



# **Version 6.4**

## **Pre-installation Guide**

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Whether you choose to install MISys Manufacturing yourself, or get professional assistance, reading this Pre-installation Guide will help you understand the big picture.

If you're like most new MISys customers, you're just catching your breath, having completed an exhaustive search and evaluation of multiple manufacturing software packages. You're probably wondering "what's next?"

## **What's Next**

As soon as your payment is processed, the MISys Customer Service Department will be in touch with you to get some additional information about how you plan to deploy MISys Manufacturing. They'll tell you about the MISys SureStart program, help you reserve your seat at the next available MISys Training Workshop, and provide you with a unique MISys Manufacturing System serial number.

## **Downloading the Software**

The MISys installation file is about 400Mb, so you'll want to make sure you have a reasonably fast connection to the Internet before you begin the download process. You should be fine if you have DSL or cable internet service. If you don't, get back in touch with Customer Service for their suggestions. In a pinch, you can go to your public library or some other place where they have fast Internet available and download the MISys installation file to a thumb drive.

## **Internet Connection**

You're going to need a live connection to the Internet in order for MISys to work. A number of functions built into the MISys software require access to Internet-based data. The program doesn't require a fast connection to do its thing, but you must have some sort of live connection.

It's not that MISys will stop working when it is disconnected from the Internet, or if your Internet connection is temporarily down. MISys need to connect at least once every 30 days.

## **Periodic Updates**

From time to time, the program will be asking you whether you want to upgrade to a new version. Usually this just requires installing some updated modules, but there may be times when the upgrade requires a complete download of a new installation file.

## **Planning Your Installation**

Before you launch into installing MISys Manufacturing on your desktop or laptop computer, we should discuss the various installation options that MISys provides and decide which of them best suits your needs and capabilities.

## **MISys Manufacturing System Components**

First, you should know that MISys is a 3-tier client-server application. Now if none of those words are in your vocabulary, don't worry. Here is what they mean in regular, everyday English:

This MISys Manufacturing System actually consists of three major components: the MISys Client, the MISys Server, and the MISys Database Engine.

### **MISys Client**

The MISys Client is the part of the program that you interact with when you are running MISys on your desktop or laptop computer. Everyone else in your company is also running their own copy of the MISys Client which is installed on their desktop or laptop computer.

### **MISys Server**

Whether you have one MISys Client running in your company, or ten, or one hundred, each MISys Client is communicating with the MISys Server. There is only one MISys Server for any installation of the MISys Manufacturing System and all the MISys Clients communicate with it. While the clients do a fair amount of work displaying MISys screens and helping you navigate through the program, it's the MISys Server that does all the heavy lifting; reading and writing data, performing computations, and analyzing the results.

### **MISys Database Engine**

The MISys Database Engine is that part of your system where all your data is stored. The Database Engine wasn't actually built by MISys. It's actually a copy of Microsoft's SQL Server software. MISys chose this software for its database engine for a number of reasons: 1) it's powerful, 2) it is an industry-standard product used and understood by IT professionals all over the world, and 3) many larger companies already have it installed.

MISys actually includes a copy of Microsoft SQL Server Express with every MISys Manufacturing system. So even if you have never heard of SQL Server before this don't worry. The default MISys database engine will be set up for you in the process of installing the software.

### **Microsoft SQL Server Express**

The Microsoft SQL Server Express software is included in the price of MISys Manufacturing. It is built for smaller implementations (it is limited to the hardware capabilities it can access and is limited to 10GB databases).

**For Installations outside of North America:** Microsoft SQL Express Edition is designed for the North American region computing environment only. If you intend to use the MISys Manufacturing System outside North America, you must install your own copy of Microsoft SQL Server 2008 or later.

### **Microsoft SQL Server**

Of course, as your MISys usage demands increase, so does the likelihood that you'll push SQL Server Express beyond its bounds. Nothing bad will happen, but the database engine will start to throttle back and you won't be happy with the performance of your MISys system. That's when you should be looking at installing a full copy of Microsoft SQL Server. This is software that you purchase directly from Microsoft, or from a Microsoft reseller. Consult your IT Department for help on getting Microsoft SQL Server installed on your computer network.

If you don't have an IT Department and don't know where to obtain Microsoft SQL Server, it's time to get some professional assistance. Another reason for having professional assistance setting up SQL Server is that the software has a number of maintenance functions that allow you (the knowledgeable user) to tune the database engine for optimal performance, schedule periodic backups, and more.

The MISys Technical Support Department stands ready to help you with problems related to the operation of the MISys software, but they don't count Microsoft SQL Server as part of their purview. So it is wise to have someone on staff, or readily available, to help you when the need arises.

### **Deployment Options**

The 3-tier client-server architecture we've been discussing provides you with a number of options when it comes to deciding on how to deploy MISys within your company. Let's have a look at some typical ones.

#### **Single-user Deployment**

If you plan to install MISys on your desktop PC, or on a laptop, things get very simple.

Obviously, you won't have more than one user, so Microsoft SQL Server Express will be all you need. And all three components of the MISys system (the MISys Client, the MISys Server, and the MISys Database Engine) will be installed on your desktop PC or laptop.

But don't think for a minute that you can cheap out by dragging one of your old computers out of the closet and setting it up as your MISys machine. MISys does a lot of hard work and so it puts a big load on your computer. Make sure that the computer you select has a fast CPU, a fast hard drive, and above all, as much RAM memory as you can cram into it.

#### **LAN Deployment**

More likely than not, you're going to install MISys on your company's local area network (LAN) so that everyone who needs to can access the wealth of information the program can deliver.

This means that everyone's desktop PC will have the MISys Client installed, but that the MISys Server will be installed somewhere on the network where every PC can reach it.

This is another place where you don't want to be using one of those old PC's you have kicking around as the MISys Server. Remember, the server does all the heavy lifting for MISys and needs to have capacity to handle requests from all your users, just in case they all pressed the "Do It" button at the same time.

If you intend to deploy MISys on your company's LAN, this is a good place to consider a dedicated machine for the purpose. You might be able to get away with installing the MISys Server software on the same machine that handles all your accounting, CRM, and other office applications. Might. But you'd be much smarter to reserve a specific machine as your MISys Manufacturing System server.

The 3-tier client-server architecture of MISys Manufacturing allows you to install the MISys Database Engine anywhere you want and. Most people install it on the same machine as the MISys Server. This is fine as long as the machine you select has plenty of available RAM.

An exception to this guidance would be the case where a company already had an installation of Microsoft SQL Server on another (probably dedicated) machine for other purposes. In a larger shop, this is a likely scenario.

The good news is that you can separate the MISys Database Engine from the MISys Server and let each live on its own machine, optimized for the purpose. This implementation should be considered if you anticipate very heavy product usage.

## **Internet Deployment**

If your company is likely to have MISys users spread in different cities, states, and countries (anyplace where it is inconvenient or impossible to run your own coax cable) then you should have a look at Internet deployment. That is, the ability to connect a computer running the MISys Client to a computer running the MISys Server over the Internet.

If you had a manufacturing plant in Beijing and another in Chicago, and users in both plants needed to access the MISys data simultaneously, you could elect to deploy MISys over the Internet. You would install the MISys Server in Chicago (along with as many MISys Client machines as you needed). And you would install as many MISys Client machines in Beijing as you needed. However, the Beijing clients would all be set to communicate with the Chicago server via HTTP.

Since HTTP is the same mechanism we all use every day to browse the Web, the connection between a remote MISys Client and a local MISys Server is no more complex, no more difficult to manage than a session in a web browser. For anyone concerned, the MISys client-server connection using plain vanilla HTTP is “firewall friendly.”

If you look closely when installing the MISys Client on a PC inside your office, you will discover that MISys uses the same HTTP to communicate with a server in the next room. So MISys doesn't really care whether the wire you have strung between your PC and the MISys Server machine is 6 feet long, 6 miles long, or 6,000 miles long (except that if it is going to be miles long, you'd best use the Internet instead of a very big spool of wire).

When installing a MISys Client on your company LAN, you tell it where on your LAN to find the MISys Server. When installing a MISys Client on the Internet, you tell it where on the Internet to find the MISys Server. One “connection string” (or URL) is inside your network, the other is outside your network. Otherwise, it matters not. HTTP does the work.

## **Integrating With An Accounting System**

You can run the MISys Manufacturing System stand-alone as a very capable inventory control and manufacturing management system. But the vast majority of MISys users (there are thousands of them around the world) choose to integrate MISys with an existing accounting system.

Today, MISys integrates seamlessly with 4 popular accounting systems: Intuit QuickBooks (including QuickBooks Enterprise Solutions as well as QuickBooks Online), Sage 50 US (Peachtree), Sage 300 ERP, and Sage 50 CAN (Simply).

What MISys means by “seamless” is that the points of integration between the manufacturing system and the accounting system are entirely automated. You may have to click the Go button to start any integration process (such as Period End that transfers manufacturing subledger transactions to your accounting system's General Ledger) but gone are the days when you did an export from one system and an import into the other.

## **New Accounting System**

If you have purchased a new accounting system as part of your decision to computerize your manufacturing management, you may be wondering whether you should deploy MISys first, or the accounting system first.

Each has its advantages, each its disadvantages. If your focus is on getting your manufacturing operations out of the weeds and back on an even keel; if you go home every night sputtering about how your purchasing people buy the right thing at the wrong time, or the wrong thing at the right time; if missing important customer shipments creates an unbearable pain, then by all means defer the deployment of a new accounting system and concentrate on getting manufacturing under control.

### **Existing Accounting System**

If you have an existing accounting system, you have a different set of problems (and a potential disaster in your hands) if you don't create a plan that everyone in your company subscribes to – and you stick with it.

On the surface, MISys is a manufacturing system. But under the covers, it is an accounting system. You can flip a switch and disable its accounting functions, but its real intent was to create and maintain a manufacturing subledger which will feed your company's General Ledger in the same way your accounts payable and accounts receivable subledgers feed your GL. When everything is humming right, your monthly financial statements accurately and reliably reflect the activities of your manufacturing operations.

Getting MISys Manufacturing plugged into your existing accounting system is no easy task, especially if the accounting system is already live and feeding your executive staff with necessary financial data. Your job will be to get MISys working the way you want, then on some agree-on time, plug it into your accounting system.

In truth it's not really that bad, mainly because MISys allows you to either shut off the manufacturing subledger entirely, or better yet to shuttle the subledger transactions it generates off to a spreadsheet where everyone in Accounting (especially the CFO) can scrutinize the result. After the spreadsheet has passed muster for several months, you and Accounting (including the CFO) can agree on a time to flip the MISys integrated accounting switch to ON.

### **Summary**

Before moving on to the installation of the MISys Manufacturing software, make sure you are certain about two things:

1. How you wish to deploy MISys (single user PC, LAN, or Internet).
2. Whether you wish to integrate MISys with your accounting system now, or later.

If you aren't certain about these things, the MISys Customer Service folks will be happy to assist you. They've worked with many manufacturers over the years who have struggled with the same issues.