



OdysseySuite SBE Installation Guide

CUSTOMER SERVICES

OdysseySuite SBE Installation Guide

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ACKNOWLEDGEMENT

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Getting ready to install OdysseySuite Small Business Edition

A look at where we are going and what we need to get there!

The OdysseySuite installation process is divided into steps. This guide will help you through it, and after all of the steps are completed successfully, you will be able to run OdysseySuite SBE.

This document describes the process of loading OdysseySuite SBE application components onto your computer. It then describes how to configure your SBE for your operating and data environment.

Before you start...

In order to successfully install and use OdysseySuite, certain hardware minimum recommendations must be met and you must have available information which is specific to your environment. If anything is suspect, take the necessary steps to correct it now.

Megasol Technologies does not supply technical support on “local” aspects of your installation – it is assumed that you have, either on staff or on call, a local support person with knowledge of your operating system, either Microsoft Windows 2000 or Microsoft Windows XP, and the data environment you intend to use, either Microsoft MSDE 2000 or Microsoft SQL Server 2000, and if you have licensed WebShop, Microsoft Internet Information Server. However we do provide guidance within this document as it specifically relates to the installation of OdysseySuite SBE..

Use our questions, checklist and guide and you will be on the way to a successful installation. Let’s start of by determining what kind of installation you wish to carry out.

Running OdysseySuite – SBE from a single computer

This is the simplest installation, just run the **setup.exe** file. You don’t need any consideration of your computer setup, unless you are going to run SBE with the

supplied version of MSDE 2000 or if you already have a version of Microsoft SQL Server 2000 installed on your computer.

Running OdysseySuite – SBE in a multi-user environment

If you intend to run OdysseySuite – SBE in a network with many users there are a couple of things you need to consider:

- 1 Which computer should act as the server?
 - 1.1 This is the computer on which you should do the first installation of ***setup.exe***.
 - 1.2 This is the computer on which your database engine will run, either the free MSDE 2000 version or Microsoft SQL Server 2000.
 - 1.3 You need to install OdysseySuite – SBE into a directory which will be available to everyone else as a mapped drive. Everyone will need full security access to this directory.
- 2 When installing workstations:
 - 2.1 You need to run the ***setup.exe*** on EVERY workstation.
 - 2.2 Make sure that, on the workstations, you have mapped a drive to the OdysseySuite – SBE installation directory on the computer which will act as the server.
 - 2.3 Make sure that you select this mapped drive as the destination folder during the installation.
 - 2.4 Make sure that you select the option OdysseySuite – SBE Runtime Libraries during the installation

Selecting the database engine

OdysseySuite – Small Business Edition will run on both Microsoft SQL Server 2000 and the free version of MSDE 2000. Which one should you select for your business?

You should run Microsoft SQL Server 2000 if:

- More than 5 users will run OdysseySuite – SBE.
- You intend to run, in-house, any of our web add-ons for OdysseySuite – SBE.
- If you already have a license for Microsoft SQL Server 2000.

- If you intend to store many files in the OdysseySuite – SBE document repository. MSDE 2000 version has a 2 GB database limit.

You should run MSDE 2000 if:

- Less than 5 users will run OdysseySuite – SBE.
- Performance is not your main issue – performance might be slower with the free MSDE 2000 version.
- You think that the licence fee for Microsoft SQL Server 2000 is too expensive - MSDE 2000 is free.
- You are not concerned that there is a maximum database limit of 2 GB in the MSDE 2000 version - this should not be any problem if you don't intend to store many documents in the built-in document repository.

If you have made your decision, you are ready to start installing OdysseySuite - SBE.

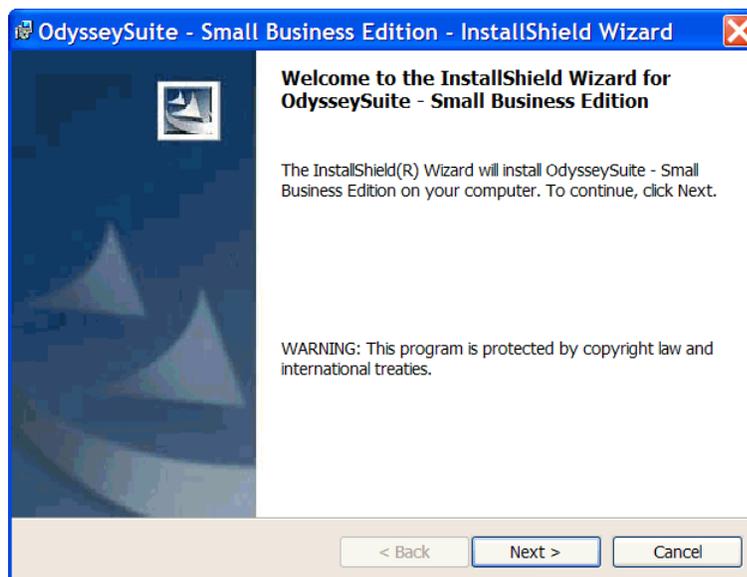
Installing OdysseySuite Small Business Edition

Defining the starting point and sequence of installation!

OK, now you know how you should install OdysseySuite – SBE in theory - let's do it then.

The first thing to do is to run the **setup.exe** file. This will be found in the location in which you stored it when you downloaded it, or on the product CD if you purchased a media-based copy.

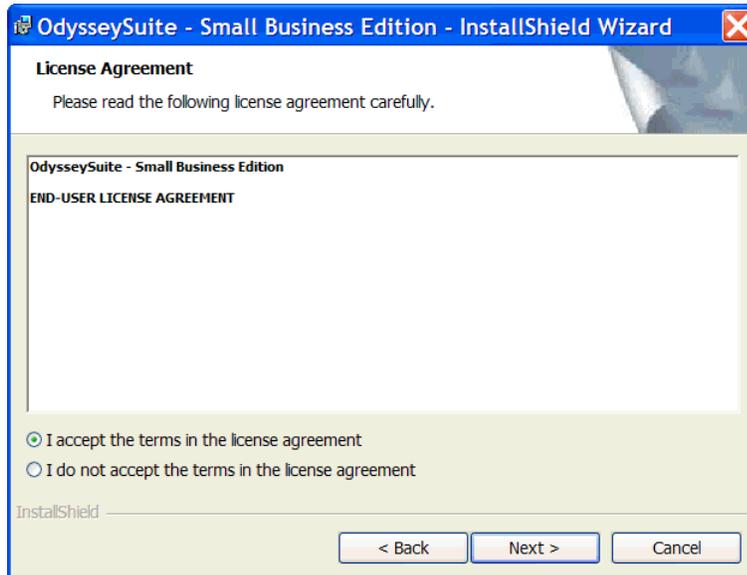
After a few seconds, the InstalShield® Wizard will appear.



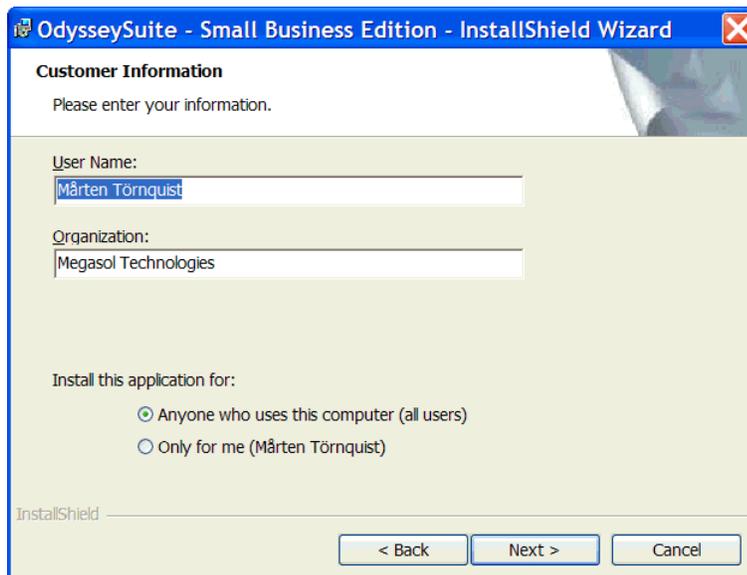
Click on **Next** to continue. The EULA (End User Licence Agreement) will appear. You must read and agree to the EULA which is a contract between you and Megasol.

If after reading the EULA you do not agree to its terms and conditions, simply click on the radio button labelled *I do not accept the terms in the license agreement* and then click on either the **Next** or **Cancel** buttons. Installation will be abandoned. We hope that you will then contact us to discuss the reason you have cancelled. Was it something we said?

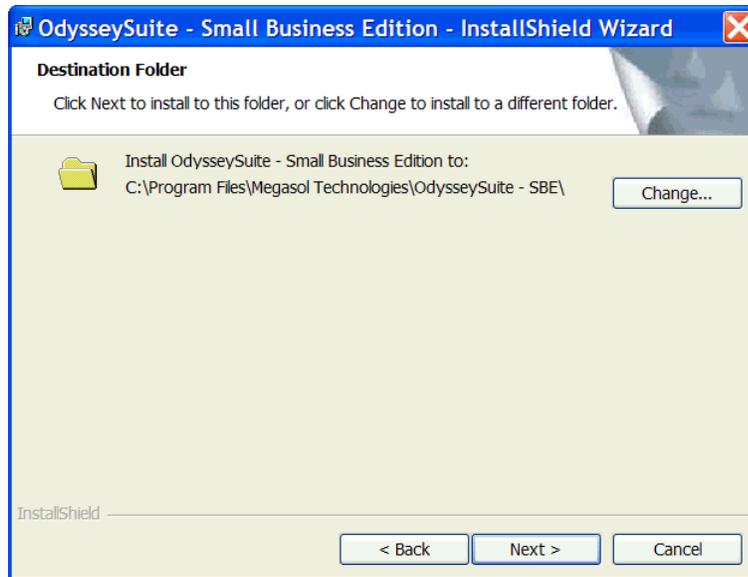
If after reading the EULA you do agree to its terms and conditions, simply click on the radio button labelled *I accept the terms in the license agreement* and then click on the **Next** button. Installation will then continue and you will have legally accepted the terms and the conditions of the EULA



The Customer Information screen will appear next. Enter your customer information and click on the **Next** button.



The next step requires you to make a decision. Where do you want to install OdysseySuite – Small Business Edition?



If you are going to run OdysseySuite – Small Business Edition as a single user on your own computer, then you should choose the default directory unless you have very good reason to change it.

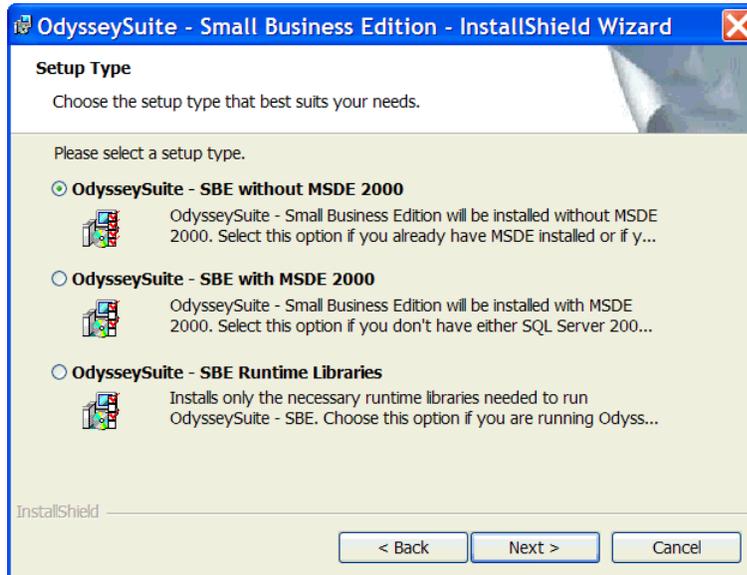
If you are going to run OdysseySuite – Small Business Edition on a network, then you need to select a directory which is available to everybody who will run it. This directory should be a mapped drive, anywhere on the network, to which all users need full security access.

Obviously, the network installation requires a working knowledge of network management. If you do not have this level of knowledge, then it is important that the installation be carried out by someone who does have that understanding. The following must be considered:

- The installation directory must be shared;
- All users must be given full right of access to the directory;
- Mappings must be made from workstations to the shared directory.

If you are uncomfortable with what has just been described, let someone with the appropriate knowledge carry out the remainder of the installation. Otherwise, click on the Change button and navigate to the installation directory in the pop-up box which appears. Once the directory is selected, click on the **Next** button.

The next step is to choose the type of installation you wish. There are three options.



OdysseySuite – SBE without MSDE 2000

Select this option if you already have Microsoft SQL Server 2000 or MSDE 2000 installed on your network. This option will install everything needed to run OdysseySuite – SBE except the database engine. This option should only be selected the first time in a network installation or if you are running a single computer installation.

OdysseySuite – SBE with MSDE 2000

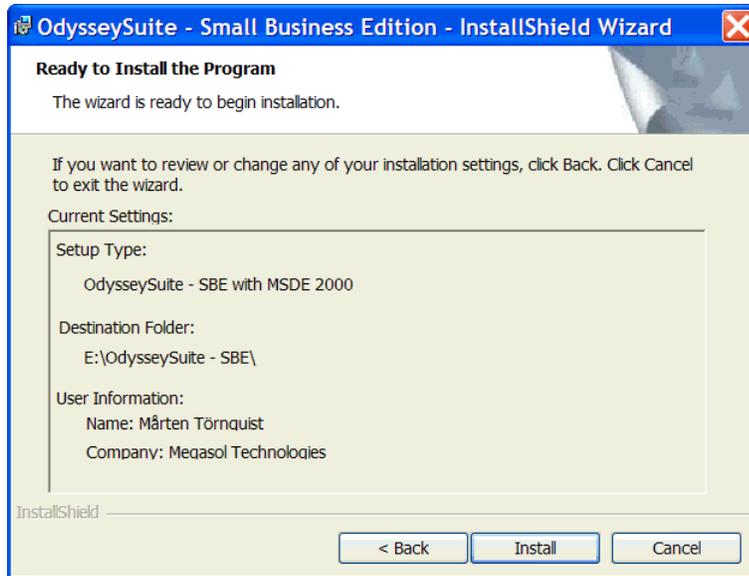
Select this option if you intend to run OdysseySuite – SBE with MSDE 2000, the free SQL Server 2000 engine from Microsoft. This option will install everything needed to run OdysseySuite – SBE, including the database engine. This option should only be selected the first time in a network installation or if you are running a single computer installation.

OdysseySuite – SBE Runtime Libraries

This option should be selected if you are running in a network environment, and you have already run one of the options above on the actual server or main computer for the OdysseySuite – SBE installation. This option will only install the required run-time files and create the desktop shortcuts.

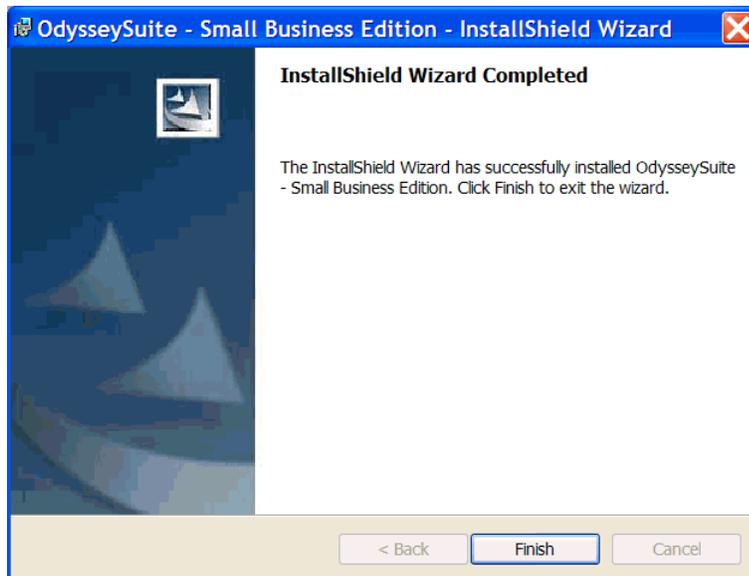
REMEMBER: If you select this option, you must have selected the mapped Destination Folder on your server or main computer in the previous screen.

After clicking on the appropriate radio button to make your selection, click on the **Next** button. The wizard has now collected all of the information necessary to install OdysseySuite – Small Business Edition.

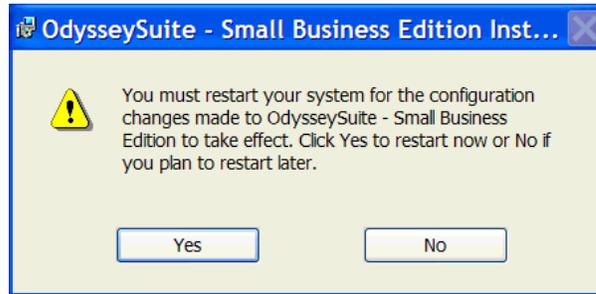


Confirm that everything is correct in the **Current settings** display panel. If anything is not correct, use the **Back** button to go back and change it.

If you are happy with the installation parameters, click on the **Install** button. Then sit back and relax – the installation may take up to a couple of minutes depending on the speed of the computer and the parameters selected. When the installation is complete, the following screen will appear.



Click on the ***Finish*** button to exit the installation program. If the following pop-up appears, restart your computer by clicking on the ***Yes*** button so that the next step of the OdysseySuite – SBE installation can continue – running the application for the first time.



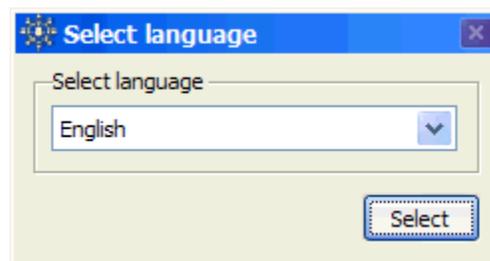
Running OdysseySuite SBE for the first time

Starting and registering the application!

When you run OdysseySuite – SBE for the first time, there are a couple of steps that you need to go through to configure and setup OdysseySuite – SBE.

First, you need to start OdysseySuite – SBE. During the installation, a shortcut was created in your Start menu and on your Desktop - click on one of them to run OdysseySuite – SBE.

Login language selection



The first thing you have to select is the default language for your installation. This is the language that will be selected as default every time you login. However, each and every user can select any of the languages you have licensed each time he or she logs in.

Choose the language from the drop-down selector and then click on the Select button. OdysseySuite – Small Business Edition will then load the product registration wizard.

Registration of OdysseySuite – Small Business Edition

Register OdysseySuite - Small Business Edition

Thank you for selecting OdysseySuite - Small Business Edition for your company. This registration process will activate your copy.

Select which version you want to run:

OdysseySuite - Small Business Edition 30 Day Trial Version
 OdysseySuite - Small Business Edition Standard Version
 OdysseySuite - Small Business Edition Pro Version
 OdysseySuite - Small Business Edition Multi-Currency Version

If you already have a license # for OdysseySuite - Small Business Edition, enter it here:

How many user licenses do you want for OdysseySuite - Small Business Edition?

1

Cancel < Prior Next > Register

If you have downloaded this version from the internet, then only the demo version option will be available to you. The demo version is a fully functionally copy of OdysseySuite – SBE, with the limitation that in certain places you are only allowed to add 50 records. As soon as you have bought your Standard, Pro or Multi-Currency version, a new license file will be sent to you and you can enjoy the full power of OdysseySuite – SBE. Remember that no data will be lost when upgrading to any version – the only visible or operational difference is that more features will be available to you.

The demo version **ONLY** allows one user at the time to use OdysseySuite – SBE. You must buy a retail version of OdysseySuite – SBE with the appropriate user pack to be able to run OdysseySuite – SBE in a multi-user environment.

Complete the form and then click on the **Next** button so that you can complete the Licence form.

Register OdysseySuite - Small Business Edition

Thank you for selecting OdysseySuite - Small Business Edition for your company. This registration process will activate your copy.

This license of OdysseySuite - Small Business Edition shall be licensed to:

Company: Megasol Technologies

Name: Mårten Törnquist

Address: Östra Ågatan 31

City: Uppsala

Zip code: 753 22 **State:** Uppland

Country: Sweden

Phone: +46-18-604930

Fax: +46-18-604931

E-mail: info@megasol.se

Cancel < Prior Next > Register

Enter your registration details. Any fields which have **bold** labels must be completed. Once finished, click on **Next**.

Register OdysseySuite - Small Business Edition

Thank you for selecting OdysseySuite - Small Business Edition for your company. This registration process will activate your copy.

Enter connection settings for your SQL/MSDE Server:

Server: (local)\OdysseySuite

User: sa

Password: **

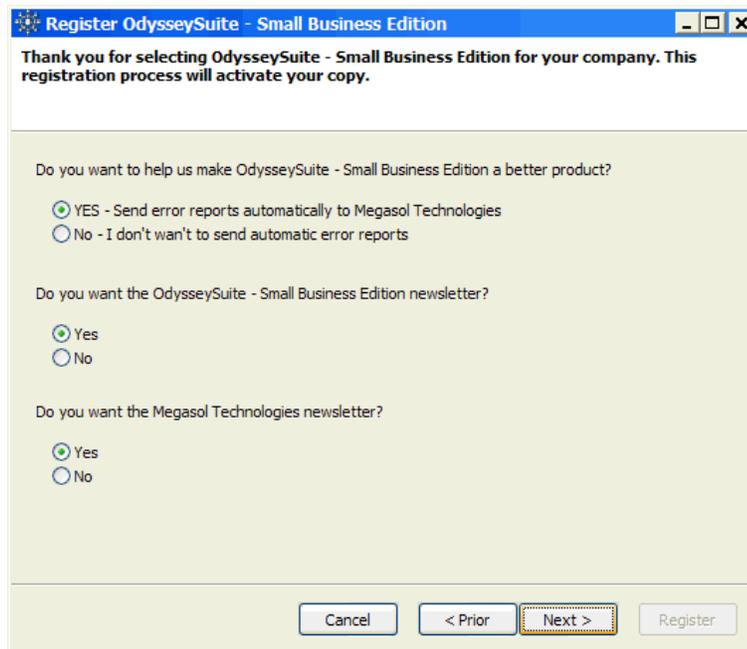
Test connection

Cancel < Prior Next > Register

Now its time to enter the details which will create a connection between OdysseySuite – SBE and your MSDE 2000 or Microsoft SQL Server 2000 database. This is a very important step. Make sure that you test your connection before you continue to make sure that everything is OK.

The default settings shown are the settings that you should use if you are running as a single user on a local computer and if you have installed OdysseySuite – SBE with the MSDE 2000 option. Any other kind of configuration will require you to change these parameters. The User and Password for the MSDE 2000 installation is **sa** and **sa**.

When sure that you have a working connection to your database, click on **Next**.



We are nearly finished - just a couple more questions...

OdysseySuite SBE has undergone thousands of hours of design, development and testing. We think it's a wonderful product with leading edge power at a very affordable price. But we are not infallible. And so, the first question:

Do you want to help us make OdysseySuite – Small Business Edition a better product?

If you select **YES**, then, whenever a error message occurs or appears, then it will be sent automatically to Megasol Technologies. NO information other than the actual error message and where it happened within the program is sent us. You can turn off this setting at any time by editing the *odysseysbe.ini* file.

Next, we would like to keep you informed about your investment with us. And so, the next question is:

Do you want the OdysseySuite – Small Business Edition newsletter?

If you select **YES**, then, whenever we have something new and exciting to tell you about OdysseySuite – SBE we will send you the information automatically. You can unsubscribe to the newsletter whenever you want.

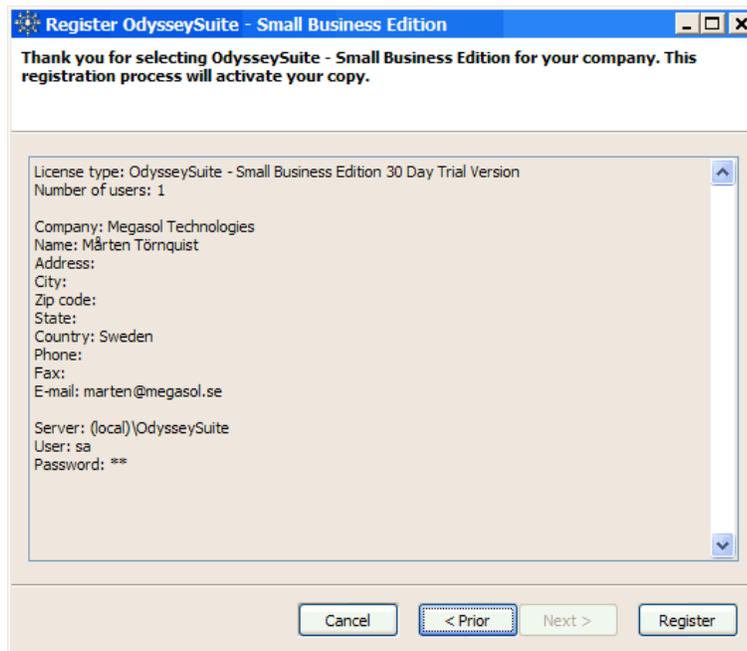
And finally, we would like to keep you informed about us – the people and company, events and products. Unless we have something important to say, we will not bother you. So:

Do you want the Megasol Technologies newsletter?

If you select **YES**, then, whenever we have something new and exciting to tell you about Megasol Technologies we will send you the information automatically. You can unsubscribe to the newsletter whenever you want.

Thank you for responding, whether you clicked Yes or No – we do appreciate the minute or so that it took you to make your decision.

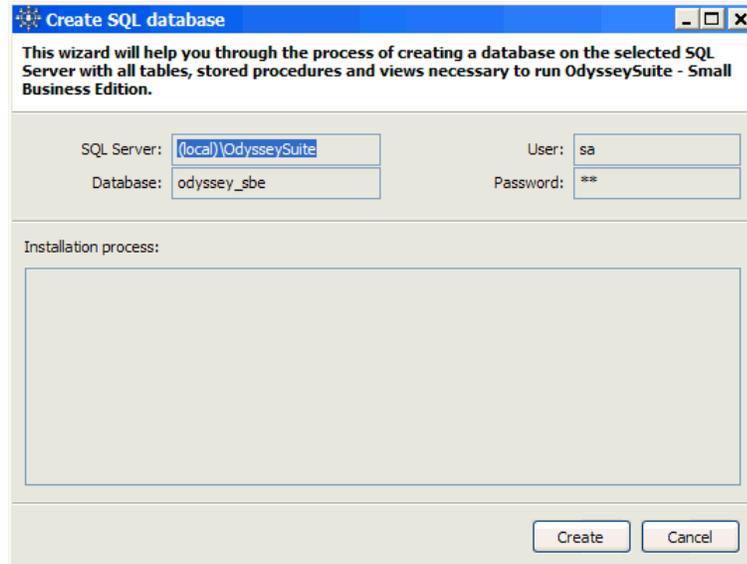
Click on **Next >** to continue.



The final step in the registration process - the confirmation of your registration details. If you are happy with everything click on **Register**.

IMPORTANT: You must be connected to the internet when clicking on Register, since the registration process will send your registration information to Megasol Technologies and a license file will be sent back to you. If you are not connected, then the registration process will fail and you will have to repeat the start-up process.

Creating the OdysseySuite – Small Business Edition database



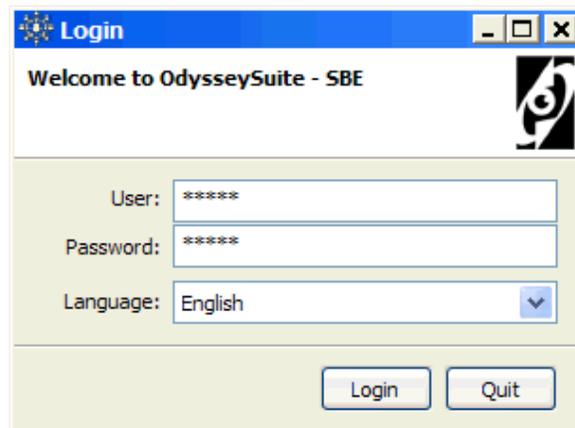
After the registration is complete, this screen will appear. It allows you to create the SBE database on the selected MSDE 2000 or Microsoft SQL Server 2000.

You must not change any of the options that you specified during the registration process, so the only thing to do is to click on **Create**.

Creation of the database takes about a minute. When it is complete, the Cancel button will change to Quit.

Click on **Quit** to continue.

Logging in for the first time



After the database is created successfully, the login screen will appear. One user is created by default:

User: **admin**

Password: **admin**

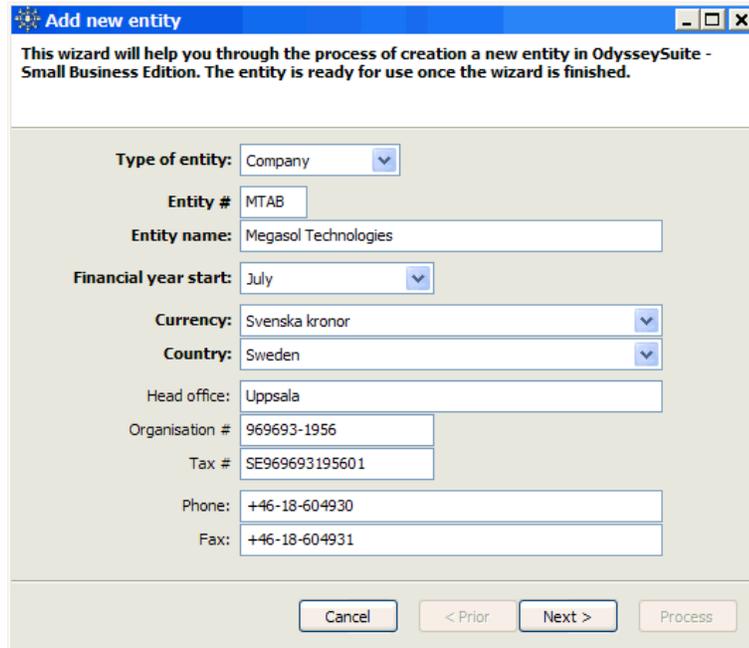
The username and password are case sensitive. You will be asked to change the password shortly after login.

Click on **Login** to continue.

An “entity” is a company managed by OdysseySuite SBE. Now that you have completed your first successful login, you will be asked to create an entity.

Creating your first entity

OdysseySuite – SBE is a multi-entity system, which means you can run as many businesses as your license grants you, but to be able to use the system, you need to create at least one. This wizard will help you through the process.

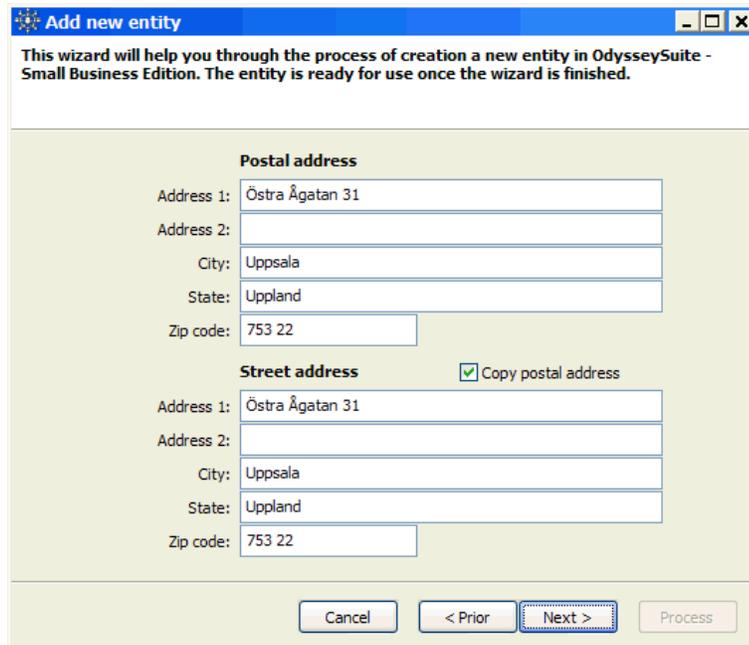


The screenshot shows a window titled "Add new entity" with a blue header bar. Below the header, a message states: "This wizard will help you through the process of creation a new entity in OdysseySuite - Small Business Edition. The entity is ready for use once the wizard is finished." The main area contains several input fields:

- Type of entity:** Company (dropdown menu)
- Entity #:** MTAB (text box)
- Entity name:** Megasol Technologies (text box)
- Financial year start:** July (dropdown menu)
- Currency:** Svenska kronor (dropdown menu)
- Country:** Sweden (dropdown menu)
- Head office:** Uppsala (text box)
- Organisation #:** 969693-1956 (text box)
- Tax #:** SE969693195601 (text box)
- Phone:** +46-18-604930 (text box)
- Fax:** +46-18-604931 (text box)

At the bottom, there are four buttons: "Cancel", "< Prior", "Next >", and "Process".

Fields that are in **bold** are required. Enter all of the details and click on **Next**.



The screenshot shows the same "Add new entity" window, but now with address information. The "Postal address" section is highlighted in bold:

- Address 1:** Östra Ågatan 31 (text box)
- Address 2:** (text box)
- City:** Uppsala (text box)
- State:** Uppland (text box)
- Zip code:** 753 22 (text box)

Below this, the "Street address" section is also highlighted in bold, and a checkbox labeled "Copy postal address" is checked:

- Address 1:** Östra Ågatan 31 (text box)
- Address 2:** (text box)
- City:** Uppsala (text box)
- State:** Uppland (text box)
- Zip code:** 753 22 (text box)

At the bottom, the "Next >" button is highlighted with a dashed border, indicating it is the active step.

Neither the postal address nor the street address is required, but they will be printed on invoices and order confirmations and so on, so the recommendation is that you enter both of them. When finished, click on **Next**.

The screenshot shows a window titled "Add new entity" with a blue header bar. Below the header, a message reads: "This wizard will help you through the process of creation a new entity in OdysseySuite - Small Business Edition. The entity is ready for use once the wizard is finished." The main content area is divided into two sections: "Automatic counters" and "Default settings".

Automatic counters

Next company #	100
Next people #	100
Next invoice #	100
Next order #	100
Next item #	100
Next purchase order #	100
Next asset #	100

Default settings

Payment terms: Net 10 days

Tax:

At the bottom of the window, there are four buttons: "Cancel", "< Prior", "Next >" (highlighted with a dashed border), and "Process".

Only the Swedish tax options are supplied at this time. Select the tax option and click on **Next >** to continue.

The screenshot shows the same "Add new entity" window, but now the "Accounting" section is visible. The "Chart of accounts" dropdown menu is set to "Swedish EU-BAS 2004". The "Financial year start" is set to "2003-07-01" and the "Financial year ends" is set to "2004-06-30".

Accounting

Chart of accounts: Swedish EU-BAS 2004

Financial year start: 2003-07-01

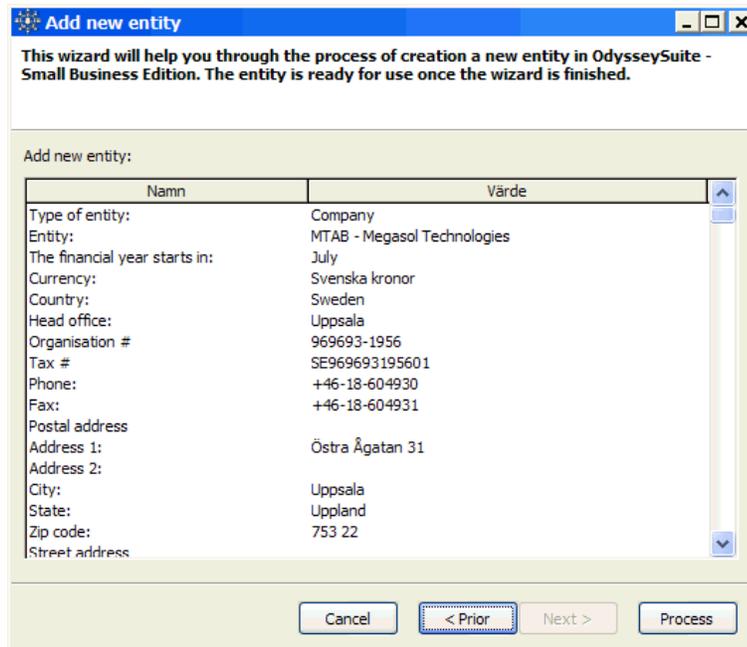
Financial year ends: 2004-06-30

At the bottom of the window, there are four buttons: "Cancel", "< Prior", "Next >" (highlighted with a dashed border), and "Process".

OdysseySuite – SBE is supplied with a set of default charts of accounts. Select the one that applies to your company or select **New chart of account** if you want to create a new empty chart of account which you can later modify in any way you like.

Next, enter the first financial year that you want the system to run.

Click on **Next >** to continue.



This wizard will help you through the process of creation a new entity in OdysseySuite - Small Business Edition. The entity is ready for use once the wizard is finished.

Add new entity:

Namn	Värde
Type of entity:	Company
Entity:	MTAB - Megasol Technologies
The financial year starts in:	July
Currency:	Svenska kronor
Country:	Sweden
Head office:	Uppsala
Organisation #	969693-1956
Tax #	SE969693195601
Phone:	+46-18-604930
Fax:	+46-18-604931
Postal address	
Address 1:	Östra Ågatan 31
Address 2:	
City:	Uppsala
State:	Uppland
Zip code:	753 22
Street address	

Buttons: Cancel, < Prior, Next >, Process

Review the information for your entity, and then click on **Process** to create the entity if you are happy with everything.

You are now ready to run OdysseySuite – Small Business Edition

The installation process is done. Once again, thank you for using OdysseySuite – Small Business Edition. Enjoy...