

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

Version 9.0 for Microsoft Dynamics<sup>TM</sup> GP 9.0

Trinity Computer Services Limited

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# Downloading, Installing and Setting Up Myridas 9.0

To download, install and set up Myridas 9.0 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 Microsoft Dynamics™ GP installation folder.

**UPGRADING AN EXISTING MYRIDAS INSTALLATION: If you are upgrading an existing Myridas installation to Myridas 9.0, please ensure that you have new Myridas 9.0 registration keys before you start the upgrade. You must complete the upgrade from Great Plains 7.5 or 8.0 to Microsoft Dynamics™ GP 9.0 before starting your Myridas upgrade.**

**IMPORTANT: There is no direct upgrade path to Myridas 9.0 from releases of Myridas earlier than 7.8. If you have an earlier Myridas installation (e.g Myridas 7.7, Myridas 7.0) which you want to upgrade to Myridas 9.0 you must upgrade via the intermediate stages.**

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

If you are loading Myridas 9.0 onto a system with an existing installation of Myridas, 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.

**If you are upgrading a Myridas 7.8 installation, rename your Myridas dictionary (Myridas.dic) in each client folder. We do not recommend loading a Myridas 9.0 chunk file over an existing Myridas 7.8 dictionary.**

## 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 9.0 "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:

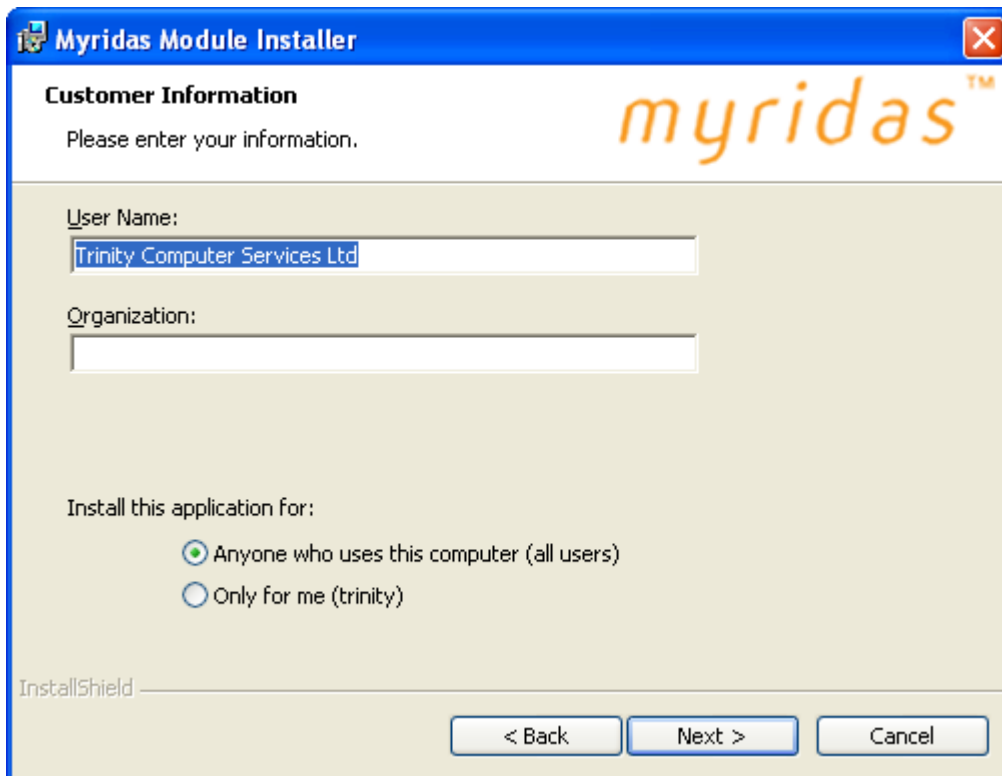
1. The terms and conditions can be downloaded from the Trinity Partner website. Please read these before continuing. To continue select **I accept and have the authority to accept, Trinity's terms and conditions of business**. Trinity's Terms and Conditions will also be installed in pdf format when Myridas 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 Trinity's Terms and Conditions, the installation will be cancelled.

**The terms and conditions can be downloaded from the "Software Terms and Conditions" link in the "Myridas Software Releases and Updates" of the Trinity Partner website.**

### In the Customer Information screen:

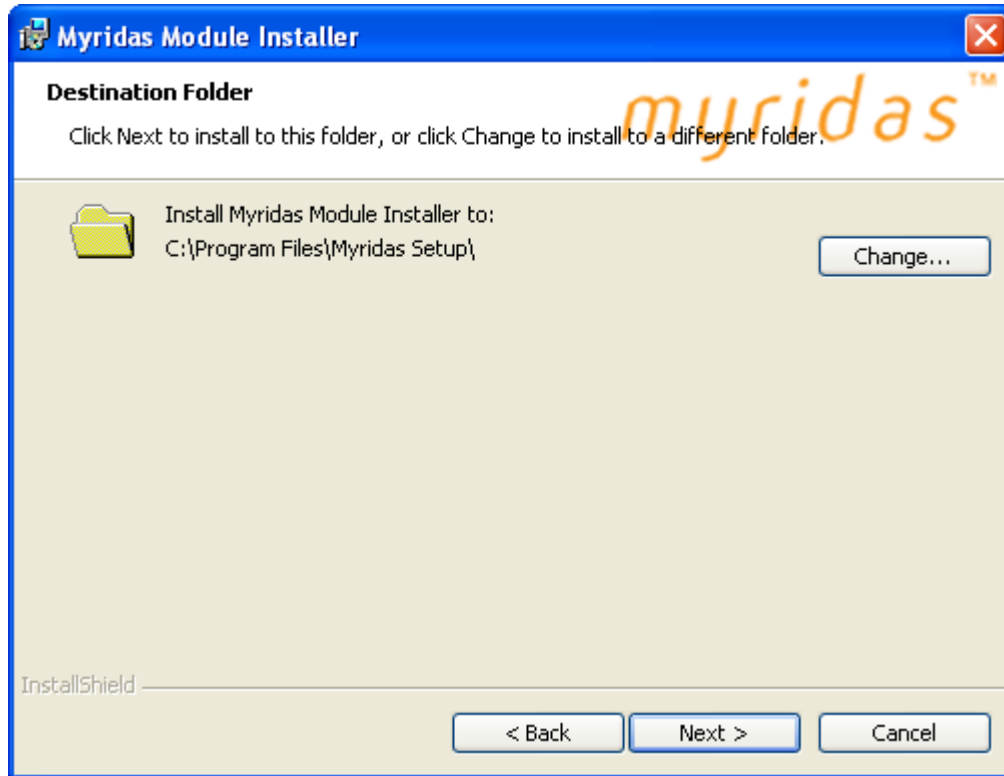
1. Enter the User Name and Organisation name for the installation.
2. Click Next to continue. The Destination Folder screen will appear.



The screenshot shows the 'Myridas Module Installer' window. The title bar reads 'Myridas Module Installer'. The main window has a blue header with the 'myridas' logo in orange. Below the logo, the text 'Customer Information' is displayed, followed by 'Please enter your information.' There are two text input fields: 'User Name:' with the text 'Trinity Computer Services Ltd' and 'Organization:' which is empty. Below these fields, the text 'Install this application for:' is followed by two radio button options: 'Anyone who uses this computer (all users)' (which is selected) and 'Only for me (trinity)'. At the bottom left, the text 'InstallShield' is visible. At the bottom right, there are three buttons: '< Back', 'Next >', and 'Cancel'.

**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:**

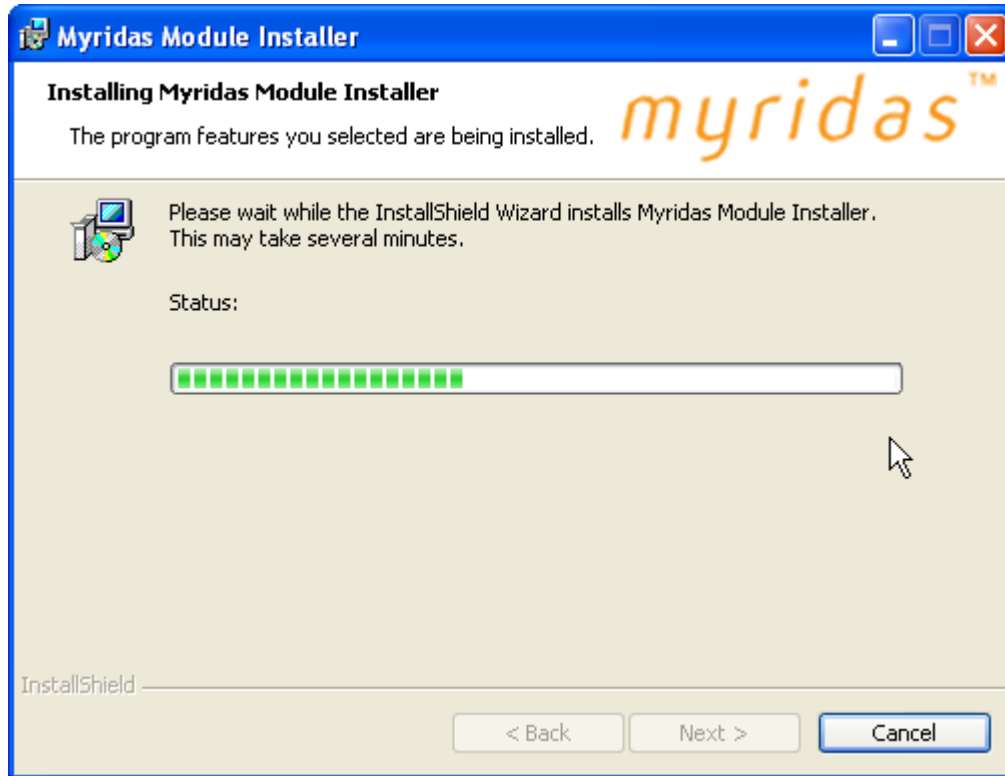
1. Select the **Typical**, **Minimal** or **Custom** installation. In most cases you should select Typical. This will install the program files and help files.
2. Click Next to continue. The Ready to Install the Program screen will open.

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

You are now ready to install Myridas.

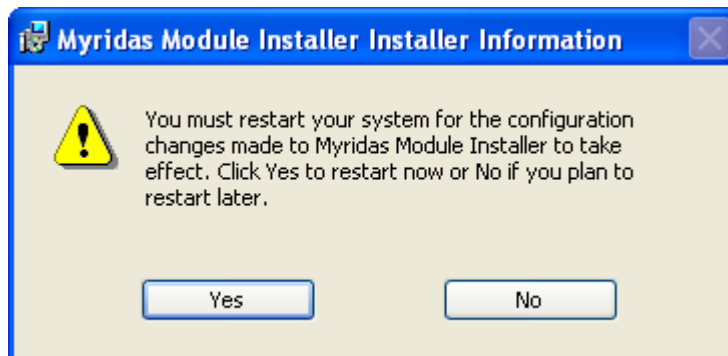
1. Check that your Myridas installation options are correct.
2. Click Back to review any of your settings or Install to begin the installation.

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 9.0 of the Myridas modules you must have the following installations:

- Microsoft Dynamics™ GP9.0

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

When you run the setup you will have the option of automatically giving security for Myridas alternate windows to your Microsoft Dynamics™ GP users. For details of the alternate windows used by Myridas, see section 5.

If you are upgrading an existing Myridas 7.8 installation, please read the additional notes in section 7.

### 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 performs the following functions:

- Creates additional tables in your company database (Fabrikam Inc 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 Microsoft Dynamics™ GP folder
- Sets permissions for Myridas alternate windows

To run the Myridas Installation System:

- Double click the Myridas Installation icon on you desktop, or:
- Select Start >> All Programs >> Myridas Setup >> Myridas Installation System, or:
- Locate and run the file "Myridas Setup9.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 Microsoft Dynamics™ GP installation. The Myridas chunk file will be placed in this folder, e.g. C:\Program Files\Microsoft Dynamics\GP

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.

If you are upgrading an existing Myridas installation to Myridas 9.0, you must enter your new Myridas registration keys at this point.

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.

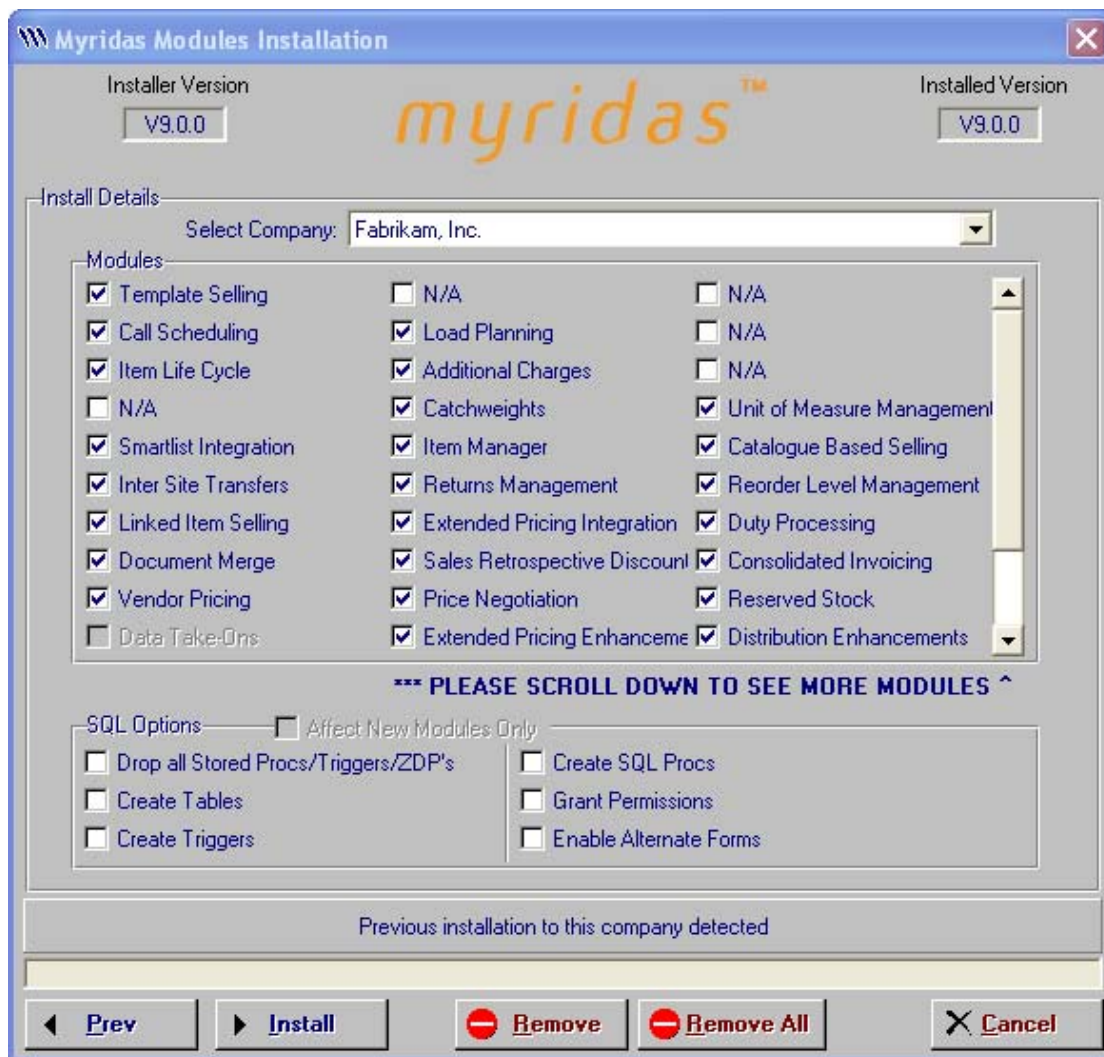
### **Upgrade Screen**

If you are installing Myridas 9.0 into an existing 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 reset the alternate window security. This is recommended, as it will ensure that you have the correct security settings for alternate windows required by Myridas.

### 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 without registration keys you will only be allowed to set up modules in Fabrikam Inc.
2. Select the Modules you wish to install. Note that Smartlist Integration is not a separate module, but can be enabled to give access to selected Myridas tables from within Smartlists. Document Merge is listed as a separate module but can only be installed in conjunction with Consolidated Invoicing. Use the scroll bar to see more modules.
3. Select whether you want to **Enable Alternate Forms**. This will enable Myridas alternate windows for all users.



4. 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 Microsoft Dynamics™ GP 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 and the Forward&Scheduled Orders module. The VBA is optional - if it is not installed the windows will be displayed during automatic line generation.*

The VBA routines are supplied as VBA package files for import. During the installation the package files will be placed in your Microsoft Dynamics™ GP 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 Microsoft Dynamics™ GP 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 for additional companies (if you have valid registration keys)
- Enable additional modules in an existing company
- Enable alternate windows
- 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 Microsoft Dynamics™ GP 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 Microsoft Dynamics™ GP installation. Files will be copied to this folder.
3. Run Microsoft Dynamics™ GP as normal to load the Myridas chunk file.
4. The Dynamics.VBA and Myridas.VBA files created by importing packages (see 3.3 above) may also be copied to each client.

### 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 Microsoft Dynamics™ GP 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 9.0 includes the following modules:

- Additional Charges
- Advanced Inventory Replenishment
- Call Scheduling
- Catalogue Based Sales
- Catchweights
- Consolidated Invoicing
- Distribution Enhancements
- Duty Processing
- En Primeur and Paid Reserves
- Extended Pricing Integration (previously Extended Pricing Data Import)
- Extended Pricing Enhancements
- Financials Enhancements
- Forward and Scheduled Orders
- 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 Navigator
- Sales Pattern Analysis
- Sales Retrospective Discounts
- Template Selling
- Trade Counter (also known as Front Counter)
- Unit of Measure Management
- Vehicle Load Planning
- Vendor Pricing

## 4.2 VBA

The system includes optional VBA integration for the following functionality:

- Hidden windows for adding lines in the Additional Charges module and the Forward and Scheduled Orders module

## 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

## 5. Myridas alternate windows and reports

Window Name	Description	Modules
Apply Sales Documents	“Apply by aging period” option	Financials Enhancements
Bulk Picking Print	Includes options for Bulk Picking by Load	Load Planning
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 and selection of vendor groups, also additional information on the Preview window. This alternate window MUST be used when using a system that includes the Vendor Pricing module	Vendor Pricing
Inventory Activity Reports	Used in Unit of Measure Management to print reports in split pack format	Unit of Measure Management
Inventory Available to Promise Enquiry	Shows Quantities in split pack format if using the Unit of Measure Management module	Unit of Measure Management, Reserved Stock
Item Stock Enquiry	Shows Quantities in split pack format if using the Unit of Measure Management module. Shows Catchweight quantities if using the Catchweight module.	Unit of Measure Management, Catchweights
Items	Alternate item number lookup which includes status code information, unit of measure management options, duty processing consolidated stock view and new Find button to search item catalogue	Item Lifecycle, Unit of Measure Management, Duty Processing, Catalogue Based Sales
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 Myridas Returns Management module.	Returns Management
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
Quantities by Site	Shows Quantities in split pack format if using the Unit of Measure Management module and reserved stock quantities if using Reserved Stock	Unit of Measure Management

Sales Automatic Order Allocation	Includes option to select by Route range if using the Myridas Load Planning module	Load Planning
Sales Bulk Confirmation	Option to open Sales Transaction Entry window. Catchweight confirmation warning indicator on documents where a Catchweight actual weight needs to be entered.	General, Catchweights
Sales Document Print Options	Includes reprint options for Collection Notes (Returns Management module) and additional functionality for the Load Planning module. This alternate window MUST be used when using a system that includes the Myridas Returns Management or Load Planning module.	Returns Management, Load Planning
Sales Item Detail	Not required for any Myridas module	
Sales Lot Number Entry	Displays dual quantity catchweight balances. This alternate window MUST be used when using a system that includes Catchweights, Duty Processing or En Primeur/Paid Reserves.	Catchweights, Duty Processing En Primeur & Paid Reserves
Sales Multiple Orders to Invoices Transfer	Includes option to select by Route range if using the Myridas Load Planning module	Load Planning
Sales Quantity Shortage Options	Expansion window to view Duty Processing consolidated stock balance. This alternate window MUST be used when using a system that includes the Myridas Duty Processing module. Take from Reserved Stock button to display Reserved Stock Allocation window.	Duty Processing, Reserved Stock
Sales Transaction Enquiry Zoom	Provides facility to filter individual despatch lines from consolidated invoices. This alternate window MUST be used when using a system that includes the Myridas Consolidated Invoicing module	Consolidated Invoicing
Sales Transaction Entry	Incorporates Returns Management options and additional requirements for Catchweights, Load Planning, Reserved Stock and Duty Processing modules. This alternate window MUST be used when using a system that includes Myridas Returns Management, Catchweights, Load Planning, Reserved Stock, Sales Navigator or Duty Processing	Returns Management, Catchweights, Load Planning, Reserved Stock, Duty Processing, Sales Navigator
Stock Count Lot Number Entry	Displays Mark All and Unmark All buttons	Distribution Enhancements

Stock Count Serial Number Entry	Displays Mark All and Unmark All buttons	Distribution Enhancements
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<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 packing slips 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 orders with Myridas tables.	
Sales Bulk Picking Ticket	There are no changes to this report in standard Myridas; it is included to allow easier customisation of picking tickets with Myridas tables.	
SOP Blank Picking Ticket Bin Sequenced	There are no changes to this report in standard Myridas; it is included to allow easier customisation of picking tickets with Myridas tables.	
SOP Blank Picking Ticket Order Entered	There are no changes to this report in standard Myridas; it is included to allow easier customisation of picking tickets with Myridas tables.	

## 6. Myridas Integration with SmartList

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

Module	Functionality
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 Smartlist Integration is essential for the Reorder Level Management module.

## 7. Additional Notes on upgrading a Myridas Installation from Great Plains 7.5 to Great Plains 8.0 and above

Please note the following:

- (1) Advanced Distribution, Advanced Picking and Available to Promise are no longer contained within the Myridas dictionary.
- (2) The Bulk Picking by Load feature which was previously a part of Advanced Picking has been redesigned as an integration between Myridas Load Planning and Advanced Picking - Bulk Picking by Batch. When printing a Bulk Picking List for a load, all the documents from the load will be transferred into a batch, which is then be printed using the standard bulk picking functionality.
- (3) Catchweight information is no longer printed as standard on picking tickets, but can be added using the Report Writer function documented in the Catchweight manual.