



AnyView™ Upgrade Procedure

For Microsoft Dynamics™ GP 2010



Version 4.96

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Purpose of This Document

The purpose of this document is to outline the steps required to upgrade an existing AnyView installation to the latest build of AnyView for Microsoft Dynamics™ GP 2010 . Before beginning the AnyView upgrade, you should already have upgraded your Microsoft Dynamics™ GP installation to Version 2010.

Pre-Upgrade Considerations

Important Note – Read this before performing the Dynamics GP 10 or GP 2010 pre-upgrade Steps involving running SQL Scripts provided by Microsoft.

In the "Hot Topic" in the Microsoft Customer Source website entitled 'Upgrading to Microsoft Dynamics GP 10.0'; (and likely in the similar document for GP 2010) In the Critical Update Notices section, step 1 is to run a script required for the security conversion.upgrade steps for GP10.

Microsoft references and provides a SQL script called:
MDGP10_SY01000SecurityConversionCheck.sql for this. Other KB articles may reference a different script: **Company ID Cleanup.sql** , that has similar code.

These SQL scripts contain code that Deletes Records All Tables in the DYNAMICS Database, based on the Values in any Tables column named "CMPANYID".

The scripts as written, **will delete AnyView Smartlist Object column formatting and drop-down list value data.**

The scripts iterate over all DYNAMICS database tables, regardless of the product to which they belong, and execute a delete statement that is qualified by a where clause which has the intent of removing records that reference "invalid" Company ID values.

However, Some AnyView tables use a different 'special value' in a COMPANYID column to represent "all companies", and so these records are valid, yet still get deleted by this .SQL Script. This causes formatting and drop-down list values to be lost in all AnyView Creator Smartlist Objects.

See Accountable Software Techknowlege article # 709 for information on how to avoid this problem ([Appendix 1 - Techknowledge Article #709](#))

Further considerations:

Before beginning the upgrade of AnyView, you should familiarize yourself with this document and the installation steps detailed in the AnyView Creator and Browser documentation. In order to successfully upgrade your AnyView installation, it is important that your systems meet the minimum requirements listed, and that you perform all required steps listed.

- **Before beginning the upgrade process, be sure you meet minimum [system requirements](#).**
- **This upgrade procedure must be performed with all users logged out of Microsoft Dynamics™ GP.**
- **All workstations must be upgraded BEFORE allowing users to log back into Microsoft Dynamics™ GP**
- **If installing AnyView Browser on the IIS Server, unload the AnyView Web Application before continuing.**
- **Read the Major Version Upgrades section of this document.**

Upgrade Quick Reference

The quick reference shows a summary of the changes that are required in order to upgrade.

General Upgrade Requirements

- ✓ Requires Upgrade to IIS Server Components (AnyView Browser only)
- ✓ Requires modification of VERSION= in anyview.ini (AnyView Browser only)
- ✓ Requires Upgrade to ALL Microsoft Dynamics™ GP Client Installations
- ✓ If using External Logins, requires Login synchronization
- ✓ If Microsoft Dynamics™ GP has been upgraded, requires re-running AV Utilities Process.

Database Specific Upgrade Requirements

SQL Server

- ✓ Requires Initialization of new Database Tables for AnyView

Pre - Installation Recommendations

1. Backup Database

As with any upgrade, it is recommended that you perform a database backup.

2. Logout All Users

Verify that everyone is logged out of Microsoft Dynamics™ GP and AnyView Browser.

Make Backups of Modified AnyView Browser Files

If you have made changes to any of the Web pages in your AnyView Browser directory, or to the Detail View style sheet, you should make copies of these files before installing. This will allow you to re-apply these changes once the installation is complete.

Files which should be backed up include:

Styles.css – This file stores the Fonts, colors, and other physical attributes of your AnyView web pages.

FormStyles.css – This file stores the Fonts, colors, and other physical attributes of your AnyView Detail View pages.

Custom.Inc – This file stores the paths to images used in you AnyView web pages.

Detail View .HTM Files – If you have made modifications to any detail view html pages, these files should also be backed up.

**See the Web Application Setup Requirements section for detail on restoring these files.*

Major Version Upgrades

When upgrading to Version 11.XX (GP 2010) of AnyView, it is recommended that you follow the steps listed below:

Delete AnyView Dictionaries from all Workstations

Before upgrading, delete the AnyView dictionaries from the Microsoft Dynamics™ GP client folder on each workstation. This is required if you are installing into a previous GP folder, since the new AV1100.cnk file will not “merge” with the old AV2377.DIC, resulting in a Version mismatch error when you log into the Dynamics GP the first time after ‘including new code’.

Note: *If you have a modified forms or reports dictionaries for AnyView, you will need to recreate those modifications once the new version is installed.*

Delete the AnyView Dictionary

In your Microsoft Dynamics™ GP folder, you will find the **AV2377.DIC** file. Delete the AV2377.DIC file.

Delete the Modified Forms Dictionary

In your Microsoft Dynamics™ GP folder, if you have modified forms in AnyView, you will find the AV2377F.DIC file. Delete the AV2377F.DIC file if it exists.

Delete the Modified Reports Dictionary

In your Microsoft Dynamics™ GP folder, if you have modified reports in AnyView, you will find the AV2377R.DIC file. Delete the AV2377R.DIC file if it exists.

Installation Steps

1. Run the installer downloaded from Accountable Software web site.
EX: AnyView Creator (GP2010) Build 96.exe

2. Follow the on screen prompts to install the desired components.

If you are unsure of which components to install, consult the AnyView Creator and AnyView Browser documentation for details on configuration.

3. If installing AnyView components on a machine with a local installation of a Microsoft Dynamics™ GP client, launch Microsoft Dynamics™ GP and Click 'Yes' to the Include new code message.

*If installing AnyView Browser on an IIS Server **without** a local Microsoft Dynamics™ GP Client install, installation for this machine is complete. Continue the installation by following steps 1 – 3 on each workstation.*

Note: Steps 4 through 8 only need to be performed on one client workstation, as they update SQL Tables on the SQL server that are shared by all workstations

4. After installing the new version of the AnyView Creator and Browser Client components, and including new code, log in to Microsoft Dynamics™ GP as a database Administrator ('sa', 'DYNSA', or member of the sysadmin SQL server fixed server role). You will be prompted to initialize tables, Click 'Yes' to begin the process.

When the initialize process is complete you should be presented with a message that the process completed successfully, if it did not, contact Accountable Software Technical Support.

5. Once logged into Microsoft Dynamics™ GP, Choose the Menu:
Tools >> Utilities >> System >> AnyView >> AV Utilities.
6. Click the PROCESS button to run the AnyView table utility. The process is complete when the PROCESS button is enabled.

It is recommended that this process is run when no users are in Microsoft Dynamics™ GP or in AnyView Browser.

7. If you are using External Logins (Customers, Vendors, Salespeople) with AnyView Browser, click the SYNCHRONIZE LOGINS button on the AnyView Utilities window. SYNCHRONIZE LOGINS runs a 'Check Links' style verification on the records in the Internet Address table and the AnyView Login tables. Any discrepancies found will be corrected and reported on the AnyView Login Errors Report when the process finishes. An example of a discrepancy that would be corrected by the synchronize process is orphaned records in the AnyView login tables. Should a record exist in the AnyView User Master table that does not exist in the Internet Information table, this process would remove that record.
8. Close the AnyView Utilities window.

Once steps 1 through 3 are completed on each workstation and on the IIS server, the installation process of the upgrade is complete.

Auditing Upgraded objects

After upgrading your Microsoft Dynamics™ GP and AnyView installations, it is recommended that you verify the validity of your AnyView objects using the AnyView Object Auditor. The Auditor will report any issues with upgraded objects including changes to fields, and tables. It is highly recommended that this audit be performed on all objects that contain Third Party product tables. Details for this process can be found in the AnyView Creator documentation.

Web Application Setup Requirements for AnyView Browser

A) Update the Version information (AnyView Browser Only)

After completing the installation, you must update the AnyView version by opening and saving the AnyView DSN Setup information. To do this, use the Microsoft Dynamics™ GP Menu choice:

Tools >> Utilities >> System >> AnyView >> AV DSN Setup.

Verify that the existing information is correct, and click the 'Save' button.

This will change the VERSION= line in the anyview.ini file to :
VERSION=11

In order to update the AnyView version, you must hit 'Save' even if no changes were made. You must unload the AnyView web application for this change to take effect. You can Unload the web application by using the Microsoft Internet Services Manager (ISM). Open ISM, then doubleclick the machine name to expand it. Expand DEFAULT WEB SITE. Then find the AnyView web entry. Right click it. Select PROPERTIES. Click the UNLOAD button. Then click OK after the application unloads. . For IIS 6.0 on Windows 2003 Server,, Unloading the web application is accomplished by stopping and starting the Application Pool that contains the AnyView Web Application.

B) Re-incorporate customized web files, if applicable.

After performing the Installation Steps, you should follow the steps listed here to complete the upgrade of your AnyView Web Application.

If upgrading from AnyView 6.00 Build 64 or later, you can now copy back any backed up copies of **Styles.css, Custom.Inc or Detail View .HTM Files** otherwise, you should follow the steps listed below.

Perform these steps ONLY if upgrading from a version prior to AnyView 6.00 Build 64.

1. Regenerate Login Pages

If you have created Login Pages using the AnyView Login Page Generator, you must recreate these pages so that changes in this version will be incorporated. Use the Login Page Generator to create new login pages for each required User Type and / or Company.

2. **Update Styles.css**

If you have made changes to the physical attributes of your AnyView web, you will need to include changes from the new Styles.css file in your saved copy of Styles.css.

Note: *The method listed below for updating the Styles.css file can be used only if you are upgrading from Build 56 of AnyView Browser. If upgrading from a version earlier than 56, you will need to reapply style changes manually using the Web Page Setup window.*

To update styles:

- 2a. Open your backup copy of Styles.css using a text editor such as Notepad.
 - 2b. Open the file StyleChanges.css in a separate instance of the same text editor.
 - 2c. Copy the entire contents of StyleChanges.css and switch to your backup copy of Styles.css.
 - 2d. Navigate to the end of the file, and paste the contents of the clipboard into the file.
 - 2e. Verify that there are no spaces between the last original entry and the new entries.
 - 2f. Save and close the Styles.css file.
 - 2g. Copy the Styles.css file back to your AnyView Physical Directory, replacing the existing file.
- The Style sheet will now contain any Style modifications you made and styles added for Build 64.

3. **Update FormStyles.css**

If you have made changes to the physical attributes of your AnyView Detail Views, you will need to include changes from the new FormStyles.css file in your saved copy of FormStyles.css.

To update Dorm styles:

- 2a. Open your backup copy of FormStyles.css using a text editor such as Notepad.
- 2b. Open the file FormStyleChanges.css in a separate instance of the same text editor.
- 2c. Copy the entire contents of FormStyleChanges.css and switch to your backup copy of FormStyles.css.
- 2d. Navigate to the end of the file, and paste the contents of the clipboard into the file.
- 2e. Verify that there are no spaces between the last original entry and the new entries.
- 2f. Save and close the FormStyles.css file.
- 2g. Copy the FormStyles.css file back to your AnyView Physical Directory, replacing the existing file.

The Style sheet will now contain any Style modifications you made and styles added for Build 64.

4. **Update Custom.inc**

If you have made changes to the images used in your AnyView web Application, you will need to include changes from the new Custom.inc file in your saved copy of Custom.inc.
To do this:

3a. Open your backup copy of Custom.inc using a text editor such as Notepad.

3b. Open the file CustomChanges.txt in a separate instance of the same text editor.

3c. Copy the new lines one at a time from CustomChanges.txt and switch to your backup copy of Custom.inc. *Note: Do not copy the comment, only the line(s) listed below the comment.*

3d. Navigate to the end of the section specified in CustomChanges.txt, and paste the contents of the clipboard into Custom.inc.

3e. Verify that there are no spaces between the last original entry and the new entry(s).

3f. Repeat steps 2c – 2f for each new line. When finished, save and close the Custom.inc file.

3g. Copy the Custom.inc file back to your AnyView Physical Directory, replacing the existing file.

The Custom.inc will now contain any Image modifications you made and paths for new images added as of Build 64.

5. **Update Detail Views**

If you have modified any detail view html pages, you should now copy them back to the AnyView Physical directory, replacing the existing file(s).

If you have modified the SOPDocument.htm file and are upgrading from an AnyView version prior to version 46, you will need to manually change the following text: **||Customer Name||** should be changed to **||ShipToName||**.

System Requirements

AnyView Browser Client

- Microsoft Internet Explorer 5.0 or higher
- Netscape 6.0 or higher

Microsoft Dynamics™ GP Client

- Microsoft Dynamics™ GP, version 2010
- SmartList Module Installed

Windows 2000 Server / Windows 2000 Professional / Windows XP / Windows Server 2003 / Windows Server 2008

- AnyView version 11.00.XX (AnyView for Dynamics GP 2010)
- Internet Service Manager
- ActiveX Data Objects (ADO) 2.5 or higher
- Internet Explorer 5.0 or greater
- Service Pack 1 for Windows 2000 is required, (Latest Service pack recommended.)

Appendix 1 - Techknowledge Article #709

Techknowledge Article #709



Subject

AnyView Creator upgrade (GP9, GP10, GP2010), Missing DDL values, Column Formats- MS provided SQL Scripts

Article #: 709
Product: Anyview Creator
Submitted: 9/18/2008

Symptom / Cause

After a Dynamics GP upgrade to GP 9 or GP 10, or GP2010 and the following AnyView Creator upgrade to a matching AnyView Version , there may be missing DDL (drop-down-list) values, and missing column formats - In AnyView Creator Objects.

For example, the Quote,Order,Invoice... SOP Document types may show as numbers instead of the words, or columns that contain numeric data that have be reformatted to not show the default currency symbol or to modify the number of decimal places shown, may revert back to showing the default currency format defined by the GP database column for the source SQL table.

The cause for these issues is that some .SQL Scripts were run prior or during the GP upgrade process, which inappropriately removed records from AV* tables in the DYNAMICS database.

Solution

In the "Hot Topic" in the Microsoft Customer Source website entitled 'Upgrading to Microsoft Dynamics GP 10.0'; In the Critical Update Notices section, step 1 is to run a script required for the security conversion.upgrade steps for GP10.

Microsoft references and provides a SQL script called:

MDGP10_SY01000SecurityConversionCheck.sql for this. Other KB articles may reference a different script: **Company ID Cleanup.sql** , that has similar code.

These SQL scripts contain code that Deletes Records All Tables in the DYNAMICS Database, based on the Values in any Tables column named "COMPANYID".

The scripts as written, will delete AnyView Smartlist Object column formatting and drop-down list value data.

The scripts iterate over all DYNAMICS database tables, regardless of the product to which they belong, and execute a delete statement that is qualified by a where clause which has the intent of removing records that reference "invalid" Company ID values.

However, Some AnyView tables use a different 'special value' in a COMPANYID column to represent "all

companies", and so these records are valid, yet still get deleted by this .SQL Script. This causes formatting and drop-down list values to be lost in all AnyView Creator Smartlist Objects.

The DELETE statement is qualified by the WHERE clause:
...where COMPANYID not in (0,-32767)..

But AnyView stores its "all companies" token in the COMPANYID column as the positive value 32767. So in order for the script to not delete AnyView table records that are needed, it should be modified before running, so that the clause reads:

...where COMPANYID not in (0,-32767, 32767)...

i.e. add the 32767 value to the exception list, everywhere that it occurs in the script.

Alternatively the script could be modified to exclude processing AV* and other third party tables.

If this unmodified .SQL Script is inadvertently run before modifying it to correct for this flaw, rows will be deleted from at least the following 2 AnyView Creator tables:

ASIAV210 (ASI_Drop_Down_List_MSTR)
and
ASIAV220: ASI_Field_Format_MSTR

If this has been done, these 2 DYNAMICS database tables should be restored from backup after the GP upgrade, in order to restore the formatting and drop-down list values for AnyView Creator Objects in the Dynamics GP system.

There is also another script that has been distributed by Microsoft, entitled:

Company ID Cleanup.sql

which is intended to cleanup DYNAMICS databases that have been moved to new SQL Servers with different sets of company databases present than the set of databases present where the DYNAMICS database originated.

This script has similar code that will delete AnyView Creator Smartlist Object formats and drop-down list values, requiring them to be manually restored as described above.