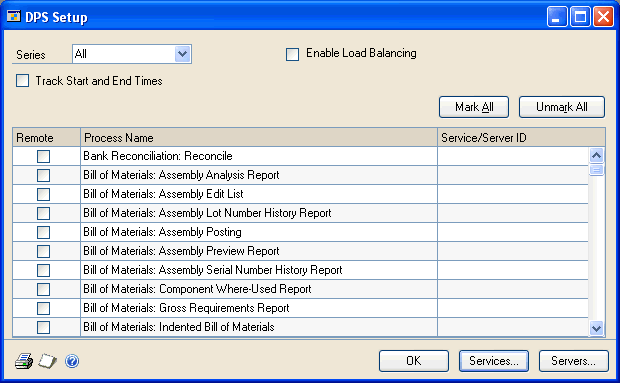
S Y S T E M A D M I N I S T R A T O R ’ S G U I D E 53

P A R T [3](#Part_3__Distributed_Process_Serv) [D I S T R I B U T E D P R O C E S S S E R V E R](#Part_3__Distributed_Process_Serv)

To set up remote processing:

1. Open the DPS Setup window.

(Microsoft Dynamics GP menu >> Tools >> Setup >> System >> Process Server)



2. In the DPS Setup window, select the series for the processes you want to set up

for remote processing, or select All to display all processes.

3. Mark the box in the Remote column by each process that you want to assign to

a process server. If you want all the available processes for the selected series to

be processed remotely, choose Mark All. If you want to deactivate remote

processing for all processes, choose Unmark All.

These processes will be processed remotely only if the user has chosen to process them

remotely, using the User Preferences window. For more information, see [Enabling](#C_H_A_P_T_E_R___9______R_E_M_O_T_1)

[remote processes on page 55.](#C_H_A_P_T_E_R___9______R_E_M_O_T_1)

4. Enter the server ID (host name) or service where each task will be processed.

If you’ve entered servers in this window without setting up the servers in the

DPS Server Setup window, the existence of those servers won’t be verified. All

services you enter must have been set up already in the DPS Service Setup

window.

If more than one instance of Distributed Process Server exists on a process

server, specify which instance of DPS you’re using on the server. For example:

Server1# (for DPS1)

Server1#2 (for DPS2)

For more information about multiple instances of Distributed Process Server,

see [Multiple instances of DPS on the same client on page 51.](#Chapter_9__Remote_processing_set_1)

5. Mark the Track Start and End Times option if you want to record the start and

end times of remote process activity in the Process Server Activity Table. If this

option isn’t marked, only alert messages will be recorded in the table.

The Process Server Activity Table can become large in a short time if you choose to track

the start and end times of all processes.

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C H A P T E R 9 R E M O T E P R O C E S S I N G S E T U P

[See Chapter 10, “Processing and monitoring remote processes,” for i](#Chapter_10__Processing_and_monit_1)nformation

about viewing, printing, and removing the information in the Process Server

Activity Table.

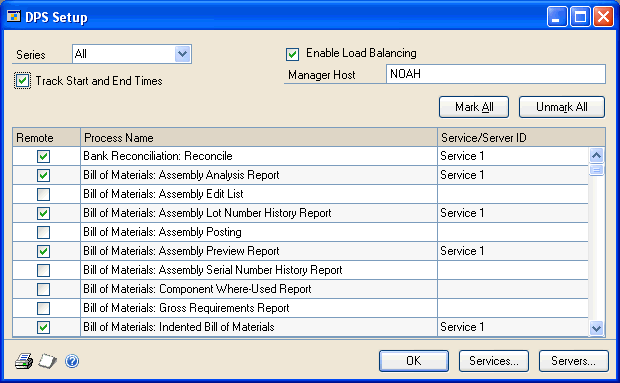
6. Mark the Enable Load Balancing option if you’re using services.

The Manager Host field will appear if Enable Load Balancing is marked; enter

the host name of the computer where you are using the Distributed Process

Manager. At this point, the DPS Setup window should resemble the following

illustration:



7. When you have finished marking processes and entering server IDs for the

selected series, select another series and set up the processes you want to

distribute to a remote processor or service.

8. When you’ve finished entering setup information for all series, choose OK to

save the entries and close the window.

To review the process information you’ve entered, choose File >> Print while

the DPS Setup window is displayed to print the Process Server Setup List.

Enabling remote processes

Use the User Preferences window to enable remote processing for each user. You must complete this procedure for each user who will use remote processes.

If the processes are set to process locally, then the entries in the DPS Setup window are ignored and the processes will occur on the local computer.

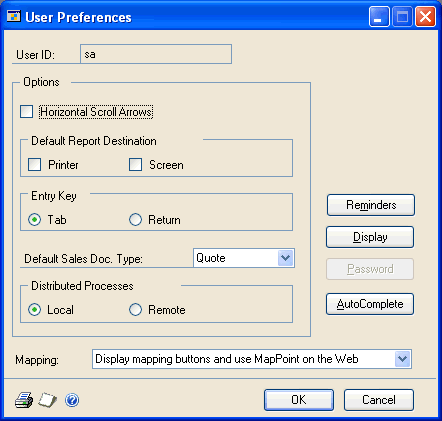
S Y S T E M A D M I N I S T R A T O R ’ S G U I D E 55

P A R T [3](#Part_3__Distributed_Process_Serv) [D I S T R I B U T E D P R O C E S S S E R V E R](#Part_3__Distributed_Process_Serv)

To enable remote processes:

1. Open the User Preferences window.

(Microsoft Dynamics GP menu >> User Preferences)



2. Mark Local or Remote for the Distributed Processes option.

3. Choose OK to save the information you’ve entered and close the User

Preferences window.

Setting up printers for remote processing

Once you begin a remote process, no additional input—such as responding to dialog boxes or specifying print destinations—is required. All processes sent to a printer will be printed to the default printer for the corresponding process server; users can’t specify the printer when they begin the process. For this reason, you may want to set up several process servers if it’s important that certain processes be

sent to a specific printer. For more information about printers, [see Chapter 2,](#Chapter_2__Printers)

[“Printers.”](#Chapter_2__Printers)

Setting up report destinations for remote processing

If any of the following situations apply to your system, be sure your report file locations are set up correctly.

If you print reports to files on process servers, the files should be stored on the process server. If you enter C:\Microsoft Dynamics GP\Report.txt as the report file name, for instance, the report will be stored on the C: drive of the process server, not the C: drive of the client you used to begin the process.

In addition, be sure you don’t print reports to the screen if the report will be processed remotely. Typically, the Screen option won’t be available if you’ve set up a process to be performed remotely. However, if you set up a report to be printed to the screen and processed locally, then decide to process it remotely, you must change the report destination, as well.

Use the Posting Setup window to set up report destinations for reports you want to print. For more information refer to your System Setup documentation (Help >> Contents >> select Setting Up the System). Be sure that you set up report destinations in this window according to these guidelines.

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C H A P T E R 9 R E M O T E P R O C E S S I N G S E T U P

Setting up reports dictionaries for remote processing

When you use Report Writer to create a primary copy of a report, it is stored in a dictionary file called Reports.dic. (Reports.dic is the name of the Microsoft Dynamics GP reports dictionary; reports dictionaries for integrating products have different names.) You can process only primary copies of reports on process servers; secondary copies and custom reports can’t be processed remotely.

For information about creating primary copies and configuring reports dictionaries, refer to your Report Writer documentation.

If the processes that you complete remotely contain reports that are primary copies—for instance, if you’re using a primary copy of a posting journal—the process server must be set up to access the correct reports dictionary. This may be on the client, at a network location, or on the process server.

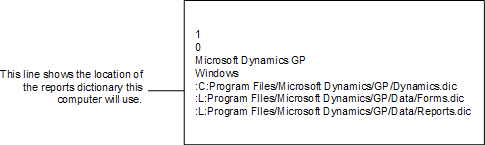
If you’re using two or more reports dictionaries—for instance, if each user has a separate local reports dictionary—you’ll need to set up your process servers so that each one accesses the correct reports dictionary.

Modified reports

If you want to process primary copies of reports remotely, the client and server must access the same reports dictionary. For instance, if a user’s launch file on a client lists J:\Microsoft Dynamics GP as the location for the reports dictionary, the launch file on the process server must specify that location for the reports dictionary, as well. If the process server can’t access the reports dictionary where a primary copy is stored, the original report will be printed instead.

You can allow users to print primary copies remotely by storing a reports dictionary on a process server. If you store the reports dictionary on the process server, printing will be faster than if it’s stored at the user’s computer.

To be sure the process server is accessing the correct reports dictionary, open the launch file. The launch file, typically called Dynamics.set, contains the location of the application dictionaries, forms dictionaries, and reports dictionaries you’re using. In the following example, the reports dictionary is stored at a central network location.



To edit the launch file, you can use the Edit Launch File window in Microsoft

Dynamics GP, or edit the file using a text editor. See [Editing a launch file using the](#P_A_R_T___4____T_E_C_H_N_I_C_A_L_3)

[Edit Launch File window on page 76](#P_A_R_T___4____T_E_C_H_N_I_C_A_L_3) and [Editing a launch file using a text editor on](#P_A_R_T___4____T_E_C_H_N_I_C_A_L_4)

[page 78 f](#P_A_R_T___4____T_E_C_H_N_I_C_A_L_4)or instructions.

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P A R T [3](#Part_3__Distributed_Process_Serv) [D I S T R I B U T E D P R O C E S S S E R V E R](#Part_3__Distributed_Process_Serv)

• To open the Edit Launch File window: Start Microsoft Dynamics GP (not DPS)

on the process server. Choose Microsoft Dynamics GP menu >> Tools >>

Setup >> System >> Edit Launch File.

• To edit using a text editor in Windows, use Notepad.

One reports dictionary that all users access

If you’re using one reports dictionary that all users access, be sure that the launch file on each process server contains the location of that reports dictionary. In the following example, all clients and process servers access a dictionary stored at a network location.

Process Server Reports.dic

Clients

You also can store the reports dictionary on the process server, to reduce network traffic.

Two or more reports dictionaries

If you’re using two or more reports dictionaries, you can use one process server for

each user, or have some users process tasks only locally (see [Enabling remote](#C_H_A_P_T_E_R___9______R_E_M_O_T_1)

[processes on page 55).](#C_H_A_P_T_E_R___9______R_E_M_O_T_1)

In the following example, each client accesses its own process server, so that the client and process server use the same reports dictionary.

Reports.dic Reports.dic Reports.dic

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C H A P T E R 9 R E M O T E P R O C E S S I N G S E T U P

In the next example, the first and third clients process locally all tasks that include primary copies of reports. The second client remotely processes tasks including primary copies, and the process server accesses that client’s report dictionary.

Reports.dic Reports.dic Reports.dic

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# Chapter 10: Processing and monitoring remote

processes

Use the following information to learn how to start the Distributed Process Manager, view tasks being completed, and view logged information about remote processes.

The information contains the following sections:

• [Starting the Distributed Process Manager](#Chapter_10__Processing_and_monit_1)

• [Monitoring background processes](#Chapter_10__Processing_and_monit_1)

• [Viewing process detail](#C_H_A_P_T_E_R___1_0______P_R_O_C)

• [Viewing process information](#P_A_R_T___3____D_I_S_T_R_I_B_U_T_8)

• [Removing and printing remote process information](#C_H_A_P_T_E_R___1_0______P_R_O_C_1)

Starting the Distributed Process Manager

When you’ve configured your process servers and are ready to begin using your multiuser system, follow the instructions in this procedure to start the components of the system in the correct order.

To start the Distributed Process Manager:

1. Shut down the computer where you are using the Distributed Process Manager,

all process servers, and all client computers.

2. Start the computer where you are using DPM, and launch the Distributed

Process Manager. (On the DPM computer, double-click the DPM icon or drag

the Dynamics.set file onto the Dpm.exe file.)

3. Start each process server computer.

4. Start each client computer.

5. Launch Microsoft Dynamics GP on each client computer.

Monitoring background processes

The Process Monitor window displays the Microsoft Dynamics GP processes (such as printing reports and posting journals) being performed locally in the background, or remotely by process servers.

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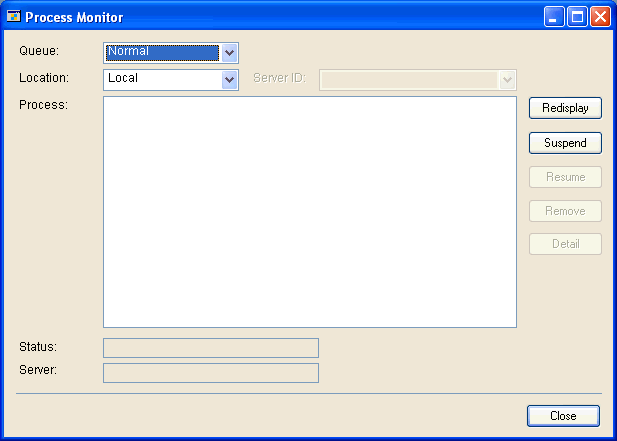
P A R T [3](#Part_3__Distributed_Process_Serv) [D I S T R I B U T E D P R O C E S S S E R V E R](#Part_3__Distributed_Process_Serv)

To monitor background processes:

1. Within Process Server, open the Process Monitor window.

(Microsoft Dynamics GP menu >> Process Monitor or drag the Dynamics.set

file onto the Dps.exe file on the client.)



The name of the processes will be displayed in the Process list. The currently

active process will appear at the top of the list. The number of steps in each

process in the list is displayed in parentheses next to the process name.

2. Select whether to view Timed or Normal processes. Timed processes are those

scheduled to be performed on a particular date and time, or to recur at a

predefined interval.

3. Select a location you want to view processes for. You can select local, remote, or

process server.

Local Allows you to view a list of processes initiated from the current

workstation that are being performed locally, at the workstation.

Remote Allows you to view a list of processes initiated from the current

workstation that are being performed by any of the process servers accessed by

the current workstation.

Process Server Allows you to view a list of all processes currently being

performed by a specific process server, regardless of which client sent the

process to that process server. If you select Process Server as the location, you

will not be able to view process details in the Process Detail window.

4. If you’ve selected Process Server as the Location, specify the server for which

you want to display processes. If you’re using the Process Monitor window on

the process server computer, you can view only the processes performed on that

server—Local.

5. To view information about any process in the list, highlight the process; the

status will be displayed below the list. The name of the server also will be

displayed.

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C H A P T E R 1 0 P R O C E S S I N G A N D M O N I T O R I N G R E M O T E P R O C E S S E S

The following are possible statuses:

Status Description Active The process is currently processing. Ready The process is queued and awaiting activation. Error An error has occurred and the process has been canceled.

6. To pause all processes being performed locally in the background, choose

Suspend. To restart all background processes, choose Resume.

You can suspend only the processes being performed locally in the background;

not any processes on process servers. If you are using the Process Monitor

window on the process server, you can suspend the processes on that server.

7. To remove processes, highlight the process and choose Remove. You can

remove reports from the queue as long as they aren’t currently active.

Processes that can be removed are indicated with a “>” sign:

> General Ledger: Trial Balance Report(2)

8. To view detailed information about a process, choose the Detail button The

Process Detail window will appear, displaying detailed information about the

selected process. For more information, s[ee Viewing process detail on page 63.](#C_H_A_P_T_E_R___1_0______P_R_O_C)

9. To update the process list, choose Redisplay.

Viewing process detail

Each process can involve several steps. For example, the check link process involves checking links, checking the error log, and printing an error report. The number of steps in each process in the list will be displayed in parentheses next to the process name in the Process Monitor window.

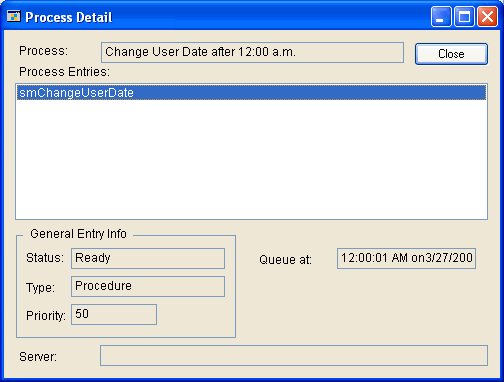
If you select Process Server as the location in the Process Monitor window, you will not be able to view process details in the Process Detail window.

To view process detail:

1. To view detailed information about a process, select the process in the Process

Monitor window and choose Detail. The Process Detail window will appear,

displaying detailed information about the selected process.



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If the process is a procedure, only the name of the procedure will appear in the

window. A procedure is a script that can be called from other scripts to perform

a common function. If the process is a group of steps, each step in the process

group will appear.

2. To view information about any step in the list, highlight the step; the status of

the step and its type (report or procedure) will be displayed below the list.

Timed Entry Info fields only appear if the currently highlighted process entry is a

recurring or scheduled process.

Viewing process information

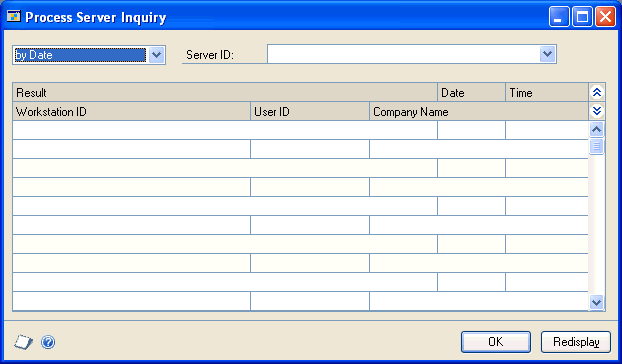
The Process Server Inquiry window shows information about the outcome of processes that have been sent to process servers. Processes that weren’t completed because an error occurred will be displayed. For example, as a process is performed by a process server, any alert messages generated by the process are recorded in the Process Server Activity Table.

Processes that are waiting to be performed by process servers will not be displayed; to view these processes, use the Process Monitor window.

To view process information:

1. Open the Process Server Inquiry window.

(Inquiry >> System >> Process Server)



2. Select a sorting option. You can view information about the processes sent to

this server by date or by user ID.

3. Select the ID of the server.

4. Choose the Redisplay button to update the list. The start and end times of

remote activities will be displayed if you marked the Track Start and End Times

option in the DPS Setup window.

You can use the Remove Process Server Detail window to remove or print the

information displayed in this window. Only the information that’s been written

to the Process Server Activity Table since the last time you removed data from

the table will be displayed. [See Removing and printing remote process information](#C_H_A_P_T_E_R___1_0______P_R_O_C_1)

[on page 65.](#C_H_A_P_T_E_R___1_0______P_R_O_C_1)

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C H A P T E R 1 0 P R O C E S S I N G A N D M O N I T O R I N G R E M O T E P R O C E S S E S

Removing and printing remote process information

Use the Remove Process Server Detail window to remove records from the Process Server Activity Table, print a report detailing the information in the table, or both.

When a process is performed by a process server on your network, information about the outcome of that process is recorded in the Process Server Activity Table. This information includes any alert messages that occurred while the task was processed. The table size can increase very quickly if many activities are performed by process servers, especially if you have the Track Start and End Times option marked in the DPS Setup window, so you may need to remove data from the table periodically.

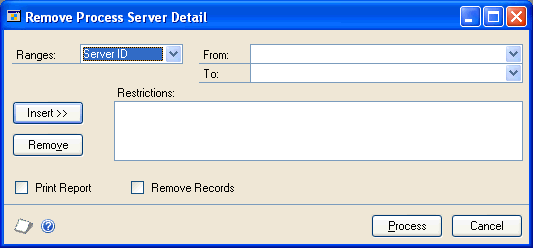
Before removing process server detail, back up your company’s data.

To remove and print remote process information:

1. Open the Remove Process Server Detail window.

(Microsoft Dynamics GP menu >> Tools >> Utilities >> System >> Process

Server)



2. Enter server and date restrictions by selecting Server ID or Date from the

Ranges listing and enter a range in the From and To fields. Choose Insert and

the range will appear in the Restrictions box.

If you don’t specify any server or date restrictions, all records will be included. You can

enter only one range of dates and one range of server IDs.

3. Select whether to remove records, print a report, or both. You can print the

Process Server Log Report without removing records by selecting only the Print

Report option.

4. Choose Process to print the report and remove records.

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PART 4: TECHNICAL REFERENCE

Part 4: Technical reference

This part of the documentation contains technical information on how Microsoft Dynamics GP runs. In it, you’ll find detailed information about integrating products, launch files, and defaults files.

The following topics are discussed:

• [Chapter 11, “Integrating products,”](#Chapter_11__Integrating_products_1) provides an overview of the

multidictionary environment.

• [Chapter 12, “Launch files,”](#Chapter_12__Launch_files_1) provides information about how to use, create, and

edit launch files.

• [Chapter 13, “Defaults files,”](#Chapter_13__Defaults_files_1) describes how to use and edit the Dex.ini file,

which contains setup and operating information about Microsoft Dynamics GP.

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# Chapter 11: Integrating products

Microsoft Dynamics GP can be used with other programs, called integrating products, that work simultaneously with Microsoft Dynamics GP. Integrating products provide an additional application dictionary that works with the Microsoft Dynamics GP engine and other files to present a functioning integrating application. Since two or more application dictionaries can be used, this system is called a multidictionary environment.

The integrating products information is divided into the following sections:

• [Types of dictionaries](#Chapter_11__Integrating_products_1)

• [Multidictionary environment example](#P_A_R_T___4____T_E_C_H_N_I_C_A_L)

• [Modifying reports for an integrating product](#P_A_R_T___4____T_E_C_H_N_I_C_A_L)

• [Modifying windows for an integrating product](#P_A_R_T___4____T_E_C_H_N_I_C_A_L)

Types of dictionaries

An application dictionary contains all the resources that make a product unique, including its windows, reports, and how it works. In the multidictionary environment of Microsoft Dynamics GP, you’ll use two types of application dictionaries:

• A main dictionary is used to access resources in integrating dictionaries. The

Microsoft Dynamics GP application dictionary (Dynamics.dic) is always

considered the main dictionary in a multidictionary environment.

• An integrating dictionary contains information about an integrating product

and runs simultaneously with the main dictionary. Integrating dictionaries may

access Microsoft Dynamics GP resources, such as fields or reports, as well as

their own resources. All application dictionaries that operate with Microsoft

Dynamics GP in a multidictionary environment are considered integrating

dictionaries.

When you install each integrating product, information about it is added to the launch file (typically Dynamics.set) so that the product will be started with

Microsoft Dynamics GP. For more information about launch files, see [Chapter 12,](#Chapter_12__Launch_files_1)

[“Launch files.”](#Chapter_12__Launch_files_1)

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Multidictionary environment example

In this example, the application dictionary for Microsoft Dynamics GP is the main dictionary in a multidictionary environment with two integrating dictionaries.

The runtime engine is used

to interpret each dictionary.

Dynamics.exe

The main dictionary in a

multidictionary environment.

Dynamics.dic

Integrating dictionaries contain

separate resources and also

can access resources in the

main dictionary.

Leads.dic TimeBill.dic

index-76_1.png

A launch file lists the

index-76_2.png

application dictionaries.

index-76_3.png

Dynamics.set

index-76_4.png

Modifying reports for an integrating product

index-76_5.png

Each application dictionary has its own reports dictionary, where reports modified and created using Report Writer are stored. The reports dictionary for Microsoft Dynamics GP is called Reports.dic. Dictionaries for other products can have other names, but must use the extension .DIC. The locations of the reports dictionaries for other products are stored in the launch file, as well.

When you’ve installed integrating products, you must select which products’ reports you want to modify when you use Report Writer. For more information, refer to your Report Writer documentation.

Modifying windows for an integrating product

Each application dictionary has its own forms dictionary, where modified windows are stored. The forms dictionary for Microsoft Dynamics GP is called Forms.dic; dictionaries for other products can have other names, but must use the extension .DIC. The locations of the forms dictionaries for other products are stored in the launch file, as well.

When you’ve installed integrating products, you must select which products’ windows you want to modify when you use the Modifier. For more information about the Modifier and the forms dictionaries, refer to your Modifier User’s Guide documentation. For more information about setting access to modified windows and reports, refer to your System Setup Guide (Help >> Contents >> Select Setting up the System).

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# Chapter 12: Launch files

A launch file is used to list each product and the locations of its application dictionary, forms dictionary, and reports dictionary. The launch file indicates which dictionaries and products should be started when you start Microsoft Dynamics GP.

Launch files are located only on client computers, or data servers that also can be used as clients, because dictionaries are installed only on clients.

The launch files information contains the following sections:

• [Launch files overview](#Chapter_12__Launch_files_1)

• [Where to store dictionaries](#P_A_R_T___4____T_E_C_H_N_I_C_A_L_1)

• [Lines in a launch file](#P_A_R_T___4____T_E_C_H_N_I_C_A_L_1)

• [Example launch file using integrating products](#P_A_R_T___4____T_E_C_H_N_I_C_A_L_2)

• [Example launch file using multiple location IDs](#P_A_R_T___4____T_E_C_H_N_I_C_A_L_2)

• [Example launch file using central dictionaries](#C_H_A_P_T_E_R___1_2______L_A_U_N_1)

• [Creating a launch file](#P_A_R_T___4____T_E_C_H_N_I_C_A_L_3)

• [Editing a launch file using the Edit Launch File window](#P_A_R_T___4____T_E_C_H_N_I_C_A_L_3)

• [Editing a launch file using a text editor](#P_A_R_T___4____T_E_C_H_N_I_C_A_L_4)

• [Troubleshooting launch files](#C_H_A_P_T_E_R___1_2______L_A_U_N_3)

Launch files overview

Launch files are located only on client computers, or data servers that also can be used as clients, because dictionaries are installed only on clients. Each client has a separate launch file for each product you install. This allows each computer to have different instructions for starting Microsoft Dynamics GP, if necessary. You can create additional launch files or modify an existing file.

A launch file for Microsoft Dynamics GP with local dictionary locations is created each time you install Microsoft Dynamics GP or its engine. A launch file for Microsoft Dynamics GP Utilities with local dictionary locations is created each time you install either application.

When you start Microsoft Dynamics GP, you indicate the launch file you’re using by double-clicking a program item that lists the Microsoft Dynamics GP engine and the corresponding launch file in its properties. You also can start Microsoft Dynamics GP by dragging the launch file, typically Dynamics.set, over the Microsoft Dynamics GP engine file, Dynamics.exe. The engine reads the launch file to determine which dictionaries will be used, then opens those dictionaries to present the functioning application.

A separate launch file is also created for Microsoft Dynamics GP Utilities and functions the same way, except that integrating products can’t be used. When you drag the Dynutils.set file (the launch file for Microsoft Dynamics GP Utilities) over the engine, the resources in the Microsoft Dynamics GP Utilities application dictionary (Dynutils.set) will be used.

If you’re using two or more launch files to use Microsoft Dynamics GP in different configurations, you can modify the existing Microsoft Dynamics GP item’s or shortcut’s properties, create additional items or shortcuts that will access other launch files, and modify the Microsoft Dynamics GP item or shortcut so that you can select the launch file you want to use each time you start Microsoft Dynamics GP.

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You can view the contents of any launch file (any file with a .SET extension) using a text editor such as Notepad; make changes, if necessary, then close. Be sure to start Notepad and then open the file, rather than double-clicking the file; double-clicking the launch file will start the corresponding application.

We do not recommend using Write for Windows to open a launch file.

Where to store dictionaries

Depending on the server you are using and how your network is set up, you can store forms and reports dictionaries locally on each client, on the server, or on a network volume. To store dictionaries on a network volume, the necessary volumes must be set up correctly and using the appropriate network software in order to allow the Microsoft Dynamics GP engine on each client to locate forms and reports dictionaries on the network. The Dynamics.dic and the Microsoft Dynamics GP engine must be on the client. Refer to your operating system documentation for information about connecting volumes in a network. If your system hasn’t been set up to allow client computers to access files other than Microsoft Dynamics GP tables on the server or network volumes, you must store dictionaries locally on all clients.

We recommend that you always store application dictionaries locally for best performance; storing forms and reports dictionaries locally improves performance, as well. For more information, see your Report Writer documentation and the Modifier documentation.

Lines in a launch file

A launch file is composed of a number of lines, depending on whether you’re using only Microsoft Dynamics GP, or integrating products, as well. In the launch files for Microsoft Dynamics GP and Microsoft Dynamics GP Utilities, the forms and reports dictionary lines must be included, but don’t affect how either application works. Some lines in the Microsoft Dynamics GP Utilities launch file may not contain dictionary locations until after you start each application for the first time.

The following information shows all the line information that could appear in the Dynamics.set file.

Line Description When to use Example Number of products in the The number of products listed in This line will always appear. 1 (if only Microsoft Dynamics GP launch file the launch file. If you’ve installed is used)

Microsoft Dynamics GP and 3 (if Microsoft Dynamics GP and

three integrating products, but two integrating products are

want to start only two of them used) with a particular launch file, list

only those products in the

launch file.

Product ID for Microsoft This line is always 0 (zero). This line will always appear. 0 Dynamics GP

Product name for Microsoft This line is always Microsoft This line will always appear. Microsoft Dynamics GP Dynamics GP Dynamics GP.

Integrating products’ product IDs If you’ve installed an integrating This line will appear only if Lead Tracking

product, its product name will be you’re using integrating added to the launch file. products.

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C H A P T E R 1 2 L A U N C H F I L E S

Line Description When to use Example Dictionary location ID This line identifies the group of This line will always appear. Windows (this is the default)

dictionary locations that follows

it, and is stored in the

Workstation2 setting in the

Microsoft Dynamics GP defaults

file. Typically, the dictionary

location ID will be stored in the

defaults file. However, if this line

is deleted, users will be

prompted to select a dictionary

location ID from those listed in

the launch file used to start that

session of Microsoft Dynamics

GP. This line is case-sensitive.

Location of Forms.dic This line specifies the location of This line will always appear. :J:Program Files/Microsoft

the Microsoft Dynamics GP Dynamics GP/Forms.dic forms dictionary, and must be

written in generic format.

Location of Reports.dic This line specifies the location of This line will always appear. :V:Program Files/Microsoft

the Microsoft Dynamics GP Dynamics GP/Data/Reports.dic

reports dictionary, and must be

written in generic format.

Location of application If you’re using integrating This line will appear only if :C:Program Files/Microsoft dictionary for integrating products, this line specifies the you’re using integrating Dynamics GP/Leads.dic products location of the product’s products.

application dictionary.

Location of forms dictionary for If you’re using integrating This line will appear only if :J:Program Files/Microsoft integrating products products, this line specifies the you’re using integrating Dynamics/GP/Data/4549F.dic

location of the product’s forms products. dictionary.

Location of reports dictionary for If you’re using integrating This line will appear only if :VOL1:Program Files/Microsoft integrating products products, this line specifies the you’re using integrating Dynamics/GP/Data/4549R.dic

location of the product’s reports products. dictionary.

Additional dictionary location This line identifies the group of This line is optional. Windows Users IDs dictionary locations that follows

it. Only one dictionary location

ID, typically “Windows,” is

provided with Microsoft

Dynamics GP. The ID that’s used

depends on the ID stored in the

Workstation2 setting of the

computer’s defaults file.

Dictionary locations for If you’re using an additional This line is optional. :C:Program Files/Microsoft Microsoft Dynamics GP dictionary location ID, list Dynamics/GP/Dynamics.dic

another set of locations for the :J:Program Files/Microsoft

Microsoft Dynamics GP Dynamics/GP/Data/Forms.dic

application, forms and reports :J:Program Files/Microsoft

dictionaries. Dynamics GP/Reports.dic

Dictionary locations for If you’re using an additional This line is optional. :C:Program Files/Microsoft integrating products dictionary location ID, list Dynamics/GP/LEADS.dic

another set of locations for :J:Program Files/Microsoft

integrating products. You must Dynamics/GP/4549F.dic list the same dictionaries for :J:Program Files/Microsoft

each dictionary location ID; for Dynamics/GP/4549R.dic instance, don’t list the

dictionaries for three products

under one dictionary location ID,

and the dictionaries for only two

under another.

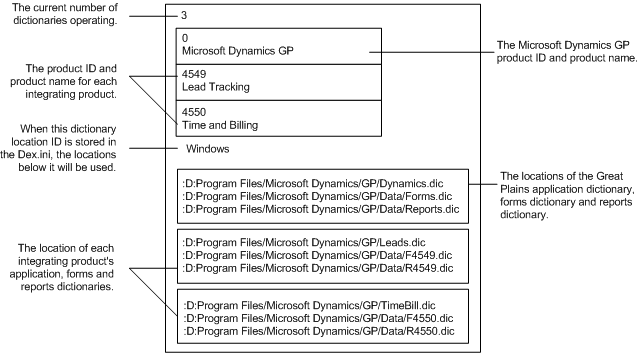
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Example launch file using integrating products

If you’ve installed integrating products, dictionary location information will be listed for those products. Each product has a separate application dictionary, forms dictionary, and reports dictionary, and the location for each must be listed in the launch file for each user to access that product.

The following example shows the information in the Dynamics.set file on a Windows client after product information has been added for two integrating products, Lead Tracking and Time and Billing.



On client computers where the defaults file Workstation2 setting is Windows, all three sets of dictionary locations will be used, so that the Lead Tracking and Time and Billing products can be opened. Since Microsoft Dynamics GP is the main product (indicated by its product ID of 0), it will be opened first. For more

information on defaults fi[les, see Chapter 13, “Defaults files.”](#Chapter_13__Defaults_files_1)

Example launch file using multiple location IDs

To use more than one forms or reports dictionary for a product, you can add dictionary location IDs and corresponding dictionary locations to a launch file and distribute the launch file to the affected users. In addition, you can control which integrating products users access. For example, you can create a launch file for one group of users listing only Microsoft Dynamics GP, and a launch file for another group of users listing Microsoft Dynamics GP and the integrating products you’ve installed.

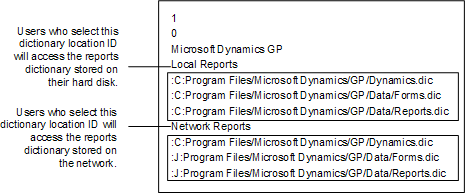
If you add dictionary location IDs to a launch file or change an existing dictionary location ID, you must make the same change in the defaults file where it’s stored.

For more information, see [How launch files and defaults files work together on page 81.](#Chapter_13__Defaults_files_1)

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C H A P T E R 1 2 L A U N C H F I L E S

In the following example, the user will be asked to select a dictionary location ID the first time he or she logs in to Microsoft Dynamics GP. Users who select the Local Reports dictionary location ID will use a reports dictionary stored on their hard disk and create a separate set of reports. Users who select the Network Reports dictionary location ID will access a common reports dictionary on a network volume. You may want to set up launch files in this way if certain users need specialized reports while others use a common set.



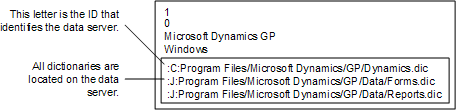
Example launch file using central dictionaries

You can store your Microsoft Dynamics GP, forms, and reports dictionaries in a central location and modify the launch files to reflect that.

Use the appropriate operating system tools to be sure the data server or process server is connected correctly, so that each client can access the location where the dictionaries are located. Use the volume ID used when you set up these connections as the volume ID in the dictionary location.

If you store dictionaries on a process server or data server, and the process server or data server and the client use different platforms, you may not be able to access those dictionaries by entering the volume letter of the process server. In this case, place the dictionary on a network volume that the process server and all clients can access. Edit the launch file of the process server so that the location on the network volume is indicated.

The following example shows the launch files for Windows clients accessing dictionaries stored on a data server.



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P A R T [4](#Part_4__Technical_reference) [T E C H N I C A L R E F E R E N C E](#Part_4__Technical_reference)

Creating a launch file

Use this checklist to create a launch file. See [Editing a launch file using the Edit Launch](#P_A_R_T___4____T_E_C_H_N_I_C_A_L_3)

[File window on page 76](#P_A_R_T___4____T_E_C_H_N_I_C_A_L_3) and [Editing a launch file using a text editor on page 78 for](#P_A_R_T___4____T_E_C_H_N_I_C_A_L_4) descriptions of how to change the information in a launch file.

To create a launch file:

1. Be sure the Microsoft Dynamics GP engine is in the same folder with all

application dictionaries.

2. Double-click the Dynamics.exe file. Microsoft Dynamics GP will be started in

minimized form; maximize it to display the File menu.

3. Choose File >> Create Launch File; a dialog box will appear. Dynamics.set will

be displayed as the default name for the new launch file.

4. Accept the name or enter a new one, then choose OK or Save.

If you don't accept the default name, be sure to modify the properties of the Microsoft

Dynamics GP program item so that the correct launch file will be used when you start

Microsoft Dynamics GP.

To start Microsoft Dynamics GP using the launch file you just created, choose

File >> Open Launch File; a dialog box will appear. Select the launch file and

choose OK; the Login window will be displayed.

5. Close Microsoft Dynamics GP. The new launch file will contain the following

information:

• The number of application dictionaries on your hard disk, the product ID,

and the product name corresponding to each application dictionary.

• A dictionary location ID, typically “Windows.”

• The location of the main product’s application dictionary, forms dictionary,

and reports dictionary (the folder where the Microsoft Dynamics GP engine is located).

• If integrating products were installed, their application dictionary, forms

dictionary and reports dictionary locations will be listed, as well.

Editing a launch file using the Edit Launch File window

Typically, it’s not necessary to edit launch files unless one is damaged or deleted, or if you change the location of your forms or reports dictionaries. If you move dictionaries or create additional launch files, you’ll need to enter current information about where your dictionaries are located, or modify the launch file to start only certain products. A launch file is any file with a .SET extension that was installed with Microsoft Dynamics GP or that you've created using the instructions in this section.

Use the following checklist to change dictionary locations in Microsoft Dynamics GP using the Edit Launch File window. You can also edit launch files using a text

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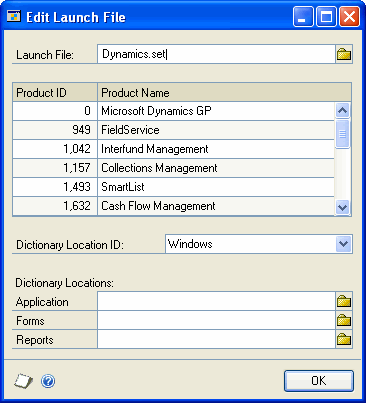
editor, such as Notepad. See [Editing a launch file using a text editor on page 78 for](#P_A_R_T___4____T_E_C_H_N_I_C_A_L_4) more information.

To edit a launch file using the Edit Launch File window:

1. Open the Edit Launch File window.

(Microsoft Dynamics GP menu >> Tools >> Setup >> System >> Edit Launch

File)



2. Select a launch file. The launch file used to start the current session of Microsoft

Dynamics GP will be displayed in the Launch File field. To select a different

launch file to edit, choose the file button to display a dialog box where you can

select a launch file. Choose OK.

3. Select a product. The scrolling window displays the products, including

Microsoft Dynamics GP and any integrating products you’re using with

Microsoft Dynamics GP, that are opened using the launch file displayed in the

Launch File field. Select the product you want to edit dictionary location

information for.

To remove a product from the launch file, or to restore a product ID and name of an

integrating product you deleted from the launch file you're editing, you must use a text

editor.

4. Select your dictionary location ID. The name displayed corresponds to a set of

locations for the selected product’s application dictionary, forms dictionary, and

reports dictionary. If you’re not sure of your dictionary location ID, you can

check it by viewing the Workstation2 setting in your Dex.ini file.

The changes you make to the dictionary location ID will affect only the dictionaries

opened on your computer.

5. Enter dictionary locations. The current location of the application dictionary,

forms dictionary, and reports dictionary for the launch file and product you

selected are displayed in the Dictionary Locations fields.

To specify a different location for a dictionary, choose the corresponding file button. A

dialog box will be displayed; specify the new location and choose OK.

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If you want to be able to access windows or reports you’ve already created,

move the dictionary containing them to the new location. If you enter a location

for the forms and reports dictionaries where a forms or reports dictionary

doesn’t exist, a new, empty dictionary will be created there the next time you

access Modifier or Report Writer.

6. If you’re editing the launch file you used to start the current session of Microsoft

Dynamics GP, restart Microsoft Dynamics GP to allow the changes to take

effect.

Editing a launch file using a text editor

Use the following information to make extensive changes to a launch file using a text editor.

Typically, it’s not necessary to edit launch files unless one is damaged or deleted, or if you change the location of your forms or reports dictionaries. If you move dictionaries or create additional launch files, you’ll need to edit the launch files to enter current information about where your dictionaries are located, or modify the launch file to start only certain products.

You can add dictionary location IDs so that different locations will be used for a product’s dictionaries, depending on which dictionary location ID is selected by the user and stored in the computer’s Dex.ini file. If you add dictionary location IDs to a launch file or change an existing dictionary location ID, you must make the same

change in the defaults files where it’s stored. For more information, see [How launch](#Chapter_13__Defaults_files_1)

[files and defaults files work together on page 81.](#Chapter_13__Defaults_files_1)

If you use more than one dictionary location ID, you must list the dictionaries for every product you're using for each dictionary location ID. If every product isn't listed, Microsoft Dynamics GP won't be opened correctly. If you want two users to access a different number of products, you must create a launch file for each.

To edit a launch file using a text editor:

1. Make a backup of the launch file or print it before you edit it.

2. Open the launch file by choosing File >> Open in Notepad or another text

editor.

We recommend that you do not edit a launch file using Write for Windows.

3. Remove integrating products. If you don’t want an integrating product to be

available to certain users, create a launch file for them without the product’s ID,

name, dictionary location ID, or dictionary locations. Be sure to modify the

number at the beginning of the launch file, which indicates the total number of

application dictionaries in the launch file.

4. [Review Lines in a launch file on page 72;](#P_A_R_T___4____T_E_C_H_N_I_C_A_L_1) be sure to make any additional entries in

the correct position in the launch file.

5. Be sure there are no blank lines in the launch file, then save changes and close it.

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6. If you want to be able to access windows or reports you’ve already created,

move the dictionary containing them to the new location.

If you entered a location for the forms and reports dictionaries where a forms or

reports dictionary doesn’t exist, a new, empty dictionary will be created there

the next time you access Modifier or Report Writer.

7. Start Microsoft Dynamics GP using the new launch file. If you removed the

dictionary location ID from the Workstation2 setting, you’ll be prompted to

select a dictionary location ID from the IDs currently in the launch file.

Troubleshooting launch files

If you made changes to a launch file, use these instructions to be sure Microsoft Dynamics GP is working properly.

Product listed in the launch file isn’t installed

If a product listed in the launch file isn’t installed in the specified location, a dialog box will appear when you start Microsoft Dynamics GP. Choose OK; you’ll be able start Microsoft Dynamics GP without installing the product or removing it from the launch file.

Existing dictionary location IDs are modified

If you’ve modified existing dictionary location IDs, edit the Workstation2 setting of the Dex.ini file for each user’s computer. Dictionary location IDs are case-sensitive; if “Windows” appears in your Dex.ini file, for instance, and “windows” appears in your launch file, the dictionary locations for the Windows dictionary location ID won’t be used.

If the defaults file Workstation2 setting contains a dictionary location ID that’s no longer in the launch file, when you start Microsoft Dynamics GP a message will prompt you to add it to the launch file. If this occurs, don’t add the ID; choose No and verify the Workstation2 setting and the dictionary location IDs in the launch file to be sure you edited each correctly. (If you add the ID, that dictionary location ID will be added for all products in the launch file.) Then restart Microsoft Dynamics GP and, if you wish, add the dictionary location ID to the launch file.

If you add dictionary location IDs, change each user’s Workstation2 setting in the defaults file to the correct ID, or remove the ID so that each user will be prompted to

select from the IDs in the launch file. For more information, see [How launch files and](#Chapter_13__Defaults_files_1)

[defaults files work together on page 81.](#Chapter_13__Defaults_files_1)

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# Chapter 13: Defaults files

The Microsoft Dynamics GP defaults file contains setup and operating information about Microsoft Dynamics GP. Each line of information, or setting, in the file contains information such as where your files are located, and whether certain functions, such as displaying print dialog boxes, should be performed. The defaults file is named Dex.ini. This type of file is sometimes referred to as an initialization file.

The Dex.ini file is installed in the Microsoft Dynamics GP folder (the folder where the Microsoft Dynamics GP engine is stored.) If you delete or rename Dex.ini and restart Microsoft Dynamics GP, the file will be re-created in the Windows folder.

The defaults files information is divided into the following sections:

• [How launch files and defaults files work together](#Chapter_13__Defaults_files_1)

• [Editing defaults files](#Chapter_13__Defaults_files_1)

• [Using multiple defaults files](#P_A_R_T___4____T_E_C_H_N_I_C_A_L_5)

• [Damaged defaults files](#P_A_R_T___4____T_E_C_H_N_I_C_A_L_5)

How launch files and defaults files work together

A launch file (Dynamics.set) works in conjunction with the Workstation2 line in the defaults file (Dex.ini) on each client computer. If you add dictionary location IDs to a launch file or change an existing dictionary location ID, you must make the same change in the defaults file where it’s stored.

For example, if you modify the dictionary location ID “Windows” in the launch file and change it to “Windows Users,” the “Windows” ID is still stored in the Workstation2 setting in the defaults file of all Windows computers. In this situation, you would change the Workstation2 setting on each Windows computer from “Windows” to “Windows Users,” so that the dictionary locations for the “Windows” dictionary location ID are used.

If you add another dictionary ID to the launch file, you must change the Workstation2 setting in the intended users’ defaults files to reflect the dictionary ID they should use. Alternately, you can delete the Workstation2 setting. Users with no Workstation2 line and launch files with multiple dictionary location IDs must select a dictionary location ID when they start Microsoft Dynamics GP for the first time. A new Workstation2 line is added to the Dex.ini, with the dictionary location ID they selected.

Editing defaults files

To edit the Dex.ini file, use Windows Notepad to open the file, then edit existing parameters or add settings and parameters. Be sure to include an equal sign for each setting, before the parameter.

We recommend that you do not edit the Dex.ini file using Windows Write. The defaults file is essential for Microsoft Dynamics GP to run correctly; always make a backup before you edit it, and don’t edit any setting unless you're instructed to do so by your reseller, or by Microsoft Dynamics GP Technical Support.

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Using multiple defaults files

To start Microsoft Dynamics GP using two or more groups of defaults file settings— for instance, to use a different printer offset or a different dictionary location ID—

use the steps in the following checklists. For more information, see [Chapter 12,](#Chapter_12__Launch_files_1)

[“Launch files.”](#Chapter_12__Launch_files_1)

To use multiple defaults files:

1. Duplicate and edit the Dex.ini file.

2. Duplicate the following files by using the Copy command to re-create them in a

different location: Dynamics.exe, Dex.dic, and all DLL files. You may want to

duplicate the Dynamics.set file as well; however, it isn’t required.

3. Move one of the Dex.ini files you created and edited to the same location.

4. Start Microsoft Dynamics GP using one of the following methods:

• Drag the appropriate launch file onto the new Dynamics.exe file to start

Microsoft Dynamics GP with the settings in the new Dex.ini file.

• Create a program item and specify the Microsoft Dynamics GP engine and

launch file in the new location. (To do this, you must have copied a launch file to the new location.) Enter the location of Dynamics.dic as the working directory.

If the message “Unable to open dictionary [location of dictionary]” appears, open the

launch file and verify that the launch file you're using specifies the correct dictionary

locations for the dictionary location ID in the Dex.ini file.

Damaged defaults files

If your defaults file is damaged or deleted, you can restore a backup, copy a defaults file from another client computer that’s set up the same way (if you need to replace the defaults file on a client computer), or re-create the file.

We recommend that you do not delete the defaults file if you want to re-create it. The defaults file is essential for Microsoft Dynamics GP to run correctly; always make a backup before you edit it, and don’t edit any setting unless you're instructed to do so by your reseller, or by Microsoft Dynamics GP Technical Support.

If no file named Dex.ini is stored in the main Microsoft Dynamics GP folder or the Windows subdirectory, the file will be re-created when you start Microsoft Dynamics GP again, in the Windows subdirectory.

We recommend that you restore a backup or copy a file from a computer with identical settings; if you re-create the file, you must reenter several of the settings. Other settings that must be reentered vary, depending on your configuration.

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PART 5: TROUBLESHOOTING

Part 5: Troubleshooting

This part of the documentation contains the following information:

• [Chapter 14, “General troubleshooting,”](#Chapter_14__General_troubleshoot_1) helps you identify common problems

and includes a reference to resources where you can get more information.

• [Chapter 15, “Data recovery,”](#Chapter_15__Data_recovery_1) provides information about how to repair data

damage.

• [Chapter 16, “Process server troubleshooting,” pr](#Chapter_16__Process_server_troub_1)ovides information to help

solve problems that may occur when installing, setting up, or using Distributed

Process Server.

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# Chapter 14: General troubleshooting

This information explains how to troubleshoot problems on your own, where to look for more information, and what information you should gather before calling Microsoft Dynamics GP Technical Support.

You also can visit the CustomerSource Web site and search the Knowledge Base for answers to your most common technical questions including troubleshooting steps, solutions to common issues, and how-to articles.

When you install or use Microsoft Dynamics GP, alert messages may appear that are caused by errors in other applications, such as the file handler or operating system. To deal with errors not caused by Microsoft Dynamics GP, refer to the documentation for the application causing the error.

The troubleshooting information is divided into the following sections:

• [Troubleshooting resources](#Chapter_14__General_troubleshoot_1)

• [Signs that data is damaged](#C_H_A_P_T_E_R___1_4______G_E_N_E)

• [Finding which tables contain damaged data](#P_A_R_T___5____T_R_O_U_B_L_E_S_H_1)

• [Alert message troubleshooting](#C_H_A_P_T_E_R___1_4______G_E_N_E_1)

• [Before you call support](#P_A_R_T___5____T_R_O_U_B_L_E_S_H_2)

Troubleshooting resources

To get more information, you can use the following troubleshooting resources.

Microsoft Dynamics GP documentation

If you’ve installed Microsoft Dynamics GP, you can use the help to access context-sensitive assistance about windows. You can choose Help >> About This Window or press F1 to access help for the window you’re currently viewing. Use the Search tab to find more information on alert messages and procedures.

You can use the manuals (Help >> Printable Manuals) to find a printable version of procedural or overview information for a specific module.

Resource descriptions

Resource descriptions provide detailed technical information about Microsoft Dynamics GP fields, tables, and windows. This utility allows you to learn more about how data is stored in Microsoft Dynamics GP, including the fields that are stored in each table, and the reports containing data from each table.

To open the Table Descriptions window, choose Microsoft Dynamics GP menu >> Tools >> Resource Descriptions >> Tables. Use the Table Descriptions window to find information about a table, such as its names, keys, key segments, and the fields it contains.

To open the Field Descriptions window, choose Microsoft Dynamics GP menu >> Tools >> Resource Descriptions >> Fields. Use the Field Descriptions window to find out which tables contain a particular field.

To open the Window Descriptions window, choose Microsoft Dynamics GP menu >> Tools >> Resource Descriptions >> Windows. Use the Window Descriptions window to find out which windows are contained in a specific product and series,

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the names assigned to each window, the fields each window contains, and the tables linked to each window.

CustomerSource

CustomerSource is a Web site for registered Microsoft Dynamics GP customers. CustomerSource is available 24 hours a day. You must have a user name and

password to enter the site. You can access CustomerSource by navi[gating to https:/](https://mbs.microsoft.com/customersource)

[/mbs.microsoft.com/customersource](https://mbs.microsoft.com/customersource) with your Internet browser.

From the CustomerSource start page, select the Support option. From the Support page, you can look for information on your own or you can use e-mail to send a question to the Microsoft Dynamics GP Technical Support team.

You’ll find links to Support Hot Topics and Knowledge Base—the best source of information for error messages, troubleshooting guides, work-arounds, and answers to common Report Writer questions. You’ll also find links for automated fixes, hardware compatibility, and downloads. Use the New Support Request link to contact Microsoft Dynamics GP Technical Support electronically. You also can view recent support requests for yourself and your company.

Microsoft SQL Server troubleshooting resources

SQL Server Books Online is a documentation resource installed with SQL Server. Use Books Online to troubleshoot SQL error messages and other issues related to

SQL Server. Microsoft’s web site, [www.microsoft.com](http://www.microsoft.com/), is also a good source of information for issues related to SQL Server or your operating system.

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Signs that data is damaged

The most common indicator of data damage is an alert message that indicates an error in a specific table. However, data damage may not always be this obvious and it may be more difficult to identify in which table or tables it has occurred. Other indicators of data damage include:

• Alert messages that you can’t explain • Inaccurate data in windows or on reports • Unusual characters in windows or on reports • Windows you’re unable to open

Once you’ve determined that a problem exists, you can use the following questions to direct your troubleshooting effort.

If you are unable to fix the problem yourself, see [Before you call support on page 90](#P_A_R_T___5____T_R_O_U_B_L_E_S_H_2) to gather information that will help your support technician solve the problem.

Does the error occur for a system administrator user?

If a system administrator user does not receive the same error as other users, a permission problem may exist.

A script called Grant.sql is included on the Microsoft Dynamics GP and is installed automatically during the Microsoft Dynamics GP client/server installation process. Run this script against the database that produces the error. For more information on running scripts, see the SQL Server documentation.

Does the error occur for all users?

If the error does not occur for all users, a security problem may exist. You should also check customizations, such as modified reports and forms.

Remember that you have security options within SQL Server and within Microsoft Dynamics GP.

Does the error occur in all companies?

If the error occurs in more than one company and is data-related, the problem is likely in the system database. The problem could also exist in one of your dictionaries, such as Dynamics.dic or Reports.dic. If an error occurs in only one company, the problem likely exists in the company database.

Does the error occur on all workstations?

To determine if a problem is data-related or dictionary-related, verify whether the error happens on all workstations. If all workstations produce the same error, the problem is likely on the server rather than on the individual client. The problem could be related to database tables or to shared files. To determine where damage

has occurred, see [Finding which tables contain damaged data on page 88](#P_A_R_T___5____T_R_O_U_B_L_E_S_H_1).

Does the error happen consistently?

If an error occurs consistently, you probably have damaged data. To determine if a table is corrupt, try isolating records within the tables you’re working with. For

more information on determining where damage has occurred[, see Finding which](#P_A_R_T___5____T_R_O_U_B_L_E_S_H_1)

[tables contain damaged data on page 88.](#P_A_R_T___5____T_R_O_U_B_L_E_S_H_1)

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Is the window or report modified?

If the non-modified version of a window or report does not receive the error, the problem is related to the modifications to the dictionary. If recent modifications have been done, check the modifications for errors. If the modifications have worked in the past, rename the dictionary and restore it from a backup.

Do not delete dictionaries. Renaming files allows you to restore these files later, if necessary.

Are there integrating products or customizations?

If there are customizations or integrating applications, try removing them to see if errors still occur. If integrating applications are present, remove the dictionaries from the Dynamics.set file and rename the associated file extensions in Windows Explorer.

Do not delete these files. Renaming file extensions allows you to restore these files later, if necessary.

If customizations exist on your system, contact the person who made the customizations for troubleshooting assistance.

If you’re having printing problems, are you able to print to

the screen, a file, or another printer?

When you notice a problem on a report or inquiry window, verify whether the error occurs when you view the information using a different medium, such as printed to the screen or to a different printer. If a report and its associated inquiry window produce the same results, the problem is likely damaged data. If only the report is incorrect, the problem could be related to a modified report.

Were the transactions imported or keyed?

If imported transactions produce errors, verify whether manually keyed transactions produce the same results. Because some methods of importing data do not require the data to be verified for accuracy, imported data may be corrupt or

incomplete. To determine where damage has occurred, see [Finding which tables](#P_A_R_T___5____T_R_O_U_B_L_E_S_H_1)

[contain damaged data on page 88.](#P_A_R_T___5____T_R_O_U_B_L_E_S_H_1)

Does the problem exist if processing is done at the

database server?

If the problem does not exist when all processing is performed at the server, the problem may be related to your network, ODBC drivers, or ODBC data sources or a result of differing MDAC versions.

Finding which tables contain damaged data

Once you’ve established that table damage has occurred in Microsoft Dynamics GP, the next step is to find out which table or tables are affected. Once you’ve determined which tables need to be repaired, see the data recovery checklist in

[Recovering damaged data on page 91.](#Chapter_15__Data_recovery_1)

• If an alert message has appeared stating the name of the table, you can begin the

data recovery checklist immediately.

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• If unusual results on a report indicate a damaged table, refer to the sample

reports provided with the module to see which table groups’ data is printed in

that report.

• If you’re having trouble opening a window, use the Window Descriptions

window (Microsoft Dynamics GP menu >> Tools >> Resource Descriptions >>

Windows) to determine the physical and table groups accessed by a window.

• If you still can’t determine which table is causing the problem, try to isolate the

problem. For example, if you’re working in Sales Order Processing, try entering

different types of transactions with various items for various customers. If the

error occurs only for a specific customer record, you can conclude that the data

in the RM Customer MSTR table is corrupt.

Each Microsoft Dynamics GP table has three names: a display name, a technical name, and a physical name. Display names are displayed in the Check Links window and other windows. The table names that appear in alert messages are typically technical names, the names that the system uses to identify tables. For example, a message may state that an error occurred in the GL\_Account\_MSTR table, but the display name for that table is Account Master.

You may need to use the Table Descriptions window (Microsoft Dynamics GP menu >>Tools >> Resource Descriptions >> Tables) to determine the table group to which a table in an alert message belongs. Some data recovery procedures can be performed only on table groups, while others can be performed on table groups or tables.

Alert message troubleshooting

If you receive an error message that indicates a problem you can’t explain, use the following resources for more information. If you are unable to resolve the problem yourself, contact Microsoft Dynamics GP Technical Support for other options.

Microsoft Dynamics GP messages

The best source of information for troubleshooting Microsoft Dynamics GP alert messages is the Knowledge Base database on CustomerSource. Go to the Technical Q&A page, where you can type in the message number or message text to search for the alert message you’re receiving.

DBMS messages

Microsoft SQL-related error messages appear as DBMS errors in Microsoft Dynamics GP. Always use the SQL Server Books Online to troubleshoot DBMS errors (Start >> Programs >> Microsoft SQL Server >> Books Online). Select the Search tab and enter the error number, then choose List Topics. Either highlight and select Display or double-click an entry to open the topic. In the description column of the error message table, you’ll see more information about the error. You can also use the SQL Query Analyzer to find the same information.

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Before you call support

Have the answers ready to the following questions to help your support specialist quickly narrow down the source of the problem you’ve experiencing.

• What is the exact error message?

• When did the error first occur?

• What task were you attempting to perform at the time you received the error

message?

• Has the task been completed successfully in the past?

• What is the name of the window you are you working in?

• What have you done so far to attempt to fix the problem?

• Have you performed any of the table maintenance procedures such as check

links?

• If have performed table maintenance procedures and received error messages,

what kind of messages?

• Does the problem occur in another company?

• Does the problem occur on another workstation?

• Does the problem occur for more than one user?

• What versions of software are you using?

Verify the version numbers for Microsoft Dynamics GP, your database

software, and Windows. Also note service packs.

• Are you using an integrating product with Microsoft Dynamics GP?

• Have you imported any data?

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# Chapter 15: Data recovery

The Microsoft Dynamics GP system is designed to ensure maximum accuracy and integrity of your data. Occasionally, however, hardware failures, power surges, and other problems can damage or destroy your data. The following information will help you minimize damage to your data and to quickly recover from damage if it occurs.

To recover damaged data, you must first determine the table or tables where the damage occurred, then determine the appropriate procedures to complete. For more

information on determining the location of damage, see [Finding which tables contain](#P_A_R_T___5____T_R_O_U_B_L_E_S_H_1)

[damaged data on page 88.](#P_A_R_T___5____T_R_O_U_B_L_E_S_H_1)

It’s very important that the data recovery functions be performed carefully by an authorized user. Refer to your System Setup documentation (Help >> Contents >> select Setting Up the System) for information about setting up security to determine users with access to these functions.

The data recovery information contains the following sections:

• [Recovering damaged data](#Chapter_15__Data_recovery_1)

• [Checking links](#P_A_R_T___5____T_R_O_U_B_L_E_S_H_3)

• [Reconciling tables](#P_A_R_T___5____T_R_O_U_B_L_E_S_H_4)

• [Restoring backups](#C_H_A_P_T_E_R___1_5______D_A_T_A_1)

• [Restoring data](#P_A_R_T___5____T_R_O_U_B_L_E_S_H_5)

• [Clearing data](#C_H_A_P_T_E_R___1_5______D_A_T_A_2)

Recovering damaged data

When you’ve determined the table or tables that are causing the problem, follow the steps in this checklist. If it’s possible that one or more tables are damaged, but you can’t determine which, perform the data recovery procedures on all tables that may be affected.

If you have a current backup that you made before your table damage occurred, you could restore it instead of completing the procedures in the recovering damaged data checklist. The more recent your backup is, the fewer transactions you’ll need to reenter.

Clearing data is the last and most drastic step. You should clear data from your tables only if you’re unable to restore a backup, since you’ll have to reenter all information in the tables to restore them.

To recover damaged data:

1. Make a backup.

Always be sure you have a current backup of your company’s data before

performing any table maintenance or utility procedures. These procedures deal

directly with the data, and if there is an interruption during processing you will

need to restore the current backup.

2. Update statistics and recompile stored procedures. Updating statistics

reconfigures table keys and results in better performance; recompiling stored

procedures adapts stored procedures to tables with significant increases or

decreases in data. For more information, [see Updating statistics on page 33 and](#C_H_A_P_T_E_R___4______M_A_I_N_T_1)

[Recompiling stored procedures on page 34.](#P_A_R_T___2____R_O_U_T_I_N_E___M_4)

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3. Check links. If you rebuild a table and the report shows that some records were

removed, check links for the table. Checking links examines the table, checking

corresponding information in related tables and, if possible, changing the

damaged data to match the corresponding data in an undamaged table. For

more information, see [Checking links on page 92.](#P_A_R_T___5____T_R_O_U_B_L_E_S_H_3)

If the damaged table is in the System or Company series, do not check links.

Instead, continue to the next step: Reconcile data.

4. Reconcile data. During a reconcile, Microsoft Dynamics GP examines the data

within different tables and checks to see whether information that is kept in two

different tables has the same value in both. For more information, see

[Reconciling tables on page 94.](#P_A_R_T___5____T_R_O_U_B_L_E_S_H_4)

5. Restore a backup. If reconciling is unsuccessful, restore your most recent

backup. The more recent your backup, the fewer transactions you’ll have to

reenter, and if you’ve printed or saved all of your posting journals, reentering

the transactions can be a fairly simple process. For more information, see

[Restoring backups on page 95 or](#C_H_A_P_T_E_R___1_5______D_A_T_A_1) [Restoring data on page 96.](#P_A_R_T___5____T_R_O_U_B_L_E_S_H_5)

6. Clear data. Clearing data is the last and most drastic step. You should clear data

from your tables only if you’re unable to restore a backup, since you’ll have to

reenter all information in the tables to restore them. This alternative is to be

used only as a last resort. For more information, se[e Clearing data on page 97](#C_H_A_P_T_E_R___1_5______D_A_T_A_2).

Checking links

Checking links examines tables, checking corresponding information in related tables and, if possible, changing the damaged data to match the corresponding data in an undamaged table.

If you were alerted to damage by an alert message indicating damage to a specific table, the name of the table won’t be listed in the Check Links window.

If the damaged table is in the System or Company series, see [Reconciling tables on page 94.](#P_A_R_T___5____T_R_O_U_B_L_E_S_H_4)

To check links:

1. Be sure that no one is using Microsoft Dynamics GP. To view which users are in

the Microsoft Dynamics GP system and where, choose Microsoft Dynamics GP

menu >> Tools >> Setup >> System >> User Activity.

2. Make a backup.

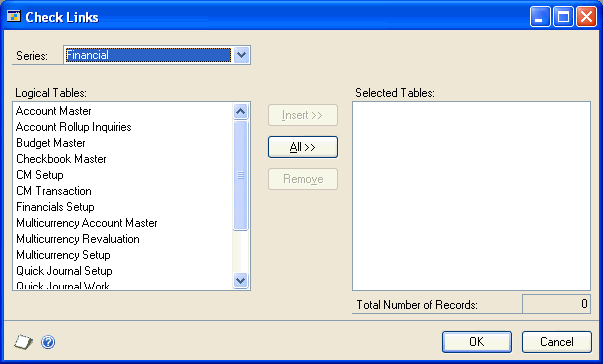
Always make a backup before checking links.

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C H A P T E R 1 5 D A T A R E C O V E R Y

3. Open the Check Links window.

(Microsoft Dynamics GP menu >> Maintenance >> Check Links)



4. Select the series containing the tables to check.

If you know the name of the damaged table, but not the table group to which it

belongs, refer to the Table Descriptions window (Microsoft Dynamics GP

menu >> Tools >> Resource Descriptions >> Tables).

5. Select the tables to check links for, and choose Insert.

To remove any table from the Selected Tables list, highlight the table name and

choose Remove.

6. To insert tables from another series, repeat steps 4 and 5.

7. Choose OK to check links for the selected tables and print the Check Links

Report. Checking links is performed as a background process, which means

you can perform other tasks while the checking is being done.

• Microsoft Dynamics GP checks links in the selected tables.

• The Report Destination window will appear, and you can specify where the

Check Links Report should be printed. If you mark File, select the appropriate table format and enter the report file name.

• The Check Links Report will display any information that was re-created.

We recommend that you send the Check Links Report to the screen, and then print it if

necessary, because it may be very large. Each report can only be printed once each time

you check links, so it’s a good idea to send the report to a file as well.

8. To determine what information to reenter, use the Table Descriptions window

(Microsoft Dynamics GP menu >> Tools >> Resource Descriptions >> Tables) to

view information for the table you checked links for, then use a window that

accesses the table to reenter information. Some records are created through

processes such as posting or aging, and this information can’t be reentered

manually in a window.

You may want to create a report using Report Writer that lists all fields included in the

table that you checked links for. This report can serve as a valuable reference tool. For

more information, refer to the Report Writer manual.

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9. If checking links is unsuccessful and the problems continue to occur, go to

[Reconciling tables on page 94.](#P_A_R_T___5____T_R_O_U_B_L_E_S_H_4)

Reconciling tables

You should reconcile your data when checking links didn’t resolve the problem. Reconciling compares corresponding data in different table groups and removes any lone, or “orphan,” records. For example, a report option that was created for a report that no longer exists is an orphan record, and would be removed.

Reconciling also checks to be sure that corresponding or identical information stored in two different tables is the same, and if there are discrepancies, changes the information in the table you’re reconciling to match the information in the table it’s being compared with.

For example, the number of periods in your fiscal year is stored in the Fiscal Periods Table and the Company Master Table. If you reconcile the Fiscal Periods Table and the number of periods is different than in the Company Master Table, the number of periods in the Fiscal Periods Table will be changed to match the number in the Company Master Table.

Refer to the Table Descriptions window (Microsoft Dynamics GP menu >> Tools >> Resource Descriptions >> Tables) for more information on table groups and tables. Some tables can’t be reconciled. If you can’t reconcile the damaged table, restore a

backup. For more information, se[e Restoring backups on page 95 or](#C_H_A_P_T_E_R___1_5______D_A_T_A_1) [Restoring data on](#P_A_R_T___5____T_R_O_U_B_L_E_S_H_5)

[page 96.](#P_A_R_T___5____T_R_O_U_B_L_E_S_H_5)

To reconcile tables:

1. Be sure that no one is using Microsoft Dynamics GP. To view which users are in

the Microsoft Dynamics GP system and where, choose Microsoft Dynamics GP

menu >> Tools >> Setup >> System >> User Activity.

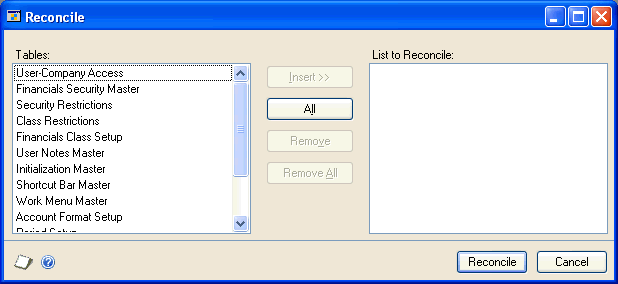
2. Make a backup.

It’s very important that you back up your tables before reconciling or

performing any other table maintenance procedure.

3. Open the Reconcile window.

(Microsoft Dynamics GP menu >> Tools >> Utilities >> System >> Reconcile)



4. Highlight each table to be reconciled and choose Insert.

Use the All button to select all of the tables in the List to Reconcile or use the

Remove button to remove any table from the list.

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5. Choose Reconcile to reconcile the selected tables and print the Reconcile Report.

The Report Destination window appears; specify where the reconcile report

should be printed. If you mark File, select the appropriate file format and enter

a report table location.

Always send the Reconcile Report to the printer, since it can be printed only once. It’s a

good idea to send the report to a file, as well, in case of a printer malfunction.

The reconcile report will display any information that was changed, and list the

number of records removed, if any. Use the information on the reconcile report

to determine what information to reenter.

Use the Table Descriptions window (Microsoft Dynamics GP menu >> Tools >>

Resource Descriptions >> Tables) to view information for a table, then use a

window that accesses that table to reenter information. Some records are

created through processes such as posting or aging, and this information can’t

be reentered manually in a window.

6. If the original problem continues to occur, restore backups. For more

information, see [Restoring backups](#C_H_A_P_T_E_R___1_5______D_A_T_A_1) [on page](#Top_of_index_html) [95 or Restoring data on page 96.](#P_A_R_T___5____T_R_O_U_B_L_E_S_H_5)

Restoring backups

Always restore the entire database containing the affected table or tables. The information in your Microsoft Dynamics GP system is so interrelated that it’s necessary to restore the database; we recommend that you restore a complete backup of your tables, if possible.

To restore backups:

1. Back up your current data.

Always make a backup of current data before restoring an earlier backup, in case you

need to refer to it later. Your current backup may have become damaged, or may contain

the same damage currently in your Microsoft Dynamics GP system. Making an

additional backup before you restore a previous backup will ensure that you’ll be able to

restore your data to its current state, if the backup that you restore is also damaged.

Don’t make this backup over a backup you have on hand.

2. Consult your reseller or qualified installer, or the manual for your backup

utility, for information on how to restore a backup.

3. Reenter information entered after the backup was made, because any newer

records were erased when the backup was restored.

4. The Table Descriptions window (Microsoft Dynamics GP menu >> Tools >>

Resource Descriptions >> Tables) contains detailed information about each of

the tables in Microsoft Dynamics GP. This information can help you reenter

data by providing the following:

• The display name, technical name, physical name, and table group for each

table

• The reports containing information from each table. Use the reports listed

to determine which data is missing, or as a source of the data you’ll need to

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reenter. The sample reports for each module also lists each report and the tables from which it draws data.

• The window used to enter information in the table. To determine the

physical and table groups accessed by a window, use the procedures in the Resource Descriptions documentation.

On rare occasions, you may not be able to reenter information into every table. Some

records are created through processes such as posting or aging, and this information

can’t be reentered manually in a window. If you were unable to reenter some of your

accounting information, reports using non-editable tables, such as history tables, could

be inaccurate until the end of the year, or until the next time you clear history.

5. If restoring a backup was unsuccessful and the original problems continue to

occur, or if you don’t have a current backup, see [Clearing data on page 97](#C_H_A_P_T_E_R___1_5______D_A_T_A_2).

Restoring data

You can back up data for one company at a time. We recommend scheduling to back up company data on a regular basis. You also should back up the system database on a regular basis. The system database includes information about how many companies you have set up and where information is stored for those companies.

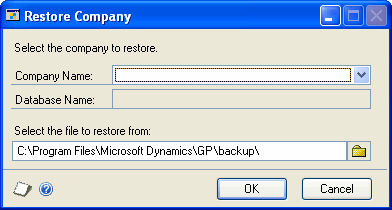
Use the Restore Company window to restore data from a backup file.

Only the system administrator can open the Restore Company window and restore data. If you have Microsoft Dynamics GP installed on a server, you must restore data on the server.

To restore data:

1. Open the Restore Company window.

(Microsoft Dynamics GP menu >> Maintenance >> Restore)



2. Select the company to restore, or select System Database to restore system data.

3. Enter the path and file name of the backup file to restore from.

4. Click OK to restore data from the backup. The window will be closed and a

message will appear when data has been restored.

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Clearing data

Clearing data from a table erases the table, removing all data. If you clear data from a table, you’ll need to reenter all of the information that was in it to restore it to the condition it was in before it was damaged.

Clearing data should be used only as a last resort. We strongly recommend that you not clear data as a means to remove selected portions of your data, such as all your posted or unposted transactions. If you do so, always check links after clearing data; if you clear data from system or company tables, always reconcile, as well.

If your tables are damaged, always check links, reconcile, then restore a backup before you clear data. If you have a backup, you should restore it rather than clearing data from your tables and starting over, regardless of how old the backup is. You may want to call your reseller, qualified installer, or Microsoft Dynamics GP Technical Support before clearing data.

Once you’ve cleared data from a table, you may not be able to reenter information into it. Some records are created through processes such as posting or aging, and this information can’t be reentered manually in a window. If you were unable to reenter some of your accounting information, reports using non-editable tables, such as history tables, could be inaccurate until the end of the year, or until the next time you clear history.

When you installed Microsoft Dynamics GP, you may have chosen to install some default data, such as payment terms or shipping methods. When you clear data from a table that contained any of the default data, that data will not be restored automatically. To restore the default data in the cleared table, you’ll need to reinstall it from a backup or your Microsoft Dynamics GP installation.

To clear data:

1. Make a backup.

Always make a backup before clearing data. It is possible after clearing data

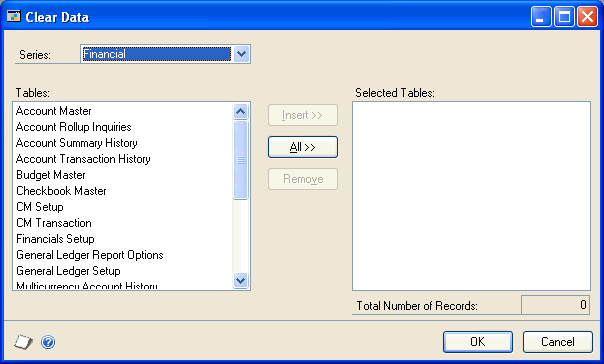
that other problems may occur as a result of missing information and you may

want to restore your system to the condition it was in before you cleared the

data. Back up database containing the tables you’ll clear.

2. Open the Clear Data window.

(Microsoft Dynamics GP menu >> Maintenance >> Clear Data)



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3. To choose whether to view the tables by individual tables or table groups, select

Display from the Extras menu on the menu bar, then select one of the following

menu options:

Physical Displays individual tables in the system.

Logical Displays the table groups available in the system. These groups can

contain several individual tables. If you choose this option to clear data, all

tables in the selected group will have their data cleared.

You should select only the physical table that is damaged.

4. From the Series list, select the series containing the tables to clear.

5. In the Tables list, select the tables you want to clear data from, then choose

Insert. To remove any table from the Selected Tables list, select it and choose

Remove.

Only the sa user or the DYNSA user should clear security data.

6. If necessary, repeat steps 4 and 5 to add tables from other series.

The total number of records in the selected tables will be displayed at the

bottom of the window. This number will be updated as items are inserted and

removed from the Selected Tables list.

7. Double-check the list of tables in the Selected Table list to be sure that you want

to clear data from all the tables listed.

You can’t stop the clear data process once it has begun.

8. Choose OK to clear data from the selected tables and print the Clear Data

Report.

The Report Destination window will appear; specify where the Clear Data

Report should be printed. If you mark File, select the appropriate file format

and report file location.

Always send the Clear Data Report to the printer, since it can be printed only once. It’s

a good idea to send the report to a file, as well, in case of a printer malfunction.

The Clear Data Report will display any information removed, and list the

number of records removed.

9. Check links, reconcile, or both. [See Checking links](#P_A_R_T___5____T_R_O_U_B_L_E_S_H_3) [on page 92](#Top_of_index_html) [and Reconciling](#P_A_R_T___5____T_R_O_U_B_L_E_S_H_4)

[tables on page 94](#P_A_R_T___5____T_R_O_U_B_L_E_S_H_4) for more information.

If you don’t have a backup to restore, check links for the tables you cleared data

from. If the tables are in the company or system series, reconcile them, as well. If

the tables were in different series, use the instructions in the appropriate

accounting manual to determine whether you should reconcile.

10. Reenter data, if possible. To determine the windows used to enter the data in

the cleared tables, choose Microsoft Dynamics GP menu >> Tools >> Resource

Descriptions >> Table.

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If you are unable to reenter some of your accounting information, reports using

non-editable tables, such as history tables, could be inaccurate until the end of

the year, or until the next time you clear history.

If you’re unable to reenter the data you’ve cleared, data in other tables may

become inaccurate or unusable as a result. For instance, if you were to clear data

from the Account Master Table in General Ledger, removing information about

your accounts, all financial information would become unusable until the

accounting information was reentered.

11. If after clearing data you’re unable to reenter all of the information that was

removed, or if you’re still having problems with your system, call your reseller,

qualified installer, or Microsoft Dynamics GP Technical Support.

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# Chapter 16: Process server troubleshooting

Use this information to help solve problems that may occur when you’re installing, setting up, or using the Distributed Process Server. If the errors continue to occur, review the installation and setup documentation, then contact your designated technical support source.

The process server troubleshooting information includes the following sections:

• [Process performed locally instead of remotely](#Chapter_16__Process_server_troub_1)

• [Process server information not appearing in Process Server Inquiry window](#Chapter_16__Process_server_troub_1)

• [Report errors](#Chapter_16__Process_server_troub_1)

• [Items to check](#P_A_R_T___5____T_R_O_U_B_L_E_S_H_7)

• [Adjusting processing](#P_A_R_T___5____T_R_O_U_B_L_E_S_H_7)

Process performed locally instead of remotely

Situation: A process was set up to be completed remotely; however, it was processed locally on a client computer instead. A message stating that the process server wasn’t available didn’t appear.

Solution: An error may have occurred in the network protocol connection between the process server and your computer, before the process was started. Use a “ping” application to be sure that the two computers are connected.

If the network protocol connection is running correctly, restart the DPS application on the process server computer.

Another possible cause of the problem is that the user initiating the process isn’t set up to process tasks remotely. Choose Microsoft Dynamics GP menu >> User Preferences to open the User Preferences window and be sure the Remote selection is marked for the Distributed Processes option.

Process server information not appearing in Process Server Inquiry window

Situation: You’ve entered or selected the process server you want to view information about in the Process Server Inquiry window, but no information is appearing in the scrolling window.

Solution: If you’ve enabled load balancing, add the “#” symbol at the end of the process server name in the Server ID field in the Process Server Inquiry window. For example, if you’ve entered Server1 in the Server ID field, add the “#” symbol so the name is Server1#. You don’t have to add the “#” symbol for the process server in the DPS Setup window or the DPS Server Setup window.

Report errors

If you’re using modified reports, be sure that the client that initiated the remote process and the process server that you sent it to are accessing the same reports

dictionary (Reports.dic). For more information, see [Chapter 8, “Process server](#Chapter_8__Process_server_config_1)

[configuration.”](#Chapter_8__Process_server_config_1)

If a process includes a report, verify the report destination. For more information,

see [Setting up report destinations for remote processing on page 56.](#P_A_R_T___3____D_I_S_T_R_I_B_U_T_5)

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Restrictions, calculated fields, additional headers and footers and field types that are set up incorrectly can prevent a report from being printed. Before using a process server to print a report you’ve modified or created, print it locally first to be sure it can be printed without errors. You’ll be able to determine how to correct the error more easily if you print the report locally and view the alert message than if you print it remotely and view the information in the Process Server Activity Table. The alert messages that appear when a report is printed locally typically contain more information than the information recorded in the activity table when an error occurs in a process.

Items to check

Use the Process Server Inquiry window to view the Process Server Activity Table, which contains all available information about errors that have occurred.

Be sure that all servers in each process are operating correctly, that the DPS application is running on each one, that the process is set up to be processed remotely in the Process Server Setup window, and that users are set up to use DPS.

If you’re using the Distributed Process Manager application (Dpm.exe), be sure it’s running, then restart each process server and client.

Adjusting processing

When you use load balancing, each machine that is running a process server is automatically given a system index. The system index is a number between 1 and 1000 that indicates the relative processing power of the machine. The smaller the system index, the faster the machine.

If you want to modify the processing load of each process server, you must edit the system index by adding it to the Dex.ini file of each process server. The system index will only appear in the Dex.ini file if you add it to the file. For example, if you wanted a process server to use a system index of 150, you would add the following setting to the Dex.ini file:

DPSSystemIndex=150

If the default system index is too high, the machine may be operating below its potential. To increase the load given to a process server, decrease the system index. If you want your process server machines to have an equal balance of processing power, each machine should have the same system index. The default system index

is 100. For more [information, see Editing defaults files on page 81](#Chapter_13__Defaults_files_1).

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Glossary Dictionary location ID Microsoft Dynamics GP engine In a launch file, a line that indicates a set of The Microsoft Dynamics GP engine, also

dictionary locations. This set of dictionary known as the runtime or executable,

Alert message locations includes generic pathnames for the interprets the resources in each application

A message that appears when inappropriate, locations of the application dictionary, forms dictionary and presents a functioning inadequate, or unclear data or instructions dictionary, reports dictionary and any application. The engine is the method you’ll are issued, when data is not accessible, or integrating dictionaries. A launch file can use to start Microsoft Dynamics GP so you when a confirmation is sought. Additional contain several sets of dictionary location can use the windows, reports and other

information about alert messages and their IDs and dictionary locations. [See also Launch](#Glossary__________Dictionary_loc)  resources, just as a car engine is used to

causes can be found in the TechKnowledge [file.](#Glossary__________Dictionary_loc) activate the frame, wheels and other database on CustomerSource. elements of the car. The file name is

Display name

Dynamics.exe.

Background processing One of the names specified for a table. The

With background processing, you can display name is used when the name of the The Microsoft Dynamics GP engine is used

continue working while Microsoft Dynamics table is displayed to the user. [See also](#G_L_O_S_S_A_R_Y)  to run Microsoft Dynamics GP and Microsoft

GP posts transactions or prints reports. [Technical name.](#G_L_O_S_S_A_R_Y) Dynamics GP Utilities.

Backup Distributed Process Manager Microsoft Dynamics GP Utilities

A copy of data made to minimize the An application that manages the interaction Utility used to set up your account difficulty of recovering from data loss, due to between clients and process servers. The file framework and update Microsoft Dynamics a damaged hard disk or power loss. Backups name is DPM.exe GP tables and dictionaries. The file name is should be performed frequently. Dynutils.dic.

Distributed Process Server

Clear data Integrating product The application that handles remote

A table maintenance routine that removes all processing of Microsoft Dynamics GP An additional application dictionary that data from a table either by removing all processes. In a client/server environment, works with the Microsoft Dynamics GP records from the table or deleting the table. you can initiate predefined functions from engine and other files. The integrating

your computer but direct the processing to application can use resources from Microsoft

Data Dynamics GP. another computer or server on the network.

Information that has been entered or selected The file name is Dps.exe. Launch file by a user and that appears on a computer

screen and will be stored in a table when Engine The file that is used to start Microsoft

saved. [See Microsoft Dynamics GP engine.](#Glossary__________Dictionary_loc) Dynamics GP; either by double-clicking or

dragging and dropping it on the Microsoft

Defaults file Field Dynamics GP executable (Dynamics.exe).

[See Dex.ini file.](#Glossary__________Dictionary_loc) A field contains a single piece of information This file stores the location of the dictionaries

Dex.ini file used by the application dictionary. that will be used, including the Microsoft

A file that stores preferences, startup File Dynamics GP dictionary, the forms

dictionary and the reports dictionary. The

information and application settings specific [See Table.](#G_L_O_S_S_A_R_Y)

file name is Dynamics.set.

to the current workstation.

Dexterity® Logical table dictionary Forms dictionary

The dictionary that stores user-modified

[See Table group.](#G_L_O_S_S_A_R_Y)

The Microsoft Dexterity dictionary contains resources. This dictionary is created when resources, such as fields, tables, windows, the Modifier is accessed for the first time. Macro text and reports, used by the Dexterity Only copies of a dictionary’s resources are A user-defined series of actions performed development system. Microsoft Dynamics stored in the forms dictionary. within an application, recorded for playback

GP was created using Microsoft Dexterity, so at another time. Macros can be used to Generic pathnames Microsoft Dexterity resources are required to automate repeated tasks, such as month-end A method of indicating a location on a hard run Microsoft Dynamics GP. The Microsoft procedures or printing reports, by recording disk or network drive. Generic pathnames Dexterity dictionary also contains the the procedure, then playing it back use a colon (:) before and after DOS and resources used to run Report Writer and the whenever the procedure must be performed Windows driver letters. The characters that Microsoft Dynamics GP Modifier. The file again. Macros are also referred to as used after each folder or directory in the name is Dex.dic. keystrokes. pathname are forward slashes (/).

DPM Modifier Microsoft Dynamics GP dictionary [See Distributed Process Manager](#Glossary__________Dictionary_loc) [.](#Glossary__________Dictionary_loc) A tool that allows users to modify an An application that includes the most application’s interface. A forms dictionary is DPS commonly-used modules in Microsoft used to store the modifications. [See Distributed Process Server](#Glossary__________Dictionary_loc) [.](#Glossary__________Dictionary_loc) Dynamics GP and all resources used by the

Microsoft Dynamics GP system, such as field Multidictionary

Dictionary and table definitions, windows text and A feature that allows the runtime engine to A group of resources that, when interpreted reports. The file name is Dynamics.dic. interpret two or more separate application by the runtime engine, present a complete

dictionaries at the same time. The capability

functioning application.

allows multiple integrating dictionaries to

function with Microsoft Dynamics GP.

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G L O S S A R Y

Passive locking Stored procedure

A method of locking a record that allows Queries written in SQL, then compiled and

other users to access and make changes to stored in a database. Stored procedures

the record. The lock for the record is released perform server-based processing tasks, and

when the user with access to the record return a status code to the application. In

moves to another record or closes the table. parameters can be passed to stored

procedures. In addition to the status code,

Pathname

out parameters also can be returned.

A specified location on a computer’s hard

disk or on a network where tables will be Structured Query Language (SQL)

created and stored. The pathname for each A language that allows you to define, table in Microsoft Dynamics GP is stored in manipulate and control access to data in a

the Pathnames Table (SY02100). relational database.

Physical name Table

The name under which a table is stored by A collection of related records, such as the operating system or database. transactions or accounts. All of the

information that you enter in Microsoft

Ping

Dynamics GP is stored in tables.

A procedure that sends a small piece of data

from one computer to another to text Table group

network connectivity between the two on a A group of logically-related tables (also

TCP/IP network. known as a logical table). For example, a

customer master table, a customer address

Process server

table and a customer history table could all

[See Distributed Process Server.](#Glossary__________Dictionary_loc) compose a table group. Table groups are

Product ID used for security and table maintenance.

The ID that’s used to uniquely identify an TCP/IP

application dictionary. An acronym for Transmission Control

Read/write Protocol/Internet Protocol. TCP/IP is a set

of transmission protocols used to transfer

A table access mode that indicates the table

data between computers on a network.

can be read from and written to.

Technical name

Record

The name used with scripts to refer to a table

A collection of data made up of one instance

or window[. See Launch file.](#Glossary__________Dictionary_loc)

of each field in a table.

Report Writer

A tool that allows you to design and print

reports in your application.

Reports dictionary

The dictionary that stores user-modified

resources for reports. This dictionary is

created when the Report Writer is accessed

for the first time. Only copies of a

dictionary’s resources are stored in the

reports dictionary.

Runtime engine

[See Microsoft Dynamics GP engine.](#Glossary__________Dictionary_loc)

Resource descriptions

A utility that allows you to learn technical

information about Microsoft Dynamics GP

fields, tables and windows. This utility

allows you to learn more about how data is

stored in Microsoft Dynamics GP, including

the fields that are stored in each table, and

the reports containing data from each table.

.SET file

[See Launch file.](#Glossary__________Dictionary_loc)

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