

*myridas*<sup>TM</sup>  
*Download & Install*

Version 7.8 for Great Plains 7.5

Trinity Computer Services Limited

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# Downloading, Installing and Setting Up Myridas 7.8

To download, install and setup Myridas 7.8 on your system, please follow the instructions in this document.

Before commencing this installation you should back up your Dynamics and Company databases, and also back up your Great Plains installation folder.

**IMPORTANT: There is no direct upgrade path to Myridas 7.8 from releases of Myridas earlier than 7.7. If you have an earlier Myridas installation (e.g Myridas 7.6, Myridas 7.0) which you want to upgrade to Myridas 7.8 you must upgrade via the intermediate stages.**

## 1. Removing earlier versions of the Myridas module installer

If you are loading Myridas 7.8 onto a system with an existing installation of Myridas 7.7, you must first remove the Myridas Module Installer from your system using Add/Remove programs from the Windows Control Panel.

Once the uninstall has completed, ensure that the installation directory (default C:\Program Files\Myridas setup) and its contents have been deleted.

## 2. Installing Myridas

Myridas is available to download from the Trinity Partner website. The file for download is an installation executable (setup.exe) which can be downloaded from the Myridas 7.8 "Server and Client Install" link in the "Software Modules and Patches" Download area of the Trinity Partner website. To install Myridas, run the executable file and continue as below.

If you are installing Myridas from CD, locate and run the Setup.exe file.

During installation preparation, the installer will check for the latest versions of essential files on your computer. If you do not have the latest files, they will be updated and you may be required to restart your system before the installation can continue. The setup routine will automatically restart once you have restarted your computer, and the first installation screen will appear.

1. Click Next to reach the Terms and Conditions screen.

### In the Terms and Conditions screen:

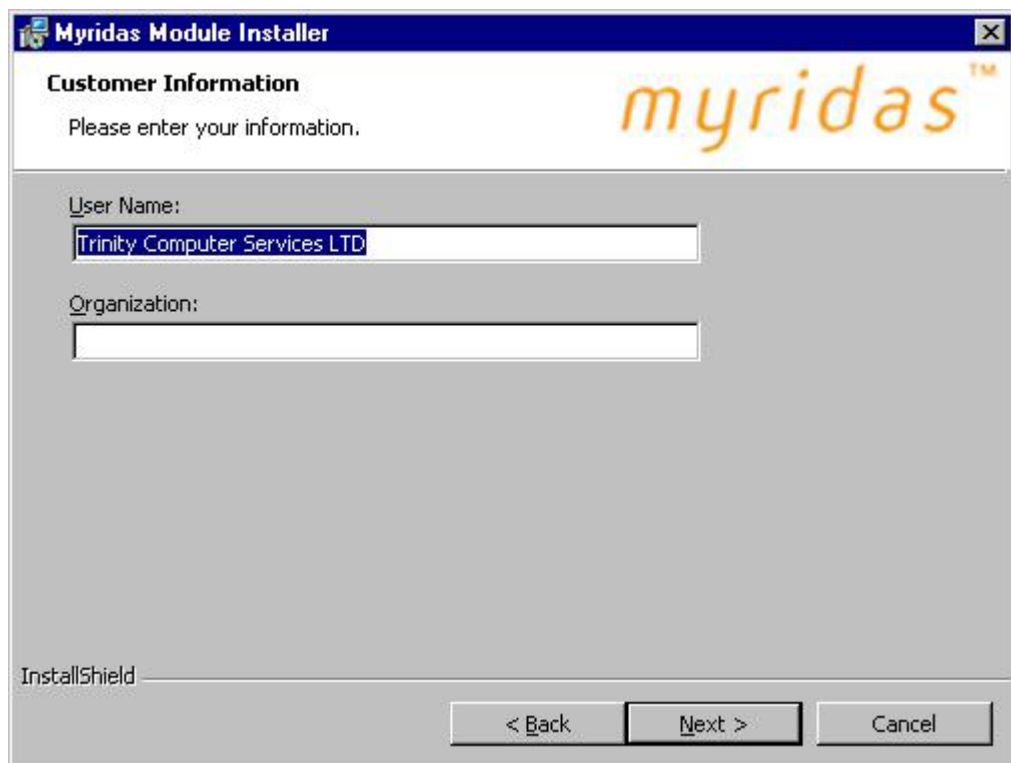
1. The terms and conditions are available on the Myridas Installation CD or can be downloaded from the Trinity Partner website. Please read these before continuing. To continue select **I accept and have the authority to accept, Trinity's terms and conditions of business**. Trinity's Terms and Conditions will also be installed in pdf format when Myridas is installed onto your computer.
2. Click Next to continue. The Customer Information screen will appear.

Note that if you do not agree to accept these terms, the installation will be cancelled.

**The terms and conditions are available in the Documentation folder on your Myridas Installation CD, and can be downloaded from the "Software Terms and Conditions" link in the "Software and Patches Download Area" of the Trinity Partner website.**

**In the Customer Information screen:**

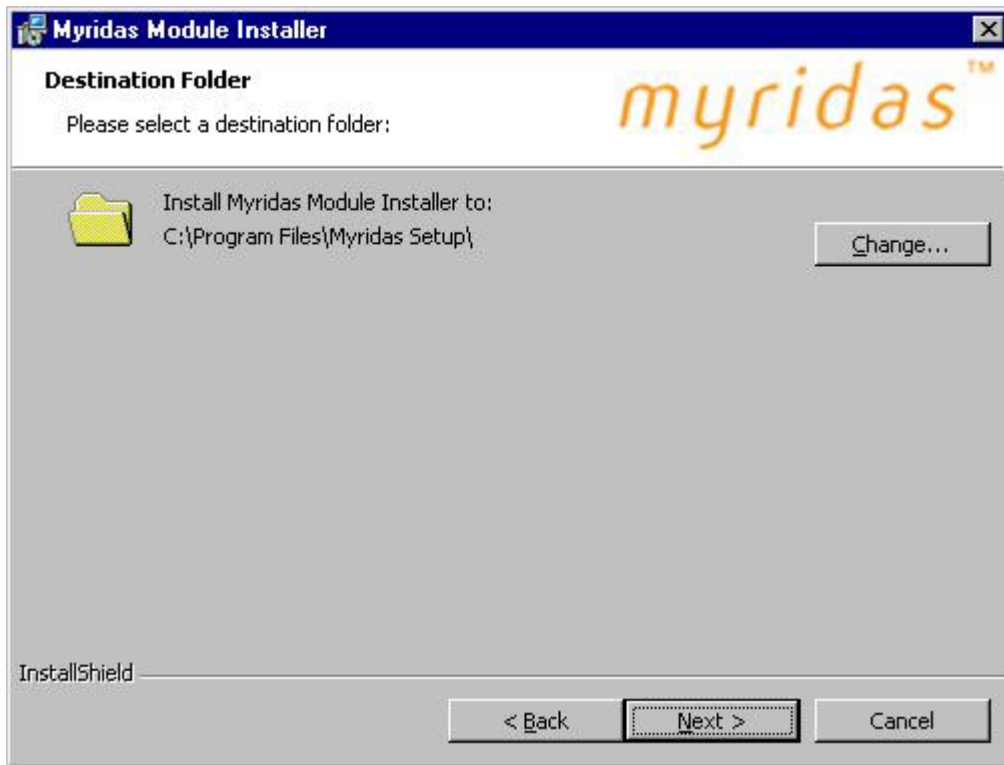
1. Enter the User Name and Organisation name for the installation.
2. Click Next to continue. The Destination Folder screen will appear.



The screenshot shows a window titled "Myridas Module Installer" with a blue header bar. Below the header, the text "Customer Information" is displayed in bold, followed by the instruction "Please enter your information." and the Myridas logo in orange. There are two input fields: "User Name:" with the text "Trinity Computer Services LTD" entered, and "Organization:" which is currently empty. At the bottom of the window, there are three buttons: "< Back", "Next >", and "Cancel". The "InstallShield" logo is visible in the bottom left corner of the window.

**In the Destination Folder screen:**

1. Click the Change... button to select a destination folder for your Myridas installation, or accept the default installation setting.
2. Click Next to continue. The Setup Type screen will appear.

**In the Setup Type screen:**

1. Select the **Typical**, **Minimal** or **Custom** installation.

In most cases you should select Typical, the default installation. Minimal will install all program files but no help system. With Custom, you can choose to install the help files in the Custom Setup screen.

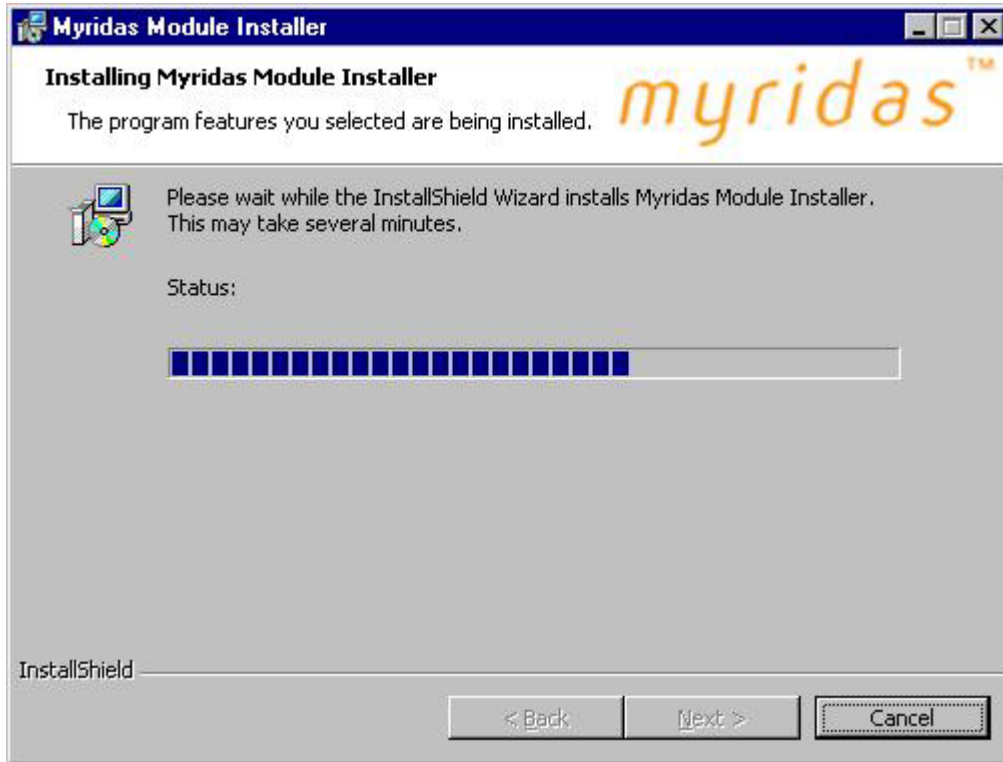
2. Click Next to continue. The Ready to Install the Program screen will open.

**In the Ready to Install the Program screen:**

You are now ready to install Myridas.

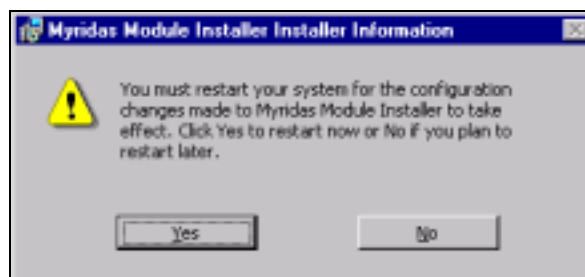
1. Check that your Myridas installation options are correct.
2. Click Back to review any of your settings or Install to begin the installation.

Please wait whilst the software is installed.



During the installation, a status bar will show you how much progress has been made. When the installation is complete, the completion screen will open. Any problems encountered during the installation will be displayed in this screen.

1. Click Finish to complete the installation. The Installer Information screen will open:



2. Click Yes to restart your computer.

You are now ready to install the Myridas modules (Section 3).

## 3. Setting up the Myridas modules

### 3.1 Before running the Myridas setup

To use version 7.8 of the Myridas modules you must have the following installations:

- Great Plains 7.5 service pack 4 or above
- SQL Server 7.0 or SQL Server 2000

If you want to run an evaluation copy of the Myridas modules, you must also have the lesson company The World Online installed on your system.

When you run the setup you will have the option of automatically giving security for the alternate windows to one or more of your Great Plains users. If you are running an evaluation copy of Myridas you may wish to create a user specifically for this purpose.

### 3.2 Running the Myridas Setup

When you installed the Myridas Setup program onto your computer (Section 2), the Myridas Installation System was added to your Start menu and to your desktop. The installation will perform the following functions:

- Creates additional tables in your company database (The World Online if you are running an evaluation)
- Creates necessary SQL triggers and stored procedures in your company database
- Places the Myridas chunk file and related files into your Great Plains folder
- Adds palette options for Myridas windows
- Sets permissions for Myridas alternate windows for specific users

To run the Myridas Installation System:

- Double click the Myridas Installation icon on you desktop, or:
- Select Start >> Programs >> Myridas Setup >> Myridas Installation System, or:
- Locate and run the file "Myridas Setup7.exe"

#### **In the Terms and Conditions screen:**

1. Please read the terms and conditions and select **I accept and have the authority to accept, Trinity's terms and conditions of business**. This agreement will also be installed in pdf format when Myridas is installed onto your computer.
2. This Terms and Conditions screen will only be displayed once. It is recommended that you print Trinity's terms and conditions. To do so click Print.
3. Click Next to continue.

#### **In the Server and Program Locations Screen:**

1. Enter or select the location of your Great Plains installation. The Myridas chunk file will be placed in this folder,  
*e.g. C:\Program Files\Microsoft Business Solutions\Great Plains\*  
Enter the System Administrator (sa) password for SQL Server. This will allow tables and SQL triggers etc to be created.

2. Enter the name of your SQL server.  
**The drop down list shows available SQL Servers. In order to be accessible to the Myridas Module Installer you must have set up an ODBC System data source (not a User DSN) for the SQL Server on which you wish to install Myridas.**
3. Click Next to continue.

### **In the Registration Keys Screen:**

Note, if you are installing an evaluation copy of the Myridas modules, you can leave all entries on the Registration Keys screen blank.

1. Enter your license information (company name, number of licensed users and registration keys) as provided by Trinity Computer Services Ltd.
2. Click Next to continue.

### **Upgrade Screen**

If you are installing Myridas 7.8 into an existing Myridas 7.7 installation, the Myridas module installer will recognise that a new version is available. Click the Install button when prompted to do so to update your existing Myridas installation to the new version. This may take several minutes.

You can then use the Installation Options screen to add new modules to your installation. If you do not wish to install any new modules at this stage, you can still use the Installation Options Screen to re-create your Myridas palettes. This is recommended, as it will re-create the palette entries required for your existing installation.

### In the Installation Options Screen:

1. Select a Company from the drop-down list. The Myridas modules will be installed to this company. If you are running an evaluation copy you will only be allowed to set up modules in The World Online.
2. Select the Modules you wish to install. To install the Load Planning module, you must have installed Advanced Distribution from Microsoft Business Solutions. Note that Explorer Integration is not a separate module, but should be enabled to give access to selected Myridas tables from within Explorer. Document Merge is listed as a separate module but can only be installed in conjunction with Consolidated Invoicing.
3. Select whether you want to **Create Palette Menus & Enable Alternate Forms**. This will enable Myridas menu access and alternate windows.
4. Select which Users you would like to set up to use alternate windows.
5. Click Install to run the installation. This may take several minutes to complete.



Repeat these steps to set up the Myridas modules for further companies.

When you have finished your installation, run Great Plains as normal to load the Myridas chunk file and update your Dynamics.set file.

### 3.3 VBA Installation

Certain elements of Myridas functionality are provided by VBA routines, associated with the Myridas and Dynamics dictionaries.

*Installation of the VBA described below is optional. The VBA is used to suppress display of the Sales and Receivings Item Detail Entry windows when automatically generating sales document lines in the Additional Charges module. The VBA is*

*optional - if it is not installed the windows will be displayed during automatic line generation.*

You do not need to re-import the packages if you are updating an existing Myridas 7.7 installation.

The VBA routines are supplied as VBA package files for import. During the installation the package files will be placed in your Great Plains installation folder. These need to be imported into your Myridas.VBA and Dynamics.VBA files.

Note that if you have made your own customisations to any of the windows which have Myridas VBA, these will be lost when the Myridas package is imported, so you may wish to save your customisation code e.g. by copying it into a text file, for re-introduction after the upgrade.

The package files to be imported into Myridas.VBA are:

<i>Package Name</i>	<i>Type</i>	
Receivings Item Detail Conversation.Package	Form with VBA	X
SOP Item Detail Conversation.Package	Form with VBA	X

The package files to be imported to Dynamics.VBA are:

<i>Package Name</i>	<i>Type</i>	
Myridas Reference.Package	Reference	X
POP Receivings Item Detail.Package	Form with VBA	X
SOP Item Detail.Package	Form with VBA	X
SOP Qty Shortage Entry.Package	Form with VBA	X

(Files marked with an "X" in the above tables will already exist if you have an existing Myridas installation, and will be marked as "Overwrite" on import.)

See the Great Plains VBA Developer's guide for instructions on importing a VBA package.

### 3.4 Updating or amending your installation

Once you have installed the Myridas modules, you can re-run the installer (Section 3.2) to do any of the following:

- Enter new registration keys
- Set up Myridas additional companies (licensed version only)
- Enable additional modules in an existing company
- Enable alternate windows for additional users

- Disable previously enabled modules for any company (this will prevent further use of Myridas functionality, but will not remove your data from the database)

### 3.5 Client installations

If you have Great Plains installed on additional client computers, you also need to install or update Myridas on the client installations. To do this, perform the following steps:

1. Run myridasclient.exe on each additional client computer. This file can be found on the Myridas CD or in your Myridas Setup folder.
2. Enter the location of the Great Plains installation. Files will be copied to this folder.
3. Run Great Plains as normal to load the Myridas chunk file.
4. The Dynamics.VBA and Myridas.VBA files created by importing packages (see 3.3 above) should also be copied to each client.

### 3.6 Palette Installation

Myridas palettes will be installed automatically for UK and US English installations. For other language installations you can set up the palettes as follows:

1. Add the window Myridas -> Company -> tcs00 Myridas Palette Installation to your shortcut bar.
2. Run tcs00 Myridas Palette Installation.
3. To create the standard palette entries, select Update.
4. Log out of Great Plains and log back on to allow your new palette entries to take effect.
5. If you want to change any of the descriptions on the palettes you can do so by double clicking the palette entry in the palette tree structure in tcs00 Myridas Palette Installation.

### 3.7 Removing Myridas

Once you have installed the Myridas modules, you can re-run the installer to remove any of the following:

- All Myridas tables, triggers and stored procedures from a selected company: select a company and click the Remove button on the Installation Options screen
- All Myridas tables, triggers and stored procedures from all companies: click the Remove All button on the Installation Options screen\*

\*Having removed Myridas from your system, you may also want to delete the Myridas dictionary from your Great Plains installation folder and edit your Dynamics.set file to delete the Myridas dictionary entry.

## 4. What's included with the Myridas system?

### 4.1 Software modules

Myridas 7.8 includes the following modules:

- Additional Charges
- Call Scheduling
- Catalogue Based Sales
- Catchweights
- Consolidated Invoicing
- Distribution Enhancements
- Duty Processing
- Extended Pricing Integration (previously Extended Pricing Data Import)
- Extended Pricing Enhancements
- Inter-Site Transfers
- Item Life Cycle
- Item Manager
- Linked Item Selling
- Price Negotiation
- Purchase Retrospective Discounts
- Reorder Level Management
- Reserved Stock
- Returns Management
- Sales Analysis History
- Sales Pattern Analysis
- Sales Retrospective Discounts
- Template Selling
- Trade Counter (also known as Front Counter)
- Unit of Measure Management
- Vehicle Load Planning
- Vendor Pricing

Palettes with access to the main module windows will be created if you selected the Create Palette Menus option in the Installation Options screen.

Access to the alternate windows will be given to the users you specified in the Installation Options screen. If you have installed Consolidated Invoicing, access to the alternate other invoice and other history invoice layout will also be given to the specified users.

### 4.2 VBA

The system includes VBA integration for the following functionality:

- Hidden windows for adding lines in the Additional Charges module

VBA integration with MS Outlook that was included in earlier releases has been replaced by Dexterity COM integration from Myridas 7.0 onwards.

### 4.3 Documentation

The following documentation is available:

- Myridas Download and Install (this document)
- Myridas User Guides for all Myridas modules
- On-line help for all Myridas modules
- Myridas 7.8 New Features

## 5. Using Myridas 7.8 with Microsoft Business Solutions Inventory and Order Processing II

Please note the following important points if you are using Myridas 7.8 and Microsoft Business Solutions Inventory and Order Processing II in the same installation.

(1) The three modules which make up Microsoft Business Solutions Inventory and Order Processing II (Advanced Distribution, Advanced Picking and Available to Promise) were previously Myridas modules, and they still form a part of the Myridas dictionary. If you only use these three modules, you will have installed Myridas dictionary version 7.5. This will be overwritten by Myridas dictionary version 7.8 when you install any Myridas 7.8 modules. It is therefore important that you do not run the MBS Inventory and Order Processing II Client Install on a Myridas 7.8 system.

(2) **DO NOT** use the Remove All option from the Inventory and Order Processing II module installer if you have any Myridas modules installed.

## 6. Myridas alternate windows and reports

Window Name	Description	Modules
Items	Alternate item number lookup which includes status code information, unit of measure management options and duty processing consolidated stock view	Item Manager, Unit of Measure Management, Duty Processing
Print Sales Documents	Includes reprint options for Collection Notes (Returns Management module). This alternate window MUST be used when using a system that includes the Returns Management module.	Returns Management
Sales Document Print Options	Includes reprint options for Collection Notes (Returns Management module) This alternate window MUST be used when using a system that includes the Returns Management module.	Returns Management
Sales Transaction Entry	Incorporates Returns Management options and additional requirements for Catchweights and Load Planning modules. This alternate window MUST be used when using a system that includes Myridas Returns Management, Catchweights, Reserved Stock or Load Planning.	Returns Management, Catchweights, Reserved Stock, Load Planning
Inventory Activity Reports	Used in Unit of Measure Management to print reports in split pack format	Unit of Measure Management
Sales Lot Number Entry	Displays dual quantity catchweight balances. This alternate window MUST be used when using a system that includes the Myridas Catchweights or Duty Processing module.	Catchweights, Duty Processing
Purchasing Lot Number Entry	Displays dual quantity catchweight balances. This alternate window MUST be used when using a system that includes the Myridas Catchweights module.	Catchweights
Sales Transaction Enquiry Zoom	Provides facility to filter individual despatch lines from consolidated invoices	Consolidated Invoicing
Generate Suggested Purchase Orders	In the vendor pricing module there is an additional option in this window to allow generation of zero quantity P.O.s	Vendor Pricing
Sales Quantity Shortage Options	Expansion window to view Duty Processing consolidated stock balance and Take from Reserved Stock button	Duty Processing, Reserved Stock

<b>Report Name</b>	<b>Description</b>	<b>Modules</b>
SOP Other Invoice Form	Invoice in graphical format incorporating additional features for Consolidated Invoices	Consolidated Invoicing
SOP Other History Invoice Form	Invoice in graphical format incorporating additional features for Consolidated Invoices	Consolidated Invoicing
SOP Blank Invoice Form	There are no changes to this report in standard Myridas; it is included to allow easier customisation of invoices with Myridas tables.	
SOP Blank History Invoice Form	There are no changes to this report in standard Myridas; it is included to allow easier customisation of invoices with Myridas tables.	
SOP Blank Packing Slip Form	There are no changes to this report in standard Myridas; it is included to allow easier customisation of invoices with Myridas tables.	
SOP Blank Order Form	There are no changes to this report in standard Myridas; it is included to allow easier customisation of invoices with Myridas tables.	

## 7. Myridas Integration with Great Plains SmartList

The Explorer Integration module is one of the modules available for installation. This module enables integration between several other Myridas modules and Great Plains SmartList. If you require SmartList integration with any of the following modules then ensure that you install this Explorer Integration.

<b>Module</b>	<b>Functionality</b>
Advanced Distribution	Logistic Status Table as separate view and as extra column on sales transaction
Load Scheduling	Vehicle Table
Item Status	Item Status Table and status code as column on items
Reorder Level Management *	Calendar Usage Table and Fiscal Usage Table
Distribution Enhancements	Sales Transaction Reason Code Table and Inventory Transaction Reason Code as separate views and as columns on transactions

\* The installation of Explorer Integration is essential for the Reorder Level Management module.