Forms Printer

For Dynamics GP

Upgrade Guide

A Guide for Upgrading to the current version of
Forms Printer Base System,
Forms Printer for Project Accounting
and
Forms Printer Plus

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Contents

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Contacting Us

Technical Support

Accountable Software Technical Support is available Monday through Friday from 9:00 am to 5:00 pm EST. Technical Support can be reached in the following ways:

610.983.3100 (voice) - support@accountable.com

When you call, or E-mail Accountable Software for support, please include the following information:

- Your name
- Your company name and phone number
- Product inquiring about and the version you are running (from the registration window)
- A brief description of the problem.

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Forms Printer Upgrade Process

The upgrade of Forms Printer includes the installation of client code, the upgrade of objects in the SQL Server database, upgrading reports to the current Dynamics GP database version, upgrading reports to include any Forms Printer changes and the entering of new registration keys. It is recommended that each Dynamics GP Company database as well as the DYNAMICS systems database is backed up prior to performing any of the upgrade steps.

This document provides the necessary steps for upgrading previous versions of Forms Printer to the current version including upgrading to Forms Printer Plus from previous versions of Forms Printer Base System.

Note: This process assumes that the Microsoft Dynamics GP core system has been successfully upgraded following all recommended upgrade procedures.

Upgrading the First Client Installation

Complete the following steps to upgrade the Forms Printer installation on each Dynamics GP client machine:

1.   Following the upgrade of your Dynamics GP application, navigate to the Dynamics GP Client Application folder using Window Explorer.

2.   Find the **two** Forms Printer dictionary files named **FPD1230.DIC** and **ASI1655.DIC**.

3.   Delete these two files.

4.   Check the Accountable Software web site for the most current version of Forms Printer compatible with your Dynamics GP version before installation. This ensures that the latest updates or fixes are installed.

5.   Run the Forms Printer installation using the downloaded Forms Printer installation file.

6.   Follow the installation wizard to complete the installation of Forms Printer.

7.   Launch Microsoft Dynamics GP and log in as 'sa' or a database administrator. A dialog window prompting to include the new code will be displayed, as shown below:
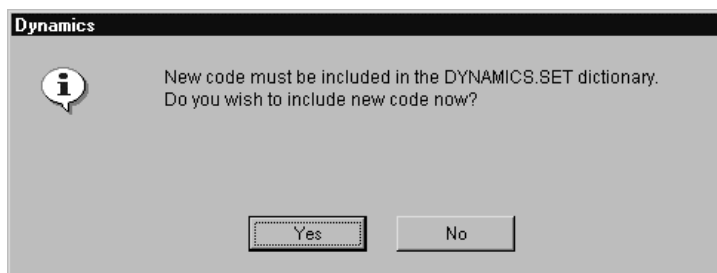
Click **Yes** and wait until the process has completed.

8.   Follow the steps below for Upgrading the SQL Server Database.

Upgrading the SQL Server Database

Done as part of the First Client Upgrade, the SQL Server Database upgrade process varies depending on which Forms Printer version you are upgrading from.

GP18.X, GP2018, GP2016, or GP2013 & GP2015 Builds 133 and Newer

If upgrading to this release from any build of Forms Printer for GP18.X, GP2018, any build of Forms Printer for GP2016, or from build 133 and higher of Forms Printer for GP2013 or GP2015 your system will do an **All Companies, Light Conversion** to this build.

This new conversion method will automatically make the SQL table changes to all companies without having to repeat the upgrade steps as described below. This means you do not need to log into each company to complete the upgrade.

Builds Prior to 133

After the new code is loaded, you must update the SQL Server Database using the steps below and you must repeat this database upgrade for each Dynamics GP Company by logging into each company and repeating the steps:

1. When prompted with the dialog window prompting to initialize and/or upgrade **Custom Report Integration** tables click **Yes** to initialize the new tables.

2. When prompted with the dialog window prompting to initialize and/or upgrade **Forms Printer** tables click **Yes** to initialize the new tables.

3. If running the Project Accounting module, you will be prompted with the dialog window asking to initialize and/or upgrade **Project Accounting** tables click **Yes** to initialize the new tables.

4. You will be presented with the message to enter registration keys. Click **Yes** to open the Forms Printer Registration window. Enter the registration keys you received from Accountable Software for your Microsoft Dynamics GP installation.

   Note: Once you have initialized tables and entered your registration keys, you will not be prompted for these steps on subsequent workstations.

Converting E-mail From Setup

If upgrading from builds earlier than build 149, after converting the database, you may optionally convert the Forms Printer E-mail From Setup by opening the E-mail From Setup window from Forms Printer Setup.

Historically, the E-mail From list, available during 'To E-mail' Delivery Setup, was saved to and modified in the Dex.ini file on each local workstation that accessed Forms Printer Setup.

With the release of build 149, you now have the option to maintain those values in the E-mail From Setup window and save them to the database rather than to the local workstation's Dex.ini file. Use the information in the Forms Printer User Guide to complete the conversion.

Upgrading Reports to the Current Database Version

When installing a new version of Forms Printer and / or Dynamics GP, database changes may have occurred. These database changes may affect tables used in your reports. In order upgrade your reports to account for these changes, you must use your Reporting tool to look for and make needed changes. Follow the steps below to upgrade reports for your reporting tool.

Upgrading Crystal Reports Database Definitions

When using Crystal Reports, database changes can be identified and corrected using the Verify Database process.

This process is required to upgrade any existing Crystal reports you may have in use. All sample reports installed with Forms Printer have already been modified to work with the current version of Microsoft Dynamics GP and Forms Printer.

Note: **It is recommended that you make a backup copy of each report before beginning the upgrade process.**

1. Open each Crystal Report individually with Business Objects Crystal Reports.
2. From the toolbar, select **Database >> Verify Database.**
3. From the Select Data Source window, select the DSN created for Forms Printer, as seen in the following illustration, then click **OK.**
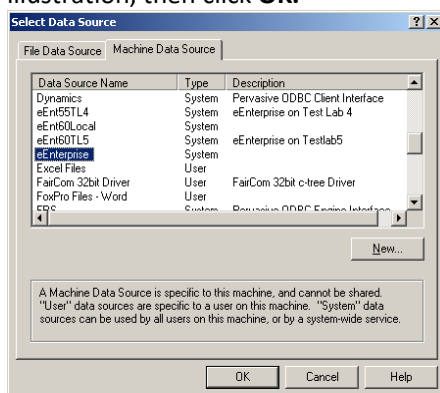
4. If using Microsoft SQL Server, when prompted, enter a valid User Name and Password. Click the Options button, select a **Company** Database and click **OK** as shown in the following illustration. You will be prompted with the following message, where "UPR10208" will be the name of the table that has changed.
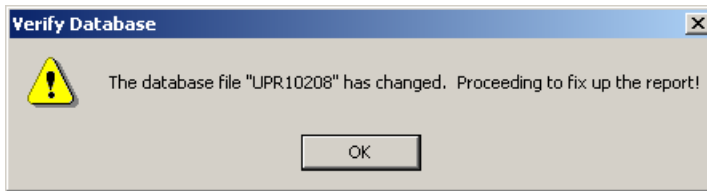
5. Click **OK** for each Verify Database message box that opens.
6. When finished, save each report with these changes.

Upgrading Crystal Reports

The upgrade from versions prior to 10.50 of Forms Printer includes several major changes that may include new tables, new report restrictions and new parameters.

With the exception of Project Accounting reports, there has been at least 1 critical change to every report used by Forms Printer.

Note: Prior to using any existing reports that were used with versions earlier than Forms Printer 10.50, they MUST be upgraded to incorporate Forms Printer changes for 10.50 and above.

To upgrade reports, follow the steps below:

1. Open each report one at a time in Crystal Reports.
2. Open the matching sample report installed with the latest version of Forms Printer.

    NOTE: Make sure you are using the samples installed the latest version of Forms Printer. The Template reports are installed by the Forms Printer installer into various series subfolders, under the following subfolders of the Dynamics GP Application Folder:

    [Dynamics GP Application Folder]\Forms Printer\Crystal Report Templates

3. Add Tables
    Use the Crystal Reports Database > Database Expert window to view the tables included and joins used on each report. Duplicate these changes by adding any new tables detailed.

4. Set Parameters
    Use the same process of either report comparison or documentation details to examine the report parameters. When setting parameters be sure that:

    1. The total number of report parameters on the report matches the Forms Printer requirement.
    2. Each parameter is of the correct data type as required by Forms Printer.
    3. The parameter order is correct as required by Forms Printer.

5. Verify Selection Criteria
    Use the same process of either report comparison or documentation details to examine the report selection criteria and ensure that any new restrictions are applied.

Project Accounting Sample Reports

For Microsoft Dynamics GP Version 10 and Higher

With the incorporation of Project Accounting PO functionality into the normal Microsoft Dynamics GP Purchase order Window, the PA Specific PO reports for Blank and Other formats are no longer used. The Blank and Other PO's are printed with the Crystal Reports set up in the "Purchasing Series" of Forms Printer Setup, the PA PO Format A, B and C are still set up in the Project Series.

Otherwise, only minor table changes have been made to Project Accounting tables used by Forms Printer in these versions. To upgrade your Forms Printer Project Accounting reports, follow the Crystal Reports documentation for the 'Verify Database' functionality. You may have to Map some old Fields that have changed names in Project Accounting 9.0 to their new names.

For Great Plains Version 6.0, 7.0 and 7.5, 8.0

Only minor table changes have been made to Project Accounting tables used by Forms Printer in these versions. To upgrade your Forms Printer Project Accounting reports, follow the Crystal Reports documentation for the 'Verify Database' functionality.