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Introduction

System Manager Overview
System Manager helps you define and manage a Microsoft Dynamics® SL system by letting you:
- create databases
- define companies
- register your software
- customize user access and security
- import transaction data
- generate reports
- publish documents on a Microsoft® SharePoint® site by using Doc Share
- publish reports to Microsoft® SharePoint® sites

User's Guide Overview
This user's guide provides information about the setup and use of the System Manager module of Microsoft Dynamics SL. The System Manager Help or user's guide differs from documentation for other modules in that the System Manager topics are typically global, applying to the whole system and to most users who work in the system.

What is Covered in the User’s Guide?
This user's guide consists primarily of procedures and checklists that describe how to perform the various tasks featured in the System Manager module. The user's guide also contains topics that help you become better acquainted with the capabilities of the module.

Who Should Use the User's Guide?
This user's guide is designed for users, system administrators, database administrators, and developers who are new to Microsoft Dynamics SL. The guide provides the information that you must have for making decisions about how to use the System Manager module to benefit the most from your system.

How to Use the User’s Guide
The user's guide presents the procedures and steps required for using the System Manager. To help you locate information, the user's guide contains:
- A table of contents of logically organized activities and tasks.
- An alphabetized “Quick Reference Task List” of typically performed tasks.
- An alphabetized “Index” of the information that is provided in the user's guide.
Quick Reference Task List

This list contains tasks that are typically performed with the System Manager module. Each task is cross-referenced to a specific topic page in this user’s guide.

How Do I Add…?
- Users to the system — see “Adding Users” on page 21.
- Custom applications to a menu — see “Adding Custom Applications to the Menu” on page 50.
- Custom reports to a menu – see “Adding a New Report, Screen, or Query to a Menu” on page 45.

How Do I Assign…?
- Application databases to the system database — see “Creating Additional Databases” on page 7.
- Users to Groups — see “Assigning Users to Groups” on page 24.

How Do I Back Up…?
- Databases — see “Backing Up Databases” on page 73.

How Do I Create…?
- An application database — see “Creating Additional Databases” on page 7.
- A Transaction Import control file — see “Working with Transaction Import Control Files” on page 89.

How Do I Customize…?
- Menus — see “Using Menu Maintenance” on page 42.

How Do I Define…?
- A company ID — see “Creating Companies” on page 5

How Do I Enter…?
- Registration information — see “Entering Registration Information” on page 14.

How Do I Import…?
- Possible values lists — see “Importing Messages and Possible Values Lists” on page 77.
- Transaction data — see “Importing Transaction Data” on page 79.

How Do I Look…?
- At the event log — see “Viewing the Event Log” on page 77.
- Up active users — see “Looking Up Active Users” on page 72.

How Do I Publish…?
- Reports to SharePoint Sites — see “Sharing Reports Using Microsoft SharePoint” on page 68.

How Do I Set…?
- Doc Share defaults — see “Sharing Documents By Using Doc Share” on page 64.
How Do I Start...?
- The Transaction Import process — see “Starting the Transaction Import Process” on page 100.

How Do I Submit...?
- Registration information — see “Entering Registration Information and Unlocking Modules” on page 14.

How Do I Unlock...?
- Microsoft Dynamics SL modules — see “Entering Registration Information and Unlocking Modules” on page 14.

How Do I Update...?
- The system database — see “Updating Databases” on page 75.

How Do I Use...?
- Initialize Mode — see “Using Initialize Mode” on page 57.

How Do I Validate and Repair...?
- Databases — see “Validating and Repairing Databases” on page 74.

How Do I View...?
- An event log — see “Viewing the Event Log” on page 77.
- A Transaction Import log file — see “Viewing Transaction Import Log Files” on page 103.
Setting Up Microsoft Dynamics SL

Overview
This section provides information about how to create the fundamental structures the program uses to work with the data it stores. These basic tasks include the following:

- Creating Companies
- Generating Databases

Creating Companies
When you first log on to Microsoft Dynamics SL, you will select a company ID that tells the system to automatically open the appropriate application database that is linked to a system database. The system administrator assigns the appropriate application database to the company ID and the system database.

Defining a Company
Upon starting Microsoft Dynamics SL for the first time, the system administrator must create at least one company. The system administrator can add more companies at any time.

To define a company:
1. Open Company Maintenance (98.280.00). The screen appears in grid view and shows all the companies currently defined in the system. Press F4 to switch to form view.

   ![Figure 1: Company Maintenance (98.280.00), form view](image)

2. Type a unique identification code for this company in Company ID.
3. Type the name of the company in Company Name.
4. Type the name of the application database to associate with the company ID in Database Name.

   Note: To see the application database names that were created, open Database Administration (98.270.00), and note the application database names that are shown in the detail area. If you
did not change the application database name when you ran the Empty Company scenario, the default application database name will be NewApp.

5. Select **Active** to indicate that the company is active. If this box is cleared, the company is inactive and you cannot add transactions.

6. The master company’s company ID is displayed as the default in **Master Chart of Accounts** and **Master Subaccount Table**. This ID cannot be changed.

7. Type address information for the company in **Address, City, State/Province, Country/Region**, and **Postal Code**.

8. Type the contact information for the company in **Phone** and in **Fax**.

9. The base currency ID from GL Setup (01.950.00) is displayed as the default in **Base Currency ID**. It cannot be changed.

10. Type the tax identification code for the company in **Employer Tax ID**.

11. Click the button that displays the company name and select a color. A number associated with the color appears in the **Company Color** box.

   **Note:** The color and company name change the appearance of the Switch Company button.

12. Click the **Save** button, and then close the screen.

13. Close Microsoft Dynamics SL, and then reopen it.

14. Click the **Switch Company** button on the toolbar. Your new company appears on the company list.

**Note:**

- Use **Switch Company** in the Microsoft Dynamics SL window to open another company that you have access to without closing the one in which you are currently working and then performing the logon process again. You can control access to this feature by using the [Company] section of the Solomon.ini (for more information, see “[Company] Section” on page 222.

- This feature provides more flexibility for those who have to work with data for multiple companies. For example, you can use this functionality to copy detail lines from Company A’s document and then quickly switch to Company B without logging off from Company A to paste the copied detail.

- The list of companies that appears in the dropdown for the Switch Company button is configurable in the **Options** screen on the **Tools** menu. The current default is 10 companies. The system will filter the list as you type part of the company name in the Select a Company window and show only those companies that match. The list will add the company that you log on to the Most Recently Used entries and put them at the top of the list.
Generating Databases

You must have at least one system database and one application database before you can start to work in Microsoft Dynamics SL. Creating these databases is part of the installation and initial setup process. Database creation procedures are included in the *Microsoft Dynamics SL Installation Guide* (InstallationGuide.pdf).

**System Database**

The system database contains shared site-specific data, such as database field attributes, edit characteristics, product registrations, customizations, and screen-level security.

**Application Database**

An application database contains all the accounting data for a specific financial entity.

**Creating Additional Databases**

After you create the initial system and application databases, your organization’s database administrator can add more databases by using *Database Maintenance (98.290.00)* or *Database Administration (98.270.00)*. For more information, see “Database Maintenance (98.290.00)” on page 113 and “Database Administration (98.270.00)” on page 198.

**To create empty databases:**

1. Open *Database Maintenance (98.290.00)*. The **Connect Server** tab appears.

   ![Figure 2: Database Maintenance (98.290.00), Connect Server tab](image)

2. In **Destination SQL Server Name**, type the name of the server where the databases will reside.

3. **Windows Authentication** is the recommended security mode to access a computer that is running SQL Server. Select **SQL Server Authentication** if it is preferred, and then enter the database administrator login ID and password for the computer on which you will create the SQL Server databases.

4. Click **Connect**. A message in the status bar indicates that you are connected to the computer that is running SQL Server.

5. Click the **Create Databases** tab.
Create Databases tab

![Create Databases tab](image)

**Figure 3: Database Maintenance (98.290.00), Create Databases tab**

6. Select the database type that you want to create from the list of **Scenarios**.

   **Note:** If you select **Additional Empty Application Database, Identify System Database** (98.290.40) appears. Select a system database to associate with the new application database, and then click OK.

7. To override the default name, location, or size of the system or application database, click the **Advanced** button. **Advanced Configuration Settings** appears.

![Advanced Configuration Settings](image)

**Figure 4: Advanced Configuration Settings**

8. Enter the correct information and then click **OK** to return to the **Create Databases** tab of **Database Maintenance** (98.290.00).
9. Click **Create**. The **Authentication** window appears.

![Figure 5: Authentication](image)

10. Verify that the correct authentication mode is selected, and then click **OK**. If **SQL Server Authentication** is selected, go to step 14. If **Windows Authentication** is selected, **SYSADMIN Windows User Name** appears.

![Figure 6: SYSADMIN Windows User Name](image)

11. In **Windows User Name**, type the identifier of the Windows user who will be the system administrator for this database. Type the information in the domain\username format.

**Note:** A user who is defined as an administrator automatically has access to all screens and reports within Microsoft Dynamics SL.

12. If you do not want to give the individual the ability to create new SQL Server users and logins, clear the **Grant this user permission to create SQL Server logins and users** check box that is selected by default. An administrator becomes a member of the SQL Server SYSADMIN server role if the **Grant this user permission to create SQL Server logins and users** check box is selected.

**Note:**
- Clearing the check box implies that the database administrator will generate SQL Server users and logins by manually using SQL Server tools.
- If the user is a Microsoft Dynamics SL SYSADMIN and also part of the SQL Sysadmin group, it is basically the same as selecting the **Grant this user permission to create SQL Server logins and users** check box.
users check box in the SYSADMIN Windows User Name screen of Database Maintenance (98.290.00).

- To avoid a situation in which the check box is cleared for a Microsoft Dynamics SL administrator who needs to access databases and perform administrative tasks, enter the following SQL statement in a query window:

  `sp_addrolemember 'db_owner', 'domain\name'

Run the command for each Microsoft Dynamics SL system and application database.

**Example:**

```sql
use SLSystemDatabase
GO
sp_addrolemember 'db_owner', 'domain\name'
GO
use SLApplicationDatabase
GO
sp_addrolemember 'db_owner', 'domain\name'
GO
```

13. Click **OK**. Go to step 21.

14. When the security message appears:

- Click **No** if you want to select Windows authentication. **Authentication** appears. Select **Windows Authentication (Recommended)**, click **OK**, and then return to step 10.
- Click **Yes** to confirm that SQL Server authentication is the correct authentication mode to use when users want to access the computer that is running SQL Server. **SQL Master80 Login** appears if you have not yet created the Master80 user. This does not occur if you have already installed a database for Microsoft Dynamics SL 2011 or later versions on the computer that is running SQL Server. If you have already created the Master80 user, go to step 20.

**Figure 7: SQL Master80 Login**

15. In the **Password** box, enter a password for the Master80 user that satisfies the strong password requirements that are listed.

16. In **Confirm Password**, type the password again.
17. Click **Ok**. **SYSADMIN Login** appears.

![Figure 8: SYSADMIN Login](image)

18. Type the **Password** of the SYSADMIN user.

19. In **Confirm**, type the password again, and then click **Ok**. **Login** appears.

![Figure 9: Login](image)

20. Type the **Password** of the SQL Server user Master80, and then click **Ok**. The database creation process starts.

21. After the database scenario is created, click **Ok** to acknowledge the completion of the database creation process, and then close **Database Maintenance (98.290.00)**.
Registering the Software

Overview
This section provides information and procedures for registering the Microsoft Dynamics SL software. These basic tasks include the following:

- Entering registration Information
- Unlocking modules

Registration Process
When your organization purchased Microsoft Dynamics SL software, a Microsoft Certified Consultant submitted to Microsoft the name of the company buying the software. Other information held about the purchase includes the following:

- Information about the company.
- The name of the consultant who sold Microsoft Dynamics SL.
- The names of any consultants engaged to customize the Microsoft Dynamics SL software.
- The licensed modules.

Your organization will receive a license that entitles you to unlimited access to the modules, and also the keys to unlock those modules. Registered users also receive software updates and bulletins.

TRIAL-LOC mode
You can install the complete suite of Microsoft Dynamics SL modules, even though you may not have licensed them all. You can use each module in a special TRIAL-LOC mode following the initial installation. The TRIAL-LOC mode allows 20 logins to an unregistered version of the Microsoft Dynamics SL database. After 20 logins, register the product to continue use.

Note: If you receive system message 6824, “You have reached the maximum number of users” while in TRIAL-LOC mode, you have exceeded the maximum number of five users. This limit is in effect until the system is registered and unlocked.
Entering Registration Information and Unlocking Modules

Complete the registration process after you receive your customer ID and module unlocking codes from Microsoft. If you have not received the unlocking information, log on to the CustomerSource website and open the My Account page to locate it, or contact a Microsoft Certified Partner. For more assistance, call Sales Operations at 1-800-456-0025 and select option 2.

Entering Customer Information

To enter customer information:

1. In the Microsoft Dynamics SL window, click the Administration button and select Registration. Registration (95.250.00) appears with the Customer tab selected.

2. In Customer ID, enter the identification code for your company as it is listed on the registration report that was sent to you and your Microsoft Certified Partner.

3. Enter information about the company in the other fields. Required fields have red borders. If you do not complete required fields, a message will be displayed that asks you to complete the fields.

4. Click the Save button on the toolbar.
Entering Reseller and Consultant Information

You can enter information about the Microsoft Certified Partner (reseller) who sold the software and any consultant hired to customize the software. This information is not required. However, it could provide a helpful resource in the future if you need contact names and numbers.

To enter reseller and consultant information:
1. In Registration (95.250.00), click the Reseller/Consultant tab to select it.

2. In the Reseller area, enter information about the Microsoft Certified Partner that sold the Microsoft Dynamics SL software to your organization.

3. In the Consultant area, enter information about the Microsoft Certified Partner your organization engaged to customize the Microsoft Dynamics SL software.

4. Click the Save button on the toolbar.
**Entering Module Information**

Enter information about any licensed modules. Microsoft issues a key to unlock the modules.

**To enter module information:**
1. In *Registration (95.250.00)*, click the **Modules** tab to select it.

![Registration (95.250.00), Modules tab](image)

2. In **Item**, type the two-character module code or five-character user pack code of each module to register.

3. Enter information received from Microsoft in **Serial Number** and **Unlocking Key**. Microsoft Dynamics SL calculates **Unlocked**, **Verification Code**, and **Authorized Users** for each module.

   **Note:** The System Manager (SY###) and General Ledger (GL) modules must be registered before other modules can be entered.

4. Click the **Save** button on the toolbar.

   **Note:** Unlocked, Verification Code, and Authorized Users are automatically updated when you save or print registration information.
Maintaining Security

Overview
This section provides information and procedures for maintaining security in Microsoft Dynamics SL. These basic tasks include the following:

- Creating Groups
- Adding Users
- Assigning Users to Groups
- Linking Microsoft Dynamics SL and Windows Users
- Assigning Access Rights
- Changing a Password
- Synchronizing Ownership and Security
- Changing the Database Authentication Mode

Microsoft Dynamics SL Security
Microsoft Dynamics SL provides two important functions that protect business information from access by unauthorized personnel. These functions are user registration and access rights assignment.

- User registration or authorization identifies a user to the system and provides a password that the user must enter to gain entry to the system.
- Access rights are a set of permissions that define the parts of the system an authorized user may access and also the user’s rights to alter any information.

The Customization Manager module provides the additional ability to restrict screen access by hiding fields and limiting the field values the user can enter.

Doc Share Security Considerations
Before you prepare the Doc Share feature for use, contact your organization’s SharePoint administrator or security officer to make sure that the necessary SharePoint security is in place.

Here are some important things to consider:

- **Security for customers, vendors, and project users who will view their documents on your SharePoint site** — The SharePoint administrator must use SharePoint security to grant these users Read permissions, giving them access to view only their own documents on a SharePoint site or in a SharePoint document library.

- **Security for employees who use Microsoft Dynamics SL and Doc Share in particular** — This user frequently has many different responsibilities in Microsoft Dynamics SL, requiring different SharePoint permissions.
  - Assign the Doc Share Creator permission level to a user who has Update permissions for the Accounts Receivable Customer Maintenance (08.260.00), Accounts Payable Vendor Maintenance (03.270.00), or Project Controller Project Maintenance (PA.PRIJ.00) screen.

  Your SharePoint administrator or security officer sets up the Doc Share Creator permission level on the SharePoint server. This permission level lets a user create SharePoint subsites on an existing SharePoint site, create document libraries, and upload documents. If Doc Share is configured for a customer, vendor, or project created by a user who has the Doc Share Creator permission level, the software generates a SharePoint site for the entity.

  To set up the Doc Share Creator permission level, copy it from the Contribute permission level that is native in SharePoint. Then grant the permissions that are listed in this section. Add the
Manage Lists permission so that users who have the Doc Share Creator permission level can create document libraries. Selecting Manage Sites, Create Subsites, Add and Customize Pages, and Enumerate Permissions lets users create subsites.

Select the following List, Site, and Personal permissions for the Doc Share Creator permission level:

**List permissions**
- Manage Lists
- Add Items
- Edit Items
- Delete Items
- View Items

**Site permissions**
- Create Subsites
- Manage Web Site
- Add and Customize Pages
- Browse Directories
- View Pages
- Enumerate Permissions

**Personal permissions**
- Manage Personal Views
- Add/Remove Personal Web Parts

- Grant the *Doc Share Contributor* permission level to a user who will upload documents.

Your SharePoint administrator or security officer creates the Doc Share Contributor permission level on the SharePoint server. This permission level lets a user upload documents to SharePoint sites and create document libraries. A user who has this permission level must be able to create document libraries so that when they upload the first of a particular document type (such as the first invoice or purchase order), Microsoft Dynamics SL can create a new library for the document. If it is created correctly, this permission level does not let a user generate subsites.

To set up the Doc Share Contributor permission level, copy it from the Contribute permission level that is native in SharePoint. Then grant the permissions that are listed in this section. This includes the Manage Lists permission. Adding the Manage Lists permission gives users who have the Doc Share Contributor permission level the ability to create document libraries.

Select the following List, Site, and Personal permissions to create the Doc Share Contributor permission level:

**List permissions**
- Manage Lists
- Add Items
- Edit Items
- Delete Items
- View Items

**Site permissions**
- Browse Directories
- View Pages
- Browse User Information

**Personal permissions**
- Manage Personal Views
- Add/Remove Personal Web Parts
Site permissions

Use Remote Interface

Personal permissions

Manage Personal Views  Update Personal Web Parts
Add/Remove Personal Web Parts

• Security for employees who do not use Microsoft Dynamics SL — Your SharePoint administrator or security officer should assign permissions for this group of users based on their work requirements, company security policies, and any other guidelines your organization follows.

• Security for Microsoft Dynamics SL Application Server — Your SharePoint administrator must assign the Doc Share Contributor permission (described earlier) to the Windows user account that runs Application Server. This lets the Application Server to publish documents to SharePoint and create document libraries.
Creating Groups

A group is a collection of users who share the same access rights and menu. Assigning users to groups makes it easier to change access rights. With a single change, all the users in the group are updated.

Microsoft Dynamics SL maintains the information about groups in the system databases. Because this information is shared, group information is available to all application databases.

Some groups are included in the database. Before you create new groups, determine whether any of the groups that you need already exist. To review these groups, press F3 in Group ID.

To create a group:
1. In the Microsoft Dynamics SL window, click the Administration button and select Group Maintenance. Group Maintenance (95.280.00) appears.

![Group Maintenance (95.280.00)](image)

2. Type an identification code for the group in Group ID.
3. Type a description of the group in Name.
4. Click to select the Role check box if this group is role. A role resembles a job description.
   
   **Example:** Project Manager is a role. For all users who are project managers, you should associate their user ID with this group.

5. In Home Page, add the URL of a website that will be displayed as the group members’ home page in the Microsoft Dynamics SL window.

   **Note:** If the user belongs to more than one group, the software examines the user’s groups in alphabetical order (excluding the EVERYONE group) until it finds a home page URL to use. A URL assigned to a specific user in User Maintenance (95.260.00) overrides a URL assigned to the user’s group.

6. Click Save.
Adding Users

Anyone who wishes to access the system must be an authorized user. Members of the Administrators group in Microsoft Dynamics SL can add users to the system by defining user information, such as user ID, name, and password.

The software maintains the information about users in the system database. Because this information is shared, user information is available to all application databases.

Using the Home Page field, you can customize the home page that a user will see when they log on to Microsoft Dynamics SL. You can also designate a home page URL for a user group in Group Maintenance (95.280.00). The software follows the search rules here to determine whether a home page URL is designated. If more than one URL is specified for a user, these rules determine which one will be used:

1. First, it checks whether a home page URL is designated for the user (User Maintenance (95.260.00)).
2. If no URL is found, it checks the user's group records for a home page URL (Group Maintenance (95.280.00)).
3. If a home page URL is still not found, it checks the Solomon.ini file to see whether there is a setting for the current company (see “[Home Page] Section” for information about how to add home page URLs by using the Solomon.ini file).
4. If a home page URL is not found, the software looks in the Solomon.ini file for a home page setting for all users.

To add a user if Windows authentication is configured:

1. In the Microsoft Dynamics SL window, click the Administration button and select User Maintenance. The Details tab of User Maintenance (95.260.00) appears.

   ![Figure 14: User Maintenance (95.260.00), Details tab when using Windows authentication](image)

2. In User ID, type a unique identification code.
3. In Name, type this user’s full user name.
4. Type a strong password in the Password box to require the user to enter a password when the user logs on to Microsoft Dynamics SL. Follow the guidelines for creating a strong password in “Changing a Password” on page 30.
5. Select Active Application Server User if the user will submit Application Server requests.
6. Click to select the Role check box if this user is a role. A role resembles a job description, for example Controller is a role.

   Note: A role is frequently associated with a group instead of a user and all users who perform that role are associated with the group. See “Creating Groups” on page 20.

7. Type the user’s Telephone and Location.

8. If the user will submit requests to the Application Server, make sure that you enter a valid email address in Email Address. This is the address from which the user will send Application Server email requests.

9. Enter a valid Windows User Name in the format domain\userid (for example, Sales\BSmith). The administrator entering this information must connect to the domain to validate the entry.

10. Click Pick Color for Required Fields to select the color for mandatory fields. Sample Required field shows you how a user will view a box for a mandatory field when it is bordered with your color choice.

11. In Home Page, you can add the URL of a website that will be displayed as the user’s home page in the Microsoft Dynamics SL window.

   Note: If a home page URL is assigned to a user’s group in Group Maintenance (95.280.00), the URL assigned to the individual user will override it.

12. Click the Save button on the toolbar.

   Note: If you have to add several users on a system that is configured for Windows authentication, see “User Import (95.300.00)” for help.

To add a user if SQL Server authentication is used:

1. In the Microsoft Dynamics SL window, click the Administration button and select User Maintenance. The Details tab of User Maintenance (95.260.00) appears.

   Figure 15: User Maintenance (95.260.00), Details tab when using SQL Server authentication

2. In User ID, type a unique identification code.

3. In Name, type this user’s full user name.

4. Type a strong password in the Password box. Follow the guidelines for creating a strong password in “Changing a Password” on page 30.
Maintaining Security

5. Select **Active Application Server User** if the user will submit Application Server requests.

6. Click to select the **Role** check box if this user is a role. A role resembles a job description, for example Controller is a role.

   **Note:** A role is frequently associated with a group instead of a user and all users who perform that role are associated with the group. See Creating Groups on page 20.

7. Type the user’s **Telephone** and **Location**.

8. If the user will submit requests to the Application Server, make sure that you enter a valid email address in **Email Address**. This is the address from which the user will send Application Server email requests.

   **Note:** Passwords must be used to maintain security and access rights within the Microsoft Dynamics SL system. You cannot leave **New Password** blank. The New Password box is visible only when you are adding a new user.

9. Click **Pick Color for Required Fields** to select the color for mandatory fields. In **Sample Required field**, you see how a mandatory field appears for this user after the color change.

10. In **Home Page**, you can add the URL of a website that will be displayed as the user’s home page in the Microsoft Dynamics SL window.

    **Note:** If a home page URL is assigned to a user’s group in **Group Maintenance** (95.280.00), the URL assigned to the individual user will override it.

11. Click the **Save** button on the toolbar.
Assigning Users to Groups

Access rights must be assigned for each user. Access rights give the user the security needed to add, modify, or delete information. To make it easier to assign access rights, assign users to groups that share similar rights.

To assign a user to a group in User Maintenance (95.260.00):

1. Open User Maintenance, and then click the Groups tab.

![User Maintenance (95.260.00), Groups tab](image)

2. In Group ID, type the identification code for the group to which the user belongs, or press F3 and double-click to select the group from the User/Group List.

Note:

- Two groups, ADMINISTRATORS and EVERYONE, are among the preloaded groups in each database. The SYSADMIN user is automatically assigned to the ADMINISTRATORS group. Users who require access to all screens in Microsoft Dynamics SL should be assigned to the ADMINISTRATORS group. This eliminates the need to manually assign access rights to the ADMINISTRATORS group.

The EVERYONE group should be used to define the minimum access rights that are required by non-administrator users in Microsoft Dynamics SL. The users are assigned to the EVERYONE group, and minimum rights are assigned to the group in Access Rights Maintenance (95.270.00).

- Additional preloaded groups that are roles, can have users assigned to them. These groups in addition to any group or user can then be given rights to Business Analyzer reports. These groups are identified by their suffix of “SL-BA.” Users are then assigned to groups that include a role they are performing.

3. Type the identification code for the Customization Group the user belongs to, if any.
4. Type the Menu Group the user belongs to, if any.
5. Click the Save button on the toolbar.

You can also add users to a group by using Group Maintenance (95.280.00) and to a customization group by using Customization Groups (91.270.00).
To assign users to a group in *Group Maintenance (95.280.00)*:

1. In the Microsoft Dynamics SL window, click the **Administration** button and select *Group Maintenance*. *Group Maintenance (95.280.00)* appears.

2. In **Group ID**, type the ID of the group to which users will be assigned, and then press **TAB**.
   - OR –
   - Press **F3** and double-click to select the group from the *User/Group List*. The rest of the fields will populate automatically. Go to step 4.

   **Note:**

   - Two groups, ADMINISTRATORS and EVERYONE, are among the preloaded groups in each database. The SYSADMIN user is automatically assigned to the ADMINISTRATORS group. Users who require access to all screens in Microsoft Dynamics SL should be assigned to the ADMINISTRATORS group. This eliminates the need to manually assign access rights to the ADMINISTRATORS group.

   The EVERYONE group should be used to define the minimum access rights that are required by non-administrator users in Microsoft Dynamics SL. The users are assigned to the EVERYONE group, and minimum rights are assigned to the group in *Access Rights Maintenance (95.270.00)*.

   - Additional preloaded groups that are roles, can have users assigned to them. These groups in addition to any group or user can then be given rights to Business Analyzer reports. These groups are identified by their suffix of “SL-BA.” Users are then assigned to groups that include a role they are performing.

3. In **Name**, type a name for the group.

4. In the **User ID** grid rows, type the IDs for all users who you want to add to the group, or press **F3** and select the users from the *User/Group List*.

5. In **Home Page**, you can add the URL of a website that will be displayed as the group members’ home page in the Microsoft Dynamics SL window. You can also define a home page URL for a specific user in *User Maintenance (95.260.00)*.

   **Note:** If the user belongs to more than one group, the software examines the user’s groups in alphabetical order (excluding the EVERYONE group) until it finds a home page URL to use. A URL assigned to a specific user in *User Maintenance (95.260.00)* overrides a URL assigned to the user’s group.

6. Click the **Save** button on the toolbar.
Linking Microsoft Dynamics SL and Windows Users

*Windows User Maintenance* (95.310.00) lets you create a relationship between one or several Microsoft Dynamics SL users and a single Windows user ID.

**To link Microsoft Dynamics SL user IDs to a Windows user ID:**

1. Open Windows User Maintenance (95.310.00).

   ![Windows User Maintenance (95.310.00)](image)

   *Figure 18: Windows User Maintenance (95.310.00)*

2. In **Windows User ID**, type the identification code assigned to the Windows user who you want to link, or press F3 and then select the ID from a possible values list. The Windows user must already exist before you follow this step.

3. In **User ID**, type the identification code assigned to the user who you want to link, or press F3 and then select the ID from a possible values list of Microsoft Dynamics SL users who are not linked to a Windows user ID.

   The name of the user appears in **User Name**.

4. Select **Default User** to specify the Microsoft Dynamics SL user as the one that the system will automatically select for the Windows user ID if another is not supplied.

5. Click the **Save** button on the toolbar.
Assigning Access Rights

Each user or group must have access rights assigned. Access rights are a set of permissions that define the parts of the system an authorized user can assess and also the user’s level of access. Levels of access range from view only to full edit capabilities. This includes adding, changing, or deleting data items. Users or groups can also be denied access to Initialize mode. See “Using Initialize Mode” on page 57.

The software maintains user and group access rights information in the system databases. Because this information is shared across application databases, you only have to enter it one time to make it available to all application databases.

To assign access rights:

1. In the Microsoft Dynamics SL window, click the Administration button and select Access Rights. Access Rights Maintenance (95.270.00) appears.

2. Select either User or Group from the Type list.

3. Type the user ID or group ID in Group/User ID. The name of the user or group displays automatically in Name.

4. Type the company ID in Company ID or select All Companies to apply the access rights to all companies. If All Companies is selected, <ALL> appears in Company ID. If you are setting up access rights for some companies but not all companies, you will have to enter the information for each company separately.

5. You can load screens or reports in either of two ways:
   - Type a screen or report number in Screen/Report Number.
   - OR –
   - Click the Preload button.
Preload Screens (95.270.01) appears.

![Preload Screens (95.270.01)](image)

**Figure 20: Preload Screens (95.270.01)**

Click the modules whose screens you want to load. Only those modules for which the **Active** check box is selected in *Module Maintenance* (98.320.00) will appear on this list. After you have selected modules, click **OK**.

6. **On Access Rights Maintenance** (95.270.00), **Screen/Report** tab, information that corresponds to the screen or report numbers for the selected modules appears in the grid area under **Screen/Report Number**, **Type**, **Name**, and **Module**.

**Note:** The user or group can access any screen or report that appears on this list. If you use Preload to load all the screens and reports for a module, make sure that you delete any screens or reports that you do not want the user or group to access.

7. **Specify access rights for each screen.** By default, if a screen appears on the list, the user or group has view access rights.
   - **View** — User can view data items.
   - **Update** — User or group can change data items. This includes deleting line items.
   - **Insert** — User or group can add data items.
   - **Delete** — User or group can delete data items or records.
   - **Initialization Mode** — User or group can use Initialize mode.

8. If the user needs access rights to Web Services, click the **Web Service** tab. If not, continue to step 12.

![Access Rights Maintenance (95.270.00), Web Service tab](image)

**Figure 21: Access Rights Maintenance (95.270.00), Web Service tab**
9. Select any Web Service Method(s) that you want the user to have access to use. For more information about the Web Services see the Web Services Help or user’s guide.

10. If the user needs access to any of the Role Centers, click the Role Center tab. If not, continue to step 12.

11. Enter the Part and Sub Part that you want to the user to access.

12. Click the Save button on the toolbar.
Changing a Password

A user receives a password when the system administrator adds the user to the system. To keep security tight, change passwords regularly.

To change a password:

1. In the Microsoft Dynamics SL window, click the **Administration** button and select **Set Password**, or click **Set Password** on the Tools menu. The **Password Change** dialog box appears.

2. In **Old Password**, type the old password.

3. In **New Password**, type the new password.

   **Note:** A “strong” password is required. Strong password requirements are as follows:
   
   - Must be six characters long, 22 characters maximum.
   - Must be case-sensitive.
   - Must include three of the following categories:
     - Numeric characters
     - Uppercase characters
     - Lowercase characters
     - Special characters (such as those used in punctuation, except for = and ;)

4. Click **OK**.

   When you log on to the Microsoft Dynamics SL the next time, your new password will be ready for use.
Synchronizing Ownership and Security

There are two scenarios available for synchronizing ownership and security on the Update Databases tab in the Database Maintenance (98.290.00) screen.

If you have several databases and want to synchronize ownership for one or more application databases, but not all the databases, use the Synchronize Selected Application Database Ownership & Security update scenario. When a report that uses views and stored procedures is added to a database, this option synchronizes ownership without affecting all databases. The Synchronize Selected Application Database Ownership & Security scenario gives SQL Server logins and roles used internally by Microsoft Dynamics SL correct rights to the selected application databases. It also resets ownership of all selected application databases to that of the system database.

If you use Windows authentication, the Synchronize All Database Ownership & Security scenario resets SQL Server logins and roles used internally by Microsoft Dynamics SL. If you use SQL Server authentication, the scenario synchronizes the passwords in the system database together with the SQL Server login passwords used by Microsoft Dynamics SL and correctly sets ownership of all databases. The Synchronize Selected Application Database Ownership & Security scenario gives SQL Server logins and roles used internally by Microsoft Dynamics SL correct rights to the selected application databases. It also resets ownership of all selected application databases to that of the system database.

These scenarios are used only under certain circumstances, such as when a database is restored on a server that differs from the server where the database backup was created. Use Synchronize All Database Ownership & Security scenario if you receive the following message.

System message 9827, “There is an inconsistency between the SQL Server login IDs and their passwords with the passwords stored in the Microsoft Dynamics SL System database. Please have the database administrator run Database Maintenance and update the database by using the Synchronize All Database Ownership & Security Update scenario.”

To synchronize ownership and security:

1. Open Database Maintenance (98.290.00) by going to Start | Control Panel | Administrative Tools, and then selecting Microsoft Dynamics SL Database Maintenance. Database Maintenance (98.290.00) appears.

2. In Destination SQL Server Name, type the name of the computer that is running SQL Server.
3. **Windows Authentication** is the recommended security mode for accessing the computer that is running SQL Server, and it is selected as the default. If you select **SQL Server Authentication**, enter the login ID and password for the computer on which the SQL Server databases will be created. This login ID should be sa or a login that has the same permissions as sa in SQL Server.

4. Click the **Connect** button. A message in the status bar indicates that you are connected to the computer that is running SQL Server.

5. Click the **Update Databases** tab.

6. Select the **Synchronize All Database Ownership & Security** update scenario from the **Update Scenarios** list if you want to synchronize all the databases at one time. If you want to synchronize only one or selected application databases use the **Synchronize Selected Application Database Ownership & Security** update scenario.

7. Click the **Update Database** button. The **Synchronize All Database Ownership & Security** update scenario processes all system databases on the connected server that were created or upgraded for Microsoft Dynamics SL.

   a.) When a system database that is configured for SQL Server authentication is processed, the **Login** dialog box appears with Master80 in **User Name**.
b.) In Password, type the password for the SQL Server Master80 user, and then click **OK**. This is the password that you created the first time that you created or updated a database on the computer that is running SQL Server.

If a password for the Master80 user has not been created, the SQL Master80 Login dialog box appears. This lets you create a password for the SQL Server Master80 user.

![SQL Master80 Login]

**Figure 27: SQL Master80 Login**

c.) In **Password**, type a password for the SQL Server Master80 user, and type it again in **Confirm Password**.

d.) Click **OK**. The synchronization process starts.

8. You will receive a message when the synchronization is completed. Click **OK**, and then close the screen.
Changing the Database Authentication Mode

Use the **Set Authentication Type** button in the *Database Maintenance (98.290.00)* window if you have to change the authentication method that was selected when the Microsoft Dynamics SL databases were created. Check to make sure that SQL Server Services are running before you follow these steps.

**To change the database authentication mode:**

1. In SQL Server Management Studio, connect to the database server as an administrator (sa or a user who is a member of the SYSADMIN server role).
2. Back up the system and application databases. See Microsoft SQL Server 2005 Books Online if you need help.
3. Open *Database Maintenance (98.290.00)* by going to Control Panel | Administrative Tools, and then selecting Microsoft Dynamics SL Database Maintenance. *Database Maintenance (98.290.00)* appears.

![Database Maintenance (98.290.00), Connect Server tab](image)

4. On the Connect Server tab, type the Destination SQL Server Name.
5. **Windows Authentication** is the default security mode to access the instance of SQL Server. It is also the recommended authentication mode. Click **SQL Server Authentication** if you prefer to use it, and then type the SQL Server “sa” **Login ID** and **Password** for the instance of SQL Server where the databases are located.
6. Click **Connect** to connect to the instance of SQL Server.
7. When the status bar at the bottom of the screen indicates that you have connected to the instance of SQL Server, click the **Update Databases** tab.
Notice that in **Databases**, the application databases are automatically selected for you.

8. In the **System Database Name** list, select the system database that will be affected by the authentication change.

9. Click **Set Authentication Type**.
Authentication appears.

![Authentication](image1.png)

**Figure 31: Authentication**

10. Select an authentication method, and then click **OK**. Windows authentication is recommended.

11. Follow these steps that apply to the authentication method that you selected.

- If you selected Windows Authentication:
  a.) **SYSADMIN Windows User Name** appears that shows the domain and user name of the default system administrator.

![SYSADMIN Windows User Name](image2.png)

**Figure 32: SYSADMIN Windows User Name**

Make changes in **Windows User Name** as needed. Type the information by using the domain\userid format.

**Note:** A user who is defined as an administrator automatically has access to all screens and reports within Microsoft Dynamics SL.

b.) If you changed the Windows user name and do not want to give the individual you designated the ability to create new SQL Server users and logins, clear the **Grant this user permission to create SQL Server logins and users** check box. (By default, the check box is selected.)

An administrator becomes a member of the SQL Server SYSADMIN server role if the **Grant this user permission to create SQL Server logins and users** check box is selected.
Note:

- Clearing the check box implies that the database administrator will generate SQL Server users and logins by manually using SQL Server tools.
- To avoid a situation in which the check box is cleared and the Microsoft Dynamics SL administrator cannot log on to access databases and perform administrative tasks, enter the following SQL statement in a query window:

  ```sql
  sp_addrolemember 'db_owner', 'domain\name'
  ```

  Run the command for each Microsoft Dynamics SL system and application database.

Example:

```sql
use SLSystemDatabase
GO
sp_addrolemember 'db_owner', 'domain\name'
GO
use SLApplicationDatabase
GO
sp_addrolemember 'db_owner', 'domain\name'
GO
```

c.) Click **Ok**. The authentication mode change process starts.

- If you selected SQL Server Authentication:
  a.) **Security** appears.

  ![Security](image)

  **Figure 33: Security**

  b.) Click **Yes** to confirm your selection and continue. **Login** appears.

  ![Login](image)

  **Figure 34: Login**

  c.) In the **Password** box, type the password that was created for the Master80 user when your databases were generated, and then click **Ok**. The authentication mode change process starts.
SYSADMIN Login appears.

![SYSADMIN Login](image)

Please specify the password for the Microsoft Dynamics SL user ID SYSADMIN. This user has rights to all screens in Microsoft Dynamics SL as well as exclusive access to several utility screens. Once the database is created, you will need the password to log in to Microsoft Dynamics SL.

Passwords must be at least 8 characters in length AND have characters from 3 of the following categories:
- Upper case letters (A-Z)
- Lower case letters (a-z)
- Numbers (0-9)
- Non-alphanumeric characters (0-9@%#()_+-)

and NOT include the following characters: (~)`

**Note:** For more information about strong passwords, see the *Microsoft Dynamics SL Security Guide*.

d.) In **Password**, type the password for the SYSADMIN user. This password must satisfy the strong password requirements that are listed in the dialog box.

e.) In **Confirm**, type the password again, and then click **Ok**.

12. When the process is complete, the 9829000 message box appears, and the status bar at the bottom of the Database Maintenance (98.290.00) window indicates that the authentication change was successful.

![Database update process complete](image)

**Note:** When an authentication change is unsuccessful, you will not see this message. Instead, a failure message appears, directing you to view the Dbbuild.log file.

13. Click **Ok**, and then close the screen.
Synchronizing the Report Server

Use the Synchronize Report Server button in Database Maintenance (98.290.00) to synchronize the Microsoft Dynamics SL security with SQL Report Server for the reports used in Business Analyzer. Synchronization of the rights on the Report Server associated with a Microsoft Dynamics SL system database functions to accurately represent the data that is stored in Access Rights Maintenance (95.270.00). For each Windows Account that is referenced by a Microsoft Dynamics SL user the access rights for user marked as the Default User in Windows User Maintenance (95.310.00) are applied to a Report Server.

To change the database authentication mode:

1. In SQL Server Management Studio, connect to the database server as an SQL database administrator (sa or a user who is a member of the SYSADMIN server role).
2. Back up the system and application databases. See SQL Server Books Online if you need help.
3. In Control Panel, select Administrative Tools, and then select Microsoft Dynamics SL Database Maintenance. Database Maintenance (98.290.00) appears.

Note: If User Account Control (UAC) is enabled, make sure that you open Database Maintenance (98.290.00) by right-clicking Microsoft Dynamics SL Database Maintenance, and then clicking Run as administrator.

4. On the Connect Server tab, type the Destination SQL Server Name.
5. Click Connect to connect to the instance of SQL Server.

Figure 37: Database Maintenance (98.290.00), Connect Server tab
6. When the status bar at the bottom of the screen indicates that you have connected to the instance of SQL Server, click the **Update Databases** tab.

**Note:** In Databases, the application databases are automatically selected for you.

![Figure 38: Database Maintenance (98.290.00), Update Databases tab – Windows Authentication](image)

7. In the **System Database Name** list, select the system database that will be affected by synchronizing the report server.


9. When the status bar at the bottom of the screen indicates that you have completed the synchronization, exit the screen.
Customizing Menus

Overview
This topic provides steps to help you customize Microsoft Dynamics SL menus to meet your business needs. The information includes the following:

- Using Menu Maintenance
- Adding Custom Applications to the Menu

Microsoft Dynamics SL Configurations
The database administrator can set up the Microsoft Dynamics SL installation in many different configurations. The configuration determines how you log on to the software.

Multiple System Databases
If a company has multiple locations, the database administrator may set up more than one system database. The system database contains site-specific data, such as product registrations, customizations, user information, and screen-level security.

When you log on for the first time, select the system database used most frequently to serve as the default database. After the initial logon, you can switch to any other system database when you log on.

Example: A company has a main office on the west coast and a satellite office on the east coast. Each office has its own system database. The east coast office may have to occasionally access the installation at the west coast office. When signing on, the east coast office would select the system database that corresponds to the west coast installation.

Multiple Application Databases
Logging on to Microsoft Dynamics SL involves specifying a company ID. This automatically loads a default system and application database. After you log on, you can switch to a different company ID to load its default system and application databases. Use Switch Company to access a company in Microsoft Dynamics SL without logging off from the current company. Do this by selecting a company from the list that appears when you click Switch Company.

Example: The west coast office in the previous example wants to keep their financial information separate from the east coast office. To perform this task, each office would have its own application database and company ID. If the west coast office wanted to access the east coast office, the west coast office would log on by using the east coast office company ID.
Using Menu Maintenance

General Information

Menu Maintenance (98.350.00) lets you streamline users’ access to the applications that they need daily. You can create menus that relate to users’ roles (profiles that are job or procedure based). Then, when a user logs on to Microsoft Dynamics SL anywhere on your system, they will see their own personalized menus.

A menu system is defined as the collection of menus a user views when they log on to Microsoft Dynamics SL. It is a combination of all the menus defined for groups with which the user is associated. If a user is a member of four user groups, their menu system is the combination of the menus accessed by all those groups. Menus are stored in the system database.

A menu system that is generated by Microsoft Dynamics SL is stored in an XML file on the user’s computer. A menu system must be generated or refreshed when any of the following occur:

- A user is added to or removed from a user group.
- A menu for a group in which the user is a member is changed.
- Access rights change for a group in which the user is a member.
- The user’s access rights change.

The menu system, which is customized by using Menu Maintenance (98.350.00), is made up of four levels:

- Module group — A collection of related modules. For example, all modules in the Financials module group help with financial accounting system tasks. You can access module groups by using the module group buttons. A module group has a name, description, and image. If module groups that have the same name are found in the menu system, they are combined in one group.
- Module — A logical grouping of screens and reports that help a user perform several related tasks. Duplicate modules are not permitted in a module group in the Microsoft Dynamics SL menu system. Modules with the same name are combined in a single module.
- Screen group — Screens that have a related purpose. Examples of screen groups include screens that produce reports or inquiries, or those that run processes. A screen group has a name, description, and image. If screen groups that have the same name are found in a module in the menu system, they are combined in one group.
- Link — A connection between an application and Microsoft Dynamics SL. Click a link in the menu system to open the application connected to it. Only one occurrence of a specific link is permitted in a screen group.

Note: When you create a custom menu, an .xml file that contains the customizations is also created and stored in \Documents and Settings\<user name>\Application Data\Microsoft Dynamics SL\MenuCache. If you uninstall Microsoft Dynamics SL, the .xml file must be deleted manually to remove the menu changes.

Building a Custom Menu

Before you start to work in Menu Maintenance (98.350.00), create user groups in Group Maintenance (95.280.00), and in User Maintenance (95.260.00), assign users to the groups that you create. See “Creating Groups” and “Assigning Users to Groups” for help with these tasks. Collaboration with department managers and other people who are familiar with your organization’s business procedures will likely prove to be helpful when you are working on these tasks.

Also, make sure that you review users’ access rights to the screens and menus they need. Only those menus and screens that are available to a group based on that group’s user rights will appear in Menu Maintenance (98.350.00). You can use the Related Screens menu in Menu Maintenance (98.350.00) to add a user or group to assign access rights.
You can add module groups, modules, screen groups, and screens to customize a menu by using drag-and-drop or right-click operations. For example, to create a copy of a module group, module, or screen group for users who will have read-only access, select the item on the Menus tab. Then either right-click and then click Add Read Only, or press CTRL while dragging the item into the navigation pane work area. Read Only will then appear next to Name for any screen group or screen that is added to the navigation pane work area in this manner.

To create a new menu:

1. Click the Administration button on the Microsoft Dynamics SL window, and then select Menu Maintenance.

   Menu Maintenance (98.350.00) appears. By default, the Menus tab is selected, and in Show Menus for, None – show All is selected.

   ![Menu Maintenance (98.350.00)]

   Figure 39: Menu Maintenance (98.350.00)

2. In the Menu for Group box, type a group ID (defined in Group Maintenance (95.280.00)), or press F3 and select the ID from Group List. The group ID appears in Menu for Group, and the group name appears next to it.

   Note: The software does not allow changes to the EVERYONE group’s menu system.

3. To create a navigation button that will give users access to the new menu, click the New Module Group button on the Menu Maintenance (98.350.00) toolbar.

   Note: You can automatically create a navigation button while adding menus in a module group by right-clicking the module group on the Menus tab, and then clicking Add Copy. All menus for the module group will be added. You may have to remove menus that should not be included on the new menu.

4. In Name, type a label for the new navigation button.
5. Use the Description box to type helpful details about the button. Be aware that this description will be viewed by users when they move their mouse pointers over the button.

6. Optional: Click Small or Large to add an image that relates to the navigation button’s use. Browse to view the images, click to select one, and then click OK to add it. It will appear on the left side of your button. The maximum size for an image is 30200 bytes. This image is stored in the database and copied locally when the menu cache is generated.

7. On the Menus tab or Screens tab, you can either
   - Right-click the module, module group, screen, or screen group that you want to add to your new menu system, and then select either Add Copy or Add Read Only. The new item is added to the navigation pane work area.
   - OR-
   - Select a module, module group, screen, or screen group, and then drag it into the navigation pane work area. Press CTRL while dragging the item to create a copy that will allow for read-only access.

   **Note:** Dragging a whole module group or screen group onto the navigation pane work area might be the quickest way to customize a menu in some cases. However, you may have to remove some modules and screens users of the new menu do not have to have.

8. Optional: Use the Description box to revise existing text, or remove it, and then enter new text about the screen group, such as a reminder or instructions.

9. Click Save on the Application menu, or click the Save button on the Menu Maintenance (98.350.00) toolbar.

10. Review the new menu before it is available to users by clicking the Preview Menu button on the Menu Maintenance (98.350.00) toolbar or Preview Menu on the Action menu. Press F3 to select a user in Preview For User. When the new menu appears, use the toolbar to edit it as needed.

11. Click Save and close the window.

12. Exit Microsoft Dynamics SL and then reopen it. All users whose menus are affected by the changes must do this also. This action creates a new .xml menu cache file for each user affected by the changes and makes the changes visible on the users’ menus.

**To remove a menu or screen from a custom menu:**

1. In the Menu for Group box, type a group ID and press ENTER, or press F3 and select the ID that is associated with the menu or screen.

2. Right-click the unnecessary item, and then click Delete. You can also select the item and then click the Delete button on the toolbar.

3. Click Save.
Adding a New Report, Screen, or Query to a Menu

After you have created a custom report, screen, or query, add it to a menu and give the users access to it by following these steps:

**Note:**
- Make sure that you have the appropriate access rights to use the screens in these steps.
- We recommend that you create a backup copy of your database before you continue.

**To add a new report or screen to a menu:**
1. If you are adding a report, you must create a new report control record in *Report Control Maintenance (98.300.00)*. Go to step 2 if you are adding a screen.
   a) In the Microsoft Dynamics SL window, click **Administration**.
   b) Click **Report Control Maintenance** in the System Manager window. *Report Control Maintenance (98.300.00)* opens.

c) In **Report Number**, type the number of your custom report without the .rpt or .rdl file name extension. For example, the report number is entered as 01-999 if the report file name is 01999.rpt or 01999.rdl.

d) In **Report Format Name**, type a name that describes the custom report format.

e) In **Report Format**, type the report format identifier. For report number is 01.999, for example, the report format identifier is entered as 01999.

f) Save and close the screen.
2. Add the screen, report, or query in Screen Maintenance (98.330.00).
   a) Open Screen Maintenance (98.330.00).

   ![Screen Maintenance (98.330.00)](image)

   Figure 41: Screen Maintenance (98.330.00)

   b) In Number, type the number of your new report or screen.

   c) In Name, type the name that you assigned to your report or screen.

   d) In Module, type the acronym for the module associated with your report or screen, or press F3 and then select the module from the list.

   e) Select the appropriate option from the Type list. The options are as follows:
      - Screen – used for screens only
      - Report – used for Crystal Reports
      - Report with Interactive Process – used for reports that have pre- or post-processes.
      - SRS Report – used for SSRS reports
      - Query - used for Quick Query

   f) In Menu Item, Yes is already selected for you.

   g) Save, and then close Screen Maintenance (98.330.00).

3. Follow these steps to either
   Add a new group made up of only those users who must have access to the new report, screen, or query from their menu

   *OR*

   Verify that an existing group contains all the users who have to access the report or screen.

   Go to step 4 if you do not have to add or change a group.
a) Open Group Maintenance (95.280.00).

![Group Maintenance (95.280.00)](image)

Figure 42: Group Maintenance (95.280.00)

b) In Group ID, type or select a group identifier by pressing F3.

c) In Name, type a name for a new group. The name of an existing group appears automatically.

d) In User ID, type a user identifier to add a user to the group, or press F3 and select a user from the list.

For an existing group, review the users who are listed and make changes as needed.

e) (Optional) In Home Page, type the URL of the webpage that will appear when the user opens Microsoft Dynamics SL.

f) Save and close the screen.

4. Assign group access rights to the new report, screen, or query.

a) Open Access Rights Maintenance (95.270.00).

![Access Rights Maintenance (95.270.00)](image)

Figure 43: Access Rights Maintenance (95.270.00)

b) Select Group from the Type list.
c) In **Group/User ID**, type the identifier of the group that will use your new report or screen, or press **F3** and select the group ID from the list.

   The group name automatically appears.

d) Either select **All Companies**, or in **Company ID**, press **F3** to select a company ID from the list.

e) Click **Preload**, and then select All or the appropriate module. Information about the screens and reports for the modules that you selected appear in the grid.

f) In the detail grid, locate the new report or screen, and assign the appropriate access rights for the group.

g) Save and close the screen.

5. Add the report or screen to a menu.

a) Open **Menu Maintenance (98.350.00)**.

   ![Menu Maintenance (98.350.00)](image)

   **Figure 44: Menu Maintenance (98.350.00)**

b) In **Menu for Group**, press **F3** and select the group that will access the new report or screen.

c) If the group that you selected has a custom menu system, it appears in the navigation pane work area. Go to step 5e.

   If the group does not have a custom menu system and information from the last **Menu Maintenance** session appears, use **Delete** to clear the navigation pane work area.

d) For a new group, on the **Menus** tab, right-click the module group that is associated with the new report or screen, and then click **Add Copy**. The module group's menus appear in the navigation pane work area.

e) In the navigation pane work area, expand the module that is associated with the new report or screen.

f) Right-click the appropriate application group name (such as Inquiries or Reports) and then click **New Link** on the menu, or click the application group name and then click **New Link** on the **Menu Maintenance** toolbar.

   A new untitled link is added at the bottom of the application group list.

g) In **Name**, type the name of the new report or screen as you want it to appear on the menu.
h) In **Screen ID**, type the number of the report or screen that you are adding to the menu, or press F3, and select from the list.

i) A command line that will run the report or screen appears automatically in **Command line for Application**. Make any changes that are needed.

j) In **Column**, select the column the report or screen will appear in on the menu.

k) Save and then review your changes by clicking **Preview Menu**.

   The preview window appears.

l) In **Preview For User**, press F3 and select a user who will access the new report or screen.

m) In **Company**, you can select a company that is associated with the menu system or accept the default, and then press TAB.

   The user’s menu system appears.

n) Make sure that the new report or screen appears in the correct area on the appropriate module menu.

o) Close the preview window.

p) Close Menu Maintenance.
Adding Custom Applications to the Menu

You can add custom applications to the Microsoft Dynamics SL menu system by using the Modules Maintenance (98.320.00), Screen Maintenance (98.330.00), Group Maintenance (95.280.00), and Menu Maintenance (98.350.00) screens. Some circumstances may require you to use SQL statements to update the necessary tables. Before you begin, verify that the applications are installed and the files are available. Also, note the path of the custom application files.

To add a custom application to the menu by using Microsoft Dynamics SL screens:

1. Click the Administration button, and then select Modules Maintenance. Modules Maintenance (98.320.00) appears.

2. Click the New button on the toolbar, or click New on the Actions menu to add a new row.
3. In Code, type a code that you want to associate with your module.
4. Enter an ID for the module.
5. In Name, type the name of the new module.
6. (Optional) If you are adding a module that has a file that is located in any location other than the standard directory and folders, you must specify the fully qualified path or a specialized relative path for the file in Execution Location. For more information, see “Modules Maintenance (98.320.00)” on page 169.
7. Select the Active check box to make the module available for use.
8. Click the Save button, and then close the screen.
9. To include a new screen or report in the All Modules menu group, select Screen Maintenance. Screen Maintenance (98.330.00) appears.
10. Click the **New** button on the toolbar, or click **New** on the Actions menu.

11. In **Number**, type the screen number.

12. In **Name**, type the name of the new screen.

13. In **Module**, type the code of the module associated with the screen. You can add screens and reports to existing modules as long as they do not have the same file name or module name.


15. In **Menu Item**, select Yes to let the screen to appear in the All Modules module group. If you select No, the screen or report will **not** be listed as a menu option in the All Modules group. Examples include report preprocesses or post-processes, or programs that are only called by other applications and are not run directly from a menu option. Even though they will not appear on a menu, these programs still have to be entered in this screen so that you can assign users access rights to them.

16. Click the **Save** button, and then close the screen.

17. Next, organize your applications into categories based on use. This is an important step. Think about the best fit for your applications. You can add them to Microsoft Dynamics SL menus or put them in their own modules or module groups.

18. To associate your menus with user groups, open **Group Maintenance** (95.280.00).

![Group Maintenance (95.280.00)](image)

**Figure 47: Group Maintenance (95.280.00)**

19. Type an identification code for the group in **Group ID**.

20. Type a brief description of the group in **Name**.

21. In **Home Page**, add the URL of a website that will be displayed as the group’s home page in the Microsoft Dynamics SL window.

    **Note:** If the user belongs to more than one group, the software examines the user’s groups in alphabetical order (excluding the EVERYONE group) until it finds a home page URL to use. A URL assigned to a specific user in **User Maintenance** (95.260.00) will override a URL assigned to the user’s group.

22. Click **Save** on the toolbar.

23. Open **Menu Maintenance** (98.350.00) to create a menu. See “Using Menu Maintenance” for more information about how to create a custom menu.

**To add a custom application to the menu by using SQL statements:**

See SQL Server Books Online for help with SQL statements.
1. In Microsoft SQL Server Management Studio, insert new records as needed in the Screen table by using the following SQL statement:

```sql
INSERT INTO Screen (MenuItem, Module, Name, Number, ScreenType)
```

This example adds a record for a new custom Accounts Receivable report:

```sql
INSERT INTO Screen (MenuItem, Module, Name, Number, ScreenType)
VALUES ('Y', 'AR', 'Custom AR report', '0899999', 'R')
```

2. Use a similar Insert statement to add a new record to the SLMenuItem table.

3. Set CacheMenu in the UserRec table to 1 to automatically rebuild the menu.xml files.

   The following example updates CacheMenu for all users:

   ```sql
   UPDATE UserRec SET CacheMenu = 1
   ```

   **Note:** See Knowledge Base article 945139, “Information about what controls the time at which Microsoft Dynamics SL regenerates the menu and favorites,” to learn more about the menu regeneration process.
Setting Up Attachments

Source document files are attached to data items similar to the way notes are attached to data items. Source document files are stored externally:

- on a Microsoft® SharePoint® site that uses the settings that are defined for a Doc Share entity
- on a SharePoint document library
- to a network folder

The Microsoft Dynamics SL screen number or web service, applicable database table name, and the location to store the source document files, must be defined in Attachments Configuration (98.400.00) to let source document files be attached to data items.

The ability to read, add, change, and delete attachments depends on both your access rights to the screen or web service where you are trying to work with the attachment and the state or status of the item to which you are trying to attach a file.

Access rights defined for the user and screen in Access Rights Maintenance (95.270.00):

- View: Lets you view existing attachments
- Insert: View + Lets you add new attachments
- Update: View + Insert + Lets you change existing attachments
- Delete: View + Insert + Update + Lets you delete existing attachments
- Initialize Mode: View + Insert + Update + Delete + Lets you perform all these actions on many items that are read-only.

Access rights defined for the user and web service method in Access Rights Maintenance (95.270.00):

- Access: You have access to this web service method.

**Example 1:** You have View rights to Journal Transactions (01.010.00).

You can view existing attachments on batches in Journal Transactions (01.010.00). You cannot add, change, or delete attachments. The status of the batch does not affect this behavior.

**Example 2:** You have Delete rights to Journal Transactions (01.010.00).

You can add new attachments and view, change, or delete existing attachments on unreleased batches in Journal Transactions (01.010.00). The status of the batch affects this behavior. If the batch is released or posted, you cannot change or delete existing attachments.

**Example 3:** You have Initialize Mode rights to Journal Transactions (01.010.00).

You can add new attachments and view, change, or delete existing attachments on unreleased batches in Journal Transactions (01.010.00). The status of the batch affects this behavior. If the batch is released, you must be in Initialize Mode to perform these actions. If the batch is posted, you must be in Initialize Mode to change or delete an attachment, adding new attachments is not permitted.

**Example 4:** You have Access only to the Microsoft.Dynamics.SL.CustomerService.ReadCustomerSystemAttachment web service method.

You can view existing attachments to customers. You cannot add, change, or delete attachments.

**Example 5:** You have Access to the following web service methods:
You can read existing attachments, create new attachments, and update the description on existing attachments to customers. You cannot delete existing attachments to customers.

To set up attachments:

1. Select **Administration | Attachments Configuration**. **Attachments Configuration (98.400.00)** appears.

   ![Attachments Configuration (98.400.00), Screen option](image)

   **Figure 48: Attachments Configuration (98.400.00), Screen option**

2. Select **Screen** or **Web Service**, depending on whether you want to set up Attachments for screens or for web services.

   ![Attachments Configuration (98.400.00), Web Service option](image)

   **Figure 49: Attachments Configuration (98.400.00), Web Service option**
3. Specify the Microsoft Dynamics SL screen number in Screen. For example, specify 0301000 to let source document files be attached to data items in Accounts Payable Voucher and Adjustment Entry (03.010.00).

**Note:** Select DEFAULT in Screen and DEFAULT in Table to enable attachments in all screens that support notes capability.

-OR-

Specify the Microsoft Dynamics SL web service in Web Service. For example, specify Microsoft.Dynamics.SL.CustomerService to let source document files be attached to data items for Microsoft.Dynamics.SL.CustomerService.CreateCustomer.

**Note:** Select DEFAULT in Web Service and DEFAULT in Table to enable attachments in all web services that support notes capability.

4. Specify the database table name applicable to the specified screen or web service in Table. For example, to let source document files be attached to document data items in Accounts Payable Voucher and Adjustment Entry (03.010.00), specify 0301000 in Screen and APDOC in Table.

5. Click Disable Attachments to prohibit the attachments capability for the data item referenced in Screen or Web Service and Table.

6. Click Disable Preview to prohibit previewing source document files for the data item referenced in Screen and Table.

**Note:** Disable Preview is not available for web services.

7. Click Disable Upload to prohibit copying source document files to the SharePoint site or network folder for the data item referenced in Screen and Table.

**Note:** Disable Upload is not available for web services.

8. Click Disable Link to prohibit linking to existing source document files on the SharePoint site or network folder for the data item referenced in Screen or Web Service and Table.

9. Select Use Doc Share Settings to store source document files on a SharePoint site that uses the settings that are defined for the Doc Share entity, Existing SharePoint Document Library to store source document files on a SharePoint document library, or Existing Folder Location to store source document files to a network folder.

   - If you selected Use Doc Share Settings, enter the Doc Share entity in Entity and the Doc Share document type in Doc Type.
   - If you selected Existing SharePoint Document Library, enter the Internet address of the SharePoint document library in URL.
   - If you selected Existing Folder Location, enter the path of the network folder in UNC.

10. Repeat steps 2 through 9 for each Screen or Web Service and Table combination. For example, you must add BATCH and APTRAN table entries for the 0301000 screen entry to let source document files be attached to the batch and transaction data items in Voucher and Adjustment Entry (03.010.00).
Using Initialize Mode

When you are setting up a Microsoft Dynamics SL module, use Initialize mode to begin data entry at a specific point in time. Initialize mode is available in most modules.

Example: You are setting up the Accounts Payable module to begin regular operation on the first day of fiscal period seven. There are six previous periods with vendor activity to enter in the database for Microsoft Dynamics SL to accurately track and maintain the accounts payable information. You could start with period one and enter, post, and close each period's activity to catch the software up with the current accounts payable situation. However, a more convenient alternative is to enable Initialize Mode in Microsoft Dynamics SL and enter all vendor-related balances, such as period-to-date purchases, payments, and discounts taken, as of the last day of fiscal period six.

By entering just the balances while in Initialize mode, you achieve the same effect as if you used Microsoft Dynamics SL to process all the activity in periods one through six. When you take the system out of Initialize mode and begin regular Accounts Payable module operations, all accounts payable information in the database will be current as of the first day of period seven.

To use Initialize mode:
Open the Application menu on the Microsoft Dynamics SL toolbar, and then click Initialize Mode. A check mark indicates that you are in Initialize mode.
Maintaining and Sharing Reports

Overview
This topic gives you information about maintaining and sharing Microsoft Dynamics SL reports. The basic tasks include the following:

- Maintaining Report Control Records
- Sharing Documents By Using Doc Share
- Viewing a Doc Share Document
- Sharing Reports Using Microsoft SharePoint

For more information about reports, see the Reporting Guide and the Quick Reference Guide.

Maintaining Report Control Records
When you print a report in Microsoft Dynamics SL, whether from the menu or from code, the Report Option Interpreter is called. Based on your choice, this program starts either the Crystal Reports printing engine (ROI.exe) or SQL Server Report Services (ROISRS.exe) to print the report. Using the interfaces ROI and ROISRS provide, you can select from many options that affect how a given report appears.

Each report can have a different set of options and formats that are determined by a record from a system table named RPTCONTROL. There must be a record in this table for all reports printed from the system. With Report Control Maintenance (98.300.00), you can set various options of the ROI for a particular report. At least one report format must be defined for each report number. The report format consists of a description of the format and the name of the actual Crystal Reports definition file that generates that report format.

For more information, see the Reporting Guide.

Note: You can configure many of the functional settings for the ROI by using the [Reports] section of the Solomon.ini file. For more information, see “Appendix A: Solomon.ini Settings” on page 221.

To maintain report control records:
1. In the Microsoft Dynamics SL window, click the Administration button, and then select Report Control Maintenance.
Report Control Maintenance (98.300.00) appears.

![Report Control Maintenance](image)

Figure 50: Report Control Maintenance (98.300.00)

2. If you are creating a new report, type a report number in **Report Number**. To select an existing report, Press F3 to open a Possible Values (PV) window listing all available report numbers to select from. Select a report number and then click **OK**.

3. In **Report Format Name**, type a name for the first report format. You may also change the name if this is an existing report.

4. In **Report Format**, type a Crystal Reports definition file for the first report format. This is the report file name without the .rpt extension.

5. To view, create, or change report processing options, click the **Control Options** tab.
Control Options tab

![Control Options tab](image)

Figure 5.1: Report Control Maintenance (98.300.00), Control Options tab

a) In **Report Date Caption**, specify the value that prompts for report date.
b) In **Pre-Process Name**, type the name of the preprocess stored procedure or Microsoft SL SDK application, if any.
c) In **Post-Process Name**, type the name of the post-process stored procedure or Microsoft SL SDK application, if any.
d) In **Data Source**, select the name of the database type where the data for this report resides.
e) If cover pages are not to be enabled for this report, select **Disable Banner Prompt**. This disables the **Cover Page** tab on the ROI window.
f) If multiple copies can be created for this report, select **Allow Multiple Copies**. This enables the **Copies** text box on the ROI **Report** tab.
g) If data for this report is to be taken from multiple companies, select **Multi-Company Selection Allowed**. This enables the **Company Selection** tab on the ROI window.
h) Select an option from **Reporting Range Prompt**. This determines how reporting dates are handled. The options are as follows:
   - No Period Number — No period or date specified
   - Period to Report — To specify a single period
   - Beg\End Period to Report — To specify a range of periods
   - Calendar Year — To specify a calendar year
   - Validated Period to Post — To specify only a period that is not closed
   - Date to Report — To specify a single date
   - Date Range — To specify a range of dates
i) If the default period value is to be taken from a setup record, select the one that you want in **Default Period From**, or select None.

j) In **Period Field Name**, enter the name of the field in the database field the ROI will use to change the RI_WHERE field to produce a period-based report. Use the format `table.field`. If Date to Report or Date Range is selected from the **Reporting Range Prompt** list, the **Period Field Name** field label changes to **Date Field Name**. In **Date Field Name**, enter the name of the database field the ROI will use to change the RI_WHERE field to produce a date-based report.

k) If this report is to be printed on special forms instead of plain paper, select **Print on Special Forms**. Selecting this option enables the next two options.

l) If the report should have account and subaccount values displayed, select **Display Acct/Sub Fields**.

m) In **Document Number Caption**, type text that will identify the type and number of documents being created by this report.

n) To accept control option changes and return to **Report Control Maintenance (98.300.00)**, click **OK**.

6. To view, create, or change report-specific runtime options for this report, click the **Custom Fields** tab.

   ![Image of Report Control Maintenance (98.300.00), Custom Fields tab](image)

   **Figure 52: Report Control Maintenance (98.300.00), Custom Fields tab**

   - To create prompts for text fields into which the user can specify values, type them in **Custom String Field Captions**.
   - To create prompts for check box options that the user can decide to turn on or off, type them in **Custom Logical Field Captions**.
   - To accept **Custom Fields** changes and return to **Report Control Maintenance (98.300.00)**, click **OK**.
7. Assign additional report format names and definitions as you want.
8. Save the record.
9. Close the screen.
10. Run the report from the menu to verify the results.
Sharing Documents By Using Doc Share

With Doc Share, you can publish documents such as invoices, purchase orders, and construction billing reports on Microsoft® SharePoint® or Microsoft® SharePoint® Online sites to help your customers and vendors gain quick and easy access to the information that they need. If a vendor, customer, or project is set up to use Doc Share, the documents that you designate will be published to a SharePoint site automatically when you print or print preview them.

The basic Doc Share configuration tasks are as follows:

- Installing and configuring prerequisites
- Setting up Application Server to publish documents by using Doc Share
- Selecting Doc Share default settings
- Changing customer, vendor, or project Doc Share settings

Installing and Configuring the Prerequisites for Doc Share

Prerequisite tasks:

- Install Internet Information Services Manager (IIS) 7.0
- Install Microsoft® SharePoint® Foundation 2010 or Microsoft® SharePoint® Server 2010
- In SharePoint, create the Doc Share site and site collection

Setting up Application Server for Doc Share

A computer that is running Application Server is used to deliver vendor, customer, or project documents to a SharePoint site. Although you must have Application Server installed and configured, you do not have to register the module to use it with Doc Share. For information about how to set up Application Server, see the Application Server Help or user’s guide.
Selecting Doc Share Default Settings

On the SharePoint Site Configuration (98.360.00) screen, you select default settings for vendors, customers, and projects. To help make Doc Share setup easier, the default settings that you select in SharePoint Site Configuration (98.360.00) are passed to Accounts Payable Vendor Maintenance (03.270.00), Accounts Receivable Customer Maintenance (08.250.00), or Project Controller Project Maintenance (PA.PRJ.00). You can override the default settings in these screens.

To select SharePoint site or document library default settings:

Follow these steps for each entity type that you want to configure.

1. Click the Administration button on the Microsoft Dynamics SL window, and then select SharePoint Site Configuration. SharePoint Site Configuration (98.360.00) appears.

2. Select an Entity Type. The entity types are Customer, Vendor, and Project.

3. In Root Site URL, type the Internet address of the SharePoint site that will be the host of either a subsite or a document library to which you will publish documents.

   Microsoft Dynamics SL will try to connect to the SharePoint site that you enter. If it cannot connect to the site, System Message 9868 will appear, suggesting that the URL you entered may not be valid. Enter a new Web address.

   **Note:** To avoid errors, do not use a root site that includes Project Web Access (PWA) at the end of its path (as in http://MyServer/PWA). Instead, enter another path, such as one that ends with the name of a PWA collection (http://MyServer/PWA/Project5 for example). The path you specify is a default you can change on SharePoint Site Creation/Linking (21.960.00) in Shared Information.
4. Select **Create a Site** to build a subsite on the SharePoint host site or **Create a Document Library** to configure a library where documents will be stored on the host site.
   
   - If you selected **Create a Site**:
     a.) In **Subsite URL Prefix**, type a meaningful prefix that will appear at the start of the subsite Internet address. Do not include colons, semicolons, or spaces. This prefix along with the entity's identifier, will become the name of the subsite. For example, if you specify *Customer*, then the full site URL for a customer who has the ID ABC123 will be `http://<Root Site Name>/CustomerABC123`.
     b.) In **SharePoint Site Template**, type the name of the SharePoint site template that you want to use to create the subsite. You can use a template to create the subsite so that it resembles your organization’s other sites and includes such things as your business logo and important lists. Press F3 to view a list of site templates.
     c.) Select **Inherit Permissions from Parent** to grant the same permissions to the subsite as those of the SharePoint site. If you do not select this check box, the administrator will have to grant users access to the site.
   
   - If you selected **Create a Document Library**:
     a.) In **Document Library Name**, type a meaningful prefix for the document library name. Do not include colons, semicolons, or spaces. For example, if you specify *CustomerLibrary*, the document library for a customer who has the ID ABC123 will be called `CustomerLibrary_ABC123`.
     b.) In **Document Library Template**, type the name of a template that you want to use to create the document library. You can use a template to create the library so that it resembles your organization’s other sites and includes custom columns and other features. Press F3 to view a list of document library templates.

5. In the Default Site/Library Creation Options area, select the option that you prefer.
   
   - **Enable Default Creation** — Selecting this option clears the **Disable Document Publishing to SharePoint** check box in Accounts Payable Vendor Maintenance (03.270.00), Accounts Receivable Customer Maintenance (08.260.00), and Project Maintenance (PA.PRJ.00). If the check box is not selected when you create a new vendor, customer, or project and save it, a new SharePoint site or library is automatically configured based on the information on this screen.
   
   - **Prompt for Each New Entity** — Selecting this option clears the **Disable Document Publishing to SharePoint** check box in Accounts Payable Vendor Maintenance (03.270.00), Accounts Receivable Customer Maintenance (08.260.00), and Project Maintenance (PA.PRJ.00). When you save a new vendor, customer, or project, *SharePoint Site Creation/Linking* (21.960.00) will display. This enables you to create a site or document library for the new entity.
   
   - **Disable Creation and Prompting** — By default, this option is selected, together with the **Disable Document Publishing to SharePoint** check box in Accounts Payable Vendor Maintenance (03.270.00), Accounts Receivable Customer Maintenance (08.260.00), and Project Maintenance (PA.PRJ.00). If you create a new vendor, customer, or project with this option selected, you must click the **Create/Modify SharePoint** button on the application toolbar in the maintenance screen to create a SharePoint site or document library for the new entity.

6. In the Publish Documents area, select an **Enabled** check box for each document type that you want to publish to the SharePoint site or library you are creating. The document types that appear are based on whether you are configuring for vendors, customers, or projects.

7. In the Publish Documents area, specify the kind of file in **File Type** that you want to publish to the SharePoint site or library you are creating. The available file types are as follows: **Text**, **Word**, **Crystal Reports**, **Excel**, **Adobe Acrobat**, **Rich Text**, **XML**, and **Comma-separated values**.

8. Select the **Configured** check box to enable web publishing for the entity.

   **Note:** You can clear the **Configured** check box to temporarily stop publishing documents for an entity. For example, you must perform maintenance on the SharePoint site that holds customer documents that were published by using Doc Share. You open **SharePoint Site Configuration**...
(98.360.00), select Customer in Entity Type, clear Configured, and save. When the site is back in operation, you select Configured again for the Customer entity type and resume publishing customer documents to the site.

9. Click Save.
For information about how to use Doc Share, see the Accounts Payable, Accounts Receivable, or Project Controller Help or user’s guide.

**Viewing a Doc Share Document**

To view a Doc Share document:

1. Determine which document that you want to view.
2. Open the inquiry screen that relates to the document. For example, to view a purchase order, open Accounts Payable Vendor History (03.271.00) or Vendor Inquiry (03.200.00).
3. Select the vendor, customer, or project related to the document.
4. Click View Shared Documents on the toolbar to link to the SharePoint site where the documents reside.

![Figure 54: Accounts Payable Vendor Inquiry (03.200.00) with View Shared Documents button](image)

**Note:** Rest the mouse pointer on the View Shared Documents button to see the web address of the SharePoint site where the documents are located.
Sharing Reports Using Microsoft SharePoint

You can publish reports to Microsoft® SharePoint® or Server or Microsoft® SharePoint® Online document libraries to help your employees gain quick and easy access to the information that they need. The reports will be published automatically when you print them.

The basic configuration and usage tasks are as follows:

- Selecting the Microsoft SharePoint document library
- Publishing reports to the Microsoft SharePoint document library

Selecting the Microsoft SharePoint document library

You chose to publish reports to a SharePoint document library by selecting Upload to SharePoint on Printer Options (98.220.00). The appropriate SharePoint document library that will store the reports must also be specified.

To select a SharePoint document library:

1. Select Application | Printer Setup. Printer Options (98.220.00) appears.

![Figure 55: Printer Options (98.220.00)](image)

2. Select Upload to SharePoint and then click Setup. Upload to SharePoint Document Library (98.220.01) appears.

![Figure 56: Upload to SharePoint Document Library (98.220.01)](image)

3. In List Types of Files, select the kind of file to be uploaded to the SharePoint document library. The file extension that is associated with the kind of file you selected will display.
4. In **SharePoint Document Library Destination**, specify the SharePoint document library path or press F3 to view a list of previously accessed SharePoint document libraries. Document Library Search appears.

5. Click **Search** to look up document libraries on a specified SharePoint site. The Document Libraries dialog box appears.

6. Enter the URL to an existing SharePoint site in *Find all the document Libraries on the SharePoint Site listed below*.

7. Click **OK**. *Document Library Search* is displayed, listing the document libraries on the SharePoint site.

8. Select the appropriate document library and then click **OK**. *Upload to SharePoint Document Library* (98.220.01) appears with the path of the document library in **SharePoint Document Library Destination**.

9. Click **OK** to close Upload to SharePoint Document Library (98.220.01).

10. Click **OK** to close *Printer Options* (98.220.00).
Publishing reports to the Microsoft SharePoint document library

The Print button on any report screen is displayed as Upload when Upload to SharePoint is selected in Printer Options (98.220.00). The report is published to the specified Microsoft SharePoint document library instead of it being sent to a printer when the Upload button is clicked.

Note: Customers, employees, vendors, and projects setup for Quick Send or Doc Share are excluded from the file uploaded to SharePoint if Quick Send and Doc Share were not disabled at the time that the report was generated.
Maintaining Microsoft Dynamics SL

Overview
The Maintaining Microsoft Dynamics SL section provides information and procedures for performing maintenance tasks and troubleshooting the system. These basic tasks include the following:

- Looking Up Active Users
- Backing Up Databases
- Validating and Repairing Databases
- Updating Databases
- Viewing the Event Log
- Setting Event Log Options

Maintaining Databases
The system and application databases should be backed up routinely. If there are system failures, a current back up of the databases is needed to restore the system.

Periodically, Microsoft issues software updates that include changes to the database structure. To add the changes to the system, update the system database.

Troubleshooting in Microsoft Dynamics SL
The event log records actions taken by each user, such as opening a database, changing a record, or deleting a data item.
Looking Up Active Users

Occasionally, you may have to locate users currently signed on to the system. The information displayed about users includes the following: name, database and screens they are using, and how to contact them.

Being able to communicate with other users quickly and efficiently is helpful in emergency situations when you are performing system-wide operations, such as backing up a database.

To look up a list of active users:

In the Microsoft Dynamics SL window, click the **Administration** button, and then select **Active Users**. **Active Users** (98.210.00) is displayed and shows a list of all the users currently active on the system.

![Active Users (98.210.00)](image)
Backing Up Databases

Backing up the database is one of the most important aspects of making sure of the integrity of your computerized accounting information. Even a small business cannot survive the loss of its database, especially when you talk about accounting records. Database backup is not an option. It is required and is always a very important part of the data processing responsibilities of any organization. Even the best hard disk fails eventually.

See Microsoft® SQL Server® Books Online for information about how to back up your databases. Backing up the program files is not necessary. It is frequently simpler to reinstall all or part of the program files from the CD.

Backing Up the System Database

The system database contains Microsoft Dynamics SL user information, access rights, customization files, registration information, and the system tables. Back up the system database after you update the database with new information, such as adding a new user. A current backup of the system database is needed to rebuild the system.

Backing Up the Application Database

The application database contains several data directories that contain the records that are added and changed every day. Use the Microsoft SQL Server Edition Backup Utility to back up system and application databases and transactions at least one time per week.
Validating and Repairing Databases

Microsoft SQL Server Edition provides the DBCC utility. This provides several options for validating and repairing databases. See the Microsoft SQL Server Edition documentation or Books Online for more information about this utility.
Updating Databases

Periodically, Microsoft issues a software update that includes changes to the database structure, such as changes to system messages and possible values. To add the new database structure to the current version of Microsoft Dynamics SL, update the system and application databases.

Updating the system and application databases may take a long time. Plan to run the update either overnight or over a weekend.

To update databases:

1. Make sure that every user is logged off from Microsoft Dynamics SL. See “Looking Up Active Users” on page 72.
2. Make a backup of the system database. See “Backing Up the System Database” on page 73.
3. Log on to the system database to update.
4. In the Microsoft Dynamics SL window, click Administration, and then click Database Update. Database Update (98.100.00) appears.
5. Click Browse for files. Select files to import appears.

![Select files to import](image)

Figure 60: Select files to import
6. Highlight the files to update or add to the current system database, and then click Open. To select more than one file at a time, press CTRL while clicking each file that you want to include.

![Database Update (98.100.00) - Contoso, Ltd Demo](image)

*Figure 61: Database Update (98.100.00)*

7. Click **Begin Processing**.
Importing Messages and Possible Values Lists

If Microsoft issues changes to just system messages and possible values lists, import the new lists instead of updating the databases to save time.

To import messages and possible values lists:
1. In the Microsoft Dynamics SL window, click the Administration button, and then select Possible Values Import. Possible Values Import (PV.REC) appears.

   ![Possible Values Import (PV.REC)](image)

   Figure 62: Possible Values Import (PV.REC)

2. Click Enter file name. The Specify Import File dialog box appears.
3. Click the file or files to import: messages (messages.csv) or possible values (pvrec.csv).
4. Click Open. Possible Values Import (PV.REC) appears with the selected file names.
5. Click Begin Process. During processing, Possible Values Import (PV.REC) appears the number of records that are being added to the database. Follow the prompts to overwrite existing files.
6. Click OK after processing has finished running.
7. Viewing the Event Log

   An event is a statement summarizing the completion of a process, such as deleting a data item or closing a module. The system records these events in the event log. Use the event log to help troubleshoot problems.

To examine the event log:
1. In the Microsoft Dynamics SL window, click the Administration button, and then select Event Log Viewer. Event Log Viewer (95.290.00) is displayed.

   ![Event Log Viewer (95.290.00)](image)

   Figure 63: Event Log Viewer (95.290.00)
2. Click the process ID of the event log you want to view.
3. Click View. Notepad opens, and information about the process that you selected appears in the window.
4. Close Notepad when you are finished viewing the event log.
5. In Event Log Viewer (95.290.00), select the Delete check box if you want to remove the event log.
6. Close the window, and then click Yes to save any changes that you made.
7. Setting Event Log Options

In addition to process information, the software can also record fatal errors and the details of database calls in the event log. By default, process information is recorded.

To set the event log options:
1. On the Microsoft Dynamics SL toolbar, open the Tools menu, and then click Options. Options Dialog appears.
2. Click the Event Log tab.

3. Select Database Calls to include database calls in the log.
4. Select Recoverable Error Diagnostics to include information about recoverable errors in the log.
5. Select Fatal Diagnostics to include information about fatal errors in the log.
6. In the Data Entry Keystrokes area, select whether to include keystrokes in the error log and the maximum number of keystrokes to include.
7. Click OK.
Importing Transaction Data

Overview
The Importing Transaction Data section provides information and procedures for importing data into a database. These basic tasks include the following:

- Editing Transaction Import Data Files
- Working with Transaction Import Control Files
- Starting the Transaction Import Process
- Viewing Transaction Import Log Files

Transaction Import
Transaction Import offers a powerful, yet flexible, way to import data into a database. Transaction Import interfaces external systems with Microsoft Dynamics SL. For example, assume a company has a branch office that generates sales orders, but records those orders in a system other than Microsoft Dynamics SL. The main office can use Transaction Import to bring those sales records into Microsoft Dynamics SL.

Transaction Import completes this action by reading the source information from a data file. It processes the lines in that file according to the instructions contained in a control file, and then puts the imported information into applications. Transaction Import supports additions, deletions, and updates to any records entered into an application.

Note: The maximum of length of a data transfer is 1,024 characters.

Transaction Import validates all imported data. For example, the software must recognize a customer ID imported from a data file as a valid customer ID. The process also maintains full logical data integrity. That is, the software must recognize as valid all the inventory items on a sales order or it refuses to import the record.

Transaction Import sends the data it imports to specific data entry screens. The end data appears just as if entered manually. Except for Data Import and some System Manager screens, Transaction Import can send data into every screen available in Microsoft Dynamics SL. Transaction Import also supports all customized Microsoft Dynamics SL screens, Microsoft SL SDK applications, and multiple languages. Additionally, multiple instances of Transaction Import can run on the same workstation at the same time.

Transaction Import uses two kinds of files:

- Data files that contain header and detail information about the source records
- Control files that instruct Transaction Import how to handle the information found in the data file

Both files come in two forms: simple and intelligent.

Simple Form Data Files
Simple data form files contain:

- The data's destination screen in Microsoft Dynamics SL
- The kind of transaction: change, insertion, or deletion
- Which information serves as key fields
- The actual data
- Comments

See “Simple Form Data File Syntax” on page 82 for detailed information on the contents and syntax of simple form data files, in addition to examples of them.
Simple form data files have some limitations:

- The comma (, ) is the only supported field separator.
- The double quotation mark (" ) is the only supported field delimiter.
- The first field in a line of data must contain the key fields for the level.
- The arrangement of fields in the data file must match that of the object names in the simple form control file.
- Limited multiple language support. Words from a different language cannot substitute for the words Change, Delete, Insert, and Comment.

**Intelligent Form Data Files**

Intelligent form data files support all the features of simple form data files, plus several other features for more flexibility:

- Fields can be arranged in any order.
- Files have better self-documenting capabilities.
- Other characters can substitute for the default separator, delimiter, and comment characters.
- Words from multiple languages can substitute for the words Change, Delete, Insert, and Comment.

See “Intelligent Form Transaction Import Control Files” on page 91 for detailed information on the contents and syntax of intelligent form data files, and examples of them.

**Simple Form Control Files**

Simple form control files consist of a list of object names. The order of these object names must correspond to the order of the data field values in the associated data file.

Each line in the simple form control file specifies all the object names included on the screen into which the simple form data file’s information flows. Data transfers can consist of no more than 1,024 characters.

Simple form control files have limitations:

- The Transaction Import process cannot perform deletes.
- The comma (, ) is the only supported field separator.

See “Simple Control File Syntax” on page 90 for detailed information on the contents and syntax of simple form control files, in addition to examples of them.

**Intelligent Form Control Files**

Intelligent form control files consist of a Visual Basic for Applications (VBA) subroutine definition called `Process Import Line`. Each line of the associated intelligent form data file calls this subroutine. Data transfers can consist of no more than 1,024 characters.

The subroutine contains `SetObjectValue` calls and, together with the `ImportField` function, imports the specified column of data into a particular object in the application screen.

There are two optional VBA subroutines that can be part of an intelligent form control file: `ButtonLevelChange` and `ButtonFormChange`. Both contain `SetObjectValue` calls to run the button click events.

See “Sample Intelligent Control Files” on page 92 for examples of Intelligent Form Control Files.
Editing Transaction Import Data Files

Create ASCII data files for Transaction Import operations by using the applications which currently store the source information.

To view or edit a Transaction Import data file:

1. In the Microsoft Dynamics SL window, click the Administration button, and then select Transaction Import. Transaction Import (98.500.00) appears.

2. Under Data File Name, put the pointer in the box that contains the name of the data file that you want to view, or if an empty Data File Name column, type the name of the data file.

3. Click Edit Errors. Import File Edit is displayed, and shows the log file generated during the last Transaction Import process and the specified data file.

4. Use the scroll bars to view various sections of the file. The line and column numbers of the pointer’s current location in the data file display in Line and Column.
5. To jump to a specific location in the data file, type the desired line and column numbers in **Line** and **Column**, and then press **TAB**. The cursor goes to the location that you specified.

6. Edit the file, then do one of the following on the File menu:
   - Click **Save Data File** to save the data file by using its current name.
   - Click **Save Data File as** to save the data file by using a new name.

7. Click **Print Data File** to print the data file on the default system printer.

8. Click **OK**. *Transaction Import* (98.500.00) appears.

### Simple Form Data File Syntax

The software ignores white space (spaces, tabs, and so on) between fields and separators, unless inside a set of delimiters.

Sample syntax:

```
LEVEL, KEY1, KEY2, ... KEYn, VALUE1, VALUE2, ... VALUEn<CR><LF>
```

or:

```
"LEVEL,[TRANTYPE]", KEY1, KEY2, ... KEYn, VALUE1, VALUE2, ... VALUEn<CR><LF>
```

or:

```
COMMENT here goes a comment
```

or:

```
' this is also a comment line
```

**LEVEL**

Tells Transaction Import the source data’s destination application screen level.

- Uses the form **LEVELn** where *n* is a number from 0 to 9.
- The level identifier must be the first field on every data line.

**“LEVEL,[TRANTYPE]”**

A level identifier-transaction type combination; required to update or delete a specific item; if not specified, Transaction Import assumes Insert.

**Valid Transaction Types**

- **Change** — Updates an existing record.
- **Insert** — Adds a new record; updates an existing record. The default value when no other is specified.
- **Delete** — Deletes an existing record.
- **Processed** — Skips the line because it has already been processed.

**KEY1,KEY2, ...KEYn**

The key fields for a specified level (LEVEL) of an application; when a key (KEY) object is populated, other objects are set to default values to prevent non-key data from changing when populating key objects; values must be first in the data line to eliminate unexpected data changes.

**VALUE1, VALUE2, ...VALUEn**

Field values for the level.

---

, (Comma)

The only field separator supported in simple form data files.
" (Double Quotation Mark)
The only field delimiter supported in simple form data files; required only if a comma is in the field
data; to include a double quotation mark as part of the data, put two quotation marks in the field itself (" ").

' (Single Quotation Mark)
Treated as a comment line and not processed as data.

Comment
Treated as a comment line and not processed as data.

<blank line>
Treated as a comment line and not processed as data.

<CRLF>
Carriage return followed by a linefeed; the end-of-line characters.

Limitations of the Simple Form Data File
- Multiple language support limited; Change, Delete, Insert, and Comment cannot interchange with
  words from a different language.
- Fields in the data file must be arranged in the same order as object names in the associated
  simple form control file.
- The key fields for a level must be the first field in a line of data.
- Maximum data transfer length is 1,024 characters.

Sample Simple Data Files/Lines

Sample One
This sample is for a screen with one level of objects. In this sample:
- Lines 1 and 2 tell Transaction Import to insert accounts 1010 and 1020.
- Line 3 tells Transaction Import to delete account 1030. Notice that if account 1030 does not
  exist, an error is reported in the event log.
- Line 3 uses a TRANTYPE. Therefore, it must use double quotation marks around the level
  identifier.
Line
1  Level0,"1010","Account 1010 Description","1A", "Y"
2  Level0,"1020","Account 1020 Description","1A", "Y"
3  "Level0,Delete","1030"

Sample Two
This sample is for an application that has three levels of objects. In this sample:
- The levels are not always sequential.
- The first and second lines have a field set to ",". This tells Transaction Import to leave the field contents as defaulted by the application. This notation is useful when the software is set up for automatic batch and reference numbering.
- Lines 1 and 3 are comments denoted in different ways.
- Line 2 tells Transaction Import to insert a new batch.
- Line 2 uses "," to indicate a blank field; means do not change the defaulted value.
- Line 4 tells Transaction Import to insert a new document.
- Line 5 tells Transaction Import to insert a transaction detail line.

Line
1 'Batch Info
2 Level0,"",199407,123.00
3 COMMENT -- Document starts here
4 Level1,"",Vendor1, 01, 5.25, 0.00
5 Level4,1030, 34234234234, 1, 5.25, 5.25, "Transaction description"

Intelligent Form Data File Syntax

Note: Maximum data transfer length is 1,024 characters.

Sample syntax:
LEVEL, VALUE1, VALUE2, ... VALUEn<CR><LF>
or:
"LEVEL[,TRANTYPE]", VALUE1, VALUE2, ... VALUEn<CR><LF>

or:
COMMENT here goes a comment

or:
' this is also a comment line

LEVEL
Tells Transaction Import the source data’s destination application screen level.
- Can use the form LEVEL0.
- Can use an alias level identifier, taking a form something like ORDER.
- The level identifier must be the first field on every data line.

The following syntax in the control file can substitute a more meaningful name for the level number; either name can then be used in the data file.
AliasConstant ( "Level0", "Order" )

"LEVEL[,TRANTYPE]"
A level identifier-transaction type combination; required to update or delete a specific item; if not specified, Transaction Import assumes Insert for levels that are not Lookup (type L) levels; for lookup-type screen levels, transaction type uses Change; no spaces allowed between double quotation marks.

Valid Transaction Types
- Change — Updates an existing record.
- Insert — Adds a new record; updates an existing record. The default value when no other is specified.
• Delete — Deletes an existing record.
• Processed — Skips the line because it has already been processed.

VALUE1, VALUE2, ...VALUEn
Field values for the level.

, (Comma)
The default field separator; a different character can be substituted through use of the following syntax in the control file; in this sample, a semicolon is designated as the separator character:
AliasConstant( "Separator", ";" )

" (Double Quotation Mark)
The default field delimiter; required only if a comma is in the field data; substitute a different character with the following syntax in the control file; whatever the character that is used, if a delimiter is in the data, two delimiters go in the field (in this sample, " " or !!):
AliasConstant( "Delimiter", "!" )

' (Single Quotation Mark)
Treated as a comment line and not processed as data.

Comment
Treated as comment lines and not processed as data; other words can substitute for Comment with the following syntax; even if AliasConstant changes the comment character, a single quotation mark in the first column of data is always treated as a comment character; in this situation, both characters are treated as comment characters.
AliasConstant( "Comment", "#" )

<blank line>
Treated as a comment line and not processed as data.

<CR><LF>
Carriage return followed by a linefeed; the end-of-line characters.

Sample Intelligent Data Files/Lines

Sample One
This sample is for a screen with only one level of objects.
• Lines 1 and 2 tell Transaction Import to insert accounts 1010 and 1020.
• Line 3 tells Transaction Import to delete account 1030; if account 1030 does not exist, an error is written to the event log.
• Also in Line 3, the level identifiers are a table name; by looking at the data, one can verify that this data file contains information for the Account records in the database.
• Line 3 uses a TRANTYPE. Therefore, it must use double quotation marks around the level identifier.

Line
1 Account,1010,Account 1010 Description,1A, Y
2 Account,1020,Account 1020 Description,1A, Y
3 "Account,Delete",1030
Sample Two
This sample is for an application that has three levels of objects.

- Levels are not always sequential.
- Delimiter is an exclamation point (!).
- Separator is a semicolon (;).
- Lines 2 and 4 set a field to !!; instructs Transaction Import to leave the field contents at their default values, as specified by the application; useful when Microsoft Dynamics SL is set up for automatic batch and reference numbering.
- Lines 1 and 3 are comments denoted in different ways.
- Line 2 tells Transaction Import to insert a new batch.
- Line 2 uses !! to indicate a blank field. This means do not change the default value.
- Line 4 tells Transaction Import to insert a new document.
- Line 5 tells Transaction Import to insert a transaction detail line.

```
1  'Batch Info
2  Level0;!!;199407!!;123.00
3  COMMENT -- Document starts here
4  Level1;!!;Vendor1!!;01!!; 5.25; 0.00
5  Level4;!1030!!;34234234234!!;1; 5.25; 5.25; !Transaction description!
```

Sample Three
This sample is for an application that has three levels of objects.

- Lines 1 and 3 are comments, denoted in different ways.
- Line 2 tells Transaction Import to insert a new batch.
- Lines 2 and 4 use !! to indicate a blank field; instructs Transaction Import to leave the field contents at their default values, as specified by the application; useful when the software is set up for automatic batch and reference numbering.
- Line 4 tells Transaction Import to insert a new document.
- Line 5 tells Transaction Import to insert a transaction detail line.

```
1  'Batch Info
2  Level0;!!;199407!!;123.00
3  # -- Document starts here
4  Level1;!!;Vendor1!!;01!!; 5.25; 0.00
5  Level4;!1030!!;34234234234!!;1; 5.25; 5.25; !Transaction description!
```

Special Data Considerations for All Data Files
Several rules specify the kinds of data acceptable for each kind of object. These apply to both the simple and intelligent Transaction Import file forms. For example, the maximum data transfer length is 1,024 characters.

SAFOPTION
This is an option button, usually grouped with other option buttons to represent a setting. Each setting is assigned a database value and a caption describing the setting. In a Transaction Import data file, either the value or the caption is a valid entry. When you use a description, Transaction Import maps that description back to the database value and the database value is stored.
Sample code:

```object cautoref```

This object is actually an array of objects:

- `cautoref(0)` Value P, Caption Past Due
- `cautoref(1)` Value E, Caption Early
- `cautoref(2)` Value O, Caption On Time

Valid data values:

- P — Past due
- E — Early
- On time

SAFCHECKBOX

The typical check box object type; possible field values:

- 0 — the box is cleared.
- 1 — the box is selected.
- CHECKED — the box is selected.
- UNCHECKED — the box is cleared.

Zero (0) and 1 are not valid for all check boxes in Microsoft Dynamics SL applications; CHECKED and UNCHECKED are valid.

SAFCOMBO

A combo box object; acceptable object values are derived from the list property of the object. A typical list property has the form:

```
Database Value; Description,...
```

- The database value is stored in the database when a selection is made.
- The description is a short description of that database value:

```
A,Active;I,Inactive;S,Suspended;C,Closed
```

Valid data file values:

- A. Active
- I. Inactive
- S. Suspended
- C. Closed

Microsoft Dynamics SL supports the database value or the description. Description support is offered because the description is displayed on the screen, but the database value is not always obvious.

Period

Format: YYYYPP.

Date

Format: MM/DD/YY.

Fields with a Mask

Valid mask characters for field masks:

- 9. Numeric characters
- A. Alphabetical characters (except * and ?)
• N. Alphabetical characters and numbers (except * and ?)
• X. Any characters between and including ASCII 32 through 127 (except * and ?)
• M. Any characters between and including ASCII 32 through 127
• L. Same as X but converted to lowercase
• U. Same as X but converted to uppercase
• V. Same as A but converted to uppercase
• W. Same as N but converted to uppercase
• H. The characters A through F and 0 through 9

**Clicking Buttons**

For some screens, processes, and reports, clicking a button is required to complete a task. Transaction Import can click buttons automatically if the process uses an Intelligent form control file. For example, applications supporting tax entry require this automatic clicking when you enter special tax information. To enable this feature, the file must contain a line similar to the following:

```plaintext
Serr = SetObjectValue( "cBeginProcess", "PRESS" )
```
Working with Transaction Import Control Files

Create initial simple and intelligent Transaction Import control files by using the control macro generator, and then adjust the files to optimize their performance. That adjusting requires knowledge of control file syntax and limitations.

Creating Control Files

The control macro generator creates a control file that contains the name of each object in the specified application screen. Using this file as a starting point, rearrange the lines in the control file to match the order of fields in the data file and add any Visual Basic for Applications (VBA) code needed to complete the Transaction Import process successfully.

To create a Transaction Import control file:

1. In the Microsoft Dynamics SL window, click Administration, and then click Control Macro Generator. Control Macro Generator (98.510.00) appears.

2. In Screen, type the number of the screen that will receive the imported data, or press F3 and select the screen from the list. If you type a screen number, do not include the periods that are part of the screen number. For example, type 0126000 to specify Chart of Accounts Maintenance (01.260.00) in General Ledger.

3. Select the kind of control file from the Control File Type list.

4. Type the path and name for the new control file in Control File Name. If you are unsure about a path, click Browse to select the file name. The default path is the user’s Documents folder.

5. Click OK to create the control file.

6. Click View Macro to examine the control macro in Notepad.
   a) Rearrange the lines of the control file to match the order of fields in the data file.
   b) Add any Visual Basic for Applications (VBA) code needed to complete the Transaction Import process successfully.
   c) On the File menu, do one of the following:
      • Click Save to save the new control file with the name that was specified in Control Macro Generator (98.510.00).
      • Click Save as to save the new control file name with a different name.
   d) If you want, click Print to print the file on the default system printer.
   e) Click OK to close Notepad.

7. Click Close to close Control Macro Generator (98.510.00).
Simple Form Control Files

Simple form control files consist of a list of object names, recorded in the same order as the field values in the associated source data file. Each line in the control file specifies all the object names for the specified application level.

Simple Control File Syntax

Simple form control files must use this syntax layout:

```
LEVEL, OBJECTNAME1, OBJECTNAME2, ... OBJECTNAMEn
```

**LEVEL**

The destination application screen level. A level identifier must be the first field on every control file line.

**OBJECTNAME1, OBJECTNAME2, ... OBJECTNAMEn**

The internal names assigned to the objects of the destination application screen. The names are separated by commas (,).

Limitations of the Simple Control Form

- The comma (,) is the only supported field separator.
- The order of the fields in the data file must match the order of object names in the simple form control file.
- Deletes cannot be performed.
- Maximum data transfer length: 1,024 characters.
- Maximum level name length: 20 characters.
- Maximum control file size: 32,000 characters.

Sample Simple Import Control Files

These sample simple form control files correspond to the sample data file discussed in “Sample Simple Data Files/Lines” on page 83.

**Sample One**

This sample is for a one-level application:

```
'Level Identifier, Account ID, Account Description, Status, Posting
Level0, cacct, cdescr, cstatus, csummpost
```

**Sample Two**

This sample is for a three-level application:

```
Description
DB Object Name
Description
DB Object Name
Description
DB Object Name
```

```
‘Level Id, Batch Number, Period, Batch Control Total
Level0, cbatnbr, ccurrperiod, cbatcntrl
‘Level Id, Ref #, Vendor ID, Terms, Document Amt, Discount Amt
Level1, crefnbr, cvendid, cterms, cdocamt, cdiscamt
‘Level Id, Account ID, Sub Acct, Quantity, UnitPrice, Tran Amount, Description
Level4, cacct, csub, cqty, cunitprc, ctranamt, ctrandesc
```
Intelligent Form Transaction Import Control Files

Intelligent form control files consist of Visual Basic for Applications (VBA) subroutine definitions, such as `ProcessImportLine`, `ButtonLevelChange`, and `ButtonFormChange`.

**Note:** Maximum data transfer length is 1,024 characters.

**For ProcessImportLine:**
- The subroutine is called for each line of the data file.
- The subroutine contains SetObjectValue calls.
- Together with the `ImportField` function, the subroutine maps a specified column of the import data into an object in the application screen.
- Substitutions are specified in the control file.
- In the default control file that was created by the control file generator, the appropriate Level Name automatically substitutes for the default LevelN constants. This causes data constants to self-document in the control file.

**For ButtonLevelChange:**
- The subroutine is called when Transaction Import detects a level change in the data.
- If the corresponding level change is in the last, the click event that triggers the change will be run.

**For ButtonFormChange:**
- The subroutine is called when Transaction Import detects a form change in a data line.
- If the corresponding form change is in the last, the click event that triggers the change will be run.
  
  **Note:** Only one level of form change in a data line is allowed. Nested form changes may cause problems.

**Functions Used in Intelligent Form Control Files**

**AliasConstant(Constant, Alias)**

Aliases certain constants used specifically by Transaction Import. This helps when you use a different language, because English words such as *Comment, Insert,* and *Change* can be replaced by another language’s alternative words.

**Syntax**

```
Call AliasConstant( Constant, Alias )
```

**Sample**

```
AliasConstant( "Change", "Update" )
```

Constants that can be redefined by using the `AliasConstant` function include the following:

- `Change`
- `Checked`
- `Comment`
- `Delete`
- `Delimiter`
- `Insert`
- `Press`
- `Processed`
- `Separator`
- `Unchecked`
- `LevelN` (where N is 0 to 9)

**ImportField(int index)**

Returns one field of information to the calling function or subfunction, or both. This function is also used to retrieve a complete data line by specifying an index of -1.

**Sample**

```
ImportField( 1 ) or ImportField( -1 )
```
**SetObjectValue(objectname, value)**

Imports a value into an object in the currently running application. Error checking functions, if any, run for the given object. An index is not needed when you use TLBOPTION objects.

Syntax

```plaintext
serr = SetObjectValue( objectname, value )
```

Sample

```plaintext
serr = SetObjectValue( "cterm", ImportField(1) )
```

or:

```plaintext
serr = SetObjectValue( "cterm", "01" )
```

**SetBufferValue(fieldname, value)**

Imports a value into a field in the currently running application. No error checking functions run for the given field. This function populates fields of database structures not associated with objects or controls on an application’s screen, such as “User” fields in the Microsoft Dynamics SL schema.

Syntax

```plaintext
Call SetBufferValue( objectname, value )
```

Sample

```plaintext
Call SetBufferValue( "bterms.User1", ImportField(1) )
```

or:

```plaintext
Call SetBufferValue( "bterms.User1", "01" )
```

**Sample Intelligent Control Files**

**Sample One**

In this sample intelligent form control file:

- BSL.DH is required.
- The TI_Start Case segment of BSL code is called only one time per import process, before any data is read. All redefinition of constants by using the AliasConstant function must be done at this point.
- The TI_Finish Case segment of BSL code is called only one time per import process, after all data processing finishes.

The sample control file:

1. Opens the data file.
2. Runs the ProcessImportLine macro for the TI_Start Case (Account substitutes for the Level ID Level0).
3. Instructs Transaction Import to read and process a line of data to determine the line’s level.
4. Runs the ProcessImportLine macro for the correct level case (0 in this sample).
5. Calls SetObjectValue for each object on that screen level. As SetObjectValue runs, ImportField is also called. ImportField extracts the value for the given field from the data line and passes it on to SetObjectValue, where edit checks occur. All objects for a level are populated and checked for errors.

```plaintext
'\$Include: "bsl.dh"
Sub ProcessImportLine( LevelNumber%, Retval%)
    Select Case LevelNumber
        case TI_Start
            Call AliasConstant("Level0", "Account"
```
case 0      ' Account
    serr = SetObjectValue("cacct",ImportField(1))
    serr = SetObjectValue("cacctdesc",ImportField(2))
    serr = SetObjectValue("cstatus",ImportField(3))
    serr = SetObjectValue("csummpost",ImportField(4))

    case TI_Finish
    ' End of screen processing
    End Select
End Sub
Sample Two
In this sample intelligent form control file with multiple levels in the application, the file uses AliasConstant to change the delimiting and separator characters.

'\$Include: "bsl.dh"
Sub ProcessImportLine( LevelNumber%, Retval%)
    Select Case LevelNumber
    case TI_Start
        Call AliasConstant( "Delimiter", ";" )
        Call AliasConstant( "Separator", ";" )
    case 0      ' Batch
        serr = SetObjectValue("cbatchnbr",ImportField(1))
        serr = SetObjectValue("ccurrperiod",ImportField(2))
        serr = SetObjectValue("cbatctrl",ImportField(3))
    case 1      ' Document
        serr = SetObjectValue("crefnbr",ImportField(1))
        serr = SetObjectValue("cvendid",ImportField(2))
        serr = SetObjectValue("cterms",ImportField(3))
        serr = SetObjectValue("cdocamt",ImportField(4))
        serr = SetObjectValue("cdiscamt",ImportField(5))
    case 4      ' Detail
        serr = SetObjectValue("cacct",ImportField(1))
        serr = SetObjectValue("csub",ImportField(2))
        serr = SetObjectValue("cqty",ImportField(3))
        serr = SetObjectValue("cunitprc",ImportField(4))
        serr = SetObjectValue("ctranamt",ImportField(5))
        serr = SetObjectValue("ctrandescr",ImportField(6))
    case TI_Finish
        ' End of screen processing
    End Select
End Sub
Sample Three
In this sample intelligent form control file, AliasConstant changes the character that is used to indicate a comment.

'\$Include: "bsl.dh"
Sub ProcessImportLine( LevelNumber%, Retval%)
    Select Case LevelNumber
        case TI_Start
            Call AliasConstant( "Comment", "#" )
            Call AliasConstant( "Delimiter", ";" )
            Call AliasConstant( "Separator", "!" )
        case 0      ' Batch
            serr = SetObjectValue("cbatchnbr",ImportField(1))
            serr = SetObjectValue("ccurrperiod",ImportField(2))
            serr = SetObjectValue("cbatctrl",ImportField(3))
        case 1      ' Document
            serr = SetObjectValue("crefnbr",ImportField(1))
            serr = SetObjectValue("cvendid",ImportField(2))
            serr = SetObjectValue("cterms",ImportField(3))
            serr = SetObjectValue("cdocamt",ImportField(4))
            serr = SetObjectValue("cdiscamt",ImportField(5))
        case 4      ' Detail
            serr = SetObjectValue("cacct",ImportField(1))
            serr = SetObjectValue("csub",ImportField(2))
            serr = SetObjectValue("cqty",ImportField(3))
            serr = SetObjectValue("cunitprc",ImportField(4))
            serr = SetObjectValue("ctranamt",ImportField(5))
            serr = SetObjectValue("ctrandescr",ImportField(6))
        case TI_Finish
            ' End of screen processing
    End Select
End Sub
Sample Four

In the following sample, the control file subroutine specifies data directly without referring to a data file. When an import data file is not specified, the ProcessImportLine subroutine is called only two times:

- The first time, with a TI_Start level number value.
- The second time, with a TI_Finish level number value.

The Transaction Import process always calls ProcessImportLine with these two level number values, regardless of whether, or how much, import data is specified.

'include: "bsl.dh"

'0101 Control Macro

Sub ProcessImportLine( LevelNumber%, Retval% )
  select Case LevelNumber
    case TI_Start
      call AliasConstant( "Level0", "Batch" )
      call AliasConstant( "Level1", "Detail" )

      serr = SetObjectValue( "cbatnbrH", "" )
      ' Field mask is UUU
      serr = SetObjectValue( "cjrnltpeH", "GJ" )
      serr = SetObjectValue( "cbattype", "N" )
      ' cperpostH is a Period Field
      serr = SetObjectValue( "cperpostH", "199407" )
      serr = SetObjectValue( "cBatchHandling", "H" )
      ' cAutoRefNbr is a Check Box
      ' Values are -1 for ON and 0 for OFF
      ' Values are CHECKED for ON and UNCHECKED for OFF
      serr = SetObjectValue( "cAutoRefNbr", "0" )
      ' cautorev is a Check Box
      ' Values are 1 for ON and 0 for OFF
      ' Values are CHECKED for ON and UNCHECKED for OFF
      serr = SetObjectValue( "cautorev", "0" )
      serr = SetObjectValue( "cctrltot", "132" )

      'Level 1 if of Type D
      serr = Edit_first(1)
      ' Field mask is UUUUUUUUUUU
      serr = SetObjectValue( "cacct", "1010" )
      ' Field mask is 99-999-WW-99-99-9
      serr = SetObjectValue( "csub", "01000AA00001" )
      ' Field mask is UUUUUU
      serr = SetObjectValue( "crefnbr", "" )
      ' ctrandate is a Date Field Type
      serr = SetObjectValue( "ctrandate", "" )
      ' Field mask is XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
      serr = SetObjectValue( "ctrandesc", "wowowow" )

serr = SetObjectValue( "cdramt", "123" )
serr = SetObjectValue( "ccramt", "0" )

' Next Level 1 if of Type D
serr = Edit_Next(1)

' Field mask is UUUUUUUUUU
serr = SetObjectValue( "cacct", "1010" )
' Field mask is 99-999-WW-99-99-9
serr = SetObjectValue( "csub", "01000AA00001" )
' Field mask is UUUUUU
serr = SetObjectValue( "crefnbr", "" )
' ctrandate is a Date Field Type
serr = SetObjectValue( "ctrandate", "" )
' Field mask is XXXXXXXXXXXXXXXXXXXXXXXXXXXXXX

serr = SetObjectValue( "ctrandesc", "wowowow" )
serr = SetObjectValue( "cdramt", "0" )
serr = SetObjectValue( "ccramt", "123" )

'Save the batch to the database
call Edit_Finish(0)
case TI_Finish
 End Select
 End Sub
Sample Five
This sample contains additional BSL code that is compiled into memory and, when certain events occur, checked to see whether certain subroutines exist. If they exist, they are run.

The control file that follows contains two new functions that are called as the application runs its validation checks and save logic.

- Application error checking occurs first.
- Any customization functions occur next.
- Any control file functions occur last.

'\$Include: "bsl.dh"

Sub ProcessImportLine( LevelNumber%, Retval%)
    Select Case LevelNumber
    case TI_Start
        Call AliasConstant( "Comment", "#" )
        Call AliasConstant( "Delimiter", ";'" )
        Call AliasConstant( "Separator", "!'" )

    case 0   ' Batch
        serr = SetObjectValue("cbatchnbr",ImportField(1))
        serr = SetObjectValue("ccurrperiod",ImportField(2))
        serr = SetObjectValue("cbatctrl",ImportField(3))

    case 1   ' Document
        serr = SetObjectValue("crefnbr",ImportField(1))
        serr = SetObjectValue("cvendid",ImportField(2))
        serr = SetObjectValue("cterm",ImportField(3))
        serr = SetObjectValue("cdocamt",ImportField(4))
        serr = SetObjectValue("cdiscamt",ImportField(5))

    case 4   ' Detail
        serr = SetObjectValue("cacct",ImportField(1))
        serr = SetObjectValue("csub",ImportField(2))
        serr = SetObjectValue("cqty",ImportField(3))
        serr = SetObjectValue("cunitprc",ImportField(4))
        serr = SetObjectValue("ctranamt",ImportField(5))
        serr = SetObjectValue("ctrandescr",ImportField(6))

    case TI_Finish
        ' End of screen processing
        End Select
    End Sub

Sub ctranamt_chk( chkstrng as String, retval as Integer )
    ' any special code needed at error checking time
    'This function is called when validation occurs on the ctranamt object
End Sub

Sub Update ( level%, insertflg%, levelsdone%, levelsleft%, retval% )
Sample Six
This sample shows how the ButtonLevelChange subroutine is used. When there is a level change in the data file, the ButtonLevelChange subroutine is called. If there is a select statement case for the level change that is occurring, the code inside that case will be run. This gives the control file the ability to open subforms if it is necessary when the level changes.

' $Include: "bsl.dh"
Sub ProcessImportLine( LevelNumber%, Retval% )
    Select Case LevelNumber
    Case TI_Start
        Call AliasConstant( "Level0", "ClassID" )
        Call AliasConstant( "Level1", "Class" )
    case 0
        ' 0 of 1
        serr = SetObjectValue("cClassID", ImportField(1))
        serr = SetObjectValue("cName", ImportField(2))
    case 1
        ' 1 of 1
        serr = SetObjectValue("cClassClassID", ImportField(1))
        serr = SetObjectValue("cStudentID", ImportField(2))
        serr = SetObjectValue("cGrade", ImportField(3))
    case TI_Finish
    End Select
End Sub
Sub ButtonLevelChange
    Dim LevelPair$
    LevelPair = trim$(str$(LevelFrom)) + "-" + trim$(str$(LevelTo))
    Select Case LevelPair
    case "0-1"
        serr = SetObjectValue ("class1","PRESS")
        serr = SetObjectValue ("command1","PRESS")
    End Select
End Sub
Starting the Transaction Import Process

After you create the data and control files, the Transaction Import process can start. Start Transaction Import in one of three ways:

- By menu selection.
- From a command line entry.
- From a Microsoft SL SDK application.

Starting Transaction Import from the Menu

Starting Transaction Import from the menu bar is the most common method that is used.

To start Transaction Import from the menu:

1. In the Microsoft Dynamics SL window, click the Administration button, and then select Transaction Import. Transaction Import (98.500.00) appears.

2. Type the full path and file name to the source file in Data File Name.
3. Click to select the Selected check box next to the data files that you want to import, or click Select All to select all data files.
4. Select the file type of the source data file from the Data File Type list.
5. In Screen, type the number of the screen in which the source data will be put. Do not include the decimal points that are part of a screen number. For example, type 0126000 to specify Chart of Accounts Maintenance (01.260.00) in the General Ledger module.
6. Type the full path and file name of the control file in Control File Name.
7. Click to select the Minimized check box to run the Transaction Import process’s target application in minimized mode. Click to clear the check box to run the target application maximized.
8. Type the full path and file name of the log file generated by Transaction Import in Output Log File Name.
9. Click Edit Errors to view, edit, or print the data and log files. See “Editing Transaction Import Data Files” on page 81.
10. Click Options to set options for this Transaction Import process.
Importing Transaction Data

Transaction Import (98.500.01) appears.

![Figure 69: Transaction Import (98.500.01)](image)

11. Select import processing options and how much information Transaction Import should write to the log file for this Transaction Import process. See “Transaction Import (98.500.01)” on page 191 for more information.

12. Type a number in **Discontinue after ____ errors** that specifies how many errors Transaction Import can encounter before abandoning the process.

13. Click **OK**.

14. In the **Transaction Import (98.500.00)** screen, click **Begin Processing**.

15. If it is necessary, press **ESC** to stop the processing of a single entry in the grid. Processing on that entry stops when Transaction Import finishes processing the batch or document.

Starting Transaction Import from a Command Line

To run a Transaction Import process from the command line, use a command line similar to the following:

```
```

- **[TI]TM =<#>** - Transaction Mode (default is 1)
  - 1 - Edit Only
  - 2 - Combine Edit and Update
  - 3 - Update after successful Edit

- **[TI]TD=<filename>** - Data Filename

- **[TI]TC=<filename>** - Control Filename

- **[TI]TO=<filename>** - Output Filename

- **[TI]TL=<#>** - Logging info (default is 0)
  - 0 - Nothing
  - 1 - All Data lines and messages
  - 2 - Just Bad Data Lines and messages

- **[TI]TE=<#>** - Number of errors to stop after (default is 20)

- **[TI]Minimize=<Y|N>** - Y - Yes, run the app minimized
  - N - No, run the app in normal mode
This command line runs *Journal Transactions* (01.010.00) in the General Ledger module and does the following:

- Imports the data from the file *Abc.dta*.
- Uses the control file *Abc.ctl*.
- Creates the output log file *Abc.out*.
- Logs all messages and data.
- Stops after 20 errors.
- Runs in Edit Only mode.
- Runs minimized.

### Starting Transaction Import from a Microsoft SL SDK Application

Use the functions `ApplSetParmValue` and to invoke Transaction Import within Microsoft SL SDK for another application. Use the following sample as a guide:

- **Set the Transaction Import mode:**
  
  ```
  Call ApplSetParmValue([TI], "TM", "1"
  
  Mode Options:
  1 — Edit Only.
  2 — Combine Edit and Update.
  3 — Update after successful Edit.
  ```

- **Set the data file name:**
  
  ```
  Call ApplSetParmValue([TI], "TD", "ABC.DTA"
  ```

- **Set the control file name:**
  
  ```
  Call ApplSetParmValue([TI], "TC", "ABC.CTL"
  ```

- **Set the output file name:**
  
  ```
  Call ApplSetParmValue([TI], "TO", "ABC.LOG"
  ```

- **Set the loginfo parameter:**
  
  ```
  Call ApplSetParmValue(PRMSECTION_TI, "TL", "1"
  
  Parameter Options:
  0 — Nothing.
  1 — All Data lines and messages.
  2 — Just Bad Data Lines and messages.
  ```

- **Add the number of errors to stop after:**
  
  ```
  Call ApplSetParmValue(PRMSECTION_TI, "TE", "20"
  ```

- **If you want to run the application in minimized mode, enter:**
  
  ```
  Call ApplSetParmValue(PRMSECTION_TI, "Minimize", "Y"
  ```

- **Call the application:**
  
  ```
  Call CallApplicWait( "0101000", ""
  ```
Viewing Transaction Import Log Files

In addition to providing a record of what occurred during a Transaction Import process, viewing, saving, and printing any generated log files helps track down and correct errors occurring during a process.

To view an import log file:
1. In the Windows Dynamics SL window, click the Administration button, and then select Transaction Import. Transaction Import (98.500.00) appears.

![Figure 70: Transaction Import (98.500.00)](image)

2. In the Data File Name column, click the name of the data file that corresponds to the log file that you want to view or edit. If the data file name does not appear in the grid, type it in a blank Data File Name box.

3. Click Edit Errors. Import File Edit appears.

![Figure 71: Import File Edit](image)

4. In the Log File frame, scroll up or down to view various sections of the log file. Make changes as needed.
5. You can print the log file on the default system printer by clicking the **Print Output Log** button, or by clicking **Print Log File** on the File menu.

6. On the File menu, do one of the following:
   - Click **Save Log File** to save the log file with its current name.
   - Click **Save Log File as** to save the log file with a new name.

7. Click **OK**. *Transaction Import* (98.500.00) appears.
## Transaction Import Messages

These messages are written to the output log file; "%s" in messages is replaced in actual messages with meaningful data such as object names, field values, column offsets, line numbers, and miscellaneous text.

<table>
<thead>
<tr>
<th>Nbr</th>
<th>Message</th>
<th>Cause</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>8000</td>
<td>Start Processing %s</td>
<td>Transaction Import process started.</td>
<td>None.</td>
</tr>
<tr>
<td>8001</td>
<td>Completed Processing %s</td>
<td>Transaction Import process finished.</td>
<td>None.</td>
</tr>
<tr>
<td>8002</td>
<td>Error In Field: %s Value: &quot;%s&quot; Column %s</td>
<td>Error reported during validation; states the object being validated and what data was being validated at the time of the error.</td>
<td>Correct the data.</td>
</tr>
<tr>
<td>8003</td>
<td>Percent Complete</td>
<td>Percentage of the data file processed.</td>
<td>None.</td>
</tr>
<tr>
<td>8004</td>
<td>Data File Record/Line Number: %s Column: %s</td>
<td>Used with other messages to define the location of an error in the data; specifies the line and column number of the data in error.</td>
<td>Use this information to locate and correct bad data in the data file.</td>
</tr>
<tr>
<td>8005</td>
<td>New Record Requested</td>
<td>An insert is about to occur.</td>
<td>None.</td>
</tr>
<tr>
<td>8006</td>
<td>Change Existing Records</td>
<td>Update to an existing record is about to occur.</td>
<td>None.</td>
</tr>
<tr>
<td>8007</td>
<td>Delete Records Requested</td>
<td>Deletion of an existing record is about to occur.</td>
<td>None.</td>
</tr>
<tr>
<td>8008</td>
<td>Record Deleted</td>
<td>A record was deleted from the database.</td>
<td>None.</td>
</tr>
<tr>
<td>8009</td>
<td>Record Added/Updated</td>
<td>A record was inserted or updated in the database.</td>
<td>None.</td>
</tr>
<tr>
<td>8010</td>
<td>Invalid Data Line Transaction Type (%s). Treated as a Comment</td>
<td>Transaction Import has detected a transaction type that it does not understand. The line is treated as if it were a comment.</td>
<td>Correct the data line and process the data file again.</td>
</tr>
<tr>
<td>8011</td>
<td>Begin Processing of a %s Data Line</td>
<td>For reference only; if an error occurs between this message and a message 8012, the error occurred in the line immediately after this message.</td>
<td>Correct the data line and process the data file again.</td>
</tr>
<tr>
<td>8012</td>
<td>End Processing of a %s Data Line</td>
<td>For reference only; if an error occurs between a message 8011 and this message, the error occurred in the line immediately after the message 8011.</td>
<td>Correct the data line and process the data file again.</td>
</tr>
<tr>
<td>8013</td>
<td>Item not found, please reenter. Control: %s Key Value: &quot;%s&quot; Column %s</td>
<td>Transaction Import encountered an error that occurs with the specified object.</td>
<td>Correct the data file.</td>
</tr>
<tr>
<td>Nbr</td>
<td>Message</td>
<td>Cause</td>
<td>Action</td>
</tr>
<tr>
<td>-----</td>
<td>------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------</td>
</tr>
<tr>
<td>8014</td>
<td>Processing has stopped after receiving %s errors</td>
<td>Processing stopped because the error limit set in Transaction Import (98.500.00) <strong>Discontinue After ____ Errors</strong> setting was reached.</td>
<td>Correct the errors in the data file and process it again.</td>
</tr>
<tr>
<td>8015</td>
<td>Possible values for the Check Box control %s are %s OR %s</td>
<td>Value specified for a Check box-type object does not match the possible values for that object.</td>
<td>Correct the data file by using values permitted for the object.</td>
</tr>
<tr>
<td>8016</td>
<td>Possible values for the control %s are %s</td>
<td>Value specified for an object does not match the possible values for that object.</td>
<td>Correct the data file by using values permitted for the object.</td>
</tr>
<tr>
<td>8017</td>
<td>Screen %s cannot be used in conjunction with Transaction Import</td>
<td>Current user does not have access rights to the application called for by Transaction Import.</td>
<td>Obtain the appropriate rights to run the specified screen.</td>
</tr>
<tr>
<td>8018</td>
<td>Invalid possible value for an options button. Control: %s Value: “%s” Column %s</td>
<td>Value specified for an option-type object does not match the possible values for that object.</td>
<td>Correct the data file by using values permitted for the object.</td>
</tr>
<tr>
<td>8019</td>
<td>Invalid possible value for a Checkbox. Control: %s Value: “%s” Column %s</td>
<td>Value specified for a check box-type object does not match the possible values for that object.</td>
<td>Correct the data file by using values permitted for the object.</td>
</tr>
<tr>
<td>8020</td>
<td>Invalid possible value for a ComboBox. Control: %s Value: “%s” Column %s</td>
<td>Value specified for a combo box-type object does not match the possible values for that object.</td>
<td>Correct the data file by using values permitted for the object.</td>
</tr>
<tr>
<td>8021</td>
<td>Invalid Level specified; treated as a comment line</td>
<td>A level identifier that is not valid was detected by Transaction Import.</td>
<td>Correct the level identifier in the data file.</td>
</tr>
<tr>
<td>8022</td>
<td>Currently Loading the Control File</td>
<td>The control file is loading into memory to run.</td>
<td>None.</td>
</tr>
<tr>
<td>8023</td>
<td>Percent Complete</td>
<td>Percentage of the data file processed by Transaction Import.</td>
<td>None.</td>
</tr>
<tr>
<td>8024</td>
<td>Error Initializing the Macro Logic</td>
<td>Error encountered while preparing Transaction Import to compile the control file.</td>
<td>Exit Microsoft Dynamics SL, reboot the computer, and try again.</td>
</tr>
<tr>
<td>8025</td>
<td>Error in compiling the Transaction Import Control File</td>
<td>A syntax error may exist in an intelligent control file.</td>
<td>Correct the syntax and try processing the file again.</td>
</tr>
<tr>
<td>8026</td>
<td>Insertion of new records on this level are NOT allowed</td>
<td>The current user does not have insert rights for the current application or this application allows for updates to existing records only.</td>
<td>Remove all inserts from the data file.</td>
</tr>
<tr>
<td>8027</td>
<td>Deletion of records on this level are NOT allowed</td>
<td>The current user does not have delete rights for the current application or this application allows for updates to existing records only.</td>
<td>Remove all deletes from the data file.</td>
</tr>
<tr>
<td>Nbr</td>
<td>Message</td>
<td>Cause</td>
<td>Action</td>
</tr>
<tr>
<td>-----</td>
<td>-------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------</td>
</tr>
<tr>
<td>8028</td>
<td>Invalid Value %s for Button %s</td>
<td>When Transaction Import tried to click a button in the destination screen, the value sent was not PRESS or an alias of PRESS.</td>
<td>Correct the data file or use a different alias for PRESS in the intelligent control file.</td>
</tr>
<tr>
<td>8029</td>
<td>Button %s was pressed</td>
<td>Confirms a button in the destination screen was clicked.</td>
<td>None</td>
</tr>
<tr>
<td>8030</td>
<td>The Number of Errors detected was %s</td>
<td>Number of errors detected; reported when processing finishes.</td>
<td>Correct any errors.</td>
</tr>
<tr>
<td>8031</td>
<td>The object names in the simple control file are not sorted correctly</td>
<td>When you process a simple control file, Transaction Import detected that the key fields in the file are not listed first.</td>
<td>Correct the simple control file to list key fields first.</td>
</tr>
<tr>
<td>8032</td>
<td>The Import Process was canceled</td>
<td>The Transaction Import process was stopped by someone pressing Esc.</td>
<td>None.</td>
</tr>
<tr>
<td>8033</td>
<td>Invalid data. Value “%s” does not match Mask “%s”</td>
<td>Some characters specified for an object do not match the mask for that object.</td>
<td>Change the data file to match the object’s mask.</td>
</tr>
<tr>
<td>8034</td>
<td>Error in Field: %s Value: %s</td>
<td>A field value has caused an error.</td>
<td>Determine why the value is in error and correct the data file.</td>
</tr>
<tr>
<td>8036</td>
<td>Invalid attempt to populate a disabled field: %s with value: %s</td>
<td>Transaction Import has tried to populate an object that was disabled by the application’s logic.</td>
<td>Change the control so that it does not try to populate the object.</td>
</tr>
<tr>
<td>8037</td>
<td>Error, no ending delimiter on the Level/Transaction Type field of the TI data line.</td>
<td>A Level or transaction type identifier, or both, in the data file is not enclosed in double quotation marks (&quot;).</td>
<td>Correct the data file.</td>
</tr>
<tr>
<td>8038</td>
<td>Error in creating a temporary macro file</td>
<td>Transaction Import could not create a new file in the Temp directory.</td>
<td>Check the Temp directory path that is specified in the Temp environment string or in the file Solomon.ini and, if it is necessary, correct it; check for sufficient disk space and, if it is necessary, free up some; try processing the file again.</td>
</tr>
<tr>
<td>8040</td>
<td>Database Name %s</td>
<td>Name of the database used for the most recent Transaction Import process.</td>
<td>None.</td>
</tr>
<tr>
<td>8041</td>
<td>Transaction Import Processing Edit Only Mode</td>
<td>Reports that Transaction Import is processing the current file in Edit Only mode, as set by using the import processing option on Transaction Import (98.500.01).</td>
<td>None.</td>
</tr>
<tr>
<td>Nbr</td>
<td>Message</td>
<td>Cause</td>
<td>Action</td>
</tr>
<tr>
<td>-----</td>
<td>---------</td>
<td>----------------------------------------------------------------------</td>
<td>--------</td>
</tr>
<tr>
<td>8042</td>
<td>Transaction Import Processing Combine Edit and Update mode</td>
<td>Reports that Transaction Import is processing the current file in combined edit and update mode, as set by using the import processing option on <em>Transaction Import</em> (98.500.01).</td>
<td>None.</td>
</tr>
<tr>
<td>8043</td>
<td>Transaction Import Processing Update after Successful Edit mode</td>
<td>Reports that Transaction Import is processing the current file in update after successful edit mode, as set by using the import processing option on <em>Transaction Import</em> (98.500.01).</td>
<td>None.</td>
</tr>
<tr>
<td>8044</td>
<td>Error — There are more than 255 lines in the function Process Line Import</td>
<td>More than 255 lines of executable code lines exist in a function or subroutine called for by the control file.</td>
<td>Edit the control file to make sure that no functions have more than 255 lines of executable code in them; comment lines do not count toward the 255-line limit.</td>
</tr>
<tr>
<td>8047</td>
<td>Invalid date specified in Data Line. Value: %s Column: %s</td>
<td>A date value in the data file is not in MM/DD/YY formatted.</td>
<td>Correct the date value.</td>
</tr>
<tr>
<td>8048</td>
<td>The Transaction Import Control Filename was NOT specified</td>
<td>A control file was not specified for a Transaction Import process.</td>
<td>Specify a control file.</td>
</tr>
<tr>
<td>8049</td>
<td>The Transaction Import Data and Control Filenames were NOT specified</td>
<td>Neither a control file nor a data file were specified for a Transaction Import process.</td>
<td>Specify control and data files.</td>
</tr>
<tr>
<td>8050</td>
<td>Error — Level name in update control is longer than 19 characters. Truncated to: %s</td>
<td>A level name in the update control of an application is longer than 19 characters.</td>
<td>Notify the developer that the level name must be shortened to be 19 or fewer characters.</td>
</tr>
</tbody>
</table>
Reference

Overview
The Reference section contains information about screens and dialog boxes that you use in System Manager. For each screen and dialog box, descriptions of fields and buttons are included. Use the Reference section topics if you have a specific question about an element on a screen or in a dialog box. If you have a procedural question, see topics in earlier sections.

Microsoft Dynamics SL Login (98.000.00)

Microsoft Dynamics SL Login (98.000.00) appears the first time that you log on after you have selected the database in Find Database (98.000.01). In later logons, the software automatically uses the last company that you accessed by using your Windows logon credentials.

If your installation is configured for Windows authentication, Microsoft Dynamics SL Login (98.00.00) appears again only for a user who has a password specified in User Maintenance (95.260.00) and is mapped to a Microsoft Dynamics SL user in Windows User Maintenance (95.310.00).

If your installation is configured for SQL Server authentication, Microsoft Dynamics SL Login (98.00.00) appears every time that you log on. The company ID and user ID that you last used are the default settings on later logons.

Note: You can configure defaults for the options in this screen by using the [Company] section of the Solomon.ini file. For more information, see “Appendix A: Solomon.ini Settings” on page 221.

The following are the field descriptions for Microsoft Dynamics SL Login (98.000.00).

User ID
Identification code of the user who is logging on.

Password
Password of the user who is logging on. A “strong” password is required. Strong password requirements:

- Must be six characters long, 22 characters maximum.
- Must be case-sensitive.
- Must include three of the following categories:
  - Numeric characters
  - Uppercase characters
  - Lowercase characters
  - Special characters (such as those used in punctuation, except for = and ;)
Find Database (button)
Click to select a different system database than the one that was used to log on the last time. For more information about this functionality, see *Find Database* (98.000.01) on page 111.
Find Database (98.000.01)

Use to locate a system database, switch to another during the initial logon to Microsoft Dynamics SL, or create a new system database. Open Find Database (98.000.01) by clicking the Find Database button in the Microsoft Dynamics SL Login (98.000.00) dialog box. After you specify both the Server Name and the Database Name, Microsoft Dynamics SL Login appears.

Note: You can configure defaults for the options on this screen by using the [System32 Database] section of the Solomon.ini file. For more information, see “Appendix A: Solomon.ini Settings” on page 221.

![Find Database (98.000.01)](image)

Figure 73: Find Database (98.000.01)

The following are the field descriptions for Find Database (98.000.01).

**Server Name**
Name of the server where the database is located.

**Database Name**
Name of the system database to load.

**Create Database (button)**
Click to create a new system database.
Select a Company

The Select a Company screen appears when you log on for the first time. For every logon after that you are logged on to the company that you last accessed. A list of companies that you have rights to access appears in the Select a Company screen.

This screen also appears after you click the Switch Company button in the Microsoft Dynamics SL window, and then click More Companies.

Figure 74: Select a Company

Click the company that you want to access, and then click OK. If you want to change the company, click the Switch Company button after you log on, and then select a different company.
Database Maintenance (98.290.00)

Use to create new application or system databases and to update existing databases to a new version of Microsoft Dynamics SL.

**Note:** Database Maintenance (98.290.00) generates logs that can be found in the user’s directory: Users\<Windows User>\Documents\Microsoft Dynamics SL\DB Maintenance Logs

Review these logs every time that you run a process in Database Maintenance (98.290.00).

Database Maintenance, Connect Server Tab

Use this tab to connect to a computer that is running SQL Server.

![Figure 75: Database Maintenance (98.290.00), Connect Server tab](image)

The following are the field descriptions for the **Connect Server** tab of Database Maintenance (98.290.00).

**Destination SQL Server Name**

Computer to which the application should connect in order to build the SQL Server database.

**Windows Authentication**

Select this option to connect to a computer that is running SQL Server by using Windows authentication security mode and Windows logon credentials. The Windows user who is specified must be a SQL Server administrator to connect and successfully create or update Microsoft Dynamics SL databases.

**SQL Server Authentication**

Select this option to connect to a computer that is running SQL Server by using SQL Server authentication security mode. A SQL Server administrator logon ID must be chosen in order to connect. The recommended logon ID to use is the standard SQL Server logon ID, “SA.”

**Login ID**

Enter a user ID to connect, using SQL Server authentication, to a computer that is running SQL Server. The user ID must have administrator rights on the server.
Password
Password to use when it connects, using SQL Server authentication, to the computer that is running SQL Server.

Connect (button)
Click to connect to the specified computer.

Path of Configuration File
Specifies the path of an .ini file (the default name of DBuild.ini) that contains settings that indicate the names of the database script files and where they are located.

Browse (button)
Use to select the configuration file by using the Windows Common dialog box.
Database Maintenance, Create Databases Tab

Use this tab to set up a scenario of databases.

![Database Maintenance (98.290.00), Create Databases tab](image)

Figure 76: Database Maintenance (98.290.00), Create Databases tab

The following are the field descriptions for the Create Databases tab of Database Maintenance (98.290.00).

**Scenarios**

The list of database scenarios that can be created.

**Create (button)**

Creates the database scenario.

**Advanced (button)**

Opens a dialog to override the default name, location, and size of the databases that will be created in the scenario.
Database Maintenance, Update Databases Tab

Use this tab to apply service pack schema updates to a set of system or application databases. Depending on the authentication type you selected when you configured the system database, the screen displays “Reset SYSADMIN user” or “Reset SYSADMIN Password” on the button below the list of databases.

Figure 77: Database Maintenance (98.290.00), Update Databases tab — Windows authentication

Figure 78: Database Maintenance (98.290.00), Update Databases tab — SQL Server authentication

The following are the field descriptions for the **Update Databases** tab of Database Maintenance (98.290.00).
System Database Name
The name of the system database that is attached to the application databases to which the updates will be applied.

Databases
List of all application databases that are connected to the selected system database.

Update Scenarios
List of all updates that can be applied either to the system or application databases.

The update scenarios that appear at the top of the list are related to the software release. The names of these scenarios are in the format “<converting from versions> to <current version>”. After you upgrade the Microsoft Dynamics SL installation to a new version, select the appropriate scenario to convert the databases from your earlier installation so that they work with your updated applications.

The other update scenarios are as follows:

- **Execute Master Indexes, Views and Stored Procedures** — Use this scenario to re-create master indexes, views, and stored procedures that are damaged or missing. Any customizations that were made in these areas must be reapplied after you run the scenario. Any hotfixes that changed indexes, views, or stored procedures must be reapplied.

- **Execute Master Views and Stored Procedures** — Using this scenario, you can re-create master views and stored procedures that are damaged or missing. Any customizations that were made in these areas must be reapplied after you run the scenario. Any hotfixes that changed views or stored procedures must be reapplied.

- **Field and Record Maintenance Update** — This scenario is primarily used by software developers to view or change Microsoft Dynamics SL database schema data.

- **Synchronize All Database Ownership & Security** — If you use Windows authentication, you can run this scenario to reset SQL Server logins and roles used internally by Microsoft Dynamics SL. If you use SQL Server authentication, this scenario synchronizes the passwords in the system database together with the SQL Server login passwords used by Microsoft Dynamics SL. It correctly sets ownership of all databases. For more information, see “Synchronizing Ownership and Security” on page 31. This scenario synchronizes all system databases and all application databases on the server.

- **Synchronize Selected Application Database Ownership & Security** — If you use Windows authentication, you can run this scenario to reset SQL Server logins and roles used internally by Microsoft Dynamics SL for a specific application database. If you use SQL Server authentication, the scenario synchronizes the passwords in the system database together with the SQL Server login passwords used by Microsoft Dynamics SL. It will correctly set ownership of all databases. For more information, see “Synchronizing Ownership and Security” on page 31. This scenario updates only the application databases that you select.
If you selected Windows Authentication as the authentication type:

Reset SYSADMIN user (button)

Click this button to open the SYSADMIN Windows User Name dialog box and associate a different Windows user with the SYSADMIN user.

Figure 79: SYSADMIN Windows User Name

Type the Windows user name in the format of domain\userid. If a valid Windows user is not specified, an error message appears.

Grant this user permission to create SQL Server logins and users (check box)

By default, this check box is selected. An administrator becomes a member of the SQL Server Sysadmin role if the Grant this user permission to create SQL Server logins and users check box is selected. If the user is the Microsoft Dynamics SL SYSADMIN and also part of the SQL Server Sysadmin role, it is basically the same as selecting the Grant this user permission to create SQL Server logins and users check box in the SYSADMIN Windows User Name screen of Database Maintenance (98.290.00).

Clear the check box if you want to create SQL Server users and logins manually. The database administrator then must perform the following tasks by either using the steps or running the SQL statements that are provided. These procedures help make sure that the minimum database rights requirements are met and Microsoft Dynamics SL functions correctly.

To create SQL Server users and logins manually:

1. Create SQL Server security logins.
   a) In SQL Server Management Studio, expand the Object Explorer tree.
   b) Under Security, right-click Logins.
   c) Click New Login.
   d) Add the Windows authenticated user or global domain security group.
   e) Click OK.

   Or

   Enter the following statement in a query window:
   
   ```sql
   Create Login [domain\name] from windows
   ```

   Domain is the name of the domain where SQL Server exists. Name is the user name or global domain security group name that is granted the permissions.
2. Grant database connect permissions.
   a) In the Object Explorer tree, expand **Databases**.
   b) Locate the Microsoft Dynamics SL database node and expand it.
   c) Click Security.
   d) Right-click **Users**, and then click **New User**.
   e) Type the **User Name** and **Login Name** of the new user or global domain security group.
   f) Click **OK**.
   - Or -
   Enter the following statement in a query window:
   
   ```sql
   Create User [domain\name] for login [domain\name]
   ```

   **Domain** is the name of the domain where SQL Server exists. **Name** is the user name or global domain security group name to grant database access permissions to. This only grants access to view objects in the database, not to access the objects or data.

3. Grant database pre-login permissions.
   a) In the Object Explorer tree, expand **Databases**.
   b) Locate the Microsoft Dynamics SL system database node and expand it.
   c) Expand **Security**, then **Roles**, and finally **Database Roles**.
   d) Right-click **MSDynamicsSL**, and then click **Properties**.
   e) Under **Role Members**, click **Add**.
   f) In **Select Database User or Role**, type the name of the user or global domain security group, or click **Browse** to find it.
   g) Click **OK**.
   - Or -
   Enter the following statement in a query window:
   
   ```sql
   sp_addrolemember 'MSDynamicsSL', 'domain\name'
   ```

   **Domain** is the name of the domain where SQL Server exists. **Name** is the user name or global domain security group name to add as a member of this role. Add to this role the name of the group that holds the Microsoft Dynamics SL users or each Windows user name to grant access to run or select required objects in the database during the Microsoft Dynamics SL pre-login process.
If you selected SQL Authentication as the authentication type:

**Reset SYSADMIN Password (button)**

Click this button to open the **SYSADMIN Login** dialog box and reset the password for the SYSADMIN user if it is forgotten.

![SYSADMIN Login](image)

Figure 80: SYSADMIN Login

A “strong” password is required. Strong password requirements:

- Must be six characters long, 22 characters maximum.
- Must be case-sensitive.
- Must include three of the following categories:
  - Numeric characters
  - Uppercase characters
  - Lowercase characters
  - Special characters (such as those used in punctuation, except for = and ;)

**Set Authentication Type (button)**

Click **Set Authentication Type** to change the authentication method that was selected when the Microsoft Dynamics SL databases were created.

**Update Views (button)**

Drops and recreates views of the system tables in the selected application databases.
Synchronize Report Server (button)

Use the Synchronize Report Server button in Database Maintenance (98.290.00) to synchronize the Microsoft Dynamics SL security with SQL Report Server for the reports used in Business Analyzer.

Synchronization of the rights on the Report Server associated with a Microsoft Dynamics SL system database functions to accurately represent the data that is stored in Access Rights Maintenance (95.270.00). For each Windows Account that is referenced by a Microsoft Dynamics SL user the access rights for user marked as the Default User in Windows User Maintenance (95.310.00) are applied to a Report Server.

For more information about how to use this feature, see “Synchronizing the Report Server” on page 39.

Update Database (button)

Applies the selected set of updates to the databases.
Advanced Configuration Settings

Use to override the default name, location, or size of the system or application databases in the scenario. To display this screen, click the Advanced button on Database Maintenance (98.290.00), Create Databases tab.

![Advanced Configuration Settings](image)

Figure 81: Advanced Configuration Settings

The following are the field descriptions for Advanced Configuration Settings.

**System Database Name**

This field uses the current system database name that is specified for the selected scenario on the Create Databases tab. You can enter a new system database name here.

**System Database Size(MB)**

This value in this field defaults from the System Database Size specified in the configuration file for the selected scenario on the Create Databases tab. This value, which can be changed, indicates the initial size of the database when it is created.

**Server Location of Database Files**

Specifies the default location of the physical database files that will be created on the destination computer that is running SQL Server. Enter a fully qualified path of the database files to change the location where the files will be created.

**Server Location of Transaction Log**

Specifies the default location of the physical transaction log file that will be created on the destination computer that is running SQL Server. Enter a fully qualified path of the log file to change this location.

**Browse (button - system database)**

Use this button to display a tree view of the directories on the destination computer that is running SQL Server:
Available Media

![Available Media](98.290.20)

The tree view can be used to select the desired path of the database files.

**Application Database Definition Grid**

This grid will display application database information for all the databases to be created for the selected scenario on the **Create Databases** tab. The values displayed are default values from the configuration file for the selected scenario on the **Create Databases** tab. Each value within the grid may be overwritten.

**Database Name**

This column shows the default database names of the application databases to be created.

**Size**

This column shows the default database size of the application databases to be created.

**Database Path**

This column shows the default location where the database files will be created. This path can be overridden by typing a new fully qualified path of the files, or by using the ellipsis button (…) to display a tree view on the destination computer.

**Transaction Log Path**

Displays the location and name of the configuration file that contains scenario data that is used by this utility. The value specified in this field must be a fully qualified path and file name.
**Browse (button - configuration file)**

Click the **Browse** button to display the Windows *Open* dialog box and locate configuration files.

*Figure 83: Open dialog box*
Attachments

Use to attach source document files to data items in data entry screens or web services that support notes capability. To display this screen, select the Attachments option on the Notes/Attachments icon on data entry screens that support notes capability. Attachments must be configured in Attachments Configuration (98.400.00) for the Attachments option to display on the Notes/Attachments icon.

![Attachments](image)

*Figure 84: Attachments*

For more information, see the Quick Reference Guide.

The following are the field descriptions for Attachments.

**Upload (button)**
Click this button to open the Add files dialog box and select a source document file to attach to the data item. The source document file is copied to the external location defined for the data item in Attachments Configuration (98.400.00) and a link is created between the source document file and the data item.

**Link (button)**
Click this button to open the Attach Existing File dialog box and select a source document file to link to the data item. Only the link between the source document file and the data item is created. The source document file must exist on the external location defined for the data item in Attachments Configuration (98.400.00).

**Edit (button)**
Click this button to open the Description dialog box and specify the description for the source document file. A source document file must be selected in the grid to define its description.

**Unlink (button)**
Click this button to remove the link between the source document file and the data item. A source document file must be selected in the grid to remove its link. The source document file is not removed from the external location.
Business Date

The business date is the month, day, and year associated with activity completed during a Microsoft Dynamics SL session. It uses your computer’s system date. After a date change, the new business date is then associated with Microsoft Dynamics SL transactions.

![Business Date](image)

Figure 85: Business Date

*Business Date* is available only to a SYSADMIN user who has update rights to the screen (assigned in *Access Rights Maintenance* (95.270.00)). An authorized user can access *Business Date* by clicking the Application button on the Microsoft Dynamics SL window and selecting the Business Date option from the menu that appears.

For more information, see the Quick Reference Guide.

Navigating the Calendar

<table>
<thead>
<tr>
<th>To move to the:</th>
<th>Press:</th>
<th>Or click:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Next day</td>
<td>RIGHT ARROW</td>
<td>In the next day</td>
</tr>
<tr>
<td>Previous day</td>
<td>LEFT ARROW</td>
<td>In the previous day</td>
</tr>
<tr>
<td>Next week</td>
<td>DOWN ARROW</td>
<td>In the next week</td>
</tr>
<tr>
<td>Previous week</td>
<td>UP ARROW</td>
<td>In the previous week</td>
</tr>
<tr>
<td><strong>OK</strong> (button)</td>
<td>TAB or SHIFT + TAB two times</td>
<td>OK</td>
</tr>
<tr>
<td><strong>Cancel</strong> (button)</td>
<td>TAB two times or SHIFT + TAB</td>
<td>Cancel</td>
</tr>
<tr>
<td>Next month</td>
<td>CTRL + RIGHT ARROW</td>
<td>The right arrow in the header</td>
</tr>
<tr>
<td>Previous month</td>
<td>CTRL + LEFT ARROW</td>
<td>The left arrow in the header</td>
</tr>
<tr>
<td>1-year view, 12-year view, or 12-decade view</td>
<td>CTRL + UP ARROW (multiple)</td>
<td>The center of the header (multiple)</td>
</tr>
<tr>
<td>12-year view, 1-year view, 1-month view</td>
<td>CTRL + DOWN ARROW (multiple)</td>
<td>The center of the header (multiple)</td>
</tr>
</tbody>
</table>
Options Dialog

Use Options Dialog to define how your applications, the Event Log Viewer, Customize mode and Navigation will behave.

Options Dialog, Application Tab

Use to customize data entry. These options are associated with your user ID and apply only to your session.

Figure 86: Options Dialog, Application tab

The following are the field descriptions for the Application tab of Options Dialog.

**Enter key = Tab key**

Sets the ENTER key to perform the same as the TAB key.

**Note:** To avoid entering extraneous tabs, do not select Enter key = Tab key when you are using Code Window (91.251.00) in the Customization Manager module. Pressing ENTER should create a new line.

**Show Grid Lines**

Displays horizontal and vertical lines around the fields in grid view.

**Show Grid Row Numbers**

Displays the row numbers in grid view.

**Cancel Prompt**

Displays a dialog box to confirm cancellation if you click Cancel during data entry.

**Save Settings on Exit**

Saves any changes that you made to a screen, such as resizing the window or the columns in grid view so that the changes become the default settings for the screen. For this option to display, the SaveSettingOnExit Solomon.ini setting must be set to Yes. For more information about this Solomon.ini setting, see Appendix A: Solomon.ini Settings in the System Manager Help or user’s guide. Make sure that you pay extra attention to the [Miscellaneous] section of the System Wide Settings topic.
Options Dialog, Event Log Tab

Use to specify that the software should also include fatal error diagnostics and database calls in the event log. The event log lists process-related events, such as detail deletions or module closings.

![Options Dialog, Event Log Tab](image)

The following are the field descriptions for the Event Log tab of Options Dialog.

**Database Calls (check box)**
Indicates to include the details of database calls.

**Recoverable Error Diagnostics (check box)**
Indicates to include the information about any recoverable errors.

**Fatal Diagnostics (check box)**
Indicates to include the information about any fatal errors.

**Data Entry Keystrokes**
Contains the options for capturing user keystrokes in the event log. The options are as follows:

- **Always Write** — Indicates to always include a user’s keystrokes.
- **Write on Error Only** — Indicates to include a user’s keystrokes when there is an error.
- **Never Write** — Indicates to never include a user’s keystrokes.

**Maximum Written Keystrokes**
The maximum number of keystrokes allowed in the event log.
Options Dialog, Customization Tab

Use to view the current customization level and to change Customize mode grid options. For more information, see the Customization Manager Help or user's guide.

![Options Dialog, Customization tab](image)

**Settings Area**

**Customization Level**
Displays the level of customization that will be created when you are customizing a screen.

**Grid Area**

**Show Grid**
Determines whether to show the object alignment grid during customize mode.

**Width**
Sets the width of the grid used during customize mode.

**Height**
Set the height of the grid used during customize mode.

**Align Objects to Grid**
Forces alignment to the grid during customize mode.

**Restore Defaults (button)**
Resets the customization options back to original settings.
Options Dialog, Navigation Menu


![Options Dialog, Navigation Menu tab](image)

**Figure 89: Options Dialog, Navigation Menu tab**

### Application Pane Area

**Images on menu items (check box)**

When the **Images on menu items** check box is selected the Application Pane will display small icons next to the application name. For example, when you have selected the General Ledger, each menu item that is an application displays a small screen next to the menu item. Each report displays a small report next to the menu item that is a report.

**Company logo on Area Page (check box)**

Company logos can be put in the Program Files\Microsoft Dynamics\SL\Applications directory. The file must be named by using the same name as the **Company ID** and have an extension of .bmp. When this check box is selected the logo file that you put in the applications directory will appear in the upper-right corner of the Application pane.

### Navigation Pane Area

**All Module navigation (check box)**

When this check box is selected the All Modules menu will appear in the Navigation Pane. When unchecked it will not be available. The All Modules menu lists all the modules in alphabetical order and within each module the applications and reports are listed in alphabetical order. Only those modules, screen or reports that a user has rights to will appear on the All Modules menu.

**Role Center as default opening page (check box)**

When this check box is selected the Role Center page will display when you first log on to the software. If this is not checked the Area Page will appear.
Open URLs in Home Area Page (check box)
When this check box is selected the URLs selected in the Favorites Pane open in the Home Area Page. When this check box is not selected URLs open as a new webpage.

Toolbar Cache Area

Menu system
The Menu system button will clear the menu system cache. The next time that you enter the system a menu will be regenerated from the group access rights information.

Most recently used navigation
The Most recently used navigation button will clear the cache of the history of the screens that you have opened since you logged on to the system. The number of entries that are saved in the cache is controlled by entering a number less than or equal to 35 or by using the arrow keys. The default is set to 15.

Most recently used companies
The Most recently used companies button will clear the cache of the history of companies shown when the Switch Companies button screen. The number of entries that are saved in the cache is controlled by entering a number less than or equal to 25 or by using the arrow keys. The default is set to 10.

Note: After the Company Name or Company Color change in Company Maintenance (98.280.00), make sure that you press the Most recently used companies button to clear the cache. Clearing the cache makes sure that the new company name and company color appear in the application pane.
Active Users (98.210.00)

Use to view information about other users currently logged on to the system, such as their telephone numbers or applications that they are using. This information is useful for troubleshooting system issues.

![Active Users (98.210.00)](image)

The following are the field descriptions for Active Users (98.210.00).

**Name**
The names of all users currently signed on to the system.

**Company ID**
Unique ID for the company each user is currently accessing.

**Database Name**
The application database that each user is currently accessing.

**Screen Number**
The number of the screen that each user is currently accessing. For example, 01010 indicates that a user is using *Journal Transactions* (01.010.00) in the General Ledger module.

**Telephone**
Each user’s telephone number; obtained from User Maintenance (95.260.00).

**Location**
The physical location of each user; obtained from User Maintenance (95.260.00).

**eMail Address**
Each user’s email address; obtained from User Maintenance (95.260.00).

**Network Address**
Each user’s network address; obtained from the system during logon.
Printer Options (98.220.00)

Use to select a printer other than the default, to send a report to a file or SharePoint document library, or to establish the default printing options. Default printing options include the print destination, the font in which all information is generated, and the orientation of the report on the printed page.

**Note:** You can configure defaults for the options on this screen by using the [Print Default] section of the Solomon.ini file. For more information, see “Appendix A: Solomon.ini Settings” on page 221.

![Printer Options (98.220.00)](image)

For more information, see the Reporting Guide or the Quick Reference Guide.

The following are the field descriptions for *Printer Options* (98.220.00).

**Destination**
Specifies where the software sends information when you print.

- If the software is sending information to a printer, this field displays the name of the printer and the port to which it is attached.
- If the software is sending information to a file, this field displays the path and file name to the location where the information is being sent.
- If the software is sending information to a SharePoint document library, this field displays the path of the user’s TEMP environment variable.

**Font**
The default printer font, which includes typeface, style, and size that the system uses when generating reports.

**Print to File (check box)**
Sends information to a file.

**Save as Default (check box)**
Saves the selected printing options as the default printing options.

**Use Printer Orientation (check box)**
Specifies if Microsoft Dynamics SL uses the orientation set for the current printer when it prints information. For example, if the check box is selected and the current printer is set for portrait orientation, the software sends the information to the printer in portrait orientation, even if the orientation of information is landscape. If the check box is not selected, the software sends the information in the orientation of the report.

**Use Windows Default Printer (check box)**
Tells the software to use the default printer defined for the Windows operating system instead of the default printer.
Upload to SharePoint (check box)
Sends information to a SharePoint document library. Customers, employees, vendors, and projects that are set up for Quick Send or Doc Share are excluded from the file uploaded to SharePoint if Quick Send and Doc Share were not disabled at the time that the report was generated.

Default (button)
Sets the printing options to the default values.

Setup (button)
Sets up the printer or specifies the full path of the location where Microsoft Dynamics SL saves the report information.

Fonts (button)
Defines the type specifications of the printer font.
Print to File

Use to define the location to put a file.

![Print to File dialog box]

For more information, see the Reporting Guide or the Quick Reference Guide.

The following are the field descriptions for Print to File.

**Destination File**
The full path of the location where the report information will be saved.

**File Name**
The name of the file that will hold the report information; if left as *.rpt, the software creates file names automatically by using the report screen number as the file name.

**Directories**
The directory where the report file will be put.

**List Types of Files**
The kind of file to display in the list. The .txt file type is the default.

**Drives**
The drive where the report file will be put.

**Open With Associated Application (check box)**
With this check box selected, the file will open for printing automatically in its associated application. For example, if it is a .doc file, then the file will open automatically in Word when you print it. If it is a .txt file type, it will open in Notepad.

**Printer Codes Included (check box)**
Indicates to include the printer control codes generated by the report writer.

**Concatenate files (check box)**
Adds the selected file to the end of an existing file; providing the file types are the same.
Upload to SharePoint Document Library (98.220.01)

Use to define the SharePoint document library location when reports are published to SharePoint sites.

For more information, see the Reporting Guide.

The following are the field descriptions for Upload to SharePoint Document Library (98.220.01).

**Destination File**

The full path of the user's TEMP environment variable. A report is sent to a file in this directory before being published to a SharePoint document library.

**File Name**

The name of the file that will hold the report information; if left as *.pdf, the file name is automatically assigned based on the report screen number.

**List Types of Files**

The kind of file that will hold the report information. The .pdf file type is the default.

**SharePoint Document Library Destination**

The full path of the SharePoint document library. Press F3 to open the Document Library Search dialog box which displays previously accessed SharePoint document libraries.
Document Library Search

Use to display document libraries on SharePoint sites.

![Image of Document Library Search dialog box]

Figure 94: Document Library Search

The following is the field description for Document Library Search.

Search (button)

Opens the Document Libraries dialog box which allows the entry of a SharePoint site path so that its document libraries are displayed on Document Library Search.

Document Libraries

Use to specify the path of a SharePoint site so that its document libraries are retrieved and displayed on the Document Library Search dialog box.

![Image of Document Libraries dialog box]

12. Figure 95: Document Libraries

The following is the field description for Document Libraries.

Find all the document Libraries on the SharePoint Site listed below

The full path of a SharePoint site so that its document libraries are displayed on the Document Library Search dialog box (for example, http://servername).
Copy Special

Use to copy all data items in a screen or a specific section of a screen.

![Copy Special dialog box](image)

Figure 96: Copy Special

The following are the field descriptions for Copy Special.

**Screen**
The name and number of the current screen from which you accessed the Copy Special dialog box.

**Section**
The select-and-copy options for the current screen:

- **All** — Select and copy all data items at all levels in the source screen.
- **Selected** — Copy only those data items selected for copying in the source screen. Select all items to copy before you open the Copy Special dialog box.
- **Order/Batch/Detail/Customer/Transaction** — Select and copy all data items in the specified major screen section only; options vary from screen to screen, depending on the function of the screen.

**Include Lower Levels (check box)**
Controls whether Microsoft Dynamics SL includes data items at a lower hierarchical level.
Template (98.230.00)

Use to create a new template and to paste the contents of an existing template into a screen or report.

The following are the field descriptions for Template (98.230.00).

**Screen**
The name and number of the screen associated with the new or existing template.

**Template ID**
The unique identification code of a new or existing template; can be any alphanumeric code up to 30 characters long.

**Description**
A description of the template.

**Visibility**
Specifies whether the template is available to users other than yourself; options are as follows:

- Private — template is available for use by only the person who created it
- Public — template is available for use by all users

**Section**
Specifies the level of screen detail included in the template; options are as follows:

- All — includes in the template all data items in the current source screen
- Selected — includes in the template only those data items that are selected in the source screen; items must be selected after accessing the appropriate data record and before you open Template (98.230.00)
- Order/Batch/Detail/Customer/Transaction — includes in the template only those data items in a specific application field section of the current source screen, such as the batch section

**Load lower levels (check box)**
Indicates to include data items at a lower hierarchical level.
Save Template (98.600.01)

Use to save the current report settings as a template. Save the report settings with the same template ID or create a new template.

![Save Template (98.600.01)](image)

**Figure 98: Save Template (98.600.01)**

The following are the field descriptions for Save Template (98.600.01).

**Template ID**
Identification code of the template.

**Description**
Brief description of the template.

**Save Current Printer settings with Template (check box)**
Select this check box to save the printer settings together with the template.
Navigation Level

Use Navigation Level to specify whether the First, Previous, Next, and Last navigation functions apply to batches or documents when you are using data entry screens. The Navigation Level function is accessed from the Actions menu on the application toolbar. It applies only to those data entry screens that use batch control, such as those used for recording vouchers and invoices.

For example:

- If navigation applies to batches only, the Next function causes the next batch in the database to display.
- If navigation applies to documents only, the Next function causes the next document in the current batch to display.

![Navigation Level](image)

**Figure 99: Navigation Level**

The following are the field descriptions for Navigation Level.

**Batch**

Applies the First, Prev, Next, and Last navigation functions to batches on data entry screens. For example, using the Next function causes the next batch in the database to appear.

**Invoice**

Applies the First, Prev, Next, and Last navigation functions to invoices on data entry screens. For example, using the Next function causes the next invoice in the current batch to appear.
Relative Date (98.240.00)

*Relative Date* (98.240.00) appears when you press F2 in a screen’s date field. *Relative Date* can be used to define a relative date formula for use in a template. For more information, see the Quick Reference Guide.

**Note:** Several kinds of date fields appear on data entry screens. On reports, the date represents the date on which the report is printed.

![Relative Date (98.240.00)](image)

*Figure 100: Relative Date (98.240.00)*

The following are the field descriptions for *Relative Date*.

**Day, Month, Year**

Select either Relative (to have the software calculate a date) or Absolute (to use a specific date) from each list.

In the boxes to the right side of *Day*, *Month*, and *Year*, select the relative or absolute values.

**Current**

 Lets you type a date to test the settings that you selected.

**Result**

 Shows the test result.
Relative Period (98.250.00)

Relative Period (98.250.00) appears when you press F2 in a screen's period field. Relative Period can be used to define a period formula for use in a template. For more information, see the Quick Reference Guide.

Note: When you create a screen template, a fiscal period is a specific month and year. When you create a report template, the fiscal period is a range of months.

![Figure 101: Relative Period (98.250.00)](image)

The following are the field descriptions for Relative Period.

**Month, Year**
Select either Relative (to have the software calculate a date) or Absolute (to use a specific date) from each list.
In the boxes to the right side of Month and Year, select the relative or absolute values.

**Current**
Lets you type a date to test the settings that you selected.

**Result**
Shows the test result.
Note (98.260.00)

Use to attach notes, up to 30,000 characters each, to data items. Notes can serve many useful purposes. For example, you can record a customer’s collection as a note and attach it to the customer’s record. You can attach only one kind of note per data item.

Although a note is attached to a data item, Microsoft Dynamics SL does not consider the note to be part of the data item’s associated data record. Notes are not included as part of the information reported when generating regular Microsoft Dynamics SL reports.

A data item with notes capability is indicated by a Notes/Attachments icon on data entry screens. The Notes/Attachments icon for the transaction details area is located near the bottom of each screen. The Notes/Attachments icon appears differently when a note or source document files are attached to data items.

- The data item does not have a note or source document files attached.
- The data item has source document files attached but not a note.
- The data item has a note attached but not source document files.
- The data item has a note and source document files attached.

Many screens and web services support multiple notes for the same data item. The software distinguishes between multiple notes according to their note type. For example, on Journal Transactions (01.010.00) in the General Ledger module, a batch-related note has a Batch note type and a transaction-details-related note has a Detail note type.

Figure 102: Note (98.260.00)

The following are the field descriptions for Note (98.260.00).

**Type**

The type of data item to which the note is attached.

**Revised Date**

The date when you last saved the note text currently displayed in the note text box.

**Text Box**

Displays up to 30,000 characters in a note; only one kind of note per field.
Password Change

**Note:** This dialog box is available only if your installation is configured to use SQL Server authentication. If your installation is configured for Windows authentication, must use the Windows procedure for changing passwords.

Open the *Password Change* dialog box by clicking the **Set Password** command on the Tools menu on the Microsoft Dynamics SL menu bar.

A “strong” password is required. The requirements for a strong password are as follows:

- Must be six characters long, 22 characters maximum.
- Must be case-sensitive.
- Must include three of the following categories:
  - Numeric characters
  - Uppercase characters
  - Lowercase characters
  - Special characters (such as those used in punctuation, except for = and ;)

![Password Change dialog box](image)

*Figure 103: Password Change*

The fields on the *Password Change* dialog box are as follows:

**Old Password**
Type your current password.

**New Password**
Type a new Microsoft Dynamics SL password that satisfies the strong password requirements that are listed here.

**Confirm New**
Type the new password again.
User Maintenance (95.260.00)

Use to add new users to the system and to organize users into groups. The appearance of the screen differs based on whether Windows authentication or SQL Server authentication was selected when the system database was configured.

Figure 104: User Maintenance (95.260.00) — Windows authentication

Figure 105: User Maintenance (95.260.00) — SQL Server authentication

The following are the field descriptions for User Maintenance (95.260.00).

User ID
Identification code of an authorized user.
Name
Name or job title that is associated with the user ID.

Password
Access code the user enters to log on to Microsoft Dynamics SL. Strong passwords are used to maintain levels of security and access rights within the system.
Strong password requirements:
- Must be six characters long, 22 characters maximum.
- Must be case-sensitive.
- Must include three of the following categories:
  - Numeric characters
  - Uppercase characters
  - Lowercase characters
  - Special characters (such as those used in punctuation, except for = and ;)

Active Application Server User (check box)
The Active Application Server User check box indicates whether this user can submit Application Server requests. The user needs sufficient access rights to the Submit to Application Server (96.020.00) screen.

Role (check box)
Click to select the Role check box if this user is role. A role resembles a job description, for example Controller is a role.

Note: A role is frequently associated with a group instead of a user and all users who perform that role are associated with the group. See Creating Groups on page 20.
User Maintenance, Details Tab

Use to enter or change specific information for a user.

Figure 106: User Maintenance (95.260.00) — Windows authentication

Figure 107: User Maintenance (95.260.00), Details tab — SQL Server authentication

The following are the field descriptions for the Details tab of User Maintenance (95.260.00).

**Telephone**
User’s telephone number including area code; also appears on the Active Users (98.210.00) screen.

**Location**
User’s physical location; also appears on the Active Users (98.210.00) screen.
EMail Address
User’s email address; also appears on the Active Users (98.210.00) screen. If the individual is an active Application Server user, this email address will be used to send requests to the Application Server.

Windows User Name
Appears if Windows authentication is used. Enter the Windows user name that will be used to access Microsoft Dynamics SL. The required format is domain\user (for example, Sales\bSmith). The software validates the user name against the domain when you move away from the field.

Pick Color for Required Fields (button)
Click Pick Color for Required Fields to display a color palette from which you can select a color that will highlight mandatory fields.

Sample Required field
Shows you how the user will view a box for a mandatory field after a color change is made.

Home Page
URL of a website that is designated to be displayed as the user’s home page when they log on to Microsoft Dynamics SL. Enter a valid, complete URL (for example, http://www.microsoft.com/).
A home page URL assigned to a specific user in this screen overrides a URL assigned to the user’s group in Group Maintenance (95.280.00).
User Maintenance, Groups Tab

Use to add the user to a group.

![User Maintenance, Groups Tab](image)

Figure 108: User Maintenance (95.260.00), Groups tab

The following are the field descriptions for the Groups tab of User Maintenance (95.260.00).

**Group ID**
Identification code of the user group; must be set up in Group Maintenance (95.280.00).

**Name**
Description of the group ID entered in Group ID; must be set up in Group Maintenance (95.280.00).

**Customization Group**
Identifies a group of users for whom certain customizations apply; must be set up in Customization Group Maintenance (91.270.00).
Trusted Web Service Account Maintenance (95.261.00)

Use Trusted Web Service Account Maintenance (95.261.00) to control membership in the “TrustedWebService” database roles for each physical Microsoft Dynamics SL system database. The grid displays a list of all Windows users who are members of the “TrustedWebService” database role for the Microsoft Dynamics SL system database.

Figure 109: Trusted Web Service Account Maintenance (95.261.00)
Access Rights Maintenance (95.270.00)

Use to set user and group access rights. See “Assigning Access Rights” on page 27 for more information.

Note:

- When granting access rights to Project Management and Accounting screens and reports, the following must be entered manually in Screen/Report Nbr unless All is selected in Preload Screens (95.270.01). These access rights should be granted to all users of Project Management and Accounting modules in addition to access rights for individual screens and reports:
  - GRRSW00
  - GRCRE00
  - GRMAI00
  - GRZIP00

- When granting access rights to post to prior periods, be aware that the option to post to prior periods is controlled at the module level. However, no user (except SYSADMIN and members of Administrators group) can specify a prior period unless you give the user access rights, at the View level or higher, to the Hard Close Feature (01.HC0.00) screen. The Hard Close Feature (01.HC0.00) screen is not a physical screen, but is an entry in the Access Rights Maintenance (95.270.00) screen. For more information, see “Selecting Posting Options” in the General Ledger Help or user’s guide.

Figure 110: Access Rights Maintenance (95.270.00)

The following are the field descriptions for Access Rights Maintenance (95.270.00).

**Type**

Specifies whether the access rights apply to a specific user or a group.

**Group / User ID**

The unique identification code of the user or group receiving access rights.
**Name**
The name of the user or group.

**Company ID**
Identification code of the company that the specified rights apply to.

**All Companies (check box)**
Indicates if the user’s or group’s access rights are valid for all companies defined in the system. If you are setting up access rights for some companies but not all companies, you will have to enter the information for each company separately.

**Preload (button)**
Click to access *Preload Screens (95.270.01)* and select modules whose screens that you want to load. Only those modules for which the *Active* check box is selected in *Module Maintenance* (98.320.00) will appear on the list. See “Preload Screens (95.270.01)” on page 156 for more information.

**Access Rights Maintenance, Screen/Report tab**

![Figure 111: Access Rights Maintenance (95.270.00), Screen/Report tab](image)

**Screen/Report Nbr**
Number of each screen or report to which the user or group is receiving access rights.

**Type**
Indicates whether the number is a screen number or a report number.

**Name**
Name of either the screen or report.

**Module**
Abbreviation of the module to which the screen or report belongs. For example, GL indicates that the screen is located in the General Ledger module.
View (check box)
Specifies that the user or group can access the screen to view its information; automatically selected by default.

Update (check box)
Select to specify that the user or group can update the existing information on the screen. Updating can include both changing line items and records and deleting line items.

Insert (check box)
Select to specify that the user or group can insert new information into the screen.

Delete (check box)
Select to specify that the user or group can delete information from the screen.

Initialization Mode (check box)
Select to specify that the user or group can set Microsoft Dynamics SL to the Initialize mode while in the screen; Initialize mode allows for entering or changing balance fields, or both.

Access Rights Maintenance, Web Service tab
A user must have rights to use Web Services. To populate the Web Service grid, the Preload button selects records according to the Module assigned in Web Service Maintenance (98.370.00). You can manually enter a Web Service Method, or they can use F3 to look up in the Web Service Method.

![Figure 112: Access Rights Maintenance (95.270.00), Web Services tab](image)

Web Service Method
Here you can select the Web Service Method that you will be giving the user or group rights to access. You can manually enter a Web Service Method, or they can use F3 to look up in the Web Service Method.

The Web Service grid is sorted first by Module and then by Web Service Method.

Additional Web Services can be added in the Web Service Method Maintenance (98.370.00) screen. For more information about web services see the Web Service Help or user’s guide.
Module

In Module the two digit abbreviation for the module that is associated with the Web Service Method selected will appear.

Access (check box)

If the Access check box is selected the user or group will have access to the Web Service Method selected. If it is not selected the user or group will cannot access the web service method.

Access Rights Maintenance, Role Center tab

Only those users or group of users who were given rights to the Role Center parts will be able to view the Role Center page. The Role Center has a section that contains Activities. These activities have associated Quick Lists that will display when the focus is on the Activity.

Part

Lookup by using the F3 key to select from the available Parts that users or groups can be given rights to access. The available role center parts to select from are as follows:

- RACT - Activities
- RCQLIST – Quick List
- RCVOICE – Connect

When you access the Role Center page and you have rights assigned, the Activities are displayed to the left section of the Role Center. The Quick List part is intended to work closely with the Activity parts. Typically a Quick List part exists for each Activity Cue that represents the aggregate of items in the Quick List. The Activity Cues represents the outstanding work a user or group has. This work is typically at a document level.

Because the Quick List and Activity parts work together you would select a RACT and RCQList for each of the Sub Part 1 and Sub Part 2 combinations that the user can view. Any of the items in the list can be selected and you will be taken to the originating document if you have rights the screen associated with that document.

The Connect Part (RCVOICE) does not require you to complete either of the subparts. This is intended to give users the ability sign in to CustomerSource from their Microsoft Dynamics SL screen and to receive up-to-date RSS Feeds from Microsoft Dynamics. The RSS feeds that are included are

Sub Part 1
Lookup by using the F3 key to select from the available Sub Part 1 options that are associated with the part that was selected. The subparts are the two digit module code.
AP – Accounts Payable
AR – Accounts Receivable
PA – Project Controller

Sub Part 2
Lookup by using the F3 key to select from the available Sub Part 2 options that are associated with the Sub Part 1 selected. Each Sub Part 1 has 2 or more associated Sub Part 2 options from which to select.

Access (check box)
The Access check box is selected the user or group will have access to the Role Center and will be able to use each of these subparts which they are given access rights.

Example:
To have the customers who have invoices past due by 2 billing cycles, in an Activity Cue and a Quick List you must select the following:

<table>
<thead>
<tr>
<th>Part</th>
<th>Sub Part 1</th>
<th>Sub Part 2</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>RCACT</td>
<td>AR</td>
<td>CUSTDUE60</td>
<td>Activities – Overdue 2 Cycles</td>
</tr>
<tr>
<td>RCQLIST</td>
<td>AR</td>
<td>CUSTDUE60</td>
<td>Quick List – Overdue 2 Cycles</td>
</tr>
</tbody>
</table>

Preload Screens (95.270.01)
Appears when you click the Preload button in Access Rights Maintenance (95.270.00). Select modules whose screens you want to load. Only those modules for which the Active check box is selected in Module Maintenance (98.320.00) will appear on this list.
The Queries and Report Server reports delivered with the product are loaded when you load the module with which they are related.

Figure 114: Preload Screens (95.270.01)
Group Maintenance (95.280.00)

Use to define groups and assign users to groups.

The following are the field descriptions for Group Maintenance (95.280.00).

**Group ID**
Unique identification for the group that you are creating.

**Note:** Two groups, Administrators and Everyone, are preloaded in each database. The SYSADMIN user is automatically assigned to the Administrators group. Users who require access to all screens in Microsoft Dynamics SL should be assigned to the Administrators group. This eliminates the need to manually assign access rights to the Administrators group.

The Everyone group should be used to define the minimum access rights that are required by non-administrator users in Microsoft Dynamics SL. The users are assigned to the Everyone group, and minimum rights are assigned to the group in Access Rights Maintenance (95.270.00).

**Name**
The name of the group that you are creating.

**Detail Area**

**User ID**
Unique ID for the user to be assigned to the group.

**Name**
The name of the user assigned to the group.

**Home Page**
URL of a website that is designated to be displayed as the home page of group members when they log on to Microsoft Dynamics SL. Enter a valid, complete URL (for example, http://www.microsoft.com/).

A home page URL assigned to a specific user will override a URL assigned to the user’s group in Group Maintenance (95.280.00).
Event Log Viewer (95.290.00)

Use to view or delete the event log files that Microsoft Dynamics SL creates automatically because of completing processes such as processing payments, deleting module details, or closing modules.

![Event Log Viewer (95.290.00)](image)

Figure 116: Event Log Viewer (95.290.00)

The following are the field descriptions for Event Log Viewer (95.290.00).

**Process ID**
Identification code of each process for which the software has created a log file. The screen number of the log file's associated process, for example, 0156000 represents Closing Process (01.560.00) in the General Ledger module.

**Delete File (check box)**
Select to specify that the software should delete the log file when exiting Event Log Viewer (95.290.00).

**User ID**
User who completed the process that created the event log file.

**Execution Date**
Date when the process that created the event log file occurred.

**Last Viewed**
Date when the event log file was last viewed.

**View (button)**
Click to access Notepad and view the selected event log. Event Log Viewer (95.290.01) notifies you if the file cannot be found.
Windows User Maintenance (95.310.00)

You can link one or several Microsoft Dynamics SL users to a single Windows user in *Windows User Maintenance* (95.310.00).

![Windows User Maintenance (95.310.00)](image)

**Figure 117: Windows User Maintenance (95.310.00)**

**Windows User ID**
Unique identification code assigned to a Windows user.

**Microsoft Dynamics SL Users/Groups Area**

**User ID**
Unique identification code assigned to the Microsoft Dynamics SL user linked to the Windows user. Type the user ID, or press F3 and then select the ID from the possible values list.

**User Name**
Name of the Microsoft Dynamics SL user linked to the Windows user.

**Default User (check box)**
When you select it, **Default User** specifies the Microsoft Dynamics SL user as the one that the system will automatically select for the Windows user ID if another is not supplied.
Database Physical Integrity (95.500.00)

Use to validate and repair the physical and logical integrity of the database if problems occur. If a database has physical integrity, all records referenced in the database index exist and an index entry exists for every record. If a database has logical integrity, the relationship between all database records is correct and up-to-date.

For example, if a database has physical and logical integrity, the open invoice file of a customer totals the outstanding balance recorded for that customer.

Figure 118: Database Physical Integrity (95.500.00)

Following are the field descriptions for Database Physical Integrity (95.500.00).

Record Name
Record name associated with the database currently being checked for integrity.

Validate (check box)
Select to complete the validation process for the database record.

Repair (check box)
Select to repair the database record if the validation process finds that the record is not valid.

Validate System Records (check box)
Select to validate all records in the current system database.

Validate Application Records (check box)
Select to validate all records in the current application database.

Complete Log (check box)
Select to record the information that results from the Database Physical Integrity Process in the event log.

Start (button)
Click to start the Database Physical Integrity process.
Registration (95.250.00)
Use to register Microsoft Dynamics SL software and modules.

Registration, Customer Tab
Displays information about the customer.

![Registration (95.250.00), Customer tab](image)

The following are the field descriptions for the Customer tab of Registration (95.250.00).

**Customer ID**
Identification code that distinguishes a customer from all other Microsoft Dynamics SL customers.

**Company Name**
Name of the company, organization, or individual to whom the software is registered.

**Parent Company**
Name of the organization’s parent company.

**Address Line 1**
Customer’s suite number or the name and number of a customer’s street location.

**Address Line 2**
Customer’s post office box number or the name and number of a customer’s street location, if a suite number is entered on the first address line.

**City**
Municipality where the customer is located.
State/Province
Customer’s two-letter state or province abbreviation.

Postal Code
Customer’s five-digit or ZIP+4 digit postal code.

Country/Region
Customer’s two or three-letter country or region abbreviation.

Contact Person
The name of the person to contact, such as the system administrator, should Microsoft need additional information.

Title
The title of the contact person.

Telephone
The customer’s area code and telephone number.

Fax
The area code and telephone number of the facsimile machine at the customer location.

Type of Business
A customer’s primary product or service.

Number of Employees at this Location
The total number of people employed by the customer.
Registration, Reseller/Consultant Tab

Identifies the Microsoft Certified Partner who sold Microsoft Dynamics SL to your organization and any consultant who is helping with the installation.

The following are the field descriptions for the Reseller/Consultant tab of Registration (95.250.00).

**Reseller ID**

The identification code of the Microsoft Certified Partner from whom the software was purchased.

**Company Name (Reseller)**

The name of the partner.

**City (Reseller)**

The municipality where the partner is located.

**State/Province (Reseller)**

The two-letter abbreviation of the state where the partner is located.

**Contact Person (Reseller)**

The name of one person, typically a salesperson, to contact at the partner’s location when purchasing Microsoft products.

**Telephone (Reseller)**

The partner’s area code and telephone number.
Consultant ID
The identification code of the consultant who is helping you with your installation. This can be someone other than the Microsoft Certified Partner from whom you purchased the software.

Company Name (Consultant)
The company name of the consultant.

City (Consultant)
The municipality where the consultant is located.

State/Province (Consultant)
The two-letter abbreviation of the state where the consultant is located.

Contact Person (Consultant)
The name of the person to contact for help in setting up, maintaining, or using Microsoft Dynamics SL.

Telephone (Consultant)
The consultant’s area code and telephone number.
Registration, Modules Tab

Use to unlock modules after you receive software license keys from Microsoft.

The following are the field descriptions for the Modules tab of Registration (95.250.00).

**Item**
The five-character module or user pack code.

**Serial Number**
The unique serial number assigned to a Microsoft Dynamics SL module.

**Unlocking Key**
The unique number assigned by Microsoft; allows for regular use of a Microsoft Dynamics SL module. For each module, this field is blank until valid unlocking codes are received from Microsoft.

**Unlocked (check box)**
Indicates if the Microsoft Dynamics SL module registration function has accepted the unlocking key; selected after Microsoft verifies that a module is registered for the number of users specified when registration information is saved or printed.

**Description**
The full name of the module or user pack; includes user count information in parentheses for user packs.

**Verification Code**
Indicates whether the unlocking key entered for a module is valid; calculated when a module’s unlocking key code is entered.
Authorized Users
The number of authorized users for each module; must be the same for all modules; changes only when registration information is saved or printed.

Print (button)
Prints registration information.


User Import (95.300.00)

**Note:** This screen is available only if your installation is configured for Windows authentication

Use this application in a Microsoft Dynamics SL database when you have several users to add. Users can be added for a Windows group or by user name.

For example, if your earlier version of Microsoft Dynamics SL contained 50 users, you could create a Windows group for those users. You would enter the group name in **Group ID**, and when you click the **Select** button, the users would be entered automatically into the detail area. The Microsoft Dynamics SL user ID would become the username (without the domain). If a user `sales\bsmith` was in the selected group, the Microsoft Dynamics SL user ID would be `bsmith` and the Windows user ID would be `sales\bsmith`.

![User Import (95.300.00)](image)

The following are the field descriptions for **User Import (95.300.00)**.

**Group ID**

Enter the name of a group that contains Windows users who will access Microsoft Dynamics SL. The domain and group name must be entered in the format `domain\group name`.

**Windows ID**

Enter the name of a valid Windows user who will access Microsoft Dynamics SL. The Windows user name, without the domain, will be the Microsoft Dynamics SL user ID. For example, if the user `sales\bsmith` was selected, the Microsoft Dynamics SL user ID would be `bsmith` and the Windows user ID would be `sales\bsmith`.

**Check Group (button)**

Used to validate a group name entered in **Group ID**. If the group cannot be validated, an error message will appear.

**Select (button)**

Click to select the group members to be added to the detail area.
Check ID (button)
Use to validate the Windows user name entered in **Windows ID**. If the user cannot be validated, an error message will appear.

Select (button)
Click to add the Windows user entered in **Windows ID** to the detail area.

**Microsoft Dynamics SL User ID**
User identifier that will be stored in the database.

**Windows User ID**
Identifier for a Windows user who can access Microsoft Dynamics SL.
Modules Maintenance (98.320.00)

Use Modules Maintenance (98.320.00) to edit data in the Modules table. Every module in the system should have a corresponding entry in this table. You can add or remove modules. You can also make them active or inactive by using Modules Maintenance (98.320.00).

![Modules Maintenance (98.320.00)](image)

Figure 123: Modules Maintenance (98.320.00)

The following are the field descriptions for Modules Maintenance (98.320.00).

**Code**
The first two digits or letters in the module screen number. An executable is considered associated with this module when its screen ID or Report Number begins with this value.

**ID**
Identification code of the module. This value can be the same as the value in **Code**. However, it is typically a characters-based ID of the module (for example, AP for Accounts Payable).

**Name**
Name of the module.

**Execution Location**
The path where the application files exist that are associated with this module (for example .exe or .rpt files). You can specify the path as a fully qualified path or as a relative path. This lets you include Third-Party applications on the Microsoft Dynamics SL menu and tells the software where it can find the application files.

**Note:**
- You cannot change this value for modules that are distributed as part of Microsoft Dynamics SL.
- A relative path is in relation to the Applications folder of the Microsoft Dynamics SL installation.

**Example:**
- Valid fully qualified paths:
  - C:\Program Files\Microsoft Dynamics\SL\Applications\eBanking
  - C:\Program Files\Microsoft Dynamics\SL\Applications\EB
- Incorrect relative path:
  - eBanking
Valid relative path:
   EB
   EBanking

**Active (check box)**

Indicates whether a module is active or inactive.
Screen Maintenance (98.330.00)

Use Screen Maintenance (98.330.00) to edit data in the Screen table. Every screen in the software should have a corresponding entry in this table. You can add or remove screens by using Screen Maintenance (98.330.00).

![Screen Maintenance (98.330.00)](image)

Figure 124: Screen Maintenance (98.330.00)

The following are the field descriptions for Screen Maintenance (98.330.00).

**Number**

Number of the application screen. This is typically defined in the form MM.NNN.SS.
- MM is the module code (01, 02, 03, 10, 21, 40).
- NNN is the screen number (010, 200, 100).
- SS is the subnumber for the application (01, 02, 03).

**Name**

Name of the screen that appears in the menu.

**Module**

Identification code of the application module.

**Type**

Kind of screen. Possible values are as follows:
- Screen – used for screens only
- Report – used for Crystal Reports Report with Interactive Process – used for reports that have pre- or post-processes.
- SRS Report – used for SSRS reports
- Query - used for Quick Query

**Menu Item**

Indicates whether a new screen or report will be displayed as a menu item in the All Modules menu group.
Menu Maintenance (98.350.00)

Used to create custom menus based on users’ roles (profiles that are job or procedure based). On this screen you will see only those menus and screens that are accessible to a group based on that group’s user rights.

![Menu Maintenance, 98.350.00, displaying the EVERYONE group](image)

The following are field descriptions and other details about Menu Maintenance (98.350.00).

**Action menu**

**Save**

Save a new menu; functions the same as Save on the toolbar.

**New Module Group**

Add a module group menu and navigation button; functions the same as New Module Group on the toolbar.

**New Module**

Add a module menu and navigation button; functions the same as New Module on the toolbar.

**New Screen Group**

Add a screen group menu and navigation button; functions the same as New Screen Group on the toolbar.
New Link
Add a connection between an application and Microsoft Dynamics SL; functions the same as **New Link** on the toolbar.

Delete
Remove a selected item; functions the same as **Delete** on the toolbar.

Preview Menu
View and edit a new menu before it is available to users; functions the same as **Preview Menu** on the toolbar.

Import
Locate a menu file and apply its contents to the current menu. The default import-from location is your My Documents folder. You can select an option that either replaces the current menu with the contents of the imported file or appends the imported file contents to it.

Export
Convert a copy of the contents of the menu creation area to an XML format for later use. Unless you specify another location, the exported file is saved in your My Documents folder. The default file name is Menu.xml.

Related Screens menu

Access Rights Maintenance
Open System Manager Access Rights Maintenance (95.270.00); use to assign user and group access rights.

User Maintenance
Open System Manager User Maintenance (95.260.00); use to add new users to the system and to organize users into groups.

Group Maintenance
Open System Manager Group Maintenance (95.280.00); use to define groups and add users to them.

Menu Maintenance toolbar

Save
Save a new menu; functions the same as **Save** on the Action menu.

New Module Group
Add a module group menu and navigation button; functions the same as **New Module Group** on the Action menu.

New Module
Add a module menu and navigation button; functions the same as **New Module** on the Action menu.

New Screen Group
Add a screen group menu and navigation button; functions the same as **New Screen Group** on the Action menu.
**New Link**

Add a connection between an application and Microsoft Dynamics SL; functions the same as *New Link* on the Action menu.

**Delete**

Remove a selected item; functions the same as *Delete* on the Action menu.

**Move Up**

Move a selected item up one level.

**Move Down**

Move a selected item down one level.

**Preview Menu**

View and edit a new menu before it is available to users; functions the same as *Preview Menu* on the Action menu.

**Menu creation area**

**Menu for Group**

Select the user or group for which a new menu will be created. After you type a group ID or press F3 and make a selection from *Group List*, the name of the group appears next to this box.

**Level**

Shows the level of the item that currently has the focus in the navigation pane work area. For example, if you click a module name in the navigation pane work area, Module will appear next to *Level*.

**Name**

Label that you create for the menu item. If you added a screen to the navigation pane work area by using the *Add Read Only* menu option or by dragging while you pressed CTRL, Read Only will appear next to *Name*. This indicates that the user will have read-only access to the screen.

**Description**

Appears if a module group, module, or screen group has the focus in the navigation pane work area. Brief details about the new command, such as why it was created and which group will use it.

**Screen ID**

Appears if a screen has the focus in the navigation pane work area. Identification number of the screen.

**Column**

Appears if a screen has the focus in the navigation pane work area. Indicates the number of the column on the user’s menu where the screen will appear. Select 1, 2, or 3 from the list.

**Browse to Application (button)**

Appears if a screen has the focus in the navigation pane work area. Click *Browse to Application* to locate the executable file for a custom screen. The custom screen file’s full path will appear in *Command line for Application*. 
Command line for Application
Appears if a screen has the focus in the navigation pane work area. The name of the Microsoft Dynamics SL screen executable file appears here automatically after the screen is added to the navigation pane work area. You can type the path of a custom screen’s executable file or use the Browse to Application button to locate the file and select it.

Small, Large (buttons)
Click either to add an image to the navigation button in the size that is designated on the image button.

Navigation Pane work area
Located to the left of Name, use this area to design the menu. You can drag-and-drop items from the Menus and Screens tabs onto the navigation pane work area, and then arrange the menu items as needed.

Menus tab
Lists menus that are available for the group that you selected in the Menus for box. This list is based on user rights for the group.

Show Menus for (Menus tab)
Filters the list of menus that appears on this tab. You can select from a list of groups that were created in Group Maintenance (95.280.00). The default is None – show all.

Screens tab
Lists screens that are available for the group that you selected in the Menus for box. This list is based on user rights for the group.

Show Screen Access for Group (Screens tab)
Filters the list of screens that appears on this tab. You can select from a list of roles that were created in Group Maintenance (95.280.00). The default is Currently Selected Role. The option, ALL – Show All Screens, is also available.

Group by Modules (check box on Screens tab)
Groups screens based on the application in which they are found.

Refresh (button on Screens tab)
Updates the Screens tab after access to screens is established in Access Rights Maintenance (95.270.00).
SharePoint Site Configuration (98.360.00)

Use this screen to establish default settings for Microsoft® Office SharePoint® sites and document libraries that will hold customer, vendor, or project documents your organization wants to share. These configuration settings can be overridden in Customer Maintenance (08.260.00), Vendor Maintenance (03.270.00), or Project Maintenance (PA.PRJ.00). (See the Accounts Receivable, Accounts Payable, or Project Controller Help or user’s guide for more information.)

The configuration settings that you select will help determine

- which entity document types to publish
- the kind of storage areas that will hold documents that you want to share
- how to browse to SharePoint sites on which Doc Share documents are stored

Note: This screen is intended for use by Administrator group members only.

The following are the field descriptions for SharePoint Site Configuration (98.360.00).

Entity Type
A classification that groups documents that are published to a SharePoint site. Entity Type choices are Customer, Project, and Vendor.
Root Site URL
Internet address of the SharePoint site that will be the host of either a subsite or a document library that will receive Doc Share documents.

Configured (check box)
Indicates that the SharePoint site that you designated in Root Site URL is ready to accept documents. Select Configured only after you have completed all the required settings on this screen.

Note: You can clear the Configured check box to temporarily stop publishing documents for an entity. For example, you must perform maintenance on the website that holds customer documents that were published by using Doc Share. You open SharePoint Site Configuration (98.360.00), select Customer in Entity Type, clear Configured, and save. When the website is back in operation, you select Configured again for the Customer entity type and resume publishing customer documents to the site.

Create a Site
Select Create a Site to generate a new SharePoint site when you create a new customer, vendor, or project. New site creation is based on what you enter in Subsite URL Prefix, SharePoint Site Template, and Inherit Permissions from Parent.
This option and those that are associated with it are not available if you select Create a Document Library.

Subsite URL Prefix
Characters that will appear at the start of the subsite Internet address. Do not include colons, semicolons, or spaces. This prefix along, with the customer, vendor, or project identifier, will become the name of the subsite. For example, if you specify Customer, the full site URL for a customer who has the ID ABC123 will be http://<Root Site Name>/CustomerABC123.

SharePoint Site Template
Name of a SharePoint site template that you want to use to create the subsite. You can use a template to create the subsite so that it resembles your organization's other sites and includes such things as your business logo and important lists. Press F3 to view a list of site templates.

Inherit Permissions from Parent (check box)
Select this check box to grant the same permissions to the subsite as those of the SharePoint root site. If you do not select this check box, the Web administrator must grant users access to the site.

Create a Document Library
Select Create a Document Library to generate a document library on the site that you specified in Root Site URL. The document library will hold all documents for customer, vendor, or project entities.
This option is not available if you select Create a Site.

Document Library Name
Characters that will appear at the beginning of the document library name. Do not include colons, semicolons, or spaces. For example, if you specify CustomerLibrary, the document library for a customer who has the ID ABC123 will be called CustomerLibrary_ABC123.

Document Library Template
Name of a SharePoint template that you want to use to create the document library. You can use a template to create the library so that it resembles libraries on your organization's other sites and includes custom columns and other features. Press F3 to view a list of document library templates.

Enable Default Creation
Select Enable Default Creation to clear the Disable Document Publishing to SharePoint check box in Accounts Payable Vendor Maintenance (03.270.00), Accounts Receivable Customer Maintenance (08.260.00), and Project Maintenance (PA.PRJ.00). If the check box is not selected when you create a
new vendor, customer, or project and save it, a new SharePoint site or document library is automatically configured based on the information on this screen.

Prompt for Each New Entity
Select **Prompt for Each New Entity** to clear the **Disable Document Publishing to SharePoint** check box in Accounts Payable Vendor Maintenance (03.270.00), Accounts Receivable Customer Maintenance (08.260.00), and Project Maintenance (PA.PRJ.00). When you save a new vendor, customer, or project, **SharePoint Site Creation/Linking** (21.960.00) is displayed. This lets you to create a site or document library for the new entity.

Disable Default Creation and Prompting
By default, **Disable Default Creation and Prompting** is selected, together with the **Disable Document Publishing to SharePoint** check box in Accounts Payable Vendor Maintenance (03.270.00), Accounts Receivable Customer Maintenance (08.260.00), and Project Maintenance (PA.PRJ.00). If you create a new vendor, customer, or project with this option selected, you must click the **Create/Modify SharePoint** button on the application toolbar in the maintenance screen to create a SharePoint site or document library for the new entity.

**Note:** If you are using the Project Connector 2010 for Microsoft® Project 2010 and you want to send your project documents to the same SharePoint site or a subsite of the SharePoint site, we recommend that you do not cancel the selection of **Disable Creation and Prompting**. If **Disable Creation and Prompting** is selected, Microsoft Project Server and Project Web Access create the SharePoint site. After the SharePoint site is generated, you can then link it to your projects.

Document Type
Lists specific Microsoft Dynamics SL documents that you can publish to the SharePoint site or document library you are create. This list differs, depending on whether you are configuring for vendors, customers, or projects.

**Enabled (check box)**
Select **Enabled** to indicate that the associated document type can be published to the SharePoint site or document library you create.

**File Type**
**File Type** lists the kinds of files that you can publish to the SharePoint site or Document Library. Valid values are as follows: Text, Word, Crystal Reports, Excel, Adobe Acrobat, Rich Text, XML, and Comma-separated values.
Use Web Service Method Maintenance (98.370.00) to add or remove Web Service methods. Any web service method that is invoked without being added in Web Service Method Maintenance (98.370.00) will encounter errors, and access rights can only be granted on Web Service methods that are added. For more information, see the Web Services Help or user’s guide.

Figure 127: Web Service Method Maintenance (98.370.00)

The following are the field descriptions for the Web Service Method Maintenance (98.370.00).

**Web Service Method**

*Web Service Method* is the fully qualified name of a web service method. *Web Service Method* is required.

**Note:** Web Services will encounter security errors if Web Service Method does not exactly match an existing web service method.

**Module**

*Module* is the module that you want to associate with the web service and controls the module that appears in Access Rights Maintenance (95.270.00) when you assign access rights for the web service method. *Module* is required.

**Description**

*Description* is a user-friendly description of the web service method.
Web Services Lookup Security (98.380.00)

Use Web Services Lookup Security (98.380.00) to associate Lookup methods with non-Lookup methods for access rights assignment. This simplifies administration by reducing the number of items that you assign to a user or group in Access Rights Maintenance (95.270.00).

When you specify a web service method, the **Unrelated Lookups** list is populated with an entry for each Lookup method in Web Service Lookup Maintenance (98.390.00). Lookups are displayed by using the Description (not the Name) from Web Service Lookup Maintenance (98.390.00). Associate Lookups with the Method by moving them into the **Related Lookups** list. This list is empty unless methods are explicitly added.

To transfer items between the list boxes, click the buttons that are located between the list boxes. The **Relate** button moves only selected items left-to-right, and the **Unrelate** button moves only selected items right-to-left, The **Relate All** button moves all items left-to-right, and the **Unrelate All** button moves all items right-to-left. You can also drag-and-drop items between the list boxes.

A Web Service Method may be associated with multiple Lookups; A Lookup may be associated with multiple Web Service Methods.

![Web Services Lookup Security (98.380.00)](image)

The following are the field descriptions for Web Services Lookup Security (98.380.00).

**Web Service Method**

The **Web Service Method** is a method that is defined in Web Service Method Maintenance (98.370.00). Access rights are assigned to each web service method in Access Rights Maintenance (95.270.00). All the lookups that are related to the method will be available to a user who has access rights to the method.
Unrelated Lookups

The list of all Lookups in the database in **Unrelated Lookups** shows potential lookups to add to the web service method. **Unrelated Lookups** displays the Description specified for the web service method in **Web Service Method Maintenance** (98.370.00).

**Relate (button)**

Relate moves selected items from Unrelated Lookups to Related Lookups.

**Unrelate (button)**

Unrelate moves selected items from Related Lookups to Unrelated Lookups.

**Relate All (button)**

Relate All moves all items from Unrelated Lookups to Related Lookups.

**Unrelate All (button)**

Unrelate All moves all items from Related Lookups to Unrelated Lookups.

Related Lookups

All Lookups that are related to the web service method appear in this list. The access rights for the related lookups are inherited from the Web Service Method. **Related Lookups** displays the Description specified for the web service method in **Web Service Method Maintenance** (98.370.00).
Web Service Lookup Maintenance (98.390.00)

Use Web Service Lookup Maintenance (98.390.00) to add or remove web service lookups. The web service lookups are used to retrieve the possible values in the database. Any web service lookup that is invoked without being added in Web Service Lookup Maintenance (98.390.00) will encounter errors. For more information, see the Web Services Help or user’s guide.

![Web Service Lookup Maintenance](image)

The following are the field descriptions for Web Service Lookup Maintenance (98.390.00).

**Web Service Lookup**

Web Service Lookup contains the name of the lookup. They are used to retrieve the possible values in the Microsoft Dynamics SL system database.

**Description**

Description holds a long description of the web service lookup and can be changed. This displays in Web Services Lookup Security (98.390.00).

**Procedures**

Procedures contains the name of the SQL stored procedure that is linked to the web service lookup. To customize the lookup the procedure can be changed. The SQL stored procedure is run when the associated Lookup is called through the Microsoft.Dynamics.SL.WebServices.Lookups.LookupServices.svc web service.
Attachments Configuration (98.400.00)

Use Attachments Configuration (98.400.00) to define the location to store source document files for data items. Attachments can serve many useful purposes. For example, you can attach the file that contains a vendor’s invoice to its corresponding Accounts Payable voucher. Multiple source document files can be attached to a data item.

Source document files are stored on a SharePoint site or to a network folder. The links between data items and their source document files are stored within Microsoft Dynamics SL. If the links between data items and their source documents are removed, the source document files are not deleted from the external location. Source document files must be maintained from the SharePoint site or network folder.

Source document files are attached to data items by using the Attachments option on the Notes/Attachments icon on data entry screens. The Notes/Attachments icon appears differently when source document files or a note are attached to data items.

- The data item does not have source document files or a note attached.
- The data item has source document files attached but not a note.
- The data item has a note attached but not source document files.
- The data item has source document files and a note attached.

**Note:** The Notes/Attachments icon for transaction data items are located near the bottom of data entry screens.

![Figure 130: Attachments Configuration (98.400.00), Screen option](image)
Source document files are also attached to data items in a web service.

![Figure 131: Attachments Configuration (98.400.00), Web Service option](image)

The following are the field descriptions for Attachments Configuration (98.400.00).

**Screen (option)**
Select **Screen** to define attachments settings for screens.

**Web Service (option)**
Select **Web Service** to define attachments settings for web services.

**Screen/Web Service**
The label for this box changes, depending on which option that you select, **Screen** or **Web Service**. Specify the screen number or web service to define its attachments settings. For example, select 0301000 to define attachments settings for Accounts Payable Voucher and Adjustment Entry (03.010.00). To define attachments settings for all screens that support notes capability, set **Screen/Web Service** and **Table** to DEFAULT.

**Table**
Specify the database table name applicable to the specified screen or web service to define its attachments settings. For example, to define attachments settings for documents in Accounts Payable Voucher and Adjustment Entry (03.010.00), set **Screen** to 0301000 and **Table** to APDOC. To define attachments settings for transactions in Accounts Payable Voucher and Adjustment Entry (03.010.00), set **Screen** to 0301000 and **Table** to APTRAN.

**Options Area**

**Disable Attachments (check box)**
Select **Disable Attachments** to prohibit the attachments capability for the data item referenced in **Screen/Web Service** and **Table**. For example, to prohibit attachments for documents in Accounts Payable Voucher and Adjustment Entry (03.010.00), set **Screen** to 0301000, **Table** to APDOC, and select **Disable Attachments**.
Disable Preview (check box)
Select **Disable Preview** to prohibit previewing source document files in *Attachments* for the data item referenced in *Screen* and *Table*. For example, to prohibit previewing source document files for documents in Accounts Payable *Voucher and Adjustment Entry* (03.010.00), set *Screen* to 0301000, *Table* to APDOC, and select **Disable Preview**.

**Note:** **Disable Preview** is not available for use with web services.

Disable Upload (check box)
Select **Disable Upload** to prohibit copying source document files to the external location in *Attachments* for the data item referenced in *Screen* and *Table*. For example, to prohibit copying source document files for documents in Accounts Payable *Voucher and Adjustment Entry* (03.010.00), set *Screen* to 0301000, *Table* to APDOC, and select **Disable Upload**.

**Note:** **Disable Upload** is not available for use with web services.

Disable Link (check box)
Select **Disable Link** to prohibit linking to existing source document files on the external location in *Attachments* for the data item referenced in *Screen/Web Service* and *Table*. For example, to prohibit linking to source document files for documents in Accounts Payable *Voucher and Adjustment Entry* (03.010.00), set *Screen* to 0301000, *Table* to APDOC, and select **Disable Link**.

Upload Destinations Area

Use Doc Share Settings
Select **Use Doc Share Settings** to store source document files on the SharePoint site or document library that is defined for the *Entity* and *Doc Type* on *SharePoint Site Configuration* (98.360.00). This option is not available if you select **Existing SharePoint Document Library** or **Existing Folder Location**.

**Entity**

**Doc Type**
Specify the Doc Share document type. This list differs, depending on the *Entity* specified.

**Existing SharePoint Document Library**
Select **Existing SharePoint Document Library** to store source document files on a SharePoint document library. This option is not available if you select **Use Doc Share Settings** or **Existing Folder Location**.

**URL**
Specify the Internet address of the SharePoint document library.

**Existing Folder Location**
Select **Existing Folder Location** to store source document files on a network folder. This option is not available if you select **Use Doc Share Settings** or **Existing SharePoint Document Library**.

**UNC**
Specify the full path of the network folder.
Browse (button)
Click this button to open *Browse for Folder* and select the path of the network folder. The path selected appears in *UNC*.  


Transaction Import (98.500.00)

Used to control the Transaction Import process.

The following are the field descriptions for Transaction Import (98.500.00).

**Selected (check box)**
Specifies whether to process a particular line of detail information.

**Data File Name**
Name of the file that contains the source data; optional if the control file contains the source data; pressing F3 while the pointer is in Data File Name displays a dialog box for selecting the source file; default data file name extension is .dta.

**Data File Type**
File type of the data file.

**Screen ID**
Number of the application screen in which the source data is imported; number is typed without decimal points.

**Control File Name**
Name of the control file for this Transaction Import; control file tells Transaction Import the arrangement of data in the data file; can also provide instructions on which source fields go with which objects in Microsoft Dynamics SL.

**Output Log File Name**
Name of the file to which Transaction Import writes messages; pressing F3 while the pointer is in Output Log File Name displays a dialog box for selecting the source file; default file name extension is .log.

**Minimized (check box)**
Specifies whether the application receiving the imported data runs in Minimized mode.

**Select All (button)**
Selects all data files in the grid for Transaction Import processing.
Clear All (button)
Cancels the selection of all data files in the grid; no data files are selected for Transaction Import processing.

Edit Errors (button)
Displays Import File Edit; see “Import File Edit” on page 189 for more information.

Options (button)
Displays Transaction Import (98.500.01); see “Transaction Import (98.500.01)” on page 191 for more information.

Begin Processing (button)
Starts the Transaction Import process; pressing Esc stops the process after the current entity finishes processing.
Import File Edit

Used to view the log file that is created during a Transaction Import process, and also to view and correct errors in the source data file; accessed by clicking Edit Errors in Transaction Import (98.500.00).

- Displays in the upper section of the screen the contents of the log file specified in Output Log File Name in Transaction Import (98.500.00).
- Displays in the lower section of the screen the contents of the data file specified in Data File Name on Transaction Import (98.500.00).

The following are menu and field descriptions for Import File Edit.

File Menu

Save Log File
Saves the log file with its current name.

Save Log File as
Saves the log file with a new name.

Save Data File
Saves the data file with its current name.

Save Data File as
Saves the data file with a new name.

Search Log File
Searches for specified text in the log file; displays a dialog box for search criteria.
Search Data File
Searches for specified text in the data file; displays a dialog box for search criteria.

Print Log File
Sends the displayed log file to the default system printer.

Print Data File
Sends the displayed data file to the default system printer.

Log File Area
Displays the content of the log file.

Data File Area
Displays the content of the data file.

Line
Displays the line number of the pointer’s current location in the data file; can be used together with Column to specify a location to jump to.

Column
Displays the column number of the pointer’s current location in the data file; can be used together with Line to specify a location to jump to.

Print Output Log (button)
Sends the displayed log file to the default system printer.

Print Data File (button)
Sends the displayed data file to the default system printer.
Transaction Import (98.500.01)

Use to specify processing options for a Transaction Import process.

Figure 134: Transaction Import (98.500.01)

The following are the field descriptions for Transaction Import (98.500.01).

**Edit Only**
Processes data but does not commit it to the database.

Error checking is limited to data entry. The error checking process will not detect an issue that occurs when a required field exists on the screen but is not in the control file and no field value is specified in the data file. This kind of error is found when you save while in Combined Edit and Update mode.

**Combined Edit and Update**
Commits only valid data to the database.

**Update After Successful Edit**
Two processing passes; data checked for errors first time; if no errors found, data committed to the database on second pass.

**Data Written to Log File**
Specifies what information goes into the log file. The options are as follows:

- No Output — Indicates that no information goes to the log file.
- All Import Data — All source data lines echo to the log file; lines processed successfully marked Processed; error messages accompany unsuccessful lines.
- Data Only in Error — Only data lines not processed successfully echo to the log file; error messages accompany data lines.

**Discontinue After ____ Errors**
Specifies the number of errors Transaction Import encounters before stopping the process.
Control Macro Generator (98.510.00)

Use to create Transaction Import control files.

![Control Macro Generator (98.510.00)](image)

The following are the field descriptions for Control Macro Generator (98.510.00).

**Screen**
The application screen into which the data is imported; screen number is entered without decimal points.

**Control File Type**
The options are as follows:

- **Intelligent** — Creates an intelligent form control file; see “Intelligent Form Control Files” on page 80 for more information.
- **Simple** — Creates a simple form control file; see “Simple Form Control Files” on page 80 for more information.

**Control File Name**
Path and name of the new control file; default file name extension is .ctl.

**Browse (button)**
Displays a dialog box used to specify the path and name of the new control file.

**View Macro (button)**
Displays Transaction Import Control File; see “Transaction Import control file” on page 243 for more information.
Transaction Import Control File

Use to view, save, and print the Transaction Import control file specified in the Control Macro Generator; accessed by clicking View Macro on Control Macro Generator (98.510.00).

Figure 136: Transaction Import Control File

The following are menu and field descriptions for Transaction Import Control File.

File Menu

Save
Saves the control file by using its current name.

Save as
Saves the control file by using a new name.

Print
Sends the displayed control file to the default system printer.

Control File Area
Name of the displayed control file.
Database Update (98.100.00)

Use to update the current database by using the latest or custom versions of key Microsoft Dynamics SL operating information. This information includes database indexes, system messages, process information, and possible values. All such information is contained in ancillary files that you copy to the database. The ability to add key information through files, instead of keying all this information, is a highly efficient way to make sure that needed database information is always up to date and complete.

When the Database Update process is complete, the software overwrites existing information in the database by using updated versions of the same information from the ancillary file. The software also adds to the database any information present in the ancillary file but currently not present in the database.

Figure 137: Database Update (98.100.00)

The following are the field descriptions for Database Update (98.100.00).

Cumulative Database Updates Area
Specifies the application database to update and its associated system database.

System Database
The current system database.

Application Databases
The application databases assigned to the current system database.

Selective Database Modifications Area
Specifies the specific files to use to update the application database.

Current Working File
The path and file name of the ancillary file that contains the information that you want to add to the database; based on the selected drive and files.
Browse for Files
Click Browse for Files to open the Select file to import screen. Here you highlight the files that you want to include in the database. Normally, you highlight the Messages and pvrec files. Then, click Open. To select more than one file at a time, press CTRL while clicking each file that you want to include.

Begin Processing (button)
Starts the database update process.
Company Maintenance (98.280.00)

Use Company Maintenance (98.280.00) to define and display information about a company. For more information, see “Creating Companies” on page 5. To learn how to switch from company to company, see “Switch Company” in the Quick Reference Help or user’s guide.

**Note:** If the Company Name or Company Color are changed in Company Maintenance (98.280.00) clear the cache for the most recently used companies. To do this, click Options on the Tools menu, and then click Most recently used companies on the Navigation Menu tab.

![Company Maintenance (98.280.00)](image)

The following are the field descriptions for Company Maintenance (98.280.00).

**Company ID**
Unique ID for the company.

**Company Name**
Name of the company. This name appears on the Switch Company button when you are logged on to the company and also appears on the application screens after the name of the screen.

**Database Name**
Name of the application database associated with this company.

**Active**
Select Active to indicate that the company is available for all purposes. This includes transaction entry. If Active is cleared, the company is available for inquiries and reports only.
Master Chart of Accounts

Master Chart of Accounts displays the company ID of the master company for the company's application database. All companies in an application database have the same ID in this box. The master company is the company in which the Chart of Accounts for the database is maintained.

Master Subaccount Table

Master Subaccount Table displays the company ID of the master company for the company's application database. All companies in an application database have the same ID in this box. The master company is the company in which the master subaccount table is maintained.

Address, City, State/Province, Country/Region, Postal Code

Address information for the company.

Phone

Telephone number of the company.

Fax

Fax number of the company.

Base Currency ID

Base Currency ID displays the base currency for the application database. All companies within the same application database must have the same base currency.

Note: You can use multiple currencies to enter documents.

Employer Tax ID

Employer tax ID number for this company.

Company Color

This defines the color that displays on the Switch Company button with the company name. Click the button that displays the company name and select a color.
Database Administration (98.270.00)

Use to display the application databases assigned to a particular system database and to make such assignments.

![Database Administration (98.270.00) - Contoso Ltd](image)

Figure 139: Database Administration (98.270.00)

The following are the field descriptions for Database Administration (98.270.00).

**Database Name (System Database)**
Name of the current system database.

**Server Name (System Database)**
Name of the server on which the current system database resides.

**Master Login Password (System Database)**
Password of the master or primary user of the current system database.

**Database Name (Application Database)**
Name of the application database assigned to the current system database.

**Server Name (Application Database)**
Name of the server on which the current application database resides.

**Password (Application Database)**
Password of the master or primary user of the current application database.

**Description (Application Database)**
Brief description of the current application database.

**Create Database (button)**
Creates a new application database assigned to the current system database.
Possible Values Import (PV.REC)

Use to update the current database by using the latest or custom versions of possible values lists. Possible values lists are contained in ancillary computer files that you import into the database. Possible values are used throughout the system to make entering and accessing data records easier and faster. Instead of typing a value into a data field, open a possible values list then select the possible value to use. When closing the possible values list, the software automatically enters the selected value. For more information, see “Adding and Modifying Possible Values Lists” in the Customization Manager Help or user’s guide. For more information about how to use possible values in a box, see “Using Possible Values Lists” in the Quick Reference Help or user’s guide.

![Possible Values Import (PV.REC)](image)

Figure 140: Possible Values Import (PV.REC)

The following are the field descriptions for Possible Values Import (PV.REC).

Specify Import File Area
Contains the options to select the file to import.

Enter file name (button)
Allows for entry of the fully qualified path and name of the ancillary files that contain the possible values to import into the current database.

Import file
The file selected for import.

Process Area
Contains the options to begin and monitor the import process.

Begin Process (button)
Starts the possible values import process.

Processing
A real-time graph of the progress of the import process.

PVRecs added
The number of records that are processed. During processing, the Import PVRecs dialog box displays the current possible values ancillary file being imported and the number of possible value records in the file being added to the database.
Currency Selection (24.000.00)

*Currency Selection (24.000.00)* is available on the Actions menu in an application screen if the Currency Manager module is installed and configured. On this screen, you can change the currency values that are used when you enter data and generate reports.

![Currency Selection (24.000.00)](image)

*Figure 141: Currency Selection (24.000.00)*

The following are the field descriptions for *Currency Selection (24.000.00)*.

**Transaction Currency Area**

Use to identify the currency that is being applied to the transaction.

- **ID**
  Identification code of the currency.

- **Description**
  Brief explanation of the currency.

- **Symbol**
  Symbol or abbreviation used to represent the currency.

**Currency Exchange Rate Area**

Use to define the exchange rate for the selected currency.

- **Base ID**
  Identification code of the base currency used for the database.

- **Rate Type**
  Rate type to use when it is retrieving the desired currency rate from the currency rate table; rate types must be set up on *Rate Type Maintenance (24.260.00)* in the Currency module.
**Effective Date**

Date to use when it is retrieving the desired currency rate from the currency rate table; if a match to the effective date is not found in the currency rate table, an exchange rate is selected that matches the **Tran Currency ID. Rate Type**, and contains the most recent date prior the effective date.

**Multiply/Divide**

Specifies whether the foreign currency indicated at **Base Currency ID** is to be multiplied by or divided by the rate given to arrive at the base currency amount.

**Rate**

Rate to apply to the base currency to arrive at the foreign currency amount.

**Rate Reciprocal**

Exchange rate applied to the base currency to arrive at the foreign currency amount; automatically calculated and displayed when the rate is entered.

**Currency Unit Equivalents Area**

Application of the currency rate in units; going from foreign to base currency and base to foreign currency.
Reports

Access reports from each module’s menu. When you select a report, a screen of options associated with that report appears. The Report options define the information to be included on the report. Each report has its own set of options.

For more information, see the Reporting Guide or the Quick Reference Guide.

The Report Option Interpreter (ROI)

Report Tab

Specifies the report format, dates, fiscal periods, page ranges, and the number of copies to print. For more information, see the Reporting Guide or the Quick Reference Guide.

![Sample Report tab](image)

Figure 142: Sample Report tab

The following are the field descriptions for the Report tab.

Report Format

The format Microsoft Dynamics SL uses to print the report. Many reports have multiple report format options.

Print Notes (check box)

Select to print the notes attached to each data item included in the report.

Do not send electronically (check box)

Select to include all data items in the report. Quick Send preferences defined for customers, employees, projects, and vendors are ignored. This check box appears when document types are defined on Quick Send Setup (21.951.00) in the Shared Information module. For more information about how to set up Quick Send, see “Setting up Quick Send” in the Shared Information Help or user’s guide.
Do not publish Doc Share requests to SharePoint (check box)
Select to include all data items in the report. Doc Share settings that are defined for customers, projects, and vendors are ignored. This check box appears when entity types are configured on SharePoint Site Configuration (98.360.00). See “Sharing Documents By Using Doc Share” on page 68.

Report Date
The date that appears on the report. The default is today.

Beg/End Period
The beginning and ending fiscal period that prints on the report.

Beg/End Page Nbr
The beginning and ending page numbers of the range of report pages to print.

Copies
The number of copies to print.

Sort Tab
Use the Sort tab to define a custom sort order for report information based on any of the report’s record.filename fields. For example, the standard sort order priority for customer names is last name first, first name second. With the Sort tab, you could set up a report to sort customers based on the sort order first name first. Or you might set up a report to sort customers based on year-to-date net sales.

The Sort tab lets you define custom report sort orders based on multiple record.filename fields. For example, first sort a report alphabetically based on vendor name, then sort the report based on year-to-date net purchases, with the lowest net purchase amount listed first.

The Sort tab first displays the grouping and sorting criteria as defined in the report itself. This allows for modifications, additions, and deletions to the criteria, and provides a complete picture of how the report will be grouped and sorted.

For more information, see the Reporting Guide or the Quick Reference Guide.

Figure 143: Sample Sort tab in grid view

The following are the field descriptions for the Sort tab.
Field
Identifies the database record.fieldname on which to base the report’s custom sort order. Press F3 to open a Possible Values (PV) window listing all record.fieldnames for the report. Select a record.fieldname, and then click OK.

Note: When the Possible Values (PV) window is open, the Field List screen also includes the Description and Report Field columns. The Report Field column is marked with a Yes for the field if the field is included in the report.

Sort Type
Describes the kind of field that is identified in Field. Group Field indicates that the field is a report group that allows for page and total breaks. Sort Field indicates that the report data is to be sorted by the values in the field, within existing groups. Groups are always processed first, followed by sort fields.

Sort Ascending (check box)
Select to sort the field in ascending order. Clear to sort in descending order.

Page Break (check box)
Determines whether the software should insert a page break every time that the value specified by record.fieldname at Field changes (for example, if the sort order is based on customer name, insert a page break between each new customer name on the report). Select Page Break to insert a page break between each new record.fieldname value. Clear Page Break to omit the page break.

Total Break (check box)
Determines whether the software should insert a total break every time that the value specified by record.fieldname at Field changes. Select Total Break to insert a total break between each new record.fieldname value. Clear Total Break to omit the total break.

Up (button)
Click the up arrow to move the selected row up in the grid.

Down (button)
Click the down arrow to move the selected row down in the grid.

Reset (button)
Click Reset to restore the grouping and sorting criteria from the report. This lets users make changes and, if they do not like them, to reset the original values or restart modifications.

Apply (button)
Click Apply to implement the changes that were made by the user for this specific report generation. Clicking Apply also updates the display to show the values in the order in which they will be used.
Select Tab

Enables you to print a report that contains only a subset of the report’s available information. You specify an expression that selects a specific value or range of values for selected fields. For example, to print only the data for account number 123, specify that the Account field only prints for values equal to 123.

For more information, see the Reporting Guide or the Quick Reference Guide.

The following are the field descriptions for the Select tab.

Field
The name of the field to use for selecting report information to print. Press F3 to select from a list of possible values.

Note: When the Possible Values (PV) window is open, the Field List screen also includes the Description and Report Field columns. The Report Field column is marked with a Yes for the field if the field is included in the report. See “Field List” on page 214

Operator
The expression that is used in the selection. For more information see “Value” below. The options are as follows:

- Begins with - Value only accepts ad-hoc values.
- Between - Type in values separated by comma or press F3 and the Between screen appears for you to enter values. You can press F3 in the Between screen fields to select from values in the database or a date on a calendar.
- Contains - Value only accepts ad-hoc values.
- Equal - Type in Value or press F3. The calendar appears if the field is a date, otherwise it displays values in the database.
- Greater than - Type in Value or press F3. The calendar appears if the field is a date, otherwise it displays values in the database.
- In – List of values. Type in values separated by a comma(,), or press F3 and select from a value in the database.
- Is NULL - No Value required.
- Less than - Type in Value or press F3. The calendar will appear if the field is a date, otherwise it will display values in the database.
- Less than or equal to - Type in Value or press F3. The calendar will appear if the field is a date, otherwise it will display values in the database.
- Not between – Type in values separated by comma or press F3 and Between screen appears for values to be entered. You can press F3 in the Between screen fields to select from values in the database or a date on a calendar.
- Not contains – Value will only accept ad-hoc values.
- Not equal- Type in Value or press F3. The calendar will appear if the field is a date, otherwise it will display values in the database.
- Not in - Not in the list of values, Type in values separated by a comma(,), or press F3 and select from a value in the database.
- Is not NULL - No Value required.

Value
The record.fieldname value (for example, amount, ID, account number, and more) on which you are basing the report selection. For example, if you select Account.ACCT in Field and Greater than in Operator, typing 1010 here would print a report that contains database records with account numbers greater than 1010. See “Operator” above for explanations of how you can populate Value.

Press F3 to open screens which help with the selection of dates or values.

Note: If you use an operator like Between, that requires more than one report select value, type a comma or the word and between the values that you enter (1010, 2020 or 1010 and 2020 for example).

Between and Not Between
Between will appear when you press F3 in the Value field after the operator Between or Not Between. There is a text box for the beginning and ending values or dates to be entered. You can press F3 to select a date or value in the database in these boxes.

Figure 145: Between used with values in the database

Figure 146: Between used with a date field
Equal, Greater Than, Greater than or equal to, Less than, Less than or equal to, and Not Equal

*Value List* appears for most data types when you press F3 and Equal, Greater Than, Greater than or equal to, Less than, Less than or equal to, and Not Equal are used as the operator. Click on the value that you want selected. You can filter the list by entering partial values in the filter box.

![Figure 147: Value List](image)
**In and Not In**

*In* appears when you press F3 in **Value** for most data types when you select *In* or *Not in* as the operator. Click **Add to List** to select those items you want included. Type a value in **Enter a Value** if it is not in the list that appears, and then click **Add to List**. Click **Remove from List** to remove an item. To remove everything from the list, click **Clear List**. You can update the list by entering partial values in the filter box. When the list includes all the values that you want to include, click **OK**.

![Figure 148: In](image)

**Boolean**

Specifies whether to use **AND** or **OR** to connect the values in a range.
Cover Page Tab

Use the Cover Page tab to print a cover page for the current report. A report cover page is an introduction to the report. It provides a summary of the report’s content, selection criteria, and sort order. It also contains any user-defined comments defined in the Cover Page tab before printing the report.

For more information, see the Reporting Guide or the Quick Reference Guide.

Figure 149: Sample Cover Page tab

The following are the field descriptions for the Cover Page tab.

**Print Cover Page (check box)**

Prints a cover page that includes information entered on the Sort and Select tabs, in front of the selected report.

**Description**

More information to print on the cover page.
Company Selection Tab

Use to select the company or multiple companies on which to report. For more information, see the Reporting Guide or the Quick Reference Guide.

The following are the field descriptions for the Company Selection tab.

**Current Company**
Reports only on the company specified when you logged in.

**Selected Companies**
Reports on a group of selected companies.

**Show active companies only (check box)**
Includes only active companies in the report.

**Select (check box)**
Includes the company shown in Company ID and Company Name in the report.

**Company ID**
Identification number of the company shown in Company Name.

**Company Name**
Name of the company.

**Active (check box)**
Indicates the company is currently active.

**Select All (button)**
Selects all available companies for inclusion in the report.
Clear All (button)

Resets the **Company Selection** tab grid so that no companies are selected.
Template Tab

Specifies the ID and description of a template, that is a set of data, such as the printing and sorting options of a report. This is saved for later use with a Microsoft Dynamics SL report.

For more information, see the Reporting Guide or the Quick Reference Guide.

Figure 151: Sample Template tab

The following are the field descriptions for the Template tab.

Public (check box)
Determines whether the template can be used by every user or just by the user who created the template.

Template ID
Identification code for the template.

Description
Description entered when the template was created.

Load Template (button)
Click to load the selected template.

Save Template (button)
Click to save the current report settings as a template.
Field List

Field List will display after pressing F3 to open a Possible Values (PV) window, listing all record.fieldnames for the report. You can sort based on the field selected in the dropdown box. The sorting can also limit what appears in the screen by entering a partial list in the box.

If you want to display only those fields on the report, select Report Field in the dropdown and type Y in the text box.

Figure 152: Field List

Following are field descriptions for the Field List.

Field Name
Identifies the database record.fieldname to use for selecting report information to be printed.

Description
Description displays the field name of the record. If the field name has been changed using Field Description Maintenance (21.405.00), the Custom Description will appear here. For more information on changing this description, see “Setting up Field Descriptions” in the Shared Information Help or user’s guide.

Source Field
Source Field will have an entry if the Field Name is from a view in the database, not the actual table.

Report Field
The Report Field will display Yes if the report exists on the report you are running. Fields with a No displaying do not print on the report but are available for selection and/or sorting the report.
Access Rights Report (95.600.00)

Use to generate user and group access rights report.

![Access Rights Report (95.600.00)](image)

**Figure 153: Access Rights Report (95.600.00)**

**Access Rights Report, Report Tab**

This is a standard report. For information about the other fields on the tab, see “Generating Reports” in this user’s guide.

**Report Format**

Report options are as follows:

- **Summary** — Generate the report in a summarized format that includes only users and groups.
- **Detail** — Generate the report in a detailed format that includes all modules and reports for each user and group.
Report Control Maintenance (98.300.00)

When you are printing a report in Microsoft Dynamics SL, whether from the menu or from inside code, a surrogate program called the Report Option Interpreter (ROI.EXE or ROI) is called and this program actually starts the Crystal Reports printing engine to print the report. The ROI provides a common interface for all reports. It lets the user make many choices that affect how a particular report will ultimately appear.

Each report can have a different set of options, formats, and so on when the ROI is run. Which options, formats, and so on will be displayed is determined by a record from a system table named RPTCONTROL. There must be a record in this table for all reports printed from Microsoft Dynamics SL. Report Control Maintenance (98.300.00) allows for many options of the ROI to be set for a given report. At a minimum, at least one report format must be defined for each report number. The report format consists of a description of the format and the name of the actual Crystal Reports definition file that generates that report format.

For more information, see the Reporting Guide.

![Figure 154: Report Control Maintenance (98.300.00)](image)

The following are the field descriptions for Report Control Maintenance (98.300.00).

**Report Number**

The screen number for the report.

**Report Format Name**

Report Format Name describes the form of the report. A report may have multiple formats, for example, Detail and Summary.
Report Format
Each report format has its own Crystal Reports file. **Report Format** indicates the name of the file for a report format.

Control Options Tab
Control Options tab is used to identify processing options to be used during the processing of the report.

![Report Control Maintenance (98.300.00), Control Options tab](image)

**Figure 155: Report Control Maintenance (98.300.00), Control Options tab**

The following are field descriptions for **Control Options** tab.

General Reporting Options Area

Report Date Caption
Report Date Caption is used to identify the date field for report date. This field lets users change the date used when generating the report.

Pre-Process Name
Pre-Process Name is the name of a Microsoft Dynamics SL Software Development Kit (Microsoft SL SDK) application or stored procedure that runs before the generation of the report. This process can be used to prepare any required data or tables for use in the report. For more information, see “RIParams” and “RptRuntime” in the Reporting Guide.

Post-Process Name
Post-Process Name is the name of a Microsoft SL SDK application or stored procedure that runs after the generation of the report. This process can be used to remove temporary data or update data based on the completion of the report.
Data Source

Data Source identifies the database type to be used when you access the data for this report. Application Database indicates that the data will come from the accounting applications. System Database indicates that the data will come from the system.

Disable Banner Prompt (check box)

Disable Banner Prompt, when selected, indicates that the ROI Cover Page tab is to be disabled, effectively disallowing a cover page for the report. If this box is cleared, the tab and cover page options are available.

Allow Multiple Copies (check box)

Allow Multiple Copies, when selected, indicates that multiple copies can be created during one generation of the report. If this box is cleared, only one copy of the report is created when you run the report.

Multi-Company Selection Allowed (check box)

Multi-Company Selection Allowed, when selected, indicates that this report can be generated from data spanning multiple companies. It enables the ROI Company Selection tab, where the user can select companies they want to include on the report. If this box is cleared, report data is taken from only the company into which the user is currently logged on.

Transactional Reporting Options Area

Reporting Range Prompt

Reporting Range Prompt determines how reporting dates are handled. The options are as follows:

- No Period Number — No period or date specified
- Period to Report — To specify a single period
- Beg\End Period to Report — To specify a range of periods
- Calendar Year — To specify a calendar year
- Validated Period to Post — To specify only a period that is not closed
- Date to Report — To specify a single date
- Date Range — To specify a range of dates

Default Period From

Default Period From is enabled if Reporting Range Prompt is not No Period Number. Select the module that is used for determining the period data.

Period Field Name

Period Field Name is the name of the database field that you specify as the period information source. For example, if you want to pull period information from the GLTran table, you could type GLTran.PerPost.

If Date to Report or Date Range is selected from the Reporting Range Prompt list, the Period Field Name field label changes to Date Field Name.

Date Field Name

Date Field Name is the name of the database field you specify as the source for date-specific report information. For example, if you want to pull information from the PRDoc table, you could type PrDoc.ChkDate. The field specified here should have a database type of smalldatetime.
Special Form Reporting Options Area

Print On Special Forms (check box)
Print On Special Forms, when selected, indicates that the report is printed on special forms.

Display Acct/Sub Fields (check box)
Display Acct/Sub Fields, when selected, indicates that the account and subaccount fields are displayed and enabled for user interaction on the ROI Report tab.

Document Number Caption
Document Number Caption is used to enter text that identifies the document number being displayed in a corresponding control.
Custom Fields Tab

**Custom Fields** tab is used to specify the values that will be displayed on the ROI **Options** tab. These fields let a report designer prompt for values not already displayed in the ROI window.

![Report Control Maintenance](image)

**Figure 156: Report Control Maintenance (98.300.00), Custom Fields tab**

The following are field descriptions for **Custom Fields** tab

**Custom String Field Captions Area**

**Custom String Field Captions** are used to identify the usage of report-specific text boxes where users can enter values in response to the prompt specified in the caption.

Logic for using these values will be in the report itself. These fields are stored in the LongAnsCaptionNN fields in the RptControl record created for a new report or updated for an existing report.

At report generation time, the values specified by the user will be in two locations: The RIParam LongAnswerNN and the RptRuntime LongAnswerNN fields. For more information, see "RIParams" and “RptRuntime” in the Reporting Guide.

**Custom Logical Field Captions Area**

The **Custom Logical Field Captions** are used to identify the usage of report-specific check boxes where users can select options that are based on the prompt specified in the caption.

Logic for using these values will be in the report itself. These fields are stored in the LongShortAnsCaptionNN fields in the RptControl record created for a new report or updated for an existing report.

At report generation time, the values specified by the user for the available options will be in two locations: The RIParam ShortAnswerNN and the RptRuntime ShortAnswerNN field. For more information, see "RIParams" and “RptRuntime” in the Reporting Guide.
Appendix A: Solomon.ini Settings

Overview

Solomon.ini, a Windows profile file, is created by the Microsoft Dynamics SL Login (98.000.00) process. The file is located in two areas: the Microsoft Dynamics SL program folder (installed by default) and the user’s application data folder. For example, on a computer that is running Windows XP, the path of the file is \Documents and Settings\<user name>\Application Data\Microsoft Dynamics SL\Solomon.ini. On a computer that is running Windows Vista, the path is \Users\<user name>\AppData\Roaming\Microsoft Dynamics SL\Solomon.ini. All updates to the Solomon.ini by Microsoft Dynamics SL occur in the file that is located in the user’s application data folder.

To read an entry in the Solomon.ini file, Microsoft Dynamics SL first looks for it in the user's application data folder. If the entry does not exist, then the search continues in the Solomon.ini file that is located in the Microsoft Dynamics SL program folder. In this manner, entries that are global (for all users) can be made in the Solomon.ini file in the Microsoft Dynamics SL program folder, and settings that are customized for a person can be located in the Solomon.ini file in the user’s application data folder.

The topics that follow describe the default values for each Solomon.ini setting, its uses, and the range of acceptable values.

System–wide Settings

- [System32 Database] Section
- [Company] Section
- [Customization] Section
- [Print Default] Section
- [Database Runtime] Section
- [QuickQuery] Section
- [Read Directory] Section
- [Report Server] Section
- [Reports] Section
- [Miscellaneous] Section
- [Event Log] Section
- [TranImport] Section
- [Home Page] Section
- [Insert/Overtype Mode] Section

Microsoft Dynamics SL Applications Settings

- [Miscellaneous] Section
- [DDLoc] Section
- [4010000] Section
- [Quick Print Formats] Section
- [Report Detail Lines] Section

Not all these settings will be in the Solomon.ini that comes from the initial installation of the software. These settings are available to make your installation more flexible and perform better.
System-wide Settings

[System32 Database] Section

Item Explanation: Sets defaults in Find Database (98.000.01).

There can be several entries for Database, Server, and Database Type. A comma separates each entry. As you enter different databases, each one is recorded here. In the earlier example the .ini settings indicate that you have signed on to two separate system databases. All database types will be MS (Microsoft SQL Server). Find Database (98.000.01) uses these entries to populate the lists for the Server and Database options.

Database

Contains the Named System Database name to be used by Microsoft Dynamics SL.

DEFAULT: {None}

VALID ENTRIES: Any Named System Database (20 characters maximum)

CREATED BY: Microsoft Dynamics SL Login (98.000.00)

READ BY: Microsoft Dynamics SL Login (98.000.00)

UPDATED BY: Microsoft Dynamics SL Login (98.000.00)

Server

Contains the Microsoft SQL Server database server name.

DEFAULT: (None)

VALID ENTRIES: Any Microsoft SQL Server database server.

CREATED BY: Microsoft Dynamics SL Login (98.000.00)

READ BY: Microsoft Dynamics SL Login (98.000.00)

UPDATED BY: Microsoft Dynamics SL Login (98.000.00)

Database Type

Describes the kind of database server to be used to access the database.

Default: {None}

Valid Entries: MS

Created By: Microsoft Dynamics SL Login (98.000.00)

Read By: Microsoft Dynamics SL Login (98.000.00)

Updated By: Microsoft Dynamics SL Login (98.000.00)

[Company] Section

Item Explanation: Used for setting the defaults for Microsoft Dynamics SL Login (98.000.00) and to control access to the Switch Company button capability.

CompanyID

Contains the last company ID entered in Microsoft Dynamics SL Login (98.000.00).

DEFAULT: (None)

VALID ENTRIES: Any Company Name in the system database (10 characters maximum)

CREATED BY: Microsoft Dynamics SL Login (98.000.00) (after OK is clicked)

READ BY: Microsoft Dynamics SL Login (98.000.00) (before display)

UPDATED BY: Microsoft Dynamics SL Login (98.000.00) (after OK is clicked)
Appendix A: Solomon.ini Settings

**UserID**
Contains the last User ID entered in *Microsoft Dynamics SL Login* (98.000.00).
DEFAULT: SYSADMIN
VALID ENTRIES: Any Valid User ID created in *User Maintenance* (95.260.00)
CREATED BY: *Microsoft Dynamics SL Login* (98.000.00) (after OK is clicked)
READ BY: *Microsoft Dynamics SL Login* (98.000.00) (before display)
UPDATED BY: *Microsoft Dynamics SL Login* (98.000.00) (after OK is clicked)

**AppCompanyLogin**
Add the following statement to a user’s Solomon.ini file to control their ability to use the **Switch Company** button to open another company without closing the one they are currently using:

```
[Company]
AppCompanyLogin=0
```

DEFAULT: On if the statement is not included in the user’s Solomon.ini file
VALID ENTRIES: 1 (On) or 0 (Off)

**[Customization] Section**

**ExportVbaSource**
You can export VBA customizations as source by using the **Export VBA as Source** check box in the *Export Customizations* (91.500.00) screen. Use this functionality to help correct issues that prevent customized screens from opening. This functionality can also help you transfer customizations from an earlier version of Microsoft Dynamics SL by importing the binary .cst from the earlier version and exporting it from Microsoft Dynamics SL 2011 FP1 or a later version in source format.

**Note:** You can export customizations that are stored as binary in either binary or source format. You can only export customizations that are stored as source in source format.

The **Export VBA as Source** check box controls the following setting in the solomon.ini file:

DEFAULT: No
VALID ENTRIES: No and Yes
CREATED BY: *Export Customizations* (91.500.00) at save time
READ BY: *Export Customizations* (91.500.00) at load time
UPDATED BY: *Export Customizations* (91.500.00) at save time

**SaveVbaSource**
You can save the VBA customization to the Microsoft Dynamics SL database as source code, instead of a binary representation of the VBA project. To enable or disable this functionality, edit the following setting in the solomon.ini file:

DEFAULT: No
VALID ENTRIES: No and Yes
CREATED BY: NONE
READ BY: Customization Mode and *Import Customization* (91.510.00) at save time
UPDATED BY: NONE

**Note:** Using this option reduces the size of the customization records in the database which reduces how much information that must be transmitted over the network or that the SQL server must process, or both. Because of the reduction of work, using this option increases how much work that the client computer runs during screen load. Enable this setting if the speed of the network or the SQL server, or both, are slow when you compare it to the speed of the workstation computer.
[Print Default] Section

**Item Explanation:** Contains printer information that is specific to this workstation for Microsoft Dynamics SL.

**PrinterOrientation**
Determines whether a report will use the saved report orientation (No setting) or the current orientation set by the user at run time (Yes setting).

DEFAULT: No
VALID ENTRIES: No and Yes
CREATED BY: Printer Options (98.220.00)
READ BY: Printer Options (98.220.00) and ROI at print time
UPDATED BY: Printer Options (98.220.00)

**WindowsDefaultPrinter**
Determines whether the Microsoft Dynamics SL printer settings are used (No setting) or the current Windows Default Printer set in Windows Control Panel (Yes setting).

DEFAULT: No
VALID ENTRIES: No and Yes
CREATED BY: Printer Options (98.220.00)
READ BY: Printer Options (98.220.00) and ROI at print time
UPDATED BY: Printer Options (98.220.00)

**Device Name**
Contains the default printer device destination name that is used when you print in ROI. This is ignored if the WindowsDefaultPrinter entry is set to Yes.

DEFAULT: Windows Default Printer
VALID ENTRIES: Windows print device names on the current workstation
CREATED BY: Printer Options (98.220.00)
READ BY: Printer Options (98.220.00) and ROI at print time
UPDATED BY: Printer Options (98.220.00)

**Driver**
Contains the default printer driver used when you print in ROI. This is ignored if the WindowsDefaultPrinter entry is set to Yes.

DEFAULT: Windows Default Printer
VALID ENTRIES: Windows print driver on the current workstation
CREATED BY: Printer Options (98.220.00)
READ BY: Printer Options (98.220.00) and ROI at print time
UPDATED BY: Printer Options (98.220.00)

**Port**
Contains the default printer port that is used when you print in ROI. This is ignored if the WindowsDefaultPrinter entry is set to Yes.

DEFAULT: Windows Default Printer
VALID ENTRIES: Windows printer port on the current workstation
CREATED BY: Printer Options (98.220.00)
Appendix A: Solomon.ini Settings

READ BY: Printer Options (98.220.00) and ROI at print time
UPDATED BY: Printer Options (98.220.00)

Font
Contains the default printer font that is used when you print in ROI. This is ignored if the WindowsDefaultPrinter entry is set to Yes.
DEFAULT: Report font that is used
VALID ENTRIES: Windows printer fonts on the current workstation
CREATED BY: Printer Options (98.220.00)
READ BY: Printer Options (98.220.00) and ROI at print time
UPDATED BY: Printer Options (98.220.00)

Font Size
Contains the default printer font size used when you print in ROI. This is ignored if the WindowsDefaultPrinter entry is set to Yes.
DEFAULT: Report font sizes used
VALID ENTRIES: Windows printer font size on the current workstation
CREATED BY: Printer Options (98.220.00)
READ BY: Printer Options (98.220.00) and ROI at print time
UPDATED BY: Printer Options (98.220.00)

Font Bold
Contains the default printer bold font attribute used when you print in ROI. This is ignored if the WindowsDefaultPrinter entry is set to Yes.
DEFAULT: Report font attributes used if Font not set. Otherwise, No
VALID ENTRIES: Yes and No
CREATED BY: Printer Options (98.220.00)
READ BY: Printer Options (98.220.00) and ROI at print time
UPDATED BY: Printer Options (98.220.00)

Font Italic
Contains the default printer italic font attribute used when you print in ROI. This is ignored if the WindowsDefaultPrinter entry is set to Yes.
DEFAULT: Report font attributes used if Font not set. Otherwise, No
VALID ENTRIES: Yes and No
CREATED BY: Printer Options (98.220.00)
READ BY: Printer Options (98.220.00) and ROI at print time
UPDATED BY: Printer Options (98.220.00)

Tray
Contains the default printer tray attribute used when you print in ROI. This is ignored if the WindowsDefaultPrinter entry is set to Yes.
DEFAULT: Report font attributes used if Font not set. Otherwise, No
VALID ENTRIES: 0 (or valid tray entry number for the printer)
CREATED BY: Printer Options (98.220.00)
READ BY: Printer Options (98.220.00) and ROI at print time
Duplex
Contains the default printer duplex attribute used when you print in ROI. This is ignored if the WindowsDefaultPrinter entry is set to Yes.
DEFAULT: Report font attributes used if Font not set. Otherwise, No
VALID ENTRIES: 0 (or valid duplex entry number for the printer)
CREATED BY: Printer Options (98.220.00)
READ BY: Printer Options (98.220.00) and ROI at print time
UPDATED BY: Printer Options (98.220.00)

Color
Contains the default printer color attribute used when you print in ROI. This is ignored if the WindowsDefaultPrinter entry is set to Yes.
DEFAULT: Report font attributes used if Font not set. Otherwise, No
VALID ENTRIES: 0 (or valid color entry number for the printer)
CREATED BY: Printer Options (98.220.00)
READ BY: Printer Options (98.220.00) and ROI at print time
UPDATED BY: Printer Options (98.220.00)

PrintToFile
Contains the print to file options. Wildcard characters can be used in the trailing portion of the file name (not in the extension). This is ignored if the WindowsDefaultPrinter entry is set to Yes.
DEFAULT: 0
VALID ENTRIES: 0 = to printer, 1 = to file (create new), 2 = to file (concatenate)
CREATED BY: Printer Options (98.220.00)
READ BY: Printer Options (98.220.00) and ROI at print time.
UPDATED BY: Printer Options (98.220.00)

IncludeCodes
Determines whether printer control codes will be included in printer file output. This is ignored if the WindowsDefaultPrinter entry is set to Yes or the PrintToFile setting is 0.
DEFAULT: Report font attributes used if Font not set. Otherwise, No
VALID ENTRIES: Yes and No
CREATED BY: Printer Options (98.220.00)
READ BY: Printer Options (98.220.00) and ROI at print time
UPDATED BY: Printer Options (98.220.00)

File
Contains the default destination path and file location. Wildcard characters can be used in the trailing portion of the file name (not in the extension). This is ignored if the WindowsDefaultPrinter entry is set to Yes.
DEFAULT: None
VALID ENTRIES: Fully qualified path and file name
CREATED BY: Printer Options (98.220.00)
READ BY: Printer Options (98.220.00) and ROI at print time
UPDATED BY: Printer Options (98.220.00)
**FileType**

Contains the default file type for when Print to File is selected. This is ignored if the WindowsDefaultPrinter entry is set to Yes.

DEFAULT: X (text)

VALID ENTRIES: X (text; .txt), W (Word for Windows; .doc), V (Character-separated values; .txt), B (Comma-separated values; .csv), C (Crystal Reports; .rpt), I (Data Interchange Format; .dif), E (Excel 2.1; .xls), F (Excel 3.0; .xls), 4 (Excel 4.0; .xls), 5 (Excel 5.0; .xls), G (Excel 5.0 tabular; .xls), H (HTML 3.0; .html), M (HTML 3.2 Microsoft; .html), N (HTML 3.2 Netscape; .html), 0 (Adobe Acrobat; .pdf), 1 (Lotus 1-2-3; .wk1), 2 (Lotus 1-2-3; .wk3), 3 (Lotus 1-2-3; .wks), Z (Paginated Text; .txt), A (Rich Text; .rtf), T (Tab-separated text; .txt), Y (Tab-separated values; .txt)

CREATED BY: Printer Options (98.220.00)
READ BY: Printer Options (98.220.00) and ROI at print time
UPDATED BY: Printer Options (98.220.00)

**ShortIntlDates**

Contains the method to do report dates in ROI. If ON then all dates in a report will be made into Short International Dates at run time (set in Control Panel).

DEFAULT: ON

VALID ENTRIES: ON and OFF

CREATED BY: Printer Options (98.220.00)
READ BY: Printer Options (98.220.00) and ROI at print time
UPDATED BY: Printer Options (98.220.00)

**[Database Runtime] Section**

**Item Explanation:** Contains settings pertinent to database operations.

**BusyRetrySeconds**

Used to change how long (in seconds) Microsoft Dynamics SL retries SQL calls during record busy conditions.

DEFAULT: 10

VALID ENTRIES: 1-63

CREATED BY: None
READ BY: Microsoft Dynamics SL Login (98.000.00)
UPDATED BY: None

**AutoRetry**

Lets the user turn off the busy record message (6902) and cause a delay (in milliseconds) between busy retries. This is useful when doing performance testing with macro scripts and eliminating the need to detect the busy message dialog box.

DEFAULT: 0

VALID ENTRIES: 0-32767

CREATED BY: None
READ BY: Microsoft Dynamics SL Login (98.000.00)
UPDATED BY: None

**RetryWaitTime**

Lets the user change how long (in milliseconds) to wait between Microsoft Dynamics SL retries during record busy conditions.
**System Manager**

**ConnectionTimeout**
Lets the user set a time-out value for database connections

DEFAULT: 30
VALID ENTRIES: 1-3000
CREATED BY: None
READ BY: Microsoft Dynamics SL Login (98.000.00), all screens, and Application Server Development Objects
UPDATED BY: None

**[QuickQuery] Section**

**Item Explanation:** Paging functionality is now available for Quick Query. This lets you display a subset of the SQL query results per page in *Quick Query Viewer* (QQ.VIE.00), improving performance. Paging buttons, menu entries, keystrokes (shortcuts), and a page text box give you multiple options for moving through the pages. The buttons, menu entries, and keystrokes include **First**, **Previous**, **Next**, and **Last**. The page text box lets you type a page number and move directly to that page.

**Example**

[QuickQuery]
Paging=Yes
MaxSQLRows=1000

**Paging**
Add to control users’ ability to use paging functionality in *Quick Query Viewer* (QQ.VIE.00). Set to **Yes** to enable paging.

DEFAULT: YES (on)
VALID ENTRIES: NO or YES
CREATED BY: None
READ BY: *Quick Query Viewer* (QQ.VIE.00)

**MaxSQLRows**
Add to control the number of rows per page in *Quick Query Viewer* (QQ.VIE.00). If you do not add this option, the default number of rows per page is 5000. The upper limit for MaxSQLRows is determined by the workstation computer’s memory and performance. You may find that 32000, for example; produces poor performance on certain workstation computers. If this is the case, use a smaller number.

DEFAULT: 5000
VALID ENTRIES: 1 - 999999999
CREATED BY: None
READ BY: *Quick Query Viewer* (QQ.VIE.00)
MaxTotalRows
Add to control the total number of rows displayed in the grid in Quick Query Viewer (QQ.VIE.00). This setting has no effect when paging is disabled (use MaxSQLRows in those instances). The default number of rows per grid is 500000. This setting is to alleviate grid rendering performance issues when there are a large number of rows. The upper limit for MaxTotalRows is determined by the workstation computer's memory and performance. You may find that 64000, for example; produces poor performance on certain workstation computers. If this is the case, use a smaller number.
DEFAULT: 5000
VALID ENTRIES: 1 – 999999999
CREATED BY: None
READ BY: Quick Query Viewer (QQ.VIE.00)

Timeout
Add to control the amount of time in seconds before the query will time out. The default is 30 seconds.
DEFAULT: 30
VALID ENTRIES: 1 – 999999999
CREATED BY: None
READ BY: Quick Query Viewer (QQ.VIE.00)

[Read Directory] Section
Item Explanation: Contains the alternative menu and message file location.

Menu File
Lets the user specify an alternative menu file. The alternative menu file is a complete replacement for the Menu file from the Microsoft Dynamics SL program directory.
DEFAULT: DELTA.MNU
VALID ENTRIES: Fully qualified path and file name
CREATED BY: None
READ BY: MSDynamicsSL Toolbar
UPDATED BY: None

Message File
Lets the user specify an alternative message file. The alternative message file is a complete replacement for the Message file from the Microsoft Dynamics SL program directory.
DEFAULT: MESSAGE.CSV
VALID ENTRIES: Fully qualified path and file name
CREATED BY: None
READ BY: First time that a message is needed
UPDATED BY: None

Cache Location
Lets the user specify an alternative location for the menu cache files.
DEFAULT: Windows User's Temp Folder
VALID ENTRIES: Fully qualified path
CREATED BY: None
READ BY: Microsoft Dynamics SL toolbar
UPDATED BY: None
[Report Server] Section

**Item Explanation:** Used for Report Server settings

**ConnectionTimeout**
Add ConnectionTimeout=n, where n is a value between 1 and 1000, to use n number of seconds to wait for a response from the Report Server when deploying reports.

**DEFAULT:** 60

**VALID ENTRIES:** 1 through 1000

**CREATED BY:** None

**READ BY:** Microsoft Dynamics SL Report Server Configuration Console

**UPDATED BY:** None

[Reports] Section

**Item Explanation:** Used for Report Option Interpreter (ROI) functional settings.

**TempDirectory**
Lets the user specify an alternative directory for report temporary files. The user should have full access rights to the report temporary directory that is specified.

**DEFAULT:** Microsoft Dynamics SL program directory

**VALID ENTRIES:** Fully qualified path

**CREATED BY:** None

**READ BY:** ROI at print time

**UPDATED BY:** None

**ODBCSource**
Lets the user specify an alternative ODBC driver for Crystal Reports.

**DEFAULT:** SQLSRV32.DLL

**VALID ENTRIES:** ODBC

**CREATED BY:** None

**READ BY:** ROI at print time

**UPDATED BY:** None

[Miscellaneous] Section

**Item Explanation:** Contains several settings that are used throughout Microsoft Dynamics SL.

**AutoSyncReportServer**
Controls whether or not User Maintenance (95.260.00), Access Rights Maintenance (95.270.00), and Group Maintenance (95.280.00) automatically synchronize rights to Report Servers when a user's groups change or access rights to a report change.

**DEFAULT:** Yes

**VALID ENTRIES:** No or Yes

**CREATED BY:** None

**READ BY:** User Maintenance (95.260.00), Access Rights Maintenance (95.270.00), and Group Maintenance (95.280.00)

**UPDATED BY:** None
**DateAutoSegmentMode**

Add `DateAutoSegmentMode=No` to turn off the software’s ability to automatically handle delimiters and cursor movement in date segments. Under the default setting, it inserts a forward slash delimiter to the end of a completed date segment and then advances the cursor to the next segment until the date entry is completed.

DEFAULT: Yes

VALID ENTRIES: No or Yes

CREATED BY: None

READ BY: Inquiry at run time

UPDATED BY: None

**KeyQueueSuppress**

Used to enable, or disable the ability for users to “type ahead” in Microsoft Dynamics SL. The default is to not suppress the queue. This lets “type ahead” to work.

DEFAULT: 0

VALID ENTRIES: 0 or 1

CREATED BY: None

READ BY: Inquiry at run time

UPDATED BY: None

**MeterOn**

Used to determine the screens and processes run by a given site. When `MeterOn = Yes`, the Microsoft Dynamics SL kernel will report information on how many Inserts, Deletes and Updates occur to database tables. It will also report information of the length of time spent in user’s processes.

DEFAULT: 0

VALID ENTRIES: 0 or 1

CREATED BY: None

READ BY: Inquiry at run time

UPDATED BY: None

**MeterFile**

Used to determine where the metering information is to be stored for future reference.

DEFAULT: DBMETER.LOG

VALID ENTRIES: A fully qualified path (up to 128 characters).

CREATED BY: None

READ BY: Inquiry at run time

UPDATED BY: None
**TempDirectory**
When the Microsoft Dynamics SL kernel creates a temporary file, it will check for a TempDirectory setting in a specialized entry, such as TranImport. If no setting is found there, the setting under miscellaneous is searched for. If this setting is not found, then the Windows Temporary directory is used to create the file.

**DEFAULT:**
**VALID ENTRIES:** A fully qualified path, no file name.
**CREATED BY:** None
**READ BY:** Inquiry at run time
**UPDATED BY:** None

**PVFastFirstRow**
Indicates that the MS SQL Server Query Optimizer table hint FastFirstRow is to be added to the possible values query to improve performance when displaying possible values. This hint will tell Microsoft SQL Server to use an index that includes the same fields as the order by of the possible values query.

**DEFAULT:** Yes
**VALID ENTRIES:** Yes and No
**CREATED BY:** None
**READ BY:** Inquiry at run time
**UPDATED BY:** None

**CenturyLimit**
Sets the century limit for two-digit year date and period fields. Two-digit dates between 0 and this value are assumed to be century 2000. Years between this and 99 are assumed to be century 1900.

**DEFAULT:** 29
**VALID ENTRIES:** 1 through 98
**CREATED BY:** None
**READ BY:** Inquiry at run time
**UPDATED BY:** None

**DatabaseIntegrityChecks**
Use DatabaseIntegrityChecks and DiagnosticsL1 to turn on the Runtime Diagnostics Kernel (RDK). This is a support diagnostics tool.

**DEFAULT:** 0
**VALID ENTRIES:** 0 or 1
**CREATED BY:** None
**READ BY:** Microsoft Dynamics SL kernel
**UPDATED BY:** None

**DiagnosticsL1**
Use DatabaseIntegrityChecks and DiagnosticsL1 to turn on the RDK. This is a support diagnostics tool.

**DEFAULT:** 0
**VALID ENTRIES:** 0 or 1
**CREATED BY:** None
**READ BY:** Microsoft Dynamics SL kernel
**UPDATED BY:** None
PVNoLock
Indicates that the Microsoft SQL Server Optimizer hint NoLock is to be added to the possible values query to prevent locking the data when displaying possible values. This hint will tell Microsoft SQL Server to display the possible values window without waiting for locks other users have on the data.
DEFAULT: Yes
VALID ENTRIES: Yes and No
CREATED BY: None
READ BY: Inquiry at run time
UPDATED BY: None

SaveSettingOnExit
This setting controls the ability for users to set the “Save Settings on Exit” value. When the value is NO, the check box to set this value on the Options Dialog box is no longer visible and the setting will be turned off.
DEFAULT: No
VALID ENTRIES: Yes and No
CREATED BY: None
READ BY: Inquiry at run time
UPDATED BY: None

<PathName>
This is a name for a path that can be used in the menu system to provide the location for an executable. For example, create an entry that resembles the following:

Crystal Location=C:\Program Files\Crystal Decisions

In the menu system, you could use a path that resembles the following:

<Crystal Location>\CRW32.EXE

Note: The following text appears in the Solomon.ini file if you installed Management Reporter or Crystal Reports 10 by using the default path:

MR Location=C:\Program Files\Microsoft Dynamics ERP\Management Reporter\2.0
Crystal Location=C:\Program Files\Crystal Decisions\Crystal Reports 10

However, if you have installed these applications to a path other than the default, you must edit the location line so that the system will be able to find the executable file when you try to open the application.
DEFAULT: none
VALID ENTRIES: A Valid Path
CREATED BY: None
READ BY: Inquiry at run time
UPDATED BY: None
RemoteAppDelay
Add RemoteAppDelay=n where n is a value between 1-99 to delay calling printer setup initialization for n number of seconds. If n = 0 then no delay occurs (default case). The delay has to be larger the more redirected printers established by the client computer that is using Terminal Services Remote App feature. Delay times vary based on the network connection also. This delay will not delay the display of the Parent Navigation Screen.
DEFAULT: 0
VALID ENTRIES: 0 through 99
CREATED BY: None
READ BY: Microsoft Dynamics SL Login (98.000.00) (before display)
UPDATED BY: None

[Event Log] Section
Item Explanation: Used for setting and saving options that are used by Microsoft Dynamics SL to populate an event log. Also used in runtime diagnostics.

Directory
Lets you set the location of a shared Event Log directory. It is also very useful when the Microsoft Dynamics SL System has used a “Local Program” installation. A local program install occurs when you are accessing a server-based database, but have a copy of Microsoft Dynamics SL installed on your local hard disk drives. You, as an administrator, may want the Process Status event log files put in a server-based directory so other users could view them.
For example, put a server-based directory in the setting: Directory = I:\Microsoft Dynamics SL\Shared\Eventlog
DEFAULT: None
VALID ENTRIES: Any valid path – security settings may require users to set the directory to an area other than C:\ or Program Files. Example: C:\Users\Public\Documents\Microsoft Dynamics SL
READ BY: Inquiry at run time

FatalDiagnostics
Determines whether Stop Message boxes (message boxes with a stop sign icon) will cause the Microsoft Dynamics SL kernel to create a general protection fault (GPF) that in turn will force Dr. Watson to become active for diagnostic purposes.
DEFAULT: No
VALID ENTRIES: Yes or No
CREATED BY: Event Log Options
READ BY: Inquiry at run time
UPDATED BY: Event Log Options

DatabaseCalls
Determines whether information about all database calls is written into the event log file. If Yes, then all database calls are written into the event log files.
DEFAULT: No
VALID ENTRIES: Yes or No
CREATED BY: Event Log Options
READ BY: Inquiry at run time
UPDATED BY: Event Log Options
**EventDetailedOutput**
Determines whether information about all database calls is written into the event log file in more detail. If Yes, then detailed database calls are written into the event log files.
DEFAULT: No
VALID ENTRIES: Yes or No
CREATED BY: Event Log Options
READ BY: Inquiry at run time
UPDATED BY: Event Log Options

** RecoverableDiagnostics**
Indicates to record the information about any recoverable errors in an event log.
DEFAULT: No
VALID ENTRIES: Yes or No
CREATED BY: Event Log Options
READ BY: Inquiry at run time
UPDATED BY: Event Log Options

**[TranImport] Section**
**Item Explanation:** Transaction Import settings are used for Transaction Import processes.

**TempDirectory**
This setting is used when Transaction Import creates a temporary file to hold an intelligent control macro. The contents of the control file are changed (if it is necessary) and copied into a temp file. It is then compiled into memory where it is run. These temp files have an extension of Transaction Import macro (TIM). These files are deleted after the import is completed successfully. If this setting is not present, the path pointed to by the TEMP environment string is used.
DEFAULT: {None} uses environment setting
VALID ENTRIES: A fully qualified path
CREATED BY: None
READ BY: Inquiry at run time
UPDATED BY: None

**[Home Page] Section**
**Item Explanation:** Sets a value that is used as a home page for Microsoft Dynamics SL users.

**ALL**
Sets the home page URL for all Microsoft Dynamics SL users. If a user does not have a specific home page URL, this setting will be used.
DEFAULT: {None}
VALID ENTRIES: A valid URL
CREATED BY: None
READ BY: Microsoft Dynamics SL toolbar at run time
UPDATED BY: None
<CompanyID>
Sets the home page URL for users who log on to a particular company. Replace the <CompanyID> with a valid ID for the specific company.
DEFAULT: [None]
VALID ENTRIES: A valid URL
CREATED BY: None
READ BY: Microsoft Dynamics SL toolbar at run time
UPDATED BY: None

[Insert/Overtype Mode] Section

Item Explanation: Sets the initial status for how an input control will treat typed characters.

InitialState
A setting of INS will cause characters to be inserted between existing characters. A setting of OVR will cause characters to overwrite existing characters.
DEFAULT: OVR
VALID ENTRIES: OVR or INS
CREATED BY: None
READ BY: Inquiry at run time
UPDATED BY: None

DisableFeature
Disables the insertion of characters.
DEFAULT: No
VALID ENTRIES: Yes or No
CREATED BY: None
READ BY: Inquiry at run time
UPDATED BY: None
Microsoft Dynamics SL Application Settings

[Miscellaneous] Section

Item Explanation: Contains several settings that are used in the Microsoft Dynamics SL applications modules.

Note: There will be two Miscellaneous Sections in the Solomon.ini file. These options would be set or will appear in the same Miscellaneous section as the system-wide settings.

PREmpRegMess
Determines when the number of employees is near the maximum, then issues a warning that indicates the maximum is approaching. When PREmpRegMess=Y, the message will display the warning message. When PREmpRegMess=N, the warning message will not display. However, the checking will continue and calculation will stop when the maximum is exceeded and the grace period has expired.
DEFAULT: Y
VALID ENTRIES: Y, y, N, n
READ BY: Inquiry at run time by Time Entry (02.010.00), Time and Dollar Entry (02.020.00), Employee Maintenance (02.250.00), Calculation (02.500.00), Advanced Time Entry by Employee (58.010.00) and Advanced Time Entry by Project (58.020.00)

CustomerDetail
Retrieves the number of Customer Activity Detail documents to display at a time. This does not include the application records associated with the customer’s documents.
DEFAULT: 5000
VALID ENTRIES: Any numeric value > 0; example 200 would retrieve the first 200 records for display
READ BY: Inquiry at run time by Customer Activity (08.260.04) screen.

PmtDetailUse
Retrieves the flag to determine Payment Detail Use.
DEFAULT: False
VALID ENTRIES: True or False
READ BY: Inquiry at run time of the Payment Application (08.030.00) screen.

PmtDetail
Retrieves the number of Customer Payment Detail documents to display at a time.
DEFAULT: 500
VALID ENTRIES: Any numeric value > 0; example 200 would retrieve the first 200 records for display
READ BY: Inquiry at run time of the Payment Application (08.030.00) screen.

SiteIDValidation
When set to ON, performance may be improved when opening the possible values list for Site ID in various Inventory and Order Management screens. This primarily helps when there are a large number of inventory items. However when enabled, you no longer see the “Active Site for this item” column in the possible values list.
DEFAULT: Off
VALID ENTRIES: On or Off
READ BY: Various Inventory and Order Management screens.
VendorDetail
Retrieves the number of Vendor Detail documents to display at a time on the Documents tab.
SECTION: Miscellaneous
DEFAULT: 200
VALID ENTRIES: Any numeric value > 0; example 50 would retrieve the first 50 records for display
READ BY: Inquiry at run time of Vendor Maintenance (03.270.00) screen.

[Report Detail Lines] Section
Item Explanation: Contains several settings that are used in the Microsoft Dynamics SL applications modules.

bRptRuntime.Reportname
This function retrieves the number of lines to print on the check stub for the Accounts Payable check formats 03620L and 03625R.
DEFAULT: 12 for 0362010, 0362510
VALID ENTRIES: Any numeric value > 0; example 12 would print 12 lines on each check stub
READ BY: Inquiry at run time by Accounts Payable Checks (03.620.00) and Detail Remittance Advice (03.625.00); also read by Checks (02.630.00) and Direct Deposit Advice Slips (02.635.00) in the Payroll module.

[Quick Print Formats] Section
Item Explanation: Contains several settings that are used in the applications modules for printing checks. This sets the default check format.

Quick Check
Contains several settings that are used in the applications modules for printing Quick Checks. This sets the default check format.

Note: Customization of the check form may be required if this number is increased.
DEFAULT: 03620L
VALID ENTRIES: Any valid check report format/file
READ BY: Inquiry at run time of Quick Voucher and Pre-Payment Entry (03.020.00), Manual Check Entry (03.030.00) and Vendor Maintenance (03.270.00).

AR Invoice
Contains several settings that are used in the applications modules for printing Quick Print Invoices. This sets the default invoice format.
DEFAULT: 08760
VALID ENTRIES: Valid format (Crystal .rpt file) of the Invoice/Memo Forms (08.760.00) report.
READ BY: Inquiry at run time of the Invoice/Memo Forms (08.760.00) report.
Appendix A: Solomon.ini Settings

[4010000] Section

Item Explanation: Contains the settings for the Sales Order Entry (40.100.00) screen.

ExpressMode

This setting causes the application to delay calculating order totals (including figuring taxes) until the user clicks Save, Finish, or closes the screen and decides to save. In orders with many schedule lines and individual taxes on each line, delaying these calculations until the screen is complete can help improve performance significantly.

DEFAULT: F

VALID ENTRIES: T or F (True or False)

READ BY: Inquiry at run time of the Sales Order Entry (40.100.00) screen.

[DDLoc] Section

Item Explanation: This section holds information for Direct Deposit

DDSysteminiFolder

This setting is used to indicate the location of the DDsystem.ini control file. It can be used to support the scenario where multiple users of Create and Send ACH File (02.530.00) do not share the same Microsoft Dynamics SL installation. Situations such as this may occur in a Terminal Server Farm environment or environments where all users have individual Microsoft Dynamics SL installations. Because it is very important that all Create and Send ACH File (02.530.00) users point to the same DDSsystem.ini file, this setting should indicate a common, shared location.

DEFAULT: PR folder in the directory where the Microsoft Dynamics SL installation resides

VALID ENTRIES: Any local folder or a folder on a mapped drive. For example, Z:\<folder name>, where Z is a mapped drive on each user’s computer that points to the same shared area used by other users who are doing the same task and is an area where all users of this function have write permission.

READ BY: Inquiry at run time of the Create and Send ACH File (02.530.00).
Glossary of Terms

access rights
A set of permissions that define the parts of the system an authorized user may access and the user’s rights to alter any information.

active user
A user who is currently logged on to Microsoft Dynamics SL.

application
One of the Microsoft Dynamics SL accounting modules, such as Accounts Payable or Accounts Receivable.

application database
A database that contains all the accounting data for a specific financial entity (see system database).

batch
A grouping of documents. The batch fields on a screen apply to all listed documents.

child
Sometimes used to refer to the relationship between the many Microsoft Dynamics SL modules and the software as a whole (see parent).

control macro
Synonym for a Transaction Import Control file.

data import
A function that brings data from another database into Microsoft Dynamics SL; typically used to help you set up the initial databases.

data item
Each record that composes the data that is entered. For example, a data item for Batch, APDoc, and APTran are created when a voucher is entered in Voucher and Adjustment Entry (03.010.00).

database administrator
One who belongs to the SQL Server sysadmin role. The database administrator creates and maintains SQL Server databases by using programs such as Database Maintenance (98.290.00) in the System Manager module of Microsoft Dynamics SL or Microsoft SQL Server Management Studio.

document
A single record in a batch. You can display document fields on a screen in either grid or form view.

extended possible values list
A list of records that displays when you press SHIFT+F3 or double-right-click in a field. The data values associated with the record that you select populate the appropriate fields on the data entry screen (see possible values).

event log
A listing of process events, such as processing payments, deleting module details, or closing modules, that occur during a session.
form view
A section of a data entry screen that shows all the fields for one record. The form view helps when you have to see all the fields in one record. Toggle between form and grid view by pressing F4 (see grid view).

grid view
A section of a data entry screen that shows all the data items for all the records in rows and columns. The grid view is useful when you compare values in detail records. Toggle between grid and form view by pressing F4 (see form view).

group
A collection of users who share the same access rights to an application screen.

Import detail definitions
Instructions that tell Microsoft Dynamics SL’s Data Import function how to put information from individual fields into the destination table.

import filters
Instructions that tell Microsoft Dynamics SL’s Data Import function how to handle the source information in relation to the destination database as a whole.

import sets
A collection of import detail definitions and import filters used by Microsoft Dynamics SL during Data Import.

Initialize mode
A special data entry mode where you select the starting point for data entry. You typically use the Initialize mode when you first set up a module. In Initialize mode, enter the starting balances only. From that point on, the software manages the account.

key information
Data that is assigned by Microsoft Dynamics SL, such as a reference number, a vendor ID number, balances, and voucher dates (see non-key information).

logical integrity
The relationship between all database records is correct and up to date. Check logical integrity by using the Database Physical Integrity option on the Utility menu. This option is available only for scalable SQL installations (see physical integrity).

module
A Microsoft Dynamics SL application.

module group
Categorizes Microsoft Dynamics SL applications, depending on their purpose; General Ledger and Accounts Payable are members of the Financials module group.

navigation pane
The column on the left side of a Microsoft Dynamics SL window that includes panes and shortcuts to various tasks.

non-key information
Data that is entered by a user, such as name and address (see key information).

parent
Sometimes used to refer to Microsoft Dynamics SL in relation to its many modules (see child).
**physical integrity**
All database records referenced in a database index exist. Check physical integrity by using the Database Physical Integrity option on the Utility menu. This option is available only for scalable SQL installations (see *physical integrity*).

**possible values**
Values that appear when you press F3 or double-click in a field. Files that contain the lists of possible values are imported into Microsoft Dynamics SL by using the Possible Values Import function on the Utility menu (see *extended possible values list*).

**role**
Profile based on a user’s work-related responsibilities.

**selection mask**
A set of selection criteria entered on the Select and Sort tabs when you create a report. The selection mask automatically prints on a cover page.

**selection tags**
Small numbers in black boxes that appear when you select multiple fields. The numbers indicate the order in which you selected the fields.

**SQL**
Structured Query Language.

**system administrator**
One who belongs to the Microsoft Dynamics SL Administrators group; can add, change, or remove other Microsoft Dynamics SL users. The system administrator has rights to all Microsoft Dynamics SL screens and reports.

**system database**
The database that contains shared site-specific data, such as database field attributes, edit characteristics, product registrations, customizations, and screen-level security (see *application database*).

**template**
A set of options, such as the printing and sorting options of a report that is saved for later use.

**Transaction Import**
A function that lets the user move data, such as sales orders and inventory information, into Microsoft Dynamics SL databases.

**Transaction Import control file**
File that contains information on how the contents of a Transaction Import Data file are to be handled by the software.

**Transaction Import data file**
File that contains information to be brought into Microsoft Dynamics SL during a Transaction Import process.

**unlocking key**
The unique number that is assigned by Microsoft Dynamics SL to allow for regular use of a module.

**unreferenced table**
A table that exists in the source database, but is not defined in any import filter.
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