

IES SOHO 191: Set Up for Implementors

Purpose

The purpose of this Document is to provide guidelines for the Implementor of IES SOHO (implementation 191 for Small Office Home Office).

Note: This Document is targeted at IES Consultants, not at Users.

Introduction

The SOHO implementation is facilitated by system support functions to make this an easy and fast implementation, while any required changes to the set up can be done afterwards, if required. It is absolutely possible to install and implement a SOHO in just a few minutes, even as little as 10 minutes, but admittedly this is a simple set up without data take ons.

Getting started

For a SOHO implementation, you set up (install) the normal set as for any IES Business implementation, e.g. install the NaviX / Navigator Client(s), and install the server D3 and datamarts.

Recommendation: The recommended platform for SOHO is on Windows, and in most cases, Windows XP would be the best choice, with the NaviX desktop client.


As soon as the necessary software is installed, please ensure the operation of the fastdrive (which will be required for the set up). [See Systems Admin, Global Controls, System Main Parameters and remember the "Q" option which provides a 'pseudo' fastdrive facility without having to map any drives!]

Starting the SOHO Set Up

Log to the Business Datamart that you have installed, and choose the System Set Up Module.

Start with the Primary Set Up option ...



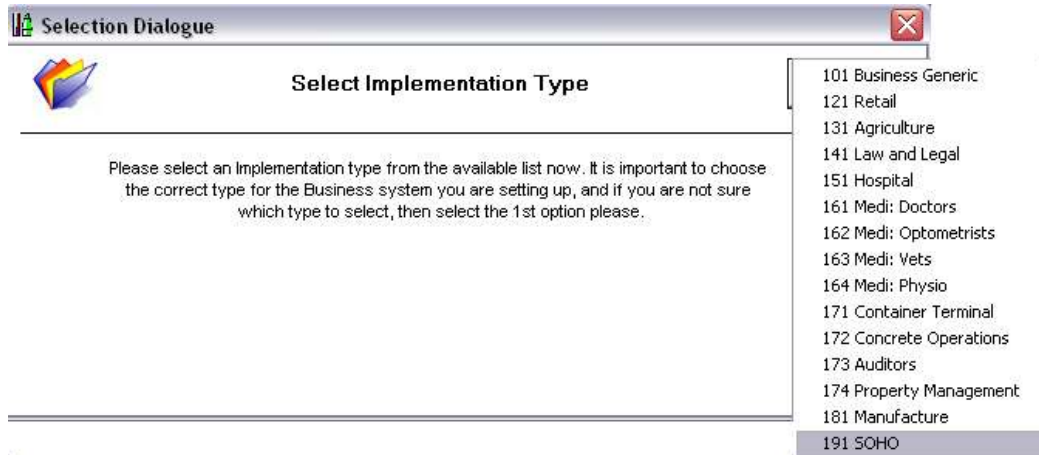
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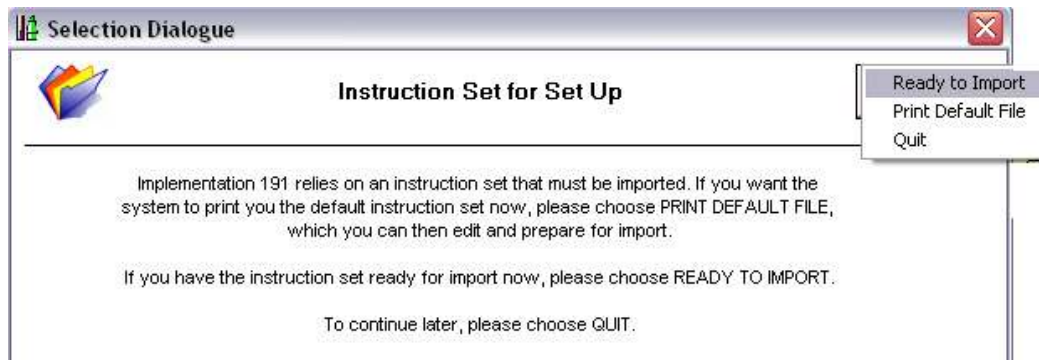


And choose 'Start new set up' ...

The system will ask to you verify that the current Datamart will be initialized, and so on, and will then present a list of potential Implementation types -



Now choose option 191, and confirm as correct when prompted. The system will launch into the Datamart initialization sequence and then prompt for the instruction set import file.



The 1st time you use this set up (or whenever you need a fresh copy of the default instruction set), you must choose 'Print Default File'. The system will then provide you with a text file that includes the default set up instruction set. Read this document and amend as necessary (it is all explained in the text document). Once the document is ready, i.e. contains your amended instruction set, you should rename it as 'instruct191.csv' and place it on the fastdrive, for that is

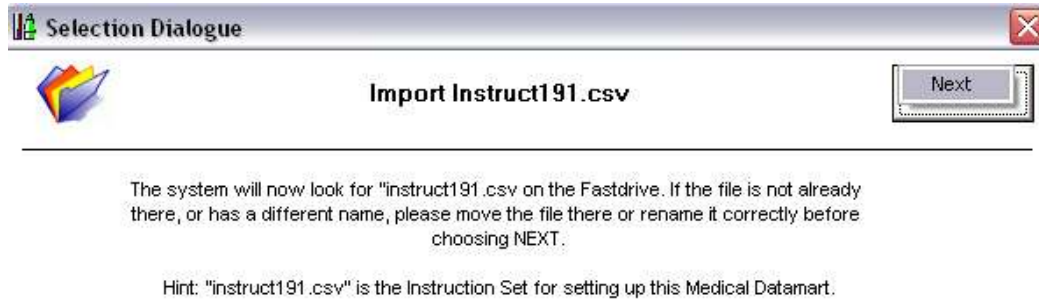
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where the system will look for it. Now start again with the 'primary' set up step and when this point is reached again, choose 'Ready to Import'.

Hint: After your 1st implementation, you should already have a custom version of this document which you can use again and again (i.e. a version that is suited to your implementations). Therefore, you will not necessarily use the 'Print Default File' step but will launch straight into the 'Ready to Import' step.

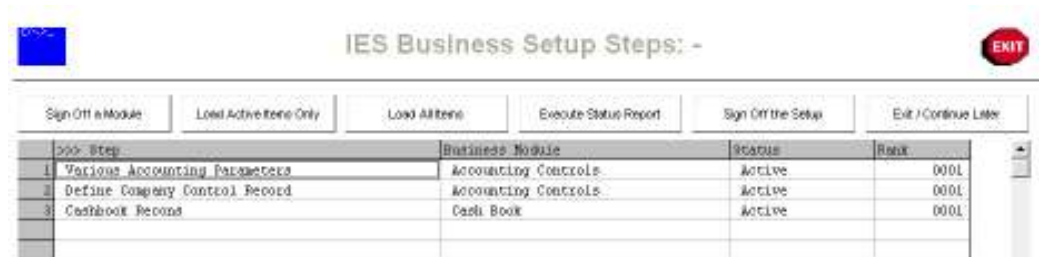
The system will then ask a few standard questions, e.g. which Month is the Year end, how to position Asset Depreciation, etc., and once you have responded satisfactorily to these questions, the system will announce that it is now going to look for the import file.



If you do not have the instruction set in place at this stage, the implementation will fail and will have to be re-started.

The system will now launch into setting up for SOHO. At the end, the system will present the remaining steps.

Below, we show the remaining steps for SOHO. These are the only steps remaining, but if you wish to adapt the system set up, or perform data take ons, then you may do so.




You may dbl-click each of these options to perform them.

This concludes the SOHO implementation. The entire system is now set up and ready for use.

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