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RCMS Pro 7.3 Install Guide

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1.1 Notes About RCMS Installation

Before installing RCMS Pro 7.3 please review this section:

- Make a backup of your current install of RCMS.
- DO NOT install RCMS Professional 7.3 over your previous RCMS install.
- Any reference to a path (i.e. C:\Pro73) is an example only. The correct path or drive letter that is used on your install will probably be different.

To run RCMS Professional 7.3 you must install System Manager (See Section 1.2, "Accpac Install"). You may also install other ACCPAC modules, but **DO NOT install Accounts Receivable**. Accounts Receivable functionality is included in the Rental Control module.

If you are running the application from a local drive on a workstation or stand alone computer (not on a network) you do not have to follow the Network Setup instructions. Just install to a local drive (such as C:).

Network Install Notes

It is best to map the drive one folder level above the ACCPAC root folder for better file organization.



Example: If RCMS is to be installed to E:\Apps\Pro73 share the folder Apps as \\SERVER\APPS. Map any drive to this path. This will allow for easier upgrades in the future as you can install later versions of RCMS parallel to the current installation.

If installing RCMS at the server you must map a drive to the same path that the users will use. During installation RCMS and Accpac make hard links to drive letter and folder paths. If the drive mappings are not correct on the server RCMS will not be able to run from the workstation.



The installation could be done from a workstation to ensure the correct mapping is used. Installing from a workstation will prevent the installation from writing to the server's local drive letter instead of the actual path.

Make sure that there is more than enough server and workstation hard drive space and memory available for the installation before proceeding. ACCPAC creates large temporary files in the installation procedure. Also remember that if you are converting data you will need 1.5 to 2 times the space that the old version occupies.



Be sure to install to a mapped drive letter that is not likely to be used on a workstation. Drive F: or higher is recommended.

Network Setup

On the Server:

1. Choose the drive letter that ACCPAC Pro Series will be loaded on. C drive will be used for this example
2. Create a folder on the server called APPS, i.e. (C:\APPS)
3. Share this folder with the appropriate rights
4. Map a drive to this shared folder (This is the drive that users will access RCMS on)
5. Begin the ACCPAC install



It is very important when installing RCMS from a server that you install to the mapped drive the users will access RCMS on. For example: if the users will access RCMS on the R: drive then you must install RCMS to the R: drive even though the R: drive may be mapped to a local drive letter.

1.2 Accpac Install

Installing Accpac

1. Insert the latest RCMS CD in the CD-ROM drive
2. When the Install CD web page appears choose “Sage Pro ERP 7.3 Install - Build 3300.00”
3. If a window appears asking whether to Open or Run, choose Run.
4. When the Sage Pro ERP install begins click Next on the Welcome screen
5. Click – I Accept – to accept the Agreement
6. Choose Destination Location: Browse for the Drive and Folder you are installing to (see Network Install notes if installing to a network). click Next.
7. Sage Product Registration – Enter Company, Product Code and Add-on Code (if applicable) exactly as provided and click Next
8. Setup Type – Make sure Custom is selected and click Next
9. In the “Select Components” window select the licensed ACCPAC modules. **WARNING Do Not Install Accounts Receivable.** This is IMPORTANT, as the wrong selections will prevent RCMS Professional 7.3 from running properly. Suggestion: you can save space by not installing source code.
 - Accounts Payable - OPTIONAL
 - General Ledger - OPTIONAL
 - Purchase Order - OPTIONAL
 - Payroll - OPTIONAL
 - System Manager - REQUIRED
 - System Files - REQUIRED
 - Workstation Installer - REQUIRED
 - Pro Alert - OPTIONAL
 - Credit Card Processing - OPTIONAL
 - Message Master - OPTIONAL



You'll only see options that you have purchased. Some options require an Add-on Code to be entered in addition to the Product Code.

10. Click – Next
11. Select Program Folder – Select Program Folder or click Next to accept the default Program Group
12. The files will now be copied to the selected location.
13. Type the folder for your TEMP files (Example: C:\TEMP) and click Install. If asked to create a new folder Click – Yes.
14. Click – OK to finish the install

The Accpac install is now finished. Continue to “RCMS Install” on page 6.

1.3 RCMS Install

Before you install the program, RCMS requires certain environment variables to be set in order to run. This is done from the System Control Panel in NT, 2000, and XP. Windows 95, 98, and ME users will have to edit their autoexec.bat and config.sys files. Detailed instructions follow.

Windows 2000 and XP:

Open the Control Panel and then double-click System. Click on the Advanced tab. Click on the “Environment Variables” button. In the “User Variables” section “Temp” and “Tmp” should point to valid folders, for example: C:\Temp.

Windows 95, 98, ME:

Modify the Autoexec.bat to include:

- Set SBTWSID=????????
 - (This needs to be unique for each workstation. A users ID or computer name is suggested)
- Set TEMP=C:\Temp (Make sure this folder exists)
- Set TMP=C:\Temp (Make sure the folder exists)

Modify the Config.sys to include:

- Files=255

From the **File** menu click **Open** to see a menu of installed applications.

Installing RCMS

1. Close all other applications
2. Insert the latest RCMS CD in the CD-ROM drive
3. When the Install CD web page appears choose “RCMS Pro 7.3 Install - Build XXXXXX”
4. If a window appears asking whether to Open or Run, choose Run.
5. Click the Pick list icon in the lower right of the screen.
6. Select the folder in which you installed Sage Pro ERP 7.3 and click OK
7. Click the Install button.
8. Click OK when the install is finished
9. Click Exit – Quit to Windows

Creating a shortcut on the desktop

1. Click Start
2. Click Programs
3. Click Pro Series 7.3 Enterprise Edition
4. Right Click on Pro Series 7.3 Enterprise Edition in the Sub-menu
5. Click Send to
6. Click Desktop (create shortcut)

Adding additional workstations

To setup additional workstations on your network, run the setup.exe program in the “Workstation Installation” subfolder found under your RCMS Pro folder.

1.4 Converting Data From Previous Build

1.4 Converting Data From Previous Build

Before you can convert data:

- All users must be logged out of the previous RCMS during the conversion process.
- Apply latest patches from <http://www.rcms.net/updates/> before beginning conversion
- RC must be the first module converted. After RC the recommended order of conversion is GL > AP > PO
- If you have the AP module GL must be converted before AP

Creating a New Company

1. Launch Pro 7.3 and open the SM module
2. From the Maintain Menu select Companies > Companies
3. Enter the company number to be added
4. Click Add to create the new company
5. Choose Yes to copy the default values
6. Copy from Company 99
7. Click on Save – Company File Maintenance
8. Choose Yes to copy Rules from another Company
9. Copy from Company 99
10. Click OK for the current fiscal year
11. Click Proceed to copy fiscal years
12. Enter the current Fiscal Period
13. Choose Yes to copy the default values
14. Enter Company 99 and click OK (Year doesn't matter)
15. Tap the Enter key until the Save button becomes available and then click Save.
16. Choose No to the Edit Holidays prompt
17. Choose No to the fiscal calendar prompt
18. Choose Yes to Install Applications

Converting RCMS Data From Previous Version

- This conversion does not change any data in the previous version
- All users must be logged out of the RCMS you will be converting from or the installation will fail
- You can copy the defaults in the sample company (99) for every screen when creating the new company, as all the settings will be overwritten when the data import begins.
- The recommended order of conversion is – RC > GL > AP > PO
- These instructions continue from the Creating a New Company section. If you closed RCMS prior to this conversion you can get to this screen by opening System Manager > Click on Maintain-Companies-Companies > Enter the company number that is being converted > Click on the Appls button. Now proceed to step one below.



RC should be released to GL in your previous RCMS version before the import.

1. Enter RC in the application ID field
2. Click Add
3. Choose Yes to copy the default values
4. Enter “99” for Source and “RC” for Application, click OK
5. Click Save at the Installed Applications screen
6. Choose “Use Defaults” at the prompt to copy configuration from another company
7. Enter a valid path in the “D&B Repts” and “TRW Repts” field (C:\ will do). Click Save
8. You will be given the choice to “Copy all data from Rental Control installed for another company in this version of Pro Series?”. You MUST answer NO to this.
9. Next you will be asked to “Convert data from another version of RCMS rental control?” You MUST answer YES to this.

1.4 Converting Data From Previous Build

10. Next you will be asked to save the Conversion Output Log file. Choose a folder to save this in and click Save.
11. At the warning screen click OK
12. Next you will be asked the root path to the previous install of RCMS Pro. Browse to the path or type it in and click OK.
13. Next you will be presented with the browse of company application databases to convert. In the right column select the RC application and company number to be converted from and press enter.
14. Confirm this is correct and click on Yes.
15. You will see the conversion log output scroll down the screen.
16. The conversion is now complete. Click OK.
17. Click Yes to install another Application (GL, AP, PO) or click No to end the conversion process.

Converting GL Data



RC must be converted before proceeding with the GL conversion

1. Type GL in the Application ID field
2. Click Add
3. Click Yes to copy default values
4. Enter 99 for Source and GL for Application, click OK
5. Optional step: Click on the Path tab and change the data path from \SAMPLEDATA to \GLDATA
6. Click Save on the Installed Application screen. If prompted to create a directory click Yes.



In steps 7, 8, and 9 you will be asked to enter a chart of accounts. Since the imported data from your previous RCMS install will overwrite all info entered in these steps you may safely ignore the warning screens.

7. Enter a valid number in the segment 1 length, short description and long description. Click OK.
8. Click Save at the Account Structure screen.
9. Click Proceed.
10. Click Save at the GL System Information screen
11. You will be given the choice to “Copy all data from Rental Control installed for another company in this version of Pro Series?”. You MUST answer NO to this.
12. Next you will be asked to “Convert data from another version of RCMS General Ledger?” You MUST answer YES to this.
13. Next you will be asked to save the Conversion Output Log file. Choose a folder to save this in and click Save. If you saved with the same file name as before you will be prompted to replace the current file, select Yes to overwrite and at the next screen select Append.
14. Next you will be asked the root path to the previous install of RCMS. Browse to the path or type it in and click OK.

1.4 Converting Data From Previous Build

15. Next you will be presented with the browse of company application databases to convert. In the right column select the GL application and company number to be converted and press return.
16. Confirm this is correct and click on Yes.
17. You will see the conversion log output scroll down the screen.
18. The conversion is now complete. Click OK.
19. Click Yes to install another Application (AP, PO) or click No to end the conversion process.

Converting AP Data



RC and GL must be converted before proceeding with the AP conversion



AP should be released to GL in your previous RCMS version before the import

1. Type AP in the Application ID field
2. Click Add
3. Click Yes to copy default values
4. Enter 99 for Source and AP for Application, click OK
5. Optional step: Click on the Path tab and change the data path from \SAMPLEDATA to \APDATA
6. Click Save on the Installed Application screen. If prompted to create a directory click Yes.
7. In the Change Accounts Payable System Information screen un-check Link to General Ledger, Click Save.
8. Click Continue at the account mask info screen. Your account mask will be imported in later steps.
9. Click Save at the Default Distribution Accounts screen.
10. You will be given the choice to “Copy all data from Rental Control installed for another company in this version of Pro Series?”. You MUST answer NO to this.
11. Next you will be asked to “Convert data from another version of RCMS Accounts Payable?” You MUST answer YES to this.
12. Next you will be asked to save the Conversion Output Log file. Choose a folder to save this in and click Save. If you saved with the same file name before you will be prompted to replace the current file, select Yes to overwrite and at the next screen select Append.
13. Next you will be asked the root path to the previous install of RCMS Pro. Browse to the path or type it in and click OK.

1.4 Converting Data From Previous Build

14. Next you will be presented with the browse of company application databases to convert. In the right column select the AP application and company number to be converted and press return.
15. Confirm this is correct and click on Yes.
16. You will see the conversion log output scroll down the screen.
17. The conversion is now complete. Click OK.
18. Click Yes to install another Application (PO) or click No to end the conversion process.

Converting PO Data

Note: RC must be converted before proceeding with the PO conversion

1. Type PO in the Application ID field
2. Click Add
3. Click Yes to copy default values
4. Enter 99 for Source and PO for Application, click OK
5. Optional step: Click on the Path tab and change the data path from \SAMPLEDATA to \PODATA
6. Click Save on the Installed Application screen. If prompted to create a directory click Yes.
7. Click Save
8. You will be given the choice to “Copy all data from Rental Control installed for another company in this version of Pro Series?”. You MUST answer NO to this.
9. Next you will be asked to “Convert data from another version of RCMS Purchase Orders?” You MUST answer YES to this.
10. Next you will be asked to save the Conversion Output Log file. Choose a folder to save this in and click Save. If you saved with the same file name before you will be prompted to replace the current file, select Yes to overwrite and at the next screen select Append.
11. Click OK at the warning message for closing the period.
12. Next you will be asked the root path to the previous install of RCMS Pro. Browse to the path or type it in and click OK.
13. Next you will be presented with the browse of company application databases to convert. In the right column select the PO application and company number to be converted and press return.
14. Confirm this is correct and click on Yes.
15. You will see the conversion log output scroll down the screen.
16. The conversion is now complete. Click OK.
17. Click No to end the conversion process.

1.4 Converting Data From Previous Build

After the Conversion

1. Any companies linked to GL will have to be re-linked
2. If you received an email with an attached pro.fxp file it must be copied into the root of the install. This will allow more than one user to log in to RCMS Pro 7.3.
3. Run the Workstation Installer for any additional computers that must access RCMS. This only needs to be done once.

1.5 Installing Patches

The latest patches will be made available on the web at <http://www.rcms.net/updates/>

1. Download patch
2. Run the patch executable file
3. If this is the first time you are updating RCMS the patch will show the default RCMS install folder of "C:\Pro73\". If RCMS is installed in another location enter the path or browse to the correct location by clicking the Browse button.



Be sure to install the patches to the correct folder path. The SY patch is installed to the root RCMS folder, see details below for other patch types.



Subsequent patch sets will remember the folder path you enter here and will use that folder information so you may skip this step in the future.

SY patches are installed to the root of RCMS (Usually in \Pro73)

RC patches are now included in the SY patch

SM patches are now included in the SY patch

AP patches are installed to the AP subfolder (Usually in \Pro73\AP)

GL patches are installed to the GL subfolder (Usually in \Pro73\GL)

PO patches are installed to the PO subfolder (Usually in \Pro73\PO)



All users must be out of the system for the next step

4. When the correct path is entered click Install. If you don't receive any errors then the patch was successfully installed.

1.5 Installing Patches



If you receive an error that some files could not be created it means that someone is logged in to RCMS while you are installing the patches. Have all users log out and install all patches again. If you still receive this error then a reboot of the server may be necessary.



Some patches have additional instructions and require utilities to be run after all of the patches are installed. If the update page has a link to special instructions for a patch set continue to those instructions once all patches have been installed.

1.6 Installing Updates

When significant updates have been made to RCMS, Offshore IT Solutions will send out a CD with the latest RCMS build.



Before updating to a new build you should make a backup of your old data.

1. Place latest RCMS build CD into CD-ROM drive
2. Run Setup.exe
3. Click Next
4. Enter path of RCMS install, click Next
5. Click Finish

Accpac launches

6. Read backup alert - click proceed if you have backed up your databases
7. Select Install > Install Updates
8. Press Ctrl-A to select all applications, press Enter
9. Click Install if paths are correct (company 99)
10. Enter the drive letter of the CD drive containing RCMS and click OK
11. If prompted, click OK when re-indexing is complete
12. At the prompt for Updating from Data Dictionary press Ctrl-A to select all, press Enter
13. Click Yes to use one output file
14. Click No to suppress prompts
15. Click Update to begin Update from Data Dictionary
16. Click OK when complete
17. Click Exit > Quit to Windows to exit setup.

1.7 Getting More Help

1.7 Getting More Help

If you need more help on the installation of RCMS Professional 7.3 please visit our support website at <http://www.rcms.net/support.htm>, email us at rcms@rcms.net, or call us at 707-544-4778.

If you need help on running the software or have questions about the software please visit our website <http://www.rcms.net/> or view the Manuals on the CD and in the Docs On Disk folder under the ACCPAC installation.

Frequently Asked Questions

Will my data get overwritten?

No, your data will be imported to the new build leaving the old version intact.

Do I have to run the Workstation Installer again?

If you have just upgraded to RCMS 7.3 you will have to run the Workstation Setup for version 7.3. If you have previously run the 7.3 Workstation Setup you will not have to run it again.

Can I still run RCMS 7.1 or earlier after updating?

Yes, your data will be left in the same condition as it was before the import into Pro 7.3. If you make any changes in your old program you will have to re-import and you will lose changes made in the RCMS 7.3.

Can I run RCMS 7.3 and a previous version simultaneously?

No