Professional PTO

Installation Manual

GREENSHADES

Let Us Handle That

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Install Required Programs

Please use this manual to install Professional PTO. After completing the steps in this installation manual, please refer to the Professional PTO User Guide available on our website.

Required Programs

Microsoft .NET Framework v 2.0
Internet Explorer v 10

These programs can be downloaded from the Professional PTO portion of our website, http://www.greenshades.com/support/propto.aspx. If you do not have these installed please install them now. If you are unsure if you have these installed, please contact your IS / IT department for help.

Before installing

You should be logged out of Dynamics GP before starting the installation process. If you are installing Professional PTO in a Citrix or Terminal Server environment, please make sure everyone is logged out of Dynamics GP before completing the installation.

You will need to know your SA (System Administrator) password for Dynamics GP in order to complete this installation. If you are unsure of this information, please contact your IS / IT department.

Installing Professional PTO

For client/server accounting packages, Professional PTO is designed to be installed on the client workstation, not server. If you are in a Citrix or Terminal Server environment, you will need to install Professional PTO directly on the server.

The process for installing Professional PTO is outlined below. If you have any questions while you proceed through the installation please contact Greenshades Support via email at support@greenshades.com or by calling 888-255-3815 extension 700.

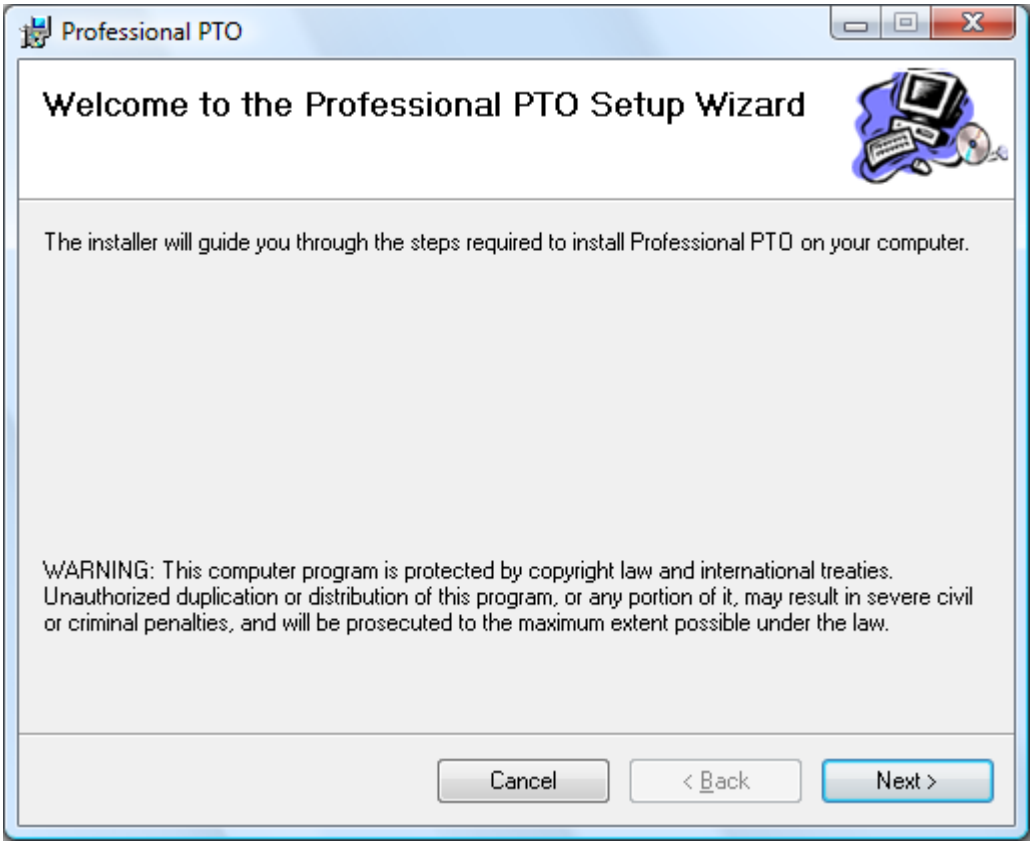
Step 1 – Download the Professional PTO installation file

The most recent Professional PTO installation file is available on our website, http://www.greenshades.com/support/propto.aspx. You will need to click on the 'Download Professional PTO' link to start the download process. When you select the download link you will need to Open, Run, or Save the installation file.

If you select Open or Run the installation file will automatically launch. If you save the installation file you will need to double-click on the installation file to launch the installation wizard.

Step 2 – Welcome to the Setup Wizard

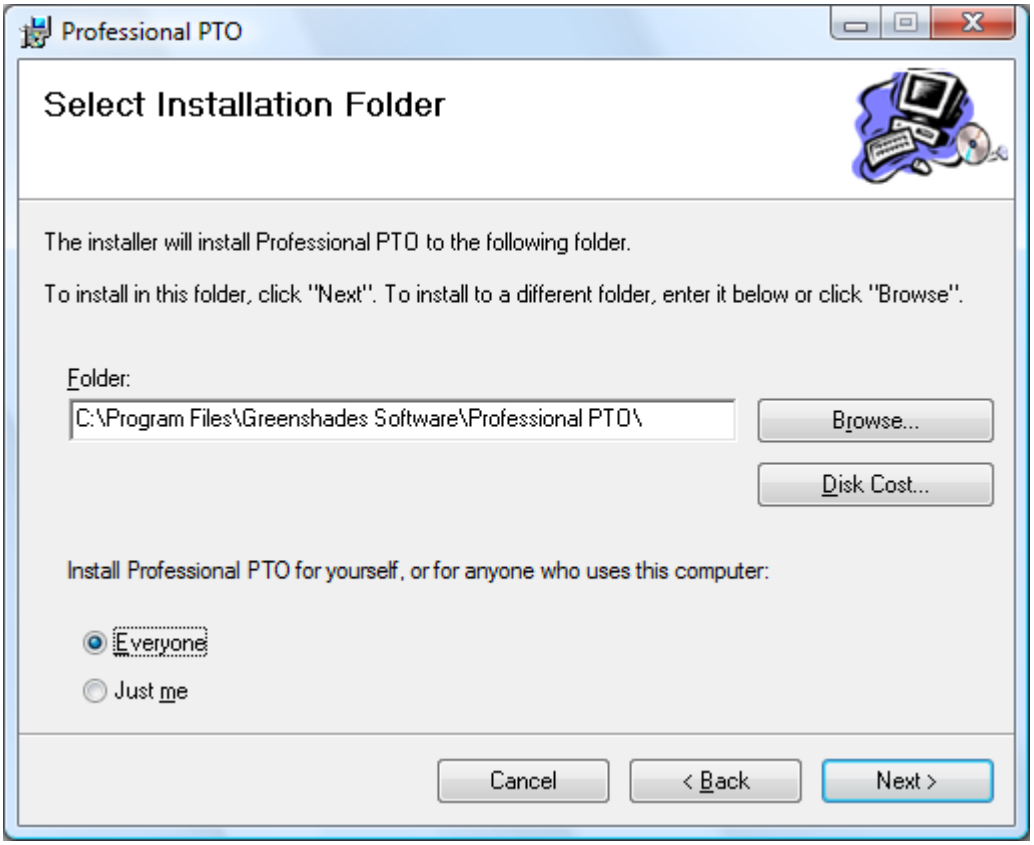
The first screen in the setup wizard is a welcome screen.



To continue through the setup wizard, click Next.

Step 3 – Select the Install Folder

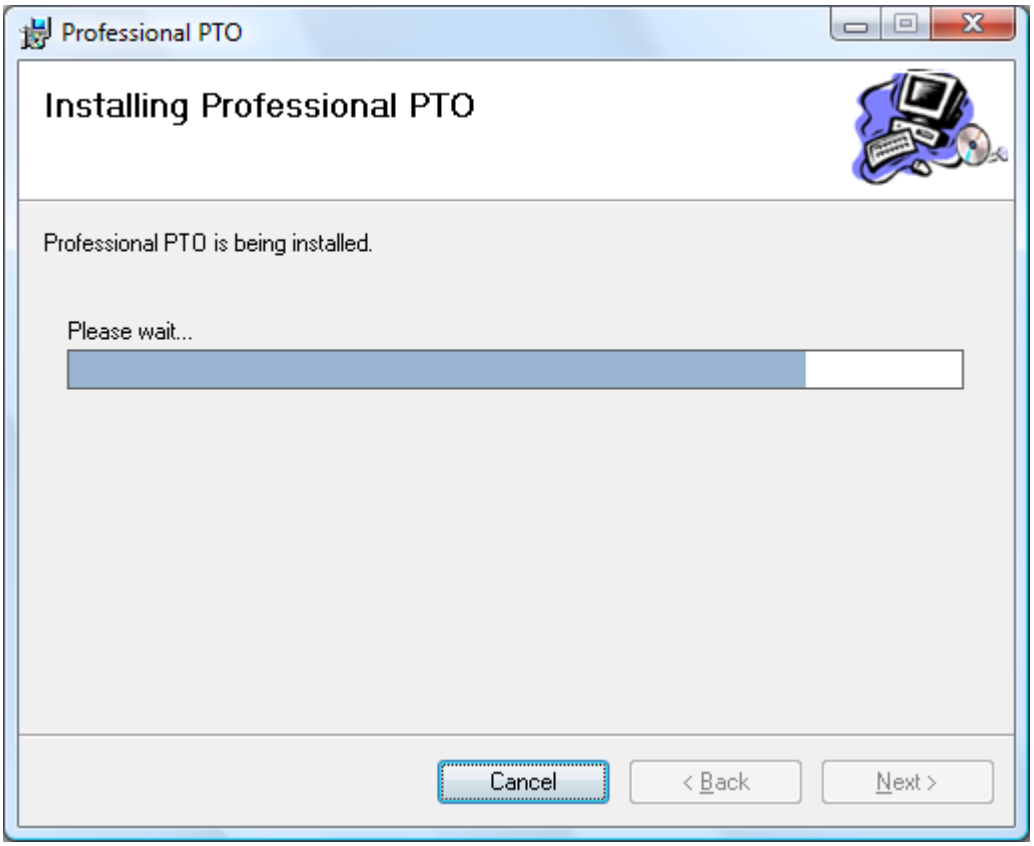
The default location for Professional PTO is C:\Program Files\Greenshades Software\Professional PTO. Although we recommend using the default installation location you can change this location by clicking the Browse option.



To continue through the setup wizard, click Next.

Step 4 – Start the installation process

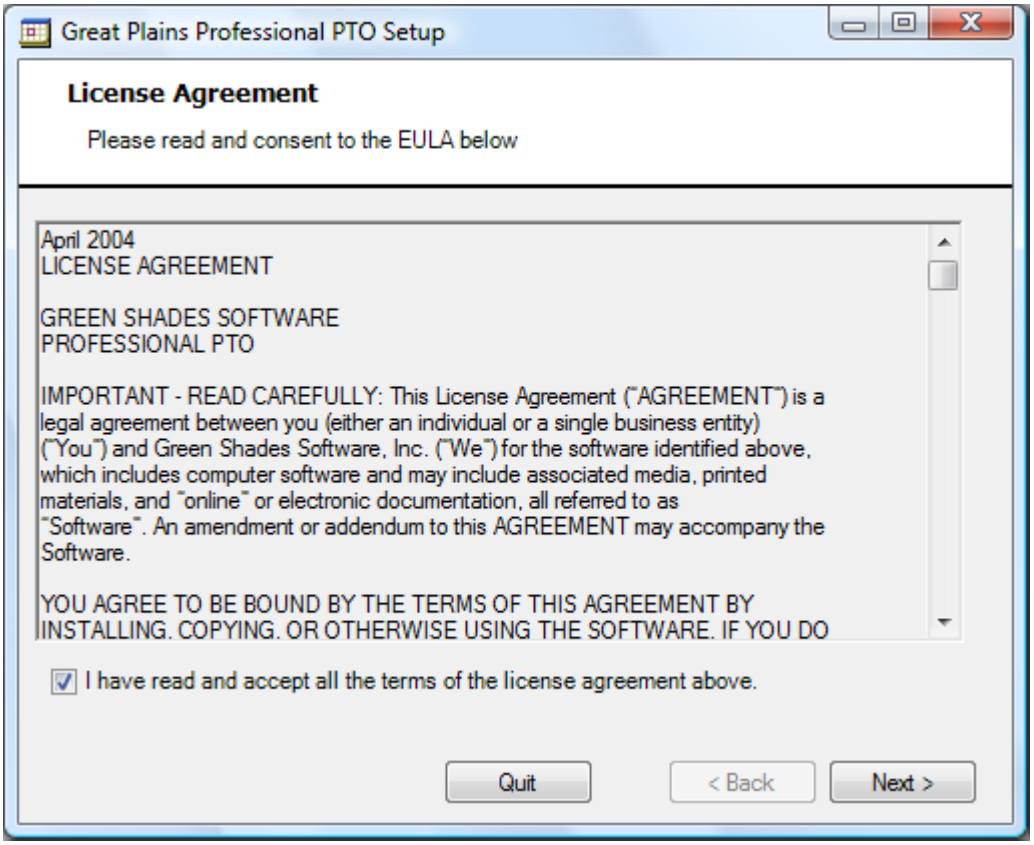
During this step the necessary files for Professional PTO are being installed. This step may take a couple of minutes.



To start the installation and continue through the setup wizard, click Next.

Step 5 – License Agreement

You should carefully read the Professional PTO license agreement before completing the installation. Once you have reviewed the license agreement, you need to click on 'I agree' before being able to continue with the setup wizard.



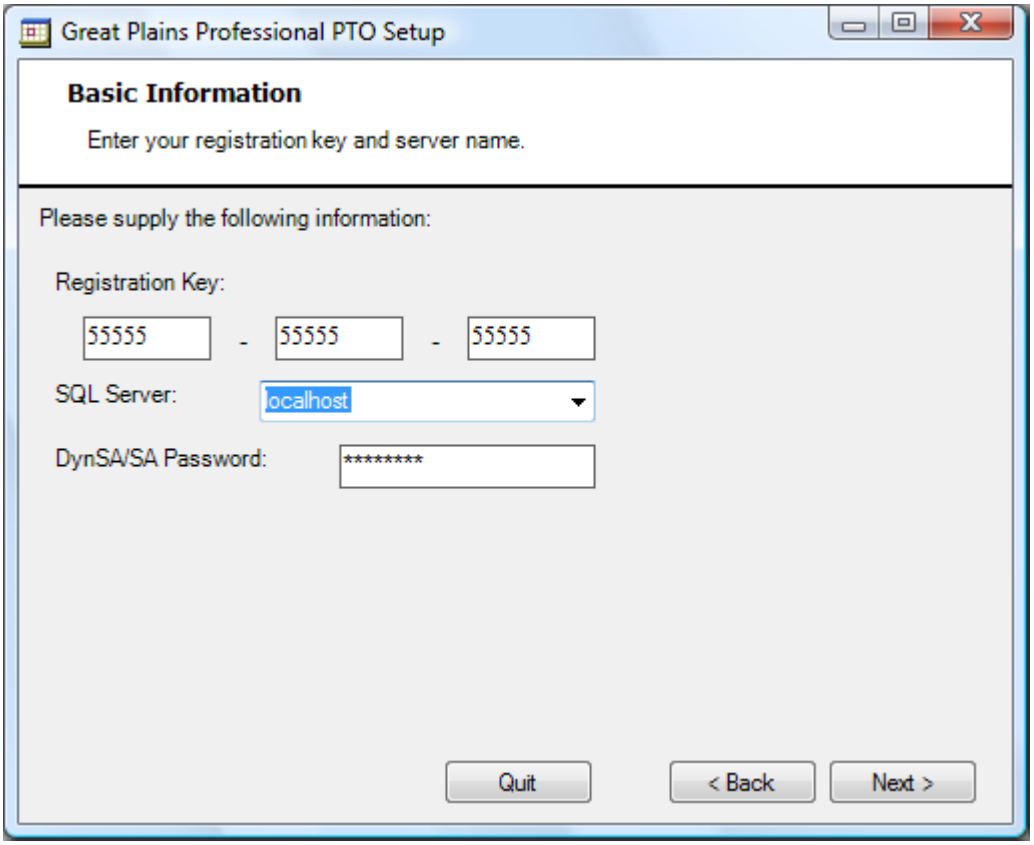
To continue through the setup wizard, click Next.

Step 6 – Enter in Basic Information

You will need to enter in your registration key that was provided to you by our sales department after completing the transaction for Professional PTO. If you do not know your registration key, it is available on your personalized MyGreenshades web portal at http://www.greenshades.com/mygreenshades. You can also contact Greenshades Support for this information.

Professional PTO also installs tables to your SQL database. To install the SQL tables you must either select or type in the appropriate server name and SA password.

The server name is your SQL server machine name. If you are unsure of your SQL server machine name you can check it by going to Start > Control Panel > Administrative Tools > Data Source (ODBC) > User DSN tab.

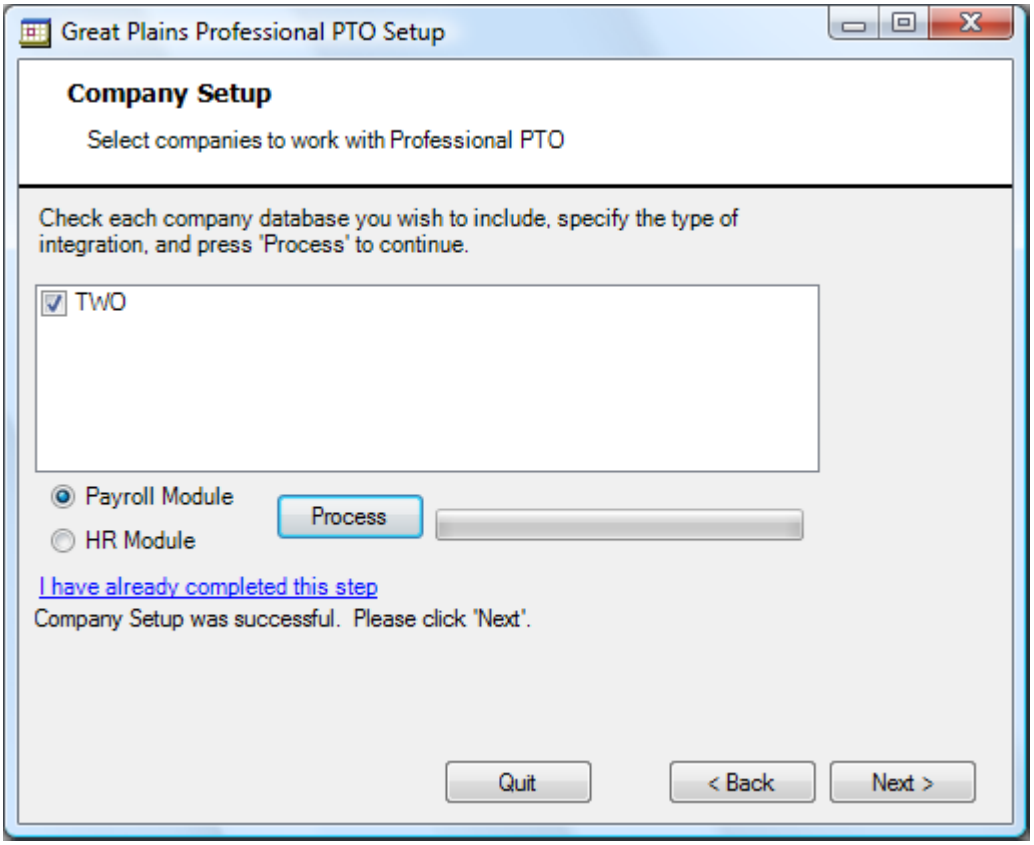


Please enter your SA (System Administration) password for Dynamics GP. If you are unsure of the correct password please check with your IT/IS department or payroll controller. Greenshades Support does not have your SA password.

To continue through the setup wizard, click Next.

Step 7 – Company Setup Information

You will now see a list the Great Plains Company Databases that the installer found on your SQL Server. Simply choose the company databases that you wish to work with Professional PTO and whether you are installing our Payroll or HR integration then click 'Process'. If you are only using the HR module, select only that option and click 'Process.' Professional PTO will then install its tables, stored procedures, triggers, and default data to those catalogs.



Once this process has completed, you will receive on screen confirmation that the application has completed successfully.

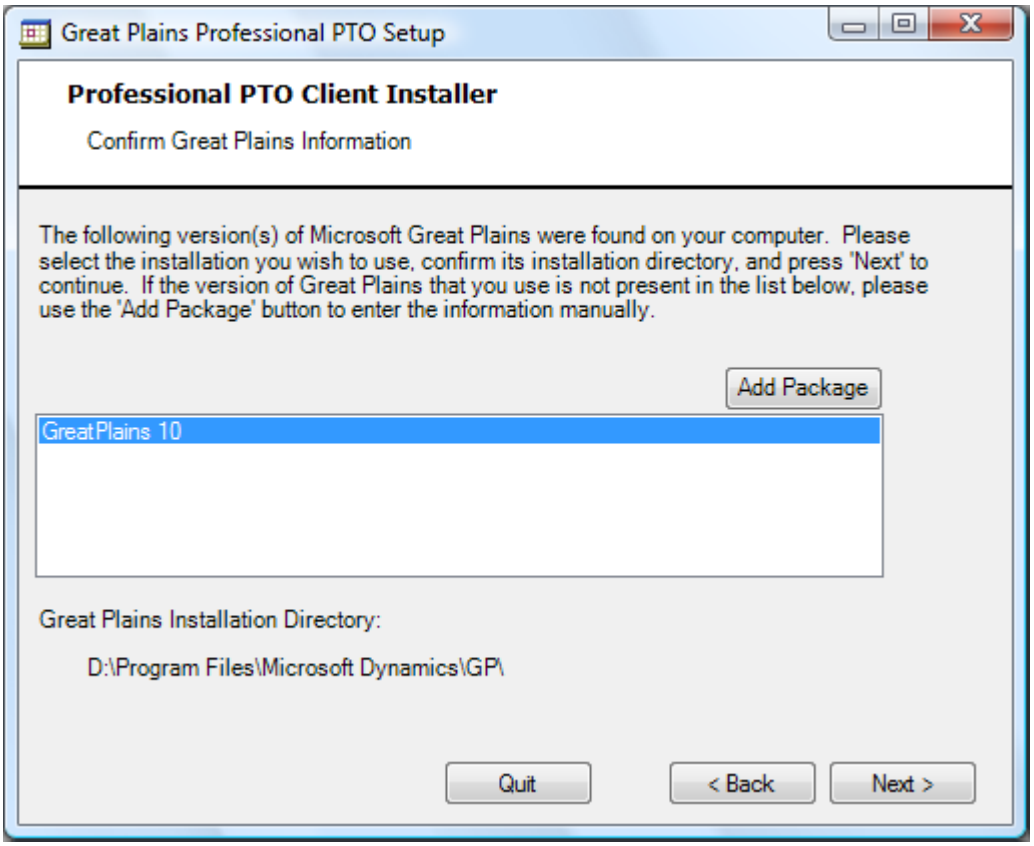
Note

If you have already performed the SQL portion of the installation process, you may click on the "I have already completed this step," link.

To continue through the setup wizard, click Next.

Step 8 – Selecting Accounting Package

Usually Greenshades will automatically detect your accounting package. If you see the correct accounting package listed, select the appropriate package.

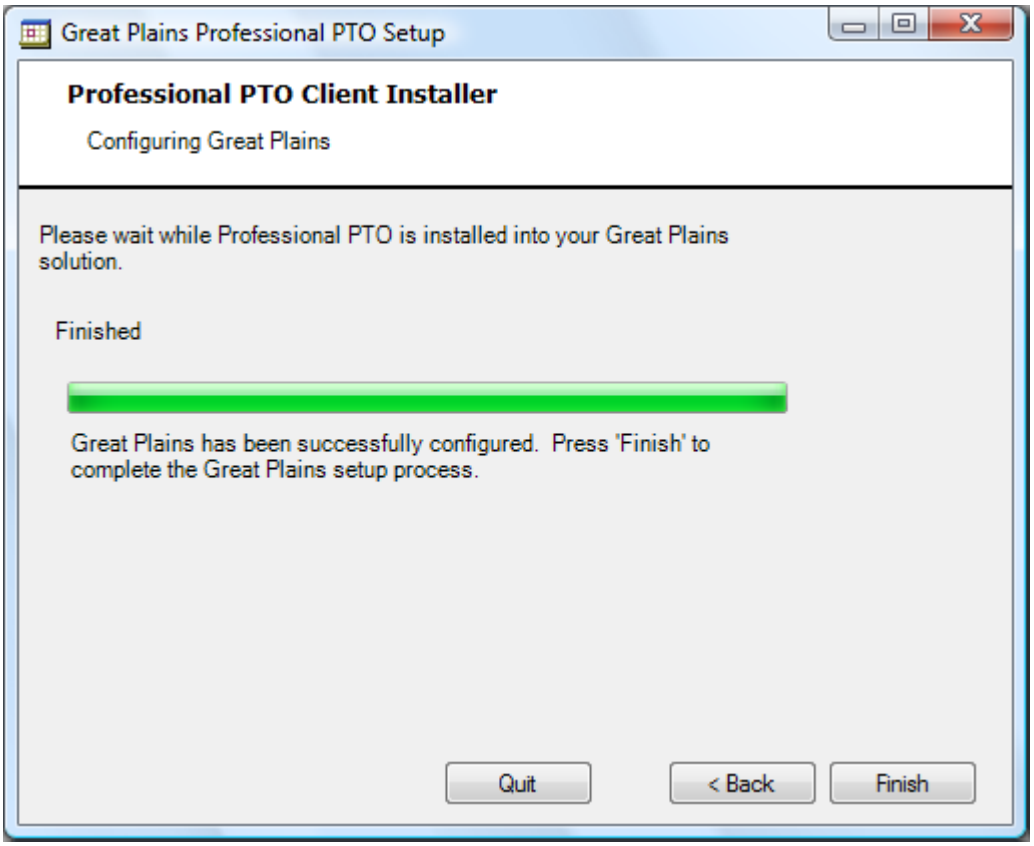


If you do not see the correct accounting package listed, click on the Add Package link. This will bring up a separate window where you will need to find the location of your accounting package.

To continue through the setup wizard, click Next.

Step 9 – Configuring Dynamics GP

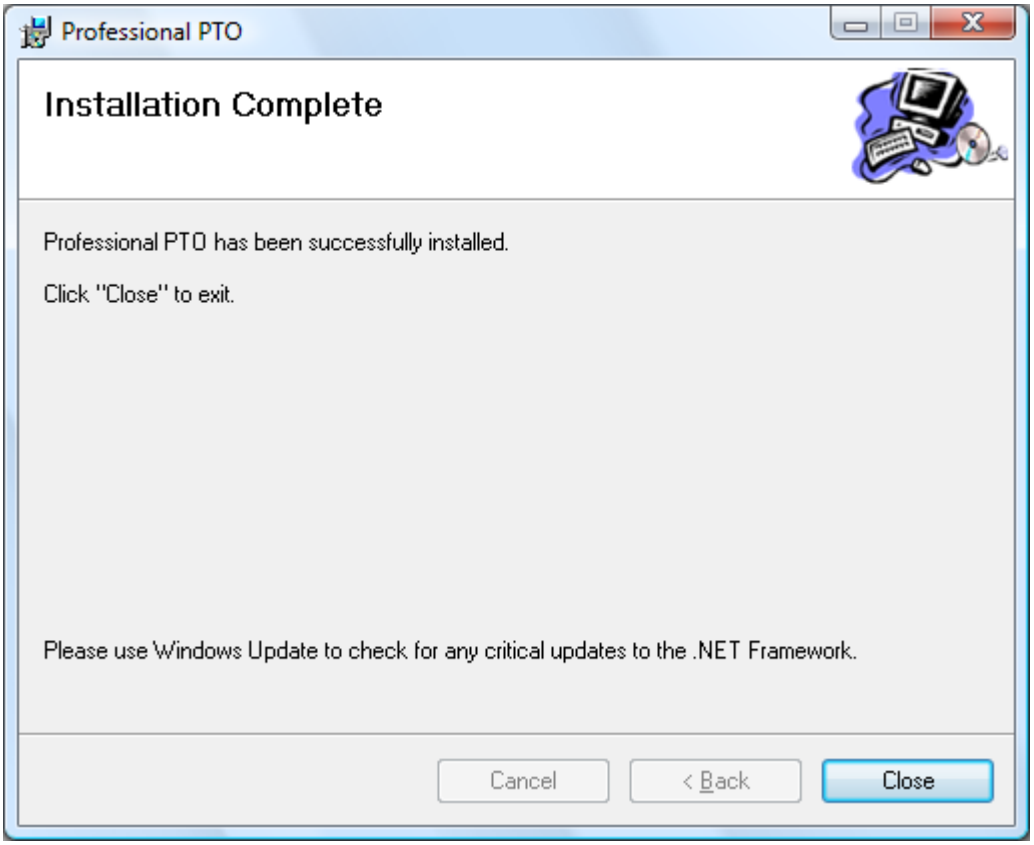
Before you can properly run Professional PTO, Dynamics GP must be properly configured. Professional PTO will do this for you. This process may take a few moments.



To complete the setup wizard, click Finish.

Step 10 – Installation Complete

Congratulations, you have successfully installed Professional PTO!



To exit the setup wizard, click Close.

Restart Notification

After completing the installation process for Professional PTO you will be prompted to restart you system in order for the configuration changes to take effect. You can select to restart immediately or later.

Important Notes

All Professional PTO users need read, write, and modify access to the Greenshades Software directory and all sub-directories. Also, all users will need read/write access to the Greenshades section of the Windows Registry (Computer\HKEY_Local_Machine\Software\Greenshades). If Professional PTO was installed on a Citrix or Terminal Services machine then the user must be granted the appropriate operating system permissions on that server.

Proxy Server and Firewall Troubleshooting Steps

Greenshades Software uses an Internet technology called web services to connect to a Greenshades web server for registration, downloading updates, and other purposes. Some of our clients have firewalls or proxy servers at their site that are preventing this registration from completing successfully. If you are receiving errors about your connection to Greenshades' servers or your firewall while using Professional PTO, please view the Proxy Guide located here: http://www.greenshades.com/pub/downloads/documentation/firewallguide.pdf

Frequently Asked Questions

Here we have provided some of our most commonly asked questions. Many of these are problems that people have encountered while running Professional PTO and possible workarounds to those problems.

How can I get live support?

Live support comes with Greenshades Software. You can access Greenshades Support online at: http://www.Greenshades.com/MyGreenshades. You can also send an email directly to support at: support@greenshades.com. Finally, you can also call support at 888-255-3815 extension 700.

What is my registration key?

Your registration key is available on your personalized MyGreenshades web portal at http://www.greenshades.com/mygreenshades. At MyGreenshades, you can retrieve registration keys, view invoices, get technical support, and much more. Once you are issued a registration key it should never change, regardless of enhancement payments or upgrades to your accounting package.

Client feedback:

Was this guide helpful to you? We would love to hear your feedback! Was there something else that you feel should have been included? We will do our best to accommodate you! Did this guide you're your task easier? Make our day and let us know! Please send all feedback to support@greenshades.com.