

OVERVIEW

This document roughly outlines the demonstration given at Engage 2011 by Tammy Louzon.

It is supplied without guarantees or promises as a way for attendees to duplicate what was done during the presentation.

License

In order to work with the SDK, the user **MUST** have a copy of the SDK Developer License.

In order to use SDK components, the user must have the SDK Client license.

To see a list of the licenses installed, In Globe:

[System](#) | [General](#) | [Change License](#)

SE5380 - SDK Developer License Exact Globe / Synergy

SE5386 - SDK Globe Client

NOTE: Do not change anything in this screen.

If the licenses are not present, please contact your Sales Rep for information on how to obtain them.

Create Group

[Add-Ons](#) | [Software Development Kit](#) | [Maintenance Groups](#)

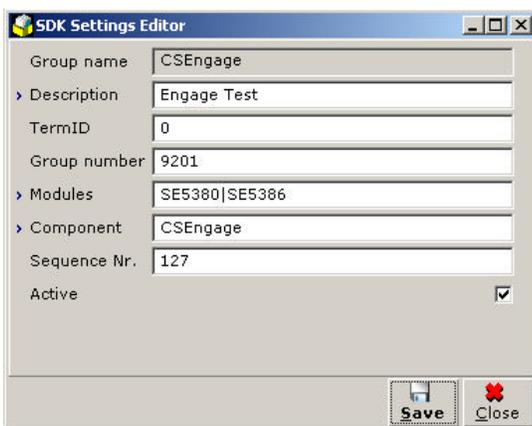
Group Name - must start with CS

Group Number - Suggest start at 9201

Component - Suggest it is made the same as Group Name. This will be the DLL name used later.

Modules - Should include **SE5380|SE5386** (No spaces)

Active - Checked



CSEngageCustomSolutions.sql

Everything done in the Add-on | Software Development Kit section will be scripted to this file. It is automatically stored in the ... \Globe \SQL directory (where ... \Globe is the directory Globe where Globe is installed - Usually c:\Program Files\Exact Software\)

Each time Globe opens, it checks this file to see if it needs to be updated. The version is stored in the Globe database, and if the version of the file is newer, it runs through the startup scripts. If the version is the same, then nothing runs. If the version is older, you may receive a message that says the instance of Globe is older than the version and you need to update.

When creating customization for Globe with an INTEGRATED Synergy Enterprise, this file must also be **copied** to the ...\\Synergy\\SQL directory. Otherwise each time users switch between Synergy and Globe the update scripts will re-run. Copying this file can be done manually or through the setup program.

The user will not need to run or modify this script manually. It CAN be manually modified, but at an advanced level.

CUSTOM TABLE

Create Custom Table

Add-Ons | Software Development Kit | Database Editor | Click NEW

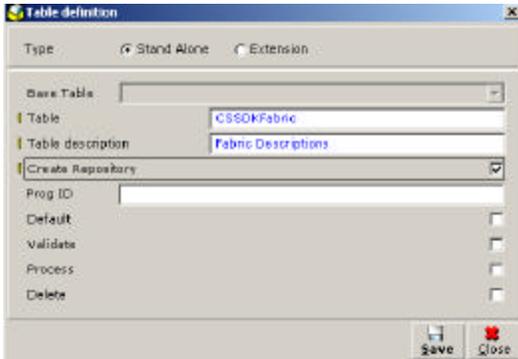
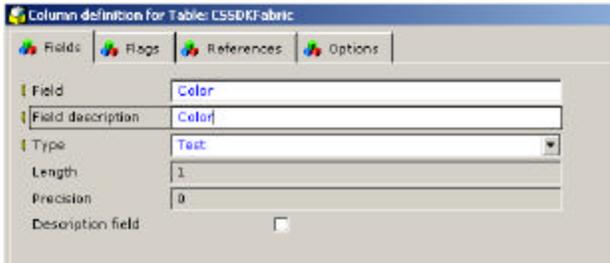
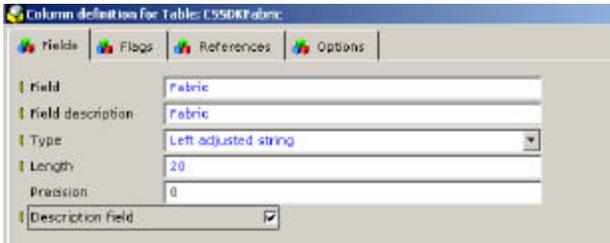


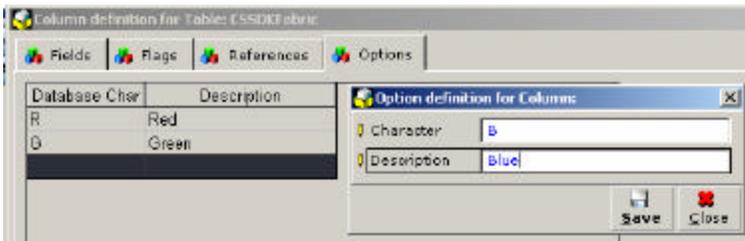
Table name - Must start with CSSDK

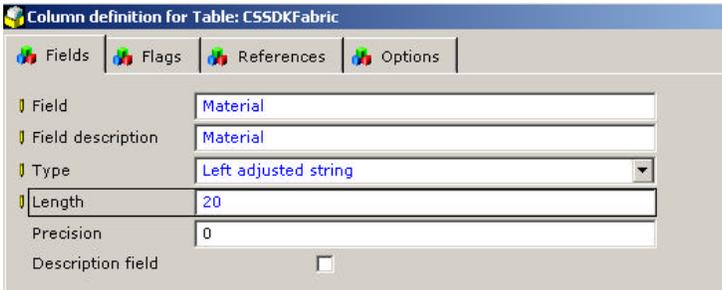
Add Fields

Every table must have one Description field

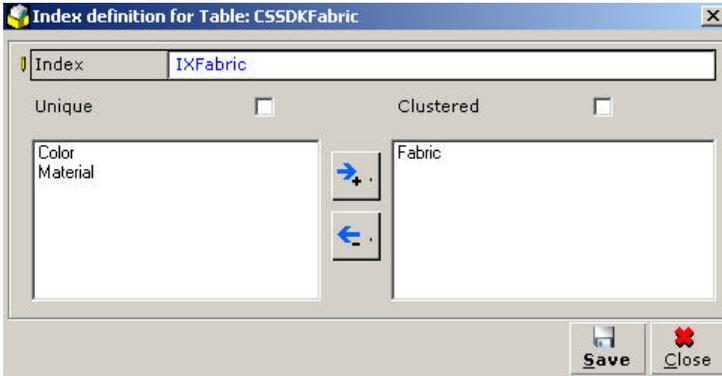


If the Type is TEST, then the Options tab allows the user to add a list of values.





Every table must have an index



Initialize the Customization

This will automatically run the CSEngageCustomSolutions.sql

This must be done to create the table before it can be added to the Globe Menus.

To run it - The user can either:

- Close Globe and re-open and the script will automatically run

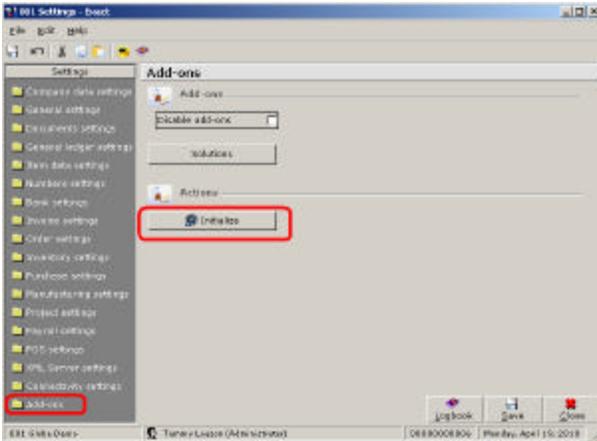
OR

A faster way is to initialize the customization is

- Click the Settings Button



- On the Add-on Settings, Choose Initialize.

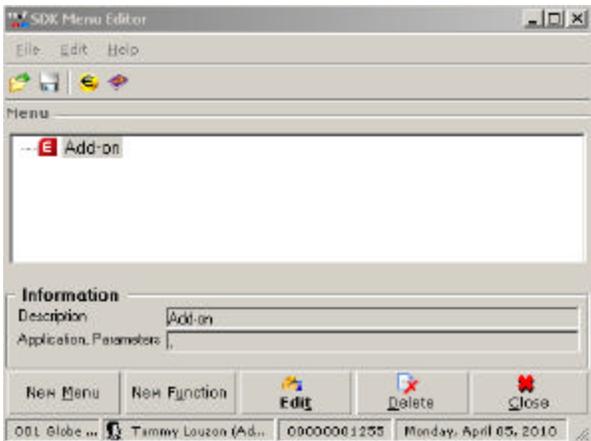


- Then close and re-open Globe.

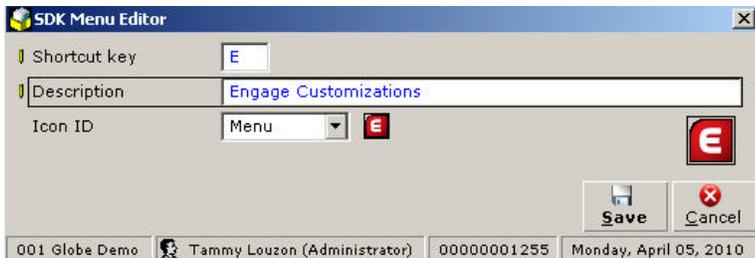
NOTE: You should never manually run the CSxxCustomSolutions.sql. Let Globe run it for you.

Link Table to Menu

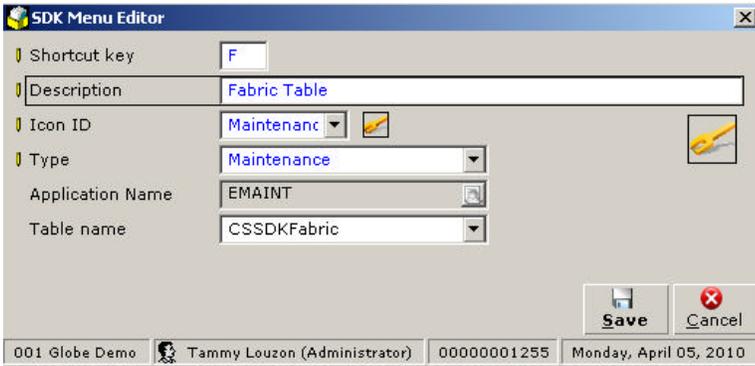
Add-Ons | Software Development Kit | Menu Editor



Add a New Menu



Add a New Function

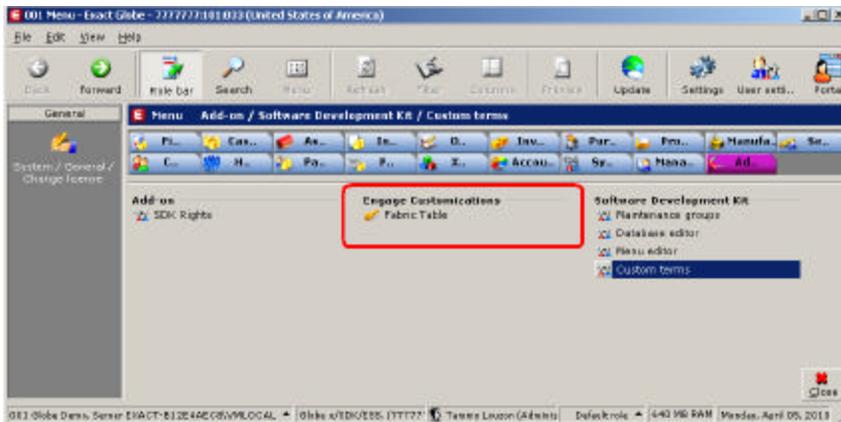


Initialize the Customization

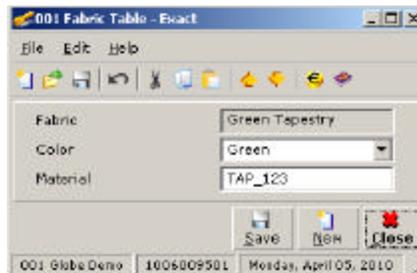
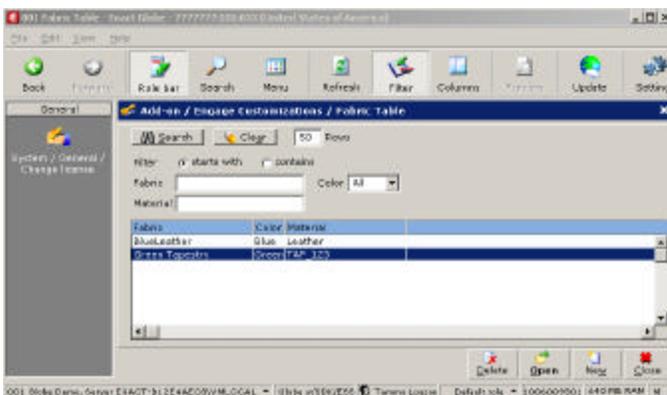
Before you will see the new menu, you must initialize the customization again. The easiest way is to just Close and re-open Globe.

New Menu

The new menu will look like this.



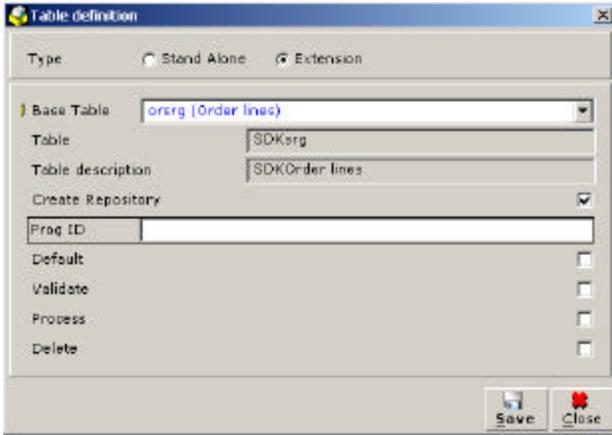
The user will be able to add/delete/modify rows in the CSFabric table through this screen.



EXTEND GLOBE TABLE

Extend Order Line Table

Add-Ons | Software Development Kit | Database Editor | Click NEW

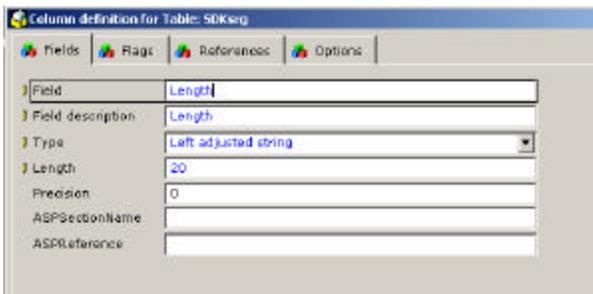


Choose Extension Table, and a list of tables that are "extendible" will be displayed as Base Table

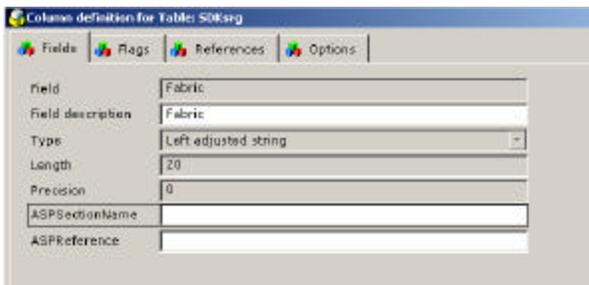
Table - is automatically filled in. This is the standard name for an extended table.

Globe will automatically add/delete rows to this extension table when rows are added/deleted in the base table.

Add fields to Order Table(s)

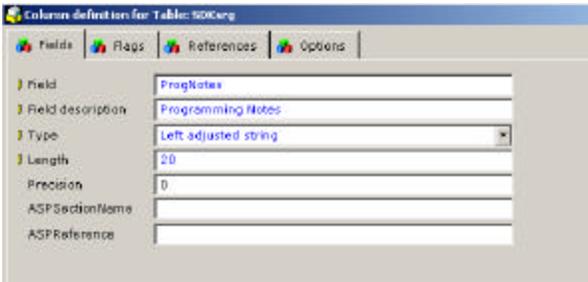


Add Lookup Field to table





NOTE: They are added to other tables automatically when INITIALLY created



Get Copy of Dispatcher

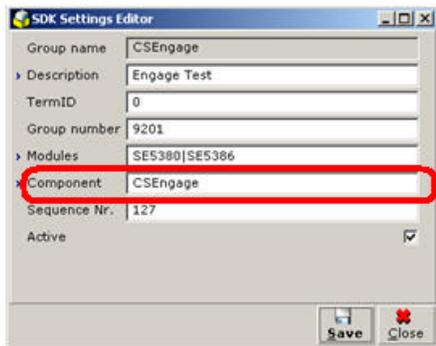
The following documents are found in the customer portal and have samples and information about the Input Dispatcher.

[Document: 10.214.055 - Input Dispatcher Test Entries](#)

[Document: 03.998.361 - SDK - Template dispatch maintenance applications](#)

[Document: 12.182.732 - How to create customizations with usage of the input dispatcher](#)

Name the dll to match the component in the group created. In this case, the VB Project Name will be CSEngage.dll.



Add Button to Screen

To add a button to the Sales Order, Code is added to the input dispatcher's iSalesOrderClass in CSEngage.dll.

In example, it is added to

```
Private Sub frmObj_Load(ByVal Form As CSSDKDispInput.formType)
```

Create Popup to enter in Data

A visual basic form is added in to CSEngage.vbp project.

Modify form to display and update data. Use ConnectViaDispatcher to connect to Globe. When compiled, it will use the same connection to link to Globe as the current Globe screen.

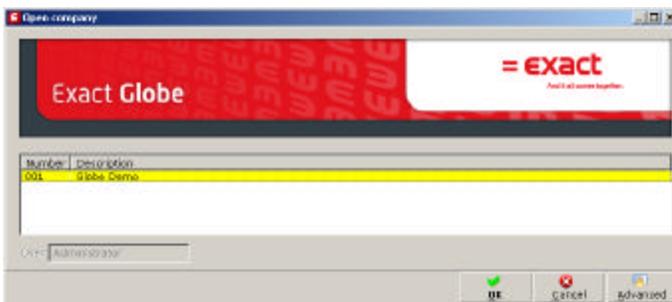
Create Standalone VB Executable and Attach to Globe Menu

Create EXE that runs a report

Create an EXE that runs a report.

Use ConnectViaGlobe to connect to Globe.

When testing or running directly from the .exe file, It will pop up the usual "Open Company" screen



When stored in the ...Globe\Bin directory and ran from the Add-ons Menu, the Open Globe Screen will not appear. It will automatically know the correct database.

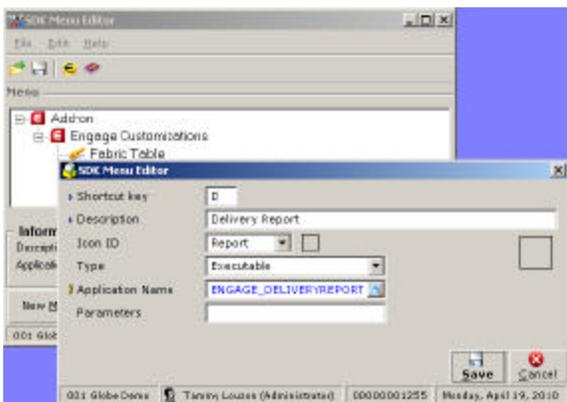
Add to Menus

Add the EXE file to the ...Globe\Bin directory.

NOTE:Globe\ is the directory that Globe has been installed in.

This is often C:\Program Files\Exact Software\

[Add-ons](#) | [Software Development Kit](#) | [Menu Editor](#) | [New Function](#)



Choose your .exe file from the Bin directory and Save

Close and re -open Globe to run the script.

The menu will now be changed and will run the .exe file.

How To Create Customer Setup

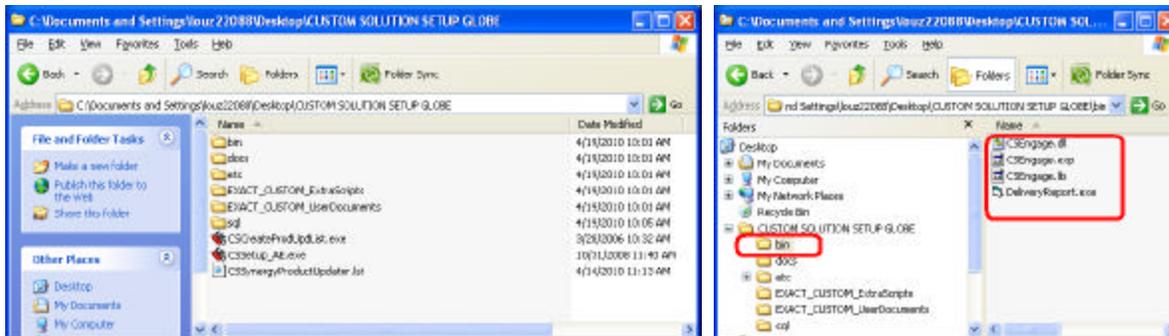
View the following Document for information on where to retrieve setup files:

[Document: 08.768.503 - SDK - Startpage - How to Create customer installation setup](#)

Create a directory for **Custom Solution Setup Globe**

Create empty folders: bin, docs, etc, sql

Create additional folders for additional files you want included. (E.g., EXACT_CUSTOM_UserDocuments)



Copy .dll's and .exe's from ...\\Globe\\Bin directory to new Bin directory. (e.g., CS

Copy CSEngageCustomSolutions.sql from ...\\Globe\\sql directory to new SQL directory.

Copy any files you want distributed into the other directories

Run CSCreateProdUpdList.exe. It will Create/Update the CSSynergyProductUpdater.lst file with the new list of files.

Server Install

Copy all files (except CSCreateProdUpdList.exe) to a location where you can run the CSSetup_AE.exe to install to your live environment.

When you run - be sure to point the install directory to your Globe install directory. When installing on a server, point to the network install.

Client Install

On the CLIENT Machines - In the ...\\Globe\\Bin directory, run WUpdate.exe and point the Install From to the network install on the server. Point the Install To to the local globe install directory.

Integrated Globe/Synergy

If you are running an Integrated Globe/Synergy application, then you must also copy the CSEngageCustomSolutions.sql to the ...\\Synergy\\SQL directory (where ...\\Synergy\\ is the network directory where Synergy is installed)

This can either be manually copied, or use the CSCreateProdUpdList.exe to create a setup.

To do this, copy the **Custom Solution Setup Globe** to a new directory called **Custom Solution Setup Synergy**. Remove all directories except the \\sql directory.

Run the CCreateProdUpdList.exe file, making sure it is pointing to the **Custom Solution Setup Synergy** directory. This will create another group of setup files that can be ran on the Synergy server.