

Consultant Course

System Administration

S100 System Administration: Basic 2022 R1

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How to Use This Course

The course consists of lessons that guide you step by step through the examples and explanations of the Acumatica ERP system administration, starting with the system installation and then proceeding to maintenance and initial configuration.

You perform the following general steps to complete the course:

1. You start with Part 1, and complete Lessons 1–4, which are dedicated to the installation of the system.
2. At Partner University, you take the *Test 1: Installation* assessment test.
3. You complete Lessons 5–8 of Part 2, which are focused on the maintenance of the system and the configuration of the system that is performed on the server side.
4. At Partner University, you take the *Test 2: Maintenance* assessment test.
5. You complete Lessons 9–11 of Part 3, which are focused on the system configuration.
6. At Partner University, you take the *Test 3: System Configuration and Management* assessment test.
7. At Partner University, you complete the course survey to finish the course and get the Partner University certificate of course completion.

What Is in a Part?

Each of the three parts of the course is dedicated to a particular area of system administration and consists of lessons you are supposed to complete.

What Is in a Lesson?

The lessons consist of steps that outline the procedures you are completing and describe the related concepts you are learning. At the end of each step, under the *Related Information* section, you can find links to detailed information about the concepts and forms used in the step. At the end of each lesson, the *Additional Information* topic provides links to additional concepts that you might be interested in but that are outside of the scope of the course.

What Are the Documentation Resources

The complete Acumatica ERP documentation is available on <https://help.acumatica.com/> and is included in the Acumatica ERP instance. While viewing any form used in the course, you can click the **Open Help** button in the top pane of the Acumatica ERP screen to bring up a form-specific Help menu; you can use the links on this menu to quickly access form-related information and activities and to open a reference topic with detailed descriptions of the form elements.

Licensing Information

For the educational purposes of this course, you use Acumatica ERP under the trial license, which does not require activation and provides all available features. For the production use of this functionality, you have to activate the license your organization has purchased. Each particular feature may be subject to additional licensing; please consult the Acumatica ERP sales policy for details.

Part 1: Installation

In this part of the course, you will learn the system requirements and receive detailed instructions for installing Acumatica ERP. In particular, you will develop an understanding of the possible deployment configurations and learn about the following tasks:

- Installing the Acumatica ERP Configuration Wizard
- Deploying the Acumatica ERP application instances
- Activating the license for an Acumatica ERP application instance
- Enabling features for an Acumatica ERP application instance

Lesson 1: Introduction to System Management

In this lesson, you will learn the Acumatica ERP installation and deployment options, the system requirements, and the required configuration of the operating system where the server part of the system will be installed. Once you complete this lesson, the server part of the Acumatica ERP system will be ready for installation.

Lesson Objectives

You will do the following:

- Learn about possible deployment configurations
- Learn about the minimum system requirements that should be met when you are installing the Acumatica ERP system locally
- Make sure that your computer meets the system requirements

Step 1.1: Possible Deployment Configurations

Acumatica ERP is a web-based application that users can access from any computer by using a web browser. This web application (the website) interacts with the application server and the database that stores all the data. Acumatica also provides a mobile application that gives users the ability to access Acumatica ERP from mobile devices running iOS and Android.

Acumatica ERP Configuration Wizard and Acumatica ERP Application Instances

The Acumatica ERP Configuration Wizard is software that is installed on the server and that gives you the ability to deploy application instances. An Acumatica ERP application instance is a website that is accessed by the users in your organization for their everyday work.

By using the Acumatica ERP Configuration Wizard, you can deploy multiple application instances. You can also delete them and perform application and database maintenance.

Installation Options

You can use either of the following installation options:

- Local, on-premises installation: Your organization is responsible for the infrastructure (hardware, system software, communication hardware, and software on user devices) and the deployment of the application software (implementation, support, and upgrading).

- Installation in the data center: The service provider manages all or most of the infrastructure. If you are provided with a web service where you can launch an operating system with Microsoft SQL Server available, the installation procedure will be the same as it is with a local installation. You can also:
 - Deploy the Acumatica ERP service on Windows Azure.
 - Install Acumatica ERP on Amazon Web Services (AWS).

Implementation of Acumatica ERP on Windows Azure and Amazon Web Services is outside of the scope of this course. For more information, refer to the *System Administration: Advanced* training.

Deployment Configurations

Depending on where the database server is installed, the following configurations are possible:

- Separate application and database servers: This is the most common configuration and the one we recommend. You can install the application server (where the web site is running) and the database on separate virtual machines or physical servers.
- The same server hosting application and database: This is the development configuration, which can be used for testing, training.
- Multiple application servers and one database server.

Configuration Used in This Training

In this training, you will install the application and database on the same server (on your computer or laptop). You will be able to launch Acumatica ERP application instances locally.

In general, you will do the following during the installation process:

1. Learn the system requirements and make sure all of them are met.
2. On the server, configure Web Server (IIS) features and perform other preparation steps.
3. Install the Acumatica ERP Configuration Wizard on the server.
This is described in Lesson 2.
4. Use the Acumatica ERP Configuration Wizard to deploy Acumatica ERP application instances.
This is described in Lesson 3.
5. Start working with Acumatica ERP, which is described in Lesson 4.

Step 1.2: System Requirements for Workstations

In this step, you will learn about the system requirements for the workstations used by the employees of your organization to work with Acumatica ERP.

The users access the Acumatica ERP application instance through the web browser. The following browsers are supported:

- Google Chrome, Version 87 and higher
- Microsoft Internet Explorer 9, 10, and 11 with Compatibility View turned off



For Microsoft Internet Explorer 10, the hotfix for the ASP.NET browser definition files in the Microsoft .NET Framework 4.0 should be installed. For more information, see <http://support.microsoft.com/kb/2600088>.

- Microsoft Edge, Version 44 and higher
- Mozilla Firefox, Version 82 and higher

- Apple Safari, Version 12 and higher

To display all system forms correctly, the resolution must be a minimum of 1024 by 768, and the recommended value is 1920 by 1080.

To view the documents exported from the Acumatica ERP system, the users will need Microsoft Office. The following versions are supported:

- 2019
- 2016
- 2013
- 2010
- 2007
- 2003 with the Microsoft Office 2007 compatibility pack

To open the Acumatica ERP documentation in PDF format, the users will need Adobe Reader version 2019 and higher.

Step 1.3: System Requirements for the Server and Database

In this step, you will learn about the system requirements for the computers hosting the server software and the database of the Acumatica ERP system. All of the listed requirements must be met before you start the installation.

Server Requirements

The environment where you install the server part of the Acumatica ERP should meet the following hardware and software requirements:

- The operating system of a server:
 - Windows Server 2019 64-bit edition
 - Windows Server 2016 64-bit edition
 - Windows Server 2012 64-bit edition
 - Windows Server 2012 R2 64-bit edition
 - Windows Server 2008 64-bit edition
 - Windows Server 2008 R2 64-bit edition

Operating systems that are not supposed for servers:



It is possible to install the server software part of Acumatica ERP on one of the operating systems listed below, but only for testing or training purposes. For production websites, you must use a server operating system.

- Windows 7 64-bit edition
- Windows 8 64-bit edition
- Windows 10 64-bit edition
- Microsoft .NET Framework 4.8
- Microsoft Internet Information Services 7.0, 7.5, 8.0, 8.5, or 10 depending on the underlying operating system.
- 16 GB RAM
- A dual core CPU 3.5 GHz or higher
- 1 GB available hard disk space plus 200 MB for each Acumatica ERP instance

Database Requirements

The system requirements for the Acumatica ERP database are listed below.

The Acumatica ERP database can be hosted by one of the following:

- Microsoft SQL Server 2019
- Microsoft SQL Server 2017
- Microsoft SQL Server 2016
- MySQL Community Edition Server 5.7 or 8.0 64-bit edition

The following hardware requirements apply for the database:

- 8 GB RAM.
- A dual core CPU 2 GHz or higher
- For each database, 1 GB available hard disk space. Depending on the number of transactions, additional hard disk space may be required to store large numbers of transactions.

For more information on system requirements for Acumatica ERP, see [System Requirements for Acumatica ERP 2022 R1](#).

Step 1.4: Preparation for the Acumatica ERP Installation

In this step, you will check the configuration of the environment where you plan to install the Acumatica ERP Configuration Wizard (the server software part of the Acumatica ERP system) and if there is a need, you might have to change the settings of your environment.



You will find instructions on checking configuration on the computer used as a server further in this step.

We recommend the following configuration on the computer used as a server:

- At least all critical updates (and preferably all available updates) for the operating system and software components are installed.
- All required third-party components listed in the system requirements are properly installed and configured.
- The following Windows features are turned on:
 - **Internet Information Services > Web Management Tools > IIS Management Console**
 - **Internet Information Services > World Wide Web Services > Application Development Features:**
 - .NET Extensibility
 - ASP.NET
 - ISAPI Extensions
 - ISAPI Filters
 - **Internet Information Services > World Wide Web Services > Common HTTP Features:**
 - Default Document
 - Static Content
 - **Internet Information Services > World Wide Web Services > Performance Features:**
 - Dynamic Content Compression
 - Static Content Compression
 - **Internet Information Services > World Wide Web Services > Security > Request Filtering**
- For each application pool you are planning to use, the **Enable 32-Bit Applications** parameter is set to *False*.

In this training, we will use the *DefaultAppPool* application pool.

- The SSL protocol in Web Server (IIS) is enabled.

The secure connection is needed so that your Acumatica ERP users can export data to Microsoft Excel spreadsheets updating the data automatically, and so that you can enable single sign-on (SSO) to Acumatica ERP with Google Account or Microsoft account.

To enable SSL in Web Server (IIS), you must first obtain a certificate that is used to encrypt and decrypt the information that is transferred over the network. You receive a certificate file from the certification authority and then register the certificate with your Web Server (IIS). For instructions, refer to your Web Server (IIS) documentation.



Acumatica ERP does not support self-signed certificates.

The scope of this training does not include configuration of data export or integration with identity providers.

- For Microsoft SQL Server, the **Full-Text and Semantic Extractions for Search** feature is installed.

Acumatica ERP uses the semantic search through SQL databases so that the system can identify the key phrases in text or documents, discover similar or related documents, and provide information to explain how documents are similar or related. This feature gives you the ability to employ semantic search in your Acumatica ERP instances.

In Microsoft SQL Server, the semantic search functionality is disabled by default, while in MySQL Server, the semantic search functionality is enabled by default. If you don't have this feature installed, you can install an update and select this feature (under **Database Engine Services**).

For more information on configuring your system for Acumatica ERP installation, see [Preparing for Installing Acumatica ERP](#).

Enabling Web Server (IIS) Features

To enable all the needed Web Server (IIS) features, perform the following instructions:



For training and testing purposes, you can install the server part of Acumatica ERP on operating systems that are not supposed for servers. The instructions listed below demonstrate the verification of the Web Server (IIS) features and the application pool settings on the computer running Windows 10. If you are using other supported environments and have trouble finding the required features, please refer to the corresponding documentation for instructions.

1. On the left end of the taskbar, click Start to open the Start menu—which contains all your apps, settings, and files—type `Windows Features`, and then click **Turn Windows features on or off**.
2. In the **Windows Features** dialog box that opens, navigate to **Internet Information Services > Web Management Tools** and select the **IIS Management Console** check box, as shown in the following screenshot.



If the check box is already selected, make no changes.

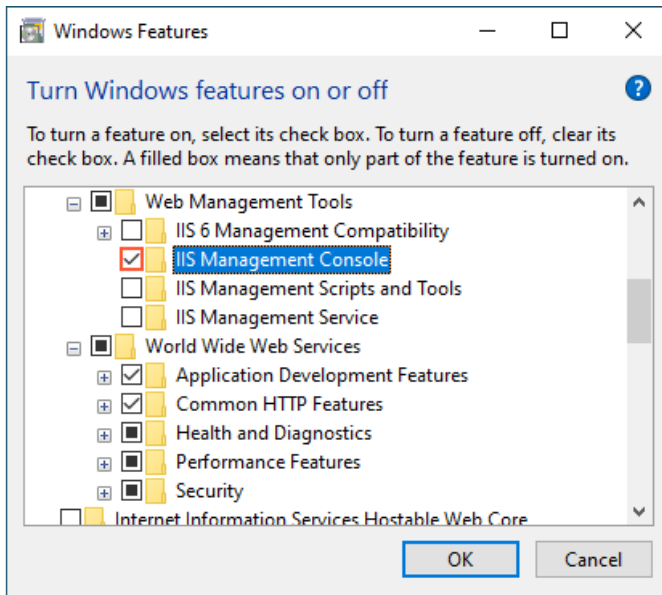


Figure: The IIS Management Console feature

3. Navigate to **Internet Information Services > World Wide Web Services > Application Development Features** and select the following check boxes:
 - **.NET Extensibility 4.8**
 - **ASP.NET 4.8**
 - **ISAPI Extensions**
 - **ISAPI Filters**
4. Navigate to **Internet Information Services > World Wide Web Services > Common HTTP Features** and select the following check boxes:
 - **Default Document**
 - **Static Content**
5. Navigate to **Internet Information Services > World Wide Web Services > Performance Features** and select the following check boxes:
 - **Dynamic Content Compression**
 - **Static Content Compression**
6. Navigate to **Internet Information Services > World Wide Web Services > Security** and select the **Request Filtering** check box.
7. Click **OK**.



If you have turned on some features, the Windows information message is shown.

Configuring Internet Information Services

To configure the Internet Information Services (IIS), perform the following instructions:

1. On the left end of the taskbar, click Start to open the Start menu, and then click **Internet Information Services (IIS) Manager**.
2. In the left **Connections** pane, find and click **Application Pools**.
3. In the middle pane, in the list of available application pools on the server, right-click the **DefaultAppPool** application pool, which you will use on your website, and select **Basic Settings**.

4. In the **Edit Application Pool** dialog box, which opens, make sure that the application pool is configured for .NET Version 4.8 and the managed pipeline mode is *Integrated*.

The version number of the .NET Framework does not necessarily correspond to the version number of the CLR it includes. .NET Framework version 4.8 includes CLR Version 4.



We generally recommend that you use a separate application pool for the Acumatica production instance.

5. Click **OK** to close the dialog box.
6. While the **DefaultAppPool** application pool is selected in the middle pane, in the right **Actions** pane, click **Advanced Settings**.
7. In the **Advanced Settings** dialog box, which opens, make sure that *False* is selected as the value of the **Enable 32-Bit Applications** setting.
8. Click **OK** to close the dialog box.

You have verified the Internet Information Services (IIS) configuration and can proceed to installing Acumatica ERP.

Additional Information

The following concept is outside of the scope of this course but may be useful to some readers. You can use the link below to get additional information.

License Resource Levels

Before determining the type of server configuration you should use, you need to make sure that you have selected the appropriate Acumatica ERP licensing limitation, which is directly related to the type of server environment you will use.

Instead of charging for every user that needs to use the system, Acumatica ERP uses a licensing system based on the size of the resource level. This system is based on the overall usage and load levels you will have on the system.

For more information about tenants and multitenant configurations, see [Typical Hardware and Virtual Machine Configurations for PCS and PCP Licenses](#).

Lesson 2: Installing the Acumatica ERP Configuration Wizard

In this lesson, you will download and install the Acumatica ERP Configuration Wizard.

Once you complete this lesson, you will have this application installed on your computer functioning as a server, and will be able to deploy the Acumatica ERP application instances.

Lesson Objectives

You will do the following:

- Obtain the Acumatica ERP installation package
- Install the Acumatica ERP Configuration Wizard application software

Step 2.1: Getting the Latest Acumatica ERP Release

In this step, you will learn where you can find the latest Acumatica ERP builds and all the previous versions. You will identify the latest release number, but find and install the previous release so that you will be then able to learn how to update the system.

To download the Acumatica ERP build, perform the following instructions:

1. Open [Acumatica Community](#).

You will need your partner login and password to access the site.



You can also download all the previously released versions on the builds.acumatica.com web site.

2. In the **Product** menu on top of the page, click **2022 R1**.

The page where you can find the latest release and prior releases of the selected Acumatica ERP version and read the release notes is displayed.

3. To download the Acumatica 2022 R1 GA version, click the corresponding link in the **Prior Releases** section. The number of the release is displayed in the link in the 22.1XX.XXXX format after the release name, which is 22.100.0178 for the Acumatica 2022 R1 GA version. The page with the release opens.
4. In the **Download Links** section, click the Acumatica ERP 2022 R1 GA link to download the `AcumaticaERPInstall.msi` Windows installer package.

Step 2.2: Installing Acumatica ERP

In this step, you will install the Acumatica ERP Configuration Wizard. This software is a part of the Acumatica ERP Tools, which also include the following components:

- The Debugger Tools: An optional set of software components that gives you a limited ability to debug the deployed Acumatica ERP instances.
- DeviceHub: An optional software component that is used to connect hardware devices, such as printers, scanners, and digital scales.
- The Acumatica Report Designer: An optional software component that provides visual tools that you can use to design custom reports for Acumatica ERP.

In this training, you will not install these components; they can be installed at any later time.

Normally, the Acumatica ERP Configuration Wizard is installed on the dedicated application server or servers, as described in Step 1.1. In this training, you will use your computer as the server hosting application and database.

To install the Acumatica ERP Configuration Wizard, perform the following instructions:

1. Run the `AcumaticaERPInstall.msi` file that you have downloaded in the previous step.
2. On the Welcome page of the installer, click **Next**.
3. On the End-User License Agreement page, read the license agreement, select the **I accept the terms in the License Agreement** check box, and click **Next**.

On the Main Software Configuration page, which opens, notice that the **Install Acumatica ERP** and **Launch the Acumatica ERP Configuration Wizard** check boxes are selected by default, as shown in the following screenshot.

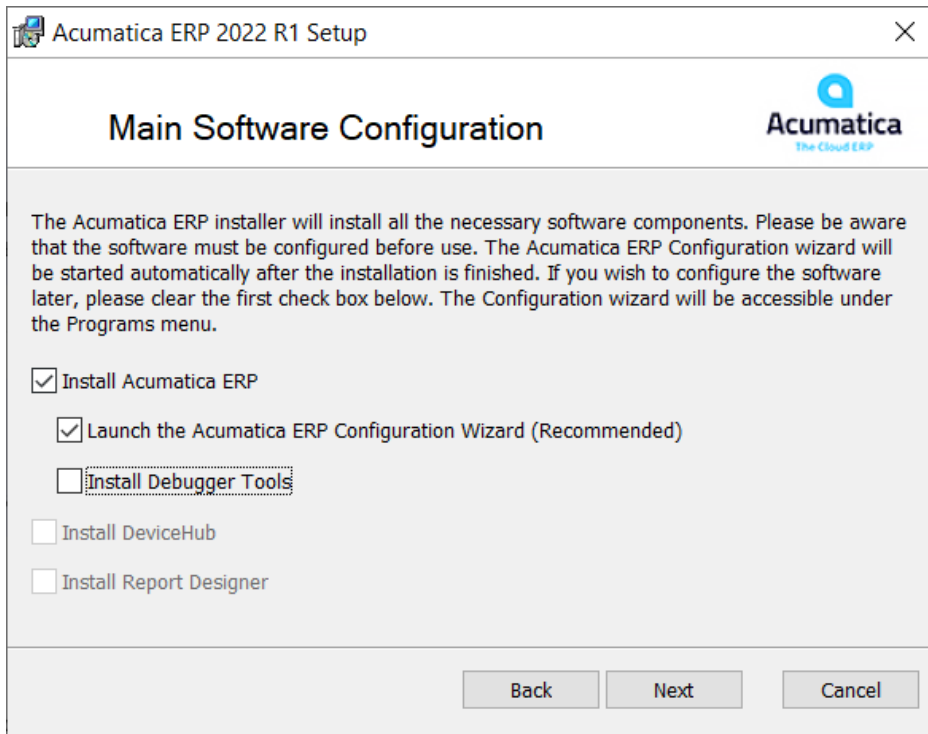


Figure: Acumatica ERP components to be installed

4. Click **Next**.
5. On the Destination Folder page, check the path to the default folder to which Acumatica ERP will be installed, and change it if needed.

By default, the address of the folder is `C:\Program Files\Acumatica ERP\`.

6. Click **Next**.
7. On the confirmation page, click **Install** to install the Acumatica ERP Configuration Wizard.

Wait while the Acumatica ERP software is being installed.

8. When the installation process has completed, click **Finish**.

The Acumatica ERP Configuration Wizard is started automatically. You can also run the Acumatica ERP Configuration Wizard anytime by selecting it in the Start menu.

Now you can proceed to deploying the Acumatica ERP application instances.

Additional Information

The following concepts are outside of the scope of this course but may be useful to some readers. You can use the links below to get additional information.

Acumatica Report Designer

This optional component that can be installed along with the Acumatica ERP Configuration Wizard or can be installed separately any later time. The Acumatica Report Designer provides visual tools that you can use to design custom reports. For more information, see [Acumatica Report Designer Guide](#).

DeviceHub

This optional application is used to connect hardware devices, such as printers, scanners, and digital scales. You can also then configure a set of default printers to streamline the printing of documents for users, regardless of the physical location of the users and printers. For detailed instructions on setting up hardware devices via DeviceHub, see [Configuring Hardware Devices in DeviceHub](#).

Debugger Tools

The Debugger Tools are an optional set of software components that gives you a limited ability to debug the deployed Acumatica ERP instances. This set can be installed along with the Acumatica ERP Configuration Wizard. When you choose to install the Debugger Tools, in the installation directory, the installer adds the `Sources` folder and `.pdb` files to the `bin` folder. The `Sources` folder contains the core files from Acumatica Framework that you can use when you are debugging the application. For more information, see [To View and Debug Acumatica ERP Source Code](#).

Acumatica Framework

Acumatica Framework is a Web application development platform you use to develop business applications, such as custom application modules that can be used with Acumatica ERP. For more information, see [Installing Acumatica Framework](#).

Lesson 3: Deploying Acumatica ERP Application Instances

In this lesson, you will learn how to deploy Acumatica ERP application instances. You will also learn about tenants as they are defined in Acumatica ERP and the number of application instances you might need to serve multiple organizations at once.

Once you complete this lesson, you will have three application instances installed on your computer, which will also function as a server, and will be able to sign in to these application instances and perform further configuration.

Lesson Objectives

You will do the following:

- Deploy an Acumatica ERP application instance
- Deploy an Acumatica ERP application instance with the demo data
- Deploy a multitenant Acumatica ERP application instance
- Change password for the first login

Application Instances and Tenants

In Acumatica ERP, a single instance of the application can serve multiple tenants which represent separate companies. In Acumatica ERP, when you create an application instance, you create at least one tenant. It is not possible to configure an instance that does not have at least one tenant defined.

You can deploy the following combinations of instances, databases, and tenants:

- One application instance—one instance of a database and one tenant.
- Multiple application instances—multiple tenants, each using its own database.

- One application instance with one instance of a database—multiple tenants with web access to the same database.
- One application instance with one instance of a database—multiple tenants work on the same database with completely isolated data. The application looks identical to all tenants, but each tenant has exclusive access to only its data.



Data sharing or separation between tenants is outside the scope of this training.

Ways to Add More Tenants

For an Acumatica ERP application instance, you can create additional tenants in three ways:

- In the process of installing an instance, on the Tenant Setup page of the Acumatica ERP Configuration Wizard.
- After the application instance has been deployed, on the Tenant Setup page of the Acumatica ERP Configuration Wizard of an existing instance.
- After the application instance has been deployed, through the Acumatica ERP web interface. For more information, see [Tenants: General Information](#).

The System Tenant and Tenant Hierarchy

When you install Acumatica ERP, the hidden *System* tenant (the one with an **ID** of 1) is always created automatically. In the following screenshot, notice that *MyCompany* has an **ID** of 2, and its parent tenant is the hidden *System* tenant with an **ID** of 1.

Tenant Setup

If you wish to create a multi-tenant site, insert rows with appropriate information for each required tenant.

Installed tenants: [Reload the List](#)

ID	Login Tenant Name	New	Insert Data	Parent Tenant ID	Visible	Additional Info
2	MyCompany	<input type="checkbox"/>	<input type="checkbox"/>	1	<input checked="" type="checkbox"/>	Company

☐ Advanced Settings ☐ Secure Tenant on Login Form

Version: 22.100.0178
<http://www.acumatica.com>

[New](#) [Delete](#) [< Back](#) [Next >](#)

Figure: The settings of the MyCompany tenant

The *System* tenant contains the predefined system data, such as preconfigured roles and numbering sequences, as well as wiki-based documentation. The system data is used by all tenants of the same application instance.

By default, the *System* tenant is hidden. All other user-created tenants inherit the initial configuration and system data (predefined data) from the *System* tenant. That is, all the data available in *System* is visible to other tenants in the same database.

When you create a new tenant, the parent tenant must be selected; the *System* tenant is inserted as a parent by default. You can create an unlimited number of child tenants; and for each of them select an arbitrary parent tenant by specifying its **ID**. When you create a tenant from the Acumatica ERP web interface, the *System* tenant is assigned as its parent.



Users can log in to only those tenants that do not have any child tenants. If you select an existing tenant to be a parent, users would not be able to sign in to this tenant anymore.

Also, the tenants can be deleted, except for the *System* tenant.

Use of a Custom Parent Tenant

An application update or upgrade replaces all the data available in the *System* tenant. The data created by users in user-created tenants remains unchanged. If you would like to replace the preconfigured data, such as roles and numbering sequences, similarly for multiple new tenants, you can create a parent tenant that will serve as a system tenant for your new tenants.

To configure a custom parent tenant, you create a new tenant and provide a name that clearly indicates how this tenant will be used—for example, *NewParent*. This tenant is a child of the *System* tenant and inherits all its data.

In the *NewParent* tenant, you can override the preconfigured settings as needed and specify other configuration settings to be used in all the new tenants. Then when you create a new tenant by using the Acumatica ERP Configuration Wizard, you specify *NewParent* as the new tenant's parent tenant; the new tenant will inherit all the data from the *NewParent* tenant rather than from the *System* tenant.

Visibility of the Tenants

When you use the Acumatica ERP Configuration Wizard to deploy a new Acumatica ERP application instance or to manage existing tenants of the existing instance, you can create more tenants than you need at the moment on the Tenant Setup page.

You can define some of the tenants to be invisible to the users by clearing the check box in the **Visible** column.

Step 3.1: Deploying a New Application Instance

In this step, you will use the Acumatica ERP Configuration Wizard to deploy a new Acumatica ERP instance.

The procedure of creating a new instance is wizard-driven with simple steps. On the eight pages of the wizard, you will select and configure the following entities for a new instance:

- **Database Server Connection:** You select the database server you want to use for the new instance and the server authentication method.

In this training, you will use a Microsoft SQL server running on your computer.

- **Database Configuration:** You can create a new database, or connect to an existing database by selecting it from the available databases on the server.

In this training, you will create a new database.

- **Tenant Setup:** Here you specify the tenant name, create more tenants if needed and set up their hierarchy, and indicate if the demo data should be inserted into the tenant (demo data sets are used for trainings and for demonstrating the features of the system).

Acumatica ERP is an application with multitenancy architecture, which means that a single instance of the application can serve multiple tenants. Each such tenant is defined in the system as a separate tenant. By running one instance of the application with one instance of the database used by the system, you can give multiple tenants web access to the same database. You will create a multitenant application instance later in this course.

In this step, you will create a single tenant named *MyCompany* with no demo dataset.

- **Database Connection:** The authentication method that the application instance will use to connect to the database, which is either Windows authentication or SQL Server authentication.

If Windows authentication is selected, the system will use the default anonymous user account with low privileges, used by Internet Information Services (IIS). Windows authentication does not work with MySQL Server.

For the SQL Server authentication method, you can create a new login or select an existing one. The login must have at least the following rights:

- *read, write, execute, and ddl_admin* for a Microsoft SQL server
- *create, alter, drop, select, delete, insert, update, create temporary tables, and execute* for a MySQL server.

In this training, you will use Windows authentication.

- **Instance Configuration:** On this page, you specify the instance name, path, and other instance configuration settings.
- **Web Configuration:** Here you configure the website settings and, optionally, select the application pool.

In this training, you will use the default application pool.

For a production instance, we recommend that you create a new application pool for production deployment.

- **Confirm Configuration:** On the last Acumatica ERP Configuration Wizard page, you review and confirm the overall instance configuration.

To deploy an application instance to be used in this course, perform the following instructions:

1. In the Start menu, find and click **Acumatica ERP Configuration** to open the Acumatica ERP Configuration Wizard.

The Acumatica ERP Configuration Wizard is opened and the Welcome page is displayed.

2. On the Welcome page, click **Deploy New Application Instance**.

The Database Server Connection page is opened. On this page, you select a server type in the **Server type** box and select a server in the **Available servers** list or enter the server name in the **Server name** box. You also select the authentication method to be used to connect to the database server. This method must be supported by the selected database server. (The instructions of this lesson describe usage of the Microsoft SQL Server.)

3. Do the following to configure the connection to the database server:

- a. In the **Server type** box, leave *Microsoft SQL Server*.
- b. In the **Server name** box, leave `(local)`.



If you are using Microsoft SQL Server Express edition, enter `localhost\sqleexpress`.

- c. In the authentication method options, leave **Windows Authentication**.
- d. Click **Next**.

The Database Configuration page is opened. This wizard page provides you with two options: to create a new database on the server selected on the previous page, or to connect to the one of the existing databases.

4. To create a new database, do the following:
 - a. Leave the **Create a new database** option selected.
 - b. In the **New database's name** box, enter *AcumaticaS100*.
 - c. Click **Next**.

The Tenant Setup page is opened. By default, the wizard creates a new tenant with no data preloaded and with the default name *Company* in the **Login Tenant Name** column. The name specified in this column is displayed on the application instance login page and in the instance user interface.

5. To configure the tenant, do the following:
 - a. In the **Login Tenant Name** column, double-click the tenant name and change it to *MyCompany*.
Leave the default values in the other boxes.
 - b. Click **Next**.

The Database Connection page is opened. On this page, you specify the authentication method that this instance of Acumatica ERP will use to connect to the database.

6. Leave the default **Windows Authentication** option selected, and click **Next**.
The default anonymous user account used by Internet Information Services (*ApplicationPoolIdentity*) will be used to connect to the database.
7. On the Instance Configuration page, which is opened, configure the instance to be created as follows:
 - a. In the **Instance Name** box, leave the *AcumaticaS100* name.
By default, this is the name that you have specified for the database. You can change it, if needed.
 - b. Leave the **Create Acumatica ERP Site** option button selected (and the **Create Portal** option button cleared).



Selecting the **Create Portal** option creates an Acumatica Self-Service Portal instead of a normal application instance. Acumatica Self-Service Portal is designed to be a site where your customers can view all the relevant information about their interaction with your company as a vendor and perform common activities online. A self-service portal is a special type of the application instance connected to your Acumatica ERP instance but with limited access.

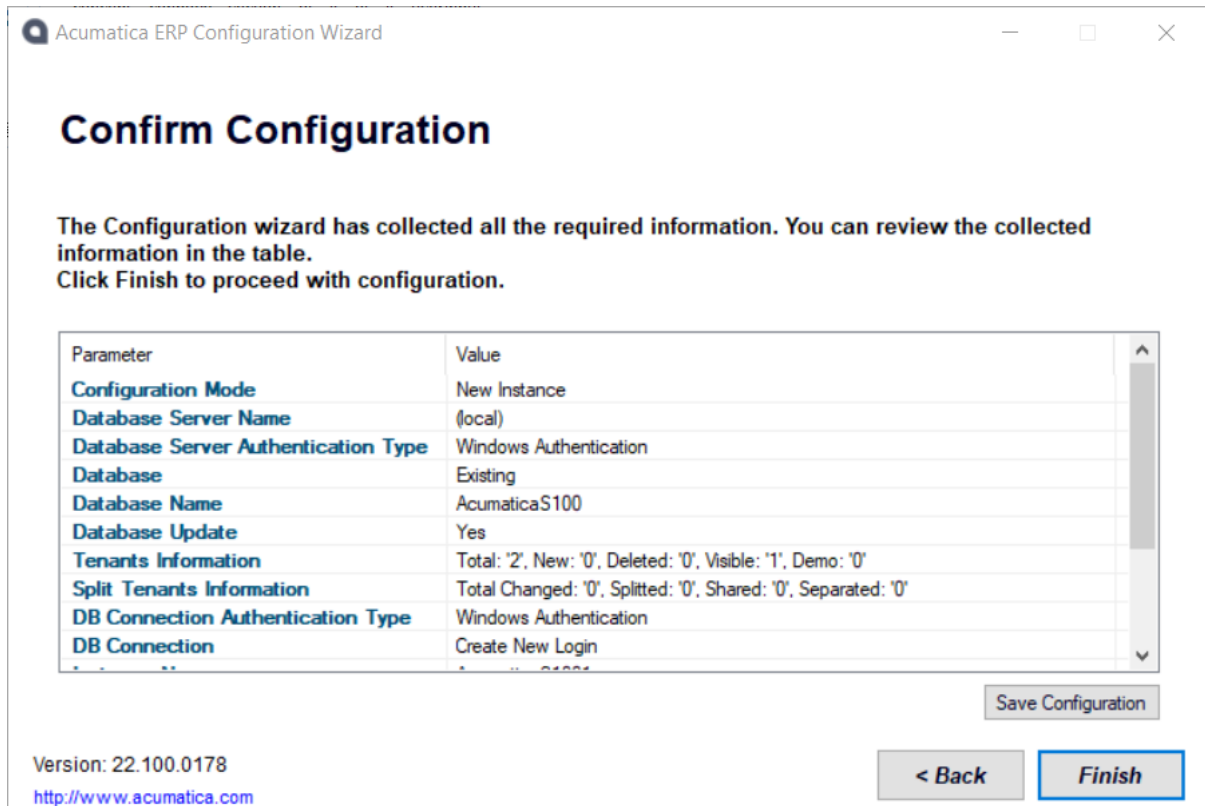
- c. In the **Local Path of the Instance** box, leave the path on the local computer to the application instance being created.
By default, this is the folder with the instance name, which is located in the folder, where the Acumatica ERP Configuration Wizard has been installed. The path should look as follows: `%Program Files%\Acumatica ERP\AcumaticaS100`.
 - d. Click **Next**.
8. On the Web Site Configuration page, which is opened, configure the web site to be created as follows:
 - a. In the **Available Web sites** list, leave *Default Web Site* selected.
 - b. Leave the **Create Virtual Directory** check box selected and the virtual directory name, which matches the instance name, specified.
 - c. Under **Application Pool Settings**, leave the **Use Existing Application Pool** option button selected and in the list of available application pools, select *DefaultAppPool*.



By using a dedicated application pool, you can better isolate instances and fine-tune resources that are allocated for the instance by IIS. The list contains only existing application pools configured in Web Server (IIS) you can use to install Acumatica ERP. You can configure more application pools in the Internet Information Services (IIS) Manager.

d. Click **Next**.

The Confirm Configuration page is opened. On this page, you can check the configuration settings you have specified, as shown in the following screenshot. You can also save the configuration settings to an XML file by clicking **Save Configuration**.



Acumatica ERP Configuration Wizard

Confirm Configuration

The Configuration wizard has collected all the required information. You can review the collected information in the table.
Click Finish to proceed with configuration.

Parameter	Value
Configuration Mode	New Instance
Database Server Name	(local)
Database Server Authentication Type	Windows Authentication
Database	Existing
Database Name	AcumaticaS100
Database Update	Yes
Tenants Information	Total: '2', New: '0', Deleted: '0', Visible: '1', Demo: '0'
Split Tenants Information	Total Changed: '0', Splitted: '0', Shared: '0', Separated: '0'
DB Connection Authentication Type	Windows Authentication
DB Connection	Create New Login

Save Configuration

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< Back Finish

Figure: The settings of the instance to be created

9. Click **Finish** and wait while the installation process completes.
10. Click **OK** in the dialog box after the installation is complete to return to the Welcome page of the Acumatica ERP Configuration Wizard.

The new Acumatica ERP instance is created, and now you can access it for the first time.

Step 3.2: Accessing the Application Instance for the First Time

In this step, you will open the created Acumatica ERP application instance and set the new administrator password.

An administrator can open the application instance in any of the following ways:

- By using the Acumatica ERP Configuration Wizard: This method is described in the instructions below.
- By finding the instance in the Start menu and clicking its name.
- By opening the http://localhost:80/Instance_name/ link in the web browser.



For the second and third ways, the instance name is the name that you have specified in the **Virtual Directory Name** box on the Web Site Configuration page during the creation of the instance. You have specified *AcumaticaS100* as this name during Step 3.1.

To access the Acumatica ERP instance remotely, as any other user would, you would use the fully qualified domain name (FQDN) of the server instead of *localhost* in the URL.

Every Acumatica ERP instance comes with an active default user account (*admin*) that you use to sign in to the system. You start working with Acumatica ERP by changing the password for this user. Later, during the system configuration, you will create more system users.

To access the application instance for the first time, perform the following instructions:

1. In the Start menu, find and click **Acumatica ERP Configuration** to open the Acumatica ERP Configuration Wizard.
2. On the Welcome page, click **Perform Application Maintenance**.
3. On the Application Maintenance page, which opens, in the list of installed sites, click the *AcumaticaS100* instance (see the following screenshot), which you created in Step 3.1, and then click the **Launch** button.

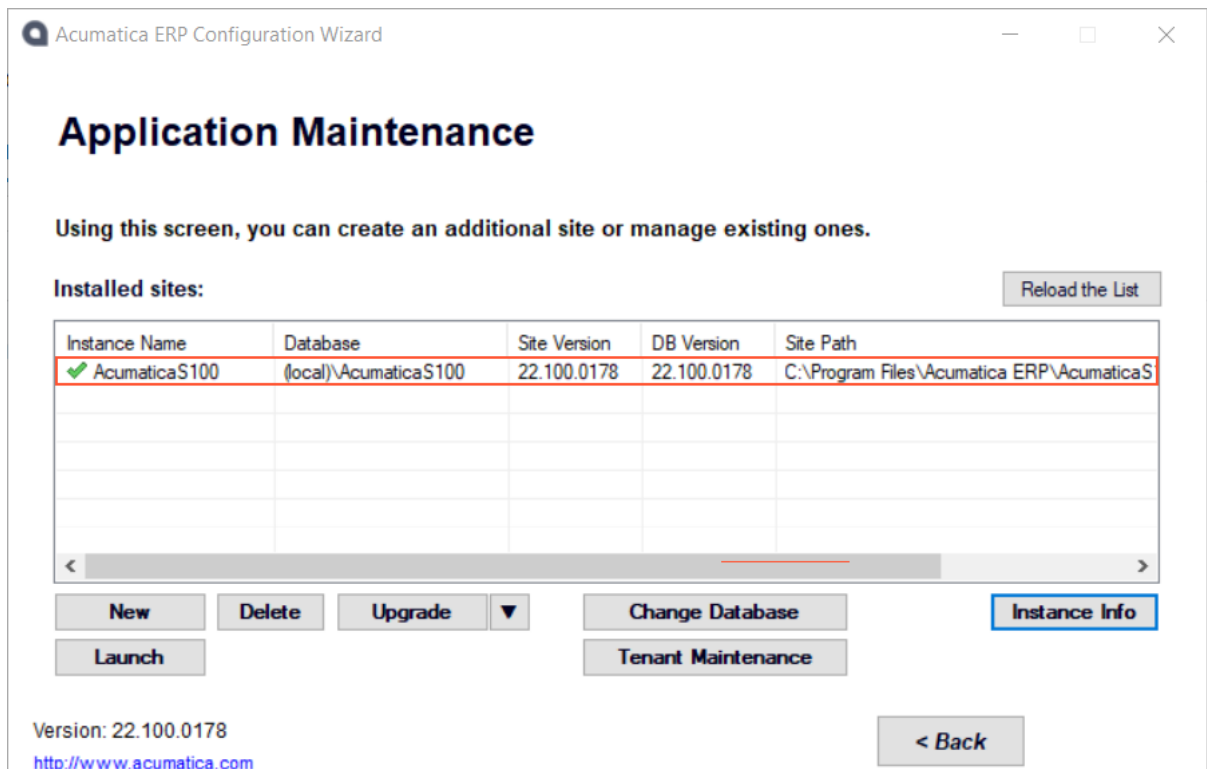


Figure: The list of Acumatica ERP installed sites

The instance opens in a new tab of your default browser. Note that the Acumatica ERP version is shown in the bottom left corner.

4. Use the following credentials for the first login:

- **My Username:** *admin*
- **My Password:** *setup*

5. Click **Sign In**.

The system asks you to enter a new password and confirm it.

6. Type the new password in the **New Password** and **Confirm Password** boxes.

Passwords must be at least 8 characters and contain characters from three of the following four categories: English uppercase characters (A through Z), English lowercase characters (a through z), base 10 digits (0 through 9), and non-alphabetic characters (such as !, \$, #, and %).

7. Click the link of the Acumatica User Agreement above the **Sign In** button, read the agreement, and then select the check box to indicate that you have read and agree to the terms of the agreement.
8. Click **Sign In**.

The home page of the Acumatica ERP instance opens.

Step 3.3: Deploying an Instance with the Demo Data

In Step 3.1, you created an out-of-the-box application instance—it does not contain any financial, organizational, or other data.

During the creation of an Acumatica ERP instance, you can fill the database with the demo data. The instances with demo data are used, for example, to execute the steps within training courses. With these instances, the learners do not have to configure the system from scratch.

Multiple data sets, which have been designed for different purposes, are available through the wizard. Some of the data sets, such as *U100* and *I100*, are used for completing the trainings. The *SalesDemo* data set is intended for demonstrating the system capabilities.

You define whether to use one of these data sets or not when you create an instance, on the Tenant Setup page of the Acumatica ERP Configuration Wizard.

In this step, you will create a new application instance that will contain the *I100* data set.

To create an Acumatica ERP instance with this demo data set inserted, perform the following instructions:

1. In the Start menu, find and click **Acumatica ERP Configuration** to open the Acumatica ERP Configuration Wizard.
2. On the Welcome page, click **Perform Application Maintenance**.
3. Below the list of existing application instances, click **New**.
4. On the Database Server Connection page, specify the following settings, and then click **Next** to proceed to the next page:
 - **Server type:** *Microsoft SQL Server*
 - **Server name:** `(local)`
 - **Windows Authentication:** Selected
5. On the Database Configuration page, specify the following settings, and then click **Next** to proceed to the next page:
 - **Create a new database:** Selected
 - **New database's name:** `AcumaticaI100`
6. On the Tenant Setup page, double-click in the **Insert Data** column for the automatically created row with the *Company* tenant name, and select *I100*, as shown in the following screenshot.

Acumatica ERP Configuration Wizard

Tenant Setup

If you wish to create a multi-tenant site, insert rows with appropriate information for each required tenant.

Installed tenants: [Reload the List](#)

ID	Login Tenant Name	New	Insert Data	Parent Tenant ID	Visible	Additional Info
2	Company	<input checked="" type="checkbox"/>	I100	1	<input checked="" type="checkbox"/>	Company

☐ Advanced Settings
 ☐ Secure Tenant on Login Form
 New
Delete

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Figure: Selection of a data set for a new tenant

7. Click **Next** to proceed to the next page.
8. On the Database Connection page, select **Windows Authentication**; click **Next**.
9. On the Instance Configuration page, specify the following settings, and then click **Next** to proceed to the next page:
 - **Instance Name:** *AcumaticaI100*
 - **Create Acumatica ERP Site:** Selected
 - **Local Path of the Instance:** The path on the local computer to the application instance
10. On the Web Site Configuration page, specify the following settings, and then click **Next** to proceed to the next page:
 - **Web Site Settings:** *Default Web Site*
 - **Create Virtual Directory:** Selected
 - **Virtual Directory Name:** *AcumaticaI100*
 - **Use Existing Application Pool:** Selected
 - List of existing application pools: *DefaultAppPool*
11. On the Confirm Configuration page, click **Finish**, and wait while the new application instance is created.
12. After the installation is completed, click **OK** in the dialog box to return to the Acumatica ERP Configuration Wizard.
13. Click **Perform Application Maintenance**.

On the Application Maintenance page, which opens, the list of existing application instances now contains two sites: *AcumaticaI100* and *AcumaticaS100*.
14. Click the line with *AcumaticaI100* instance, and then click **Launch**.

The instance opens in a new tab of your default browser.

15. Use the *admin* username and the *setup* password to sign in to the instance for the first time, and change the default password. The home page of the Acumatica ERP instance opens.
16. To verify that the demo data has been inserted, open the [Employees](#) (EP203000) form and make sure that there are six employees (Michael Andrews, Maxwell Baker, Layla Beauvoir, Joseph Becher, Martin Bernia, and Todd Bloom). These employees do not come in the out-of-the-box tenant; they have appeared in the instance because you directed the wizard to insert the data.

Step 3.4: Deploying a Multitenant Instance

In this step, you will create an Acumatica ERP application instance with three tenants. You will assign one of them to be a parent of the other. After the instance is created, you will open the instance Sign-In page and make sure that the tenant selection box has appeared.

Then you will modify the instance: add one more tenant and make one of the existing tenants invisible. For a multitenant Acumatica ERP instance, you can restrict the list of tenants a user can see only to the tenants the user has access to. You will do this and then make sure that the tenants selection box does not appear on the instance Sign-In page by default.

Creating an Instance with Multiple Tenants

To create a multitenant Acumatica ERP instance, perform the following instructions:

1. In the Start menu, find and click **Acumatica ERP Configuration** to open the Acumatica ERP Configuration Wizard.
2. On the Welcome page, click **Deploy New Application Instance**.
3. On the Database Server Connection page, specify the following settings, and then click **Next** to proceed to the next page:
 - **Server type:** *Microsoft SQL Server*
 - **Server name:** *(local)*
 - **Windows Authentication:** Selected
4. On the Database Configuration page, specify the following settings, and then click **Next** to proceed to the next page:
 - **Create a new database:** Selected
 - **New database's name:** *AcumaticaMultiple*
5. On the Tenant Setup page, do the following to configure the tenants of the instance:
 - a. Click the **New** button twice to add two more new tenants in addition to the default new tenant so that there are three new tenants on the list.
 - b. Double-click in the **Parent Tenant ID** column for the first tenant in the list.
Notice that you can select only the default parent *System* tenant (the one with an **ID** of 1).
 - c. Select the **Advanced Settings** check box below the table.
Now the wizard also displays the *System* tenant. Notice that the **Visible** check box for this tenant is cleared, meaning that the users do not see it.



With the **Advanced Settings** check box selected, you can also select a new data template in the **Insert Data** column for an existing tenant, if needed. This overrides the data of the tenant.

- d. In the line with the *Company* tenant, clear the **Visible** check box.

- e. In the line with the *Company3* tenant, double-click in the **Parent Tenant ID** column and select 2. as shown in the screenshot below.

This makes *Company3* the child of *Company*. In such a configuration, users will be able to log in to only *Company2* and *Company3*, because they do not have children.

Tenant Setup

If you wish to create a multi-tenant site, insert rows with appropriate information for each required tenant.

Installed tenants: Reload the List

ID	Login Tenant Name	New	Insert Data	Parent Tenant ID	Visible	Additional Info
1		<input type="checkbox"/>			<input type="checkbox"/>	System
2	Company	<input checked="" type="checkbox"/>		1	<input type="checkbox"/>	Company
3	Company2	<input checked="" type="checkbox"/>		1	<input checked="" type="checkbox"/>	Company2
4	Company3	<input checked="" type="checkbox"/>		2	<input checked="" type="checkbox"/>	Company3

☒ Advanced Settings ☐ Secure Tenant on Login Form New Delete

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Figure: The tenants to be created for the instance

- f. Click **Next** to proceed to the next page.
- On the Database Connection page, select **Windows Authentication**; click **Next**.
 - On the Instance Configuration page, specify the following settings, and then click **Next** to proceed to the next page:
 - Instance Name:** *AcumaticaMultiple*
 - Create Acumatica ERP Site:** Selected
 - Local Path of the Instance:** The path on the local computer to the application instance
 - On the Web Site Configuration page, specify the following settings, and then click **Next** to proceed to the next page:
 - Web Site Settings:** *Default Web Site*
 - Create Virtual Directory:** Selected
 - Virtual Directory Name:** *AcumaticaMultiple*
 - Use Existing Application Pool:** Selected
 - List of existing application pools: *DefaultAppPool*
 - On the Confirm Configuration page, click **Finish**, and wait while the new application instance is created.
 - After the installation is completed, click **OK** in the dialog box to return to the Acumatica ERP Configuration Wizard.
 - Click **Perform Application Maintenance**.

On the Application Maintenance page, which opens, the list of existing application instances now contains three sites: *Acumatical100*, *AcumaticaS100*, and *AcumaticaMultiple*.

12. Click the line with *AcumaticaMultiple* instance, and then click **Launch**.

The instance opens in a new tab of your default browser. Notice that the instance Sign-In page has the tenant selection box above the **Sign In** button with *Company2* and *Company3* you have created in this step.

Making Changes to Instance Tenants

To make changes to tenants of the created instance, perform the following instructions:

1. Go back to the Acumatica ERP Configuration Wizard.
2. On the Welcome page, click **Perform Application Maintenance**.
3. On the Application Maintenance page, click the line with the *AcumaticaMultiple* instance, and click **Tenant Maintenance**.
4. In the SQL Server Authentication dialog box, leave **Windows Authentication** selected and click **OK**.
The Tenants Setup page is displayed for the selected instance.
5. Click **New** to add one more tenant to the instance.
The system adds a new line with the *Company4* tenant to the list.
6. Select the **Secure Tenant on Login Form** check box.
This hides the box where the tenant can be selected from the instance Sign-In page until a user enters his or her login and password. After the user is authorized, the system displays a list of tenants to which the user can sign in.
7. In the line with *Company3* tenant, clear the check box in the **Visible** column.
This makes the tenant invisible for all users. Only the *Company2* and *Company4* tenants have the **Visible** check box selected.
8. Click **Next**.
9. On the Confirm Configuration page, click **Finish**.
10. After the application instance is updated, click **OK** in the dialog box to return to the Acumatica ERP Configuration Wizard.
11. Click **Perform Application Maintenance**.
12. On the Application Maintenance page, click the line with the *AcumaticaMultiple* instance, and click **Launch**.
The instance opens in a new tab of your default browser. Notice that the instance Sign-In page does not have the tenant selection box.
13. Enter the default login and password for the application instance (*admin* and *setup*, respectively).
Because the *admin* user has access to all the tenants you have created, the tenant selection box is displayed for the user. Notice that only *Company2* and *Company4* are available for signing in.

Additional Information

The following concepts are outside of the scope of this course but may be useful to some readers. You can use the links below to get additional information.

Acumatica Self-Service Portal

The Acumatica Self-Service Portal is an optional component that can be installed along with the Acumatica ERP Configuration Wizard or at any later time. For more information, see [Setting Up the Acumatica Self-Service Portal](#).

Branches and Multiple Branch Support

In each Acumatica ERP tenant, you must define at least one branch to represent your company. As small and medium-sized organizations grow, they often add new locations that become branches with some degree of autonomy. You can define these branches in Acumatica ERP.

The multibranch functionality has been developed for organizations that meet certain requirements:

- All branches use the same base currency.
- The chart of accounts is shared among branches, or similar charts of accounts used by different branches can be merged into one chart of accounts used by all branches.
- The branches have the same financial year and periods.

For more information, see [Multiple Branch Support](#).

General Ledger Consolidation

Larger organizations with base currencies that are different in different branches, fiscal years, and periods can configure their subsidiaries as separate organizations with individual company IDs and use the consolidation functionality to be able to report as a single company. For more information, see [GL Consolidation Configuration: General Information](#) and [GL Consolidation: General Information](#).

Lesson 4: Enabling Features and Activating a License

In this lesson, you will learn about the trial and full license modes of Acumatica ERP, and the procedure of applying a license. You will also enable the Acumatica ERP features that provide the system functionality.

Once you complete this lesson, two suites and one additional functional area will be shown on the interface of the application instance.

Lesson Objectives

You will do the following:

- Enable feature groups for an Acumatica ERP application instance
- Learn how to activate a full-product Acumatica ERP license

Step 4.1: Enabling Product Features

When you install a new blank instance of Acumatica ERP, most of the product features are disabled. When you sign in to a new Acumatica ERP instance, the only form you can access is the [Enable/Disable Features](#) (CS100000) form, which you use to enable features in accordance with the license you have bought.

Acumatica ERP provides a scalable core system functionality and offers a range of add-on features. On the [Enable/Disable Features](#) (CS100000) form, you can view and modify the list of enabled features according to your license limitations. When you open the form, you will see that multiple features are selected by default. These features represent the standard set that is available for you regardless of your license limitations.

Only after you enable a feature, all feature-related forms and individual elements appear in Acumatica ERP. Some features may add only additional elements to the available forms, and others may enable a workspace or a set of workspaces with multiple forms.

The [Enable/Disable Features](#) form also displays (at the top of the form) the state of the currently selected feature set. The following states are possible:

- *Pending Activation*: You have modified the feature set but have not enabled the features. With this status, the settings on the form do not reflect the actual set of features available in Acumatica ERP.
- *Validated*: All the features selected on the form have been enabled. With this status, the settings on the form reflect the actual set of features available in your instance of Acumatica ERP.

In this step, you will enable the *Inventory and Order Management* and *Customer Management* features. To enable these features on the instance you have created, perform the following instructions:

1. Launch the *AcumaticaS100* application instance and sign in with the *admin* username and the password that you have specified in Step 3.2.
2. In the Main menu in the left pane, click **More Items**, then in the Working area, click **System Management**, and then [Enable/Disable Features](#) (CS100000) form.



You can click any form name when you sign in to a new Acumatica ERP instance and the system will redirect you to the [Enable/Disable Features](#) form until you perform the initial enablement of features.

Notice that the activation status of the currently opened feature set is *Pending Activation*.

3. On the form toolbar of the [Enable/Disable Features](#), which is opened, click **Enable**.

All the features that have been selected by default are enabled. The status of the currently selected feature set is *Validated*, and workspaces of the financial and organization functional areas appear in the Main menu in the left pane.

4. To enable other features, on the form toolbar, click **Modify**.

Invoking this action makes the check boxes on the form available for selection.

5. In the list of features, select the **Inventory and Order Management** and **Customer Management** check boxes.

Selecting the group of features causes the basic features below it to be selected, as shown in the following screenshot, but not necessarily all of them.

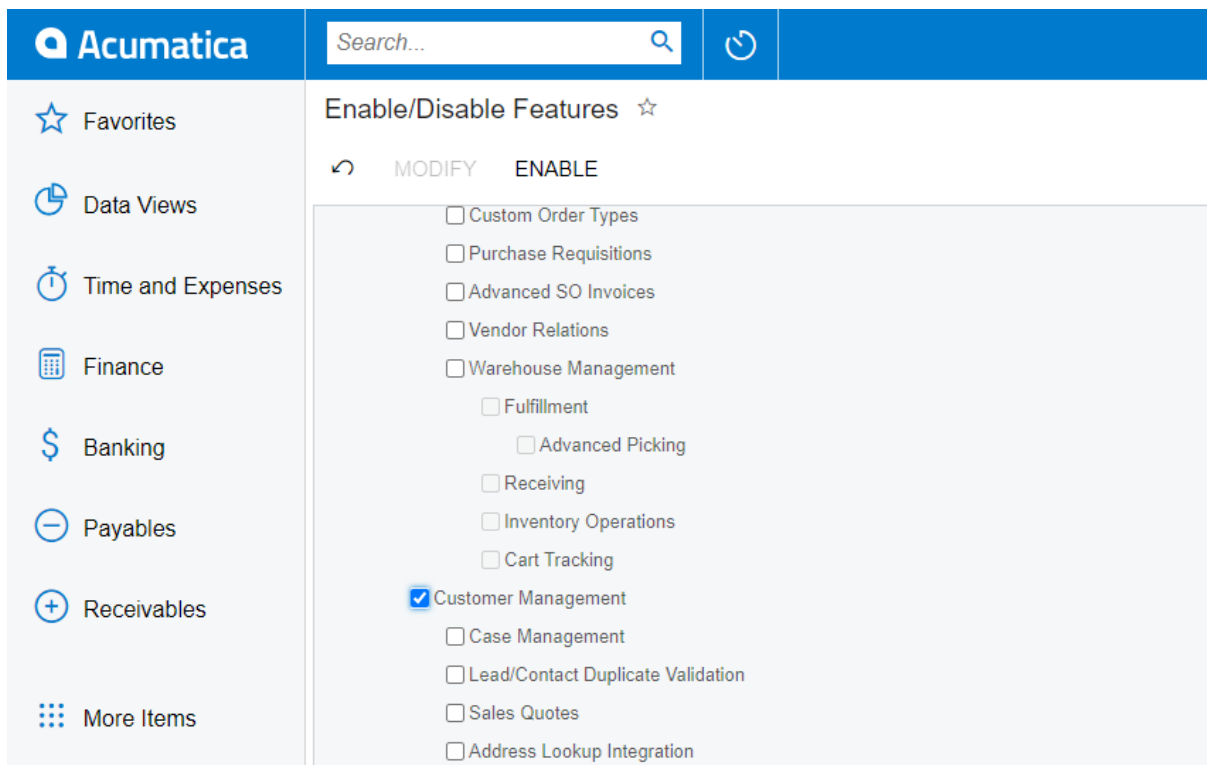


Figure: Enabling features

6. On the toolbar, click **Enable**.

The status of the currently selected feature set is now *Validated*. Notice that new workspaces appear in the Main menu in the left pane (**Inventory**, **Sales Orders**, and **Purchases**).

7. In the search box in the top pane of the screen, type `Customer Management` and verify that the [Customer Management Preferences](#) (CR101000) form related to the customer management functionality has also appeared on the user interface.

Step 4.2: Activating a License

By default, Acumatica ERP is installed in trial mode. Although in this mode all features are available, the mode has the following restrictions:

- You can create no more than 10 tenants per instance.
- All tenants that you create have the *Test Tenant* status.
- The watermark is added to all printed forms and reports.
- Only two conventional users can concurrently use the system. Each time a third conventional user signs in to Acumatica ERP, one of the current users is forcibly signed out. The following message is displayed at the bottom of each form, followed by the *Activate* link you can click to activate a license: *Your product is in trial mode. Only two concurrent users are allowed.*
- Only two API users can concurrently use the system. A third API user cannot sign in to Acumatica ERP and receives an error during the signing in.

In trial mode, you can enable and use any feature. For a production site, you should activate the full-product license, thus running the system in license mode. After the license activation, the system hides the features that are not included in your license on the [Enable/Disable Features](#) form, and you will not be able to enable these features.

When you obtain the license for using Acumatica ERP and apply this license to an instance, the trial mode restrictions are removed. A license defines the number of tenants you can add to the instance, the number of concurrent users, and the set of features you can activate for the instance.

For a license to be validated, the licensing server requires port 443 to be opened on the computer running the Acumatica ERP instance you use to enter the key. If the server has a firewall enabled, this port may be closed by default.



During licensing and activation, the application instance is restarted. When you apply a license on a non-testing environment, make sure that all users of your website are warned about the restart of the site so that they can save all work in progress.

This step describes how you can activate a full product license.



You do not have to perform these instructions to pass the training, because all of the features are available in trial mode.

To activate the full-product license, you would perform the following instructions:

1. Obtain a product key by creating a support case through the [Partner Portal](#) by submitting the following information:
 - **Installation ID:** The installation ID is available on the **About** dialog box of the Acumatica ERP application instance. To open this dialog box, on any Acumatica ERP form, click **Tools > About**
 - **Contract ID:** You can find this ID on your Acumatica ERP sales invoice.
2. On the [Activate License](#) (SM201510) form, do one of the following depending on the license type that you have obtained from your sales representative:
 - If you have obtained a license key, click **Enter License Key** on the form toolbar, enter the license key in the **Activate New License** dialog box, which is opened, and click **OK**.
The system contacts the licensing server and validates the license online. Each license can be used to activate a predetermined number of instances. If you reach the limit for your license, you generally will not be able to use this license. Alternatively, depending on your license settings, the system may bring up a prompt asking if you want to deactivate the license from the oldest instance.
 - If you have obtained a license file, click **Upload License File** on the form toolbar, and then select and upload the license file by using the **Upload New License File** dialog box.
If you use a license file, the system validates the license without contacting the licensing server.
3. In the **Agree to Proceed** dialog box, which opens, click the link to read the license agreement, and if you agree to the terms of the agreement, click **Agree** to proceed with activation and close the dialog box.
4. In the table, review the features that this license supports, and make sure that the feature list is correct.
5. On the form toolbar, click **Apply License** to activate your instance.

The status of the license becomes *Valid*, and the check mark in the green circle appears next to the status, as shown in the following screenshot.

Activate License

↶ ENTER LICENSE KEY UPLOAD LICENSE FILE UPDATE LICENSE DELETE LICENSE

Status:	Valid	✓	
Valid From:	8/12/2013 12:00:00 AM	Valid To:	6/25/2021 12:00:00 AM
Number of Users:	1000	Version:	6.00
		Number of Tenants:	50

↶ + × |↔| ☒

Activated	Feature Name
> <input checked="" type="checkbox"/>	Business Account Locations
<input checked="" type="checkbox"/>	Active Directory and Other External SSO
<input checked="" type="checkbox"/>	Address Lookup Integration

Figure: Activated license

Part 2: Maintenance

In this part of the course, you will learn the system maintenance tasks. In particular, you will develop an understanding of when the system must be and might be updated. You will also perform the following tasks:

- Viewing and changing the parameters of an Acumatica ERP application instance
- Updating an application instance by using Acumatica ERP Configuration Wizard
- Configuring an application instance whose settings are stored in the `web.config` file of the site
- Deleting an application instance

Lesson 5: Maintenance

In this lesson, you will learn how to perform maintenance tasks that are associated with the Acumatica ERP instances and their databases.

You can perform all necessary maintenance tasks by using the Acumatica ERP Configuration Wizard, which you installed in Lesson 2 and used for creating application instances.

Lesson Objectives

You will do the following:

- View the details of a application instance
- Change a database of an application instance
- Make an existing tenant invisible
- Create a new child tenant for the application instance and insert demo data to this tenant

Step 5.1: Viewing the Details of an Application Instance

Acumatica ERP provides a way to view the following details of an application instance:

- Instance name
- Instance type (regular site or self-service portal)
- Instance file path
- Database
- Database version
- Files version
- Instance URL
- Website name
- Virtual directory name

The instance and virtual directory names can be edited. The Instance Information page also provides quick access to the folder where the files of this instance are stored. You can also create a shortcut for the instance URL to get quick access to the site.

In this lesson, you will view the details of the *Acumatica100* application instance and change its name.

Perform the following instructions:

1. In the Start menu, find and click **Acumatica ERP Configuration** to open the Acumatica ERP Configuration Wizard.
2. On the Welcome page, click **Perform Application Maintenance**.
3. In the list of existing application instances, click the line with the *Acumatica100* instance and click the **Instance Info** button.

This opens the Instance Information page.

4. To change the instance name, do the following:
 - a. Right of the **Instance Name** box, click **Rename**.
 - b. Change the name of the instance to *AcumaticaTraining*, as shown in the following screenshot.

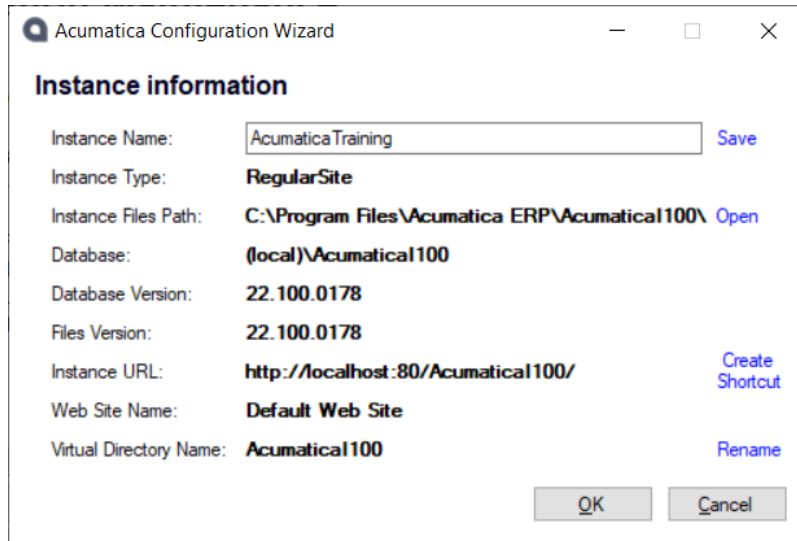


Figure: The updated instance name

- c. Right of the **Instance Name** box, click **Save**.
5. Right of the **Instance Files Path**, click **Open**.
This opens the folder where the selected application instance is installed. In particular, this folder contains the `web.config` file of the current instance.
6. To change the virtual directory name, go back to the Acumatica ERP Configuration Wizard and do the following:
 - a. Right of the **Virtual Directory Name** box, click **Rename**.
 - b. Change the virtual directory name to *AcumaticaTraining*
 - c. Right of the **Virtual Directory Name** box, click **Save**.
7. Click **OK** to save your changes.
8. In the dialog box with the notification message, which the system displays, click **OK**.
This reloads the list of application instances, and the system displays the updated list. Notice that the URL of the renamed *AcumaticaTraining* instance is also updated.

Step 5.2: Changing the Database of an Application Instance

You can change the database of an existing Acumatica ERP instance—for example, if you want to switch to a backup database. You can also associate the instance with a new database and create it on the fly.



When you connect the application instance to another existing database, the version of the database is checked. The versions of the database and the Acumatica ERP Configuration Wizard must be the same. If the database has a lower version, you must update it to correspond to the Acumatica ERP Configuration Wizard version. This can be done during the process of changing the database but this will also lead you to the necessity of updating the instance site as a separate step.

In this lesson, you will change the database of the *AcumaticaTraining* application instance and connect it to the *AcumaticaS100* database, which you have created during the *AcumaticaS100* instance deployment process.

Perform the following instructions:

1. In the Start menu, find and click **Acumatica ERP Configuration** to open the Acumatica ERP Configuration Wizard.
2. On the Welcome page, click **Perform Application Maintenance**.
3. In the list of existing application instances, click the line with the *AcumaticaTraining* instance and click the **Change Database** button.

This opens the Database Server Connection page, which provides the list of available servers.

4. On the Database Server Connection page, specify the following settings, and click **Next** to proceed to the next page:
 - **Server type:** *Microsoft SQL Server*
 - **Server name:** *(local)*
 - **Windows Authentication:** Selected
5. On the Database Configuration page, specify the following settings (as shown in the screenshot below), and click **Next** to proceed to the next page:
 - **Connect to an existing database:** Selected
 - **Available databases on server:** *AcumaticaS100*

Notice that the version of the selected database is automatically detected (as shown in the following screenshot), and it is the same version the Acumatica ERP Configuration Wizard has. If it was lower than the Acumatica ERP Configuration Wizard version, you would have an option to update the database and could not proceed further without updating the selected database.

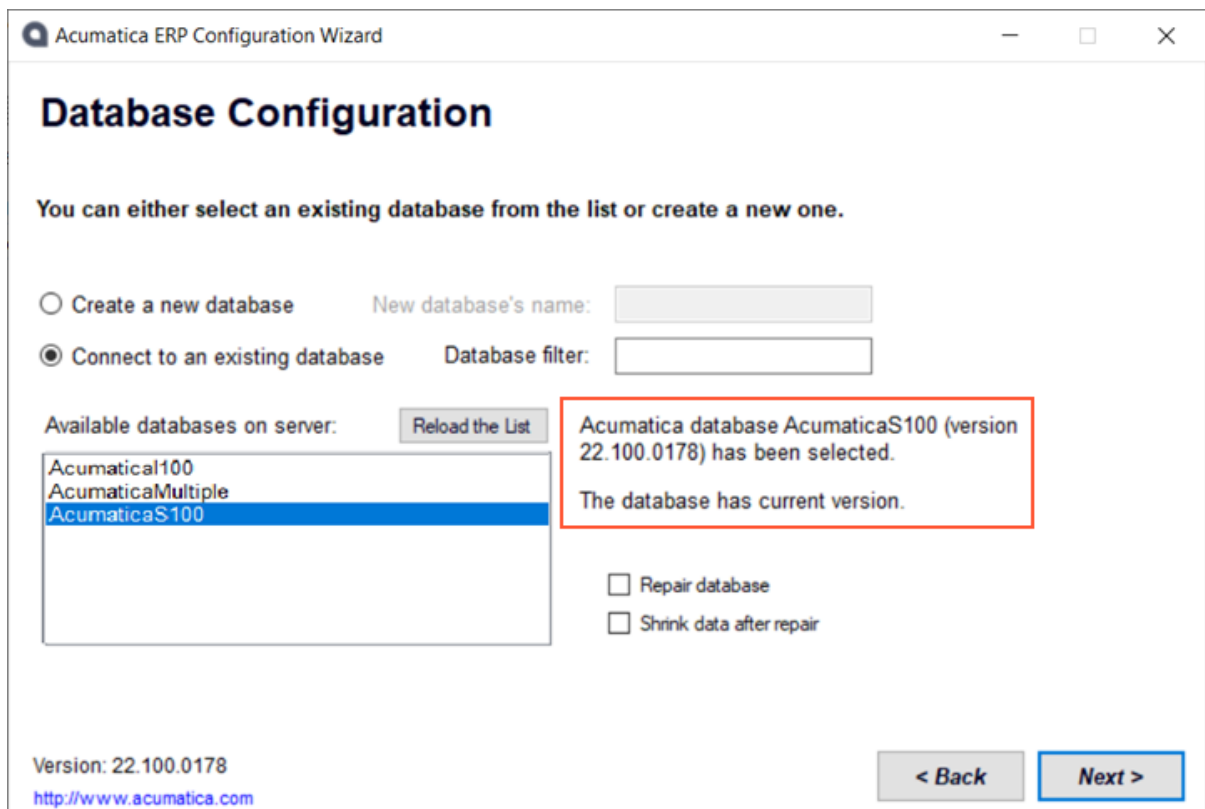


Figure: Selection of an existing database

6. On the Tenant Setup page, click **Next**.
7. On the Database Connection page, click **Next**.
8. On the Confirm Configuration page, review your changes, and click **Finish**.
9. Wait while the application instance settings are updated, and click **OK** in the Installation Complete dialog box.
10. On the Acumatica ERP Configuration Wizard Welcome page, which opens, click **Perform Application Maintenance**.
11. On the Application Maintenance page, notice the values in the **Database** column. Two instances (*AcumaticaS100* and *AcumaticaTraining*) are now connected to the same *AcumaticaS100* database.

Step 5.3: Maintaining Tenants for an Instance

For an existing Acumatica ERP instance, you can also modify a set of tenants. In Step 3.4, you learned how to add a new tenant to the existing instance and how to change its name; you also changed tenants' visibility settings.


In this lesson, you will create a new tenant and insert the demo data to this tenant. You will also try to set all tenants to be invisible, and try to make the visible tenant be a parent of a new tenant.

Perform the following instructions:

1. In the Start menu, find and click **Acumatica ERP Configuration** to open the Acumatica ERP Configuration Wizard.
2. On the Welcome page, click **Perform Application Maintenance**.

3. In the list of existing application instances, click the line with the *AcumaticaTraining* instance and click the **Tenant Maintenance** button.
4. In the SQL Server Authentication dialog box, leave the default settings, and click **OK**.
This opens the Tenant Setup page, which shows the full list of tenants for the selected application instance.
5. Select the **Advanced Settings** check box below the list of tenants.

The system displays the default system tenant with the **ID** equals 1 in the list of tenants.

6.  With the **Advanced Settings** check box selected, you can also select a new data template in the **Insert Data** column for an existing tenant. If you finish updating the tenant, the Acumatica ERP Configuration Wizard replaces the tenant data with the data of the selected template.

7. Clear the **Visible** check box in the line with the *MyCompany* tenant, and click **Next**.

The system shows you a warning that informs that you cannot continue with all the instance tenants are invisible.

8. In the warning dialog box, click **OK**.
9. On the Tenant Setup page, to which you return, do the following:
 - a. Click **New** below the list of tenants to add one more tenant.
 - b. For the new tenant, select 2 in the **Parent Tenant ID** column.
 - c. Select the **Visible** check box in the line with the *MyCompany* tenant.
 - d. Click **Next**.

The system shows you a warning that informs that you cannot continue because only an invisible tenant can be specified as a parent of another tenant, as shown in the following screenshot.

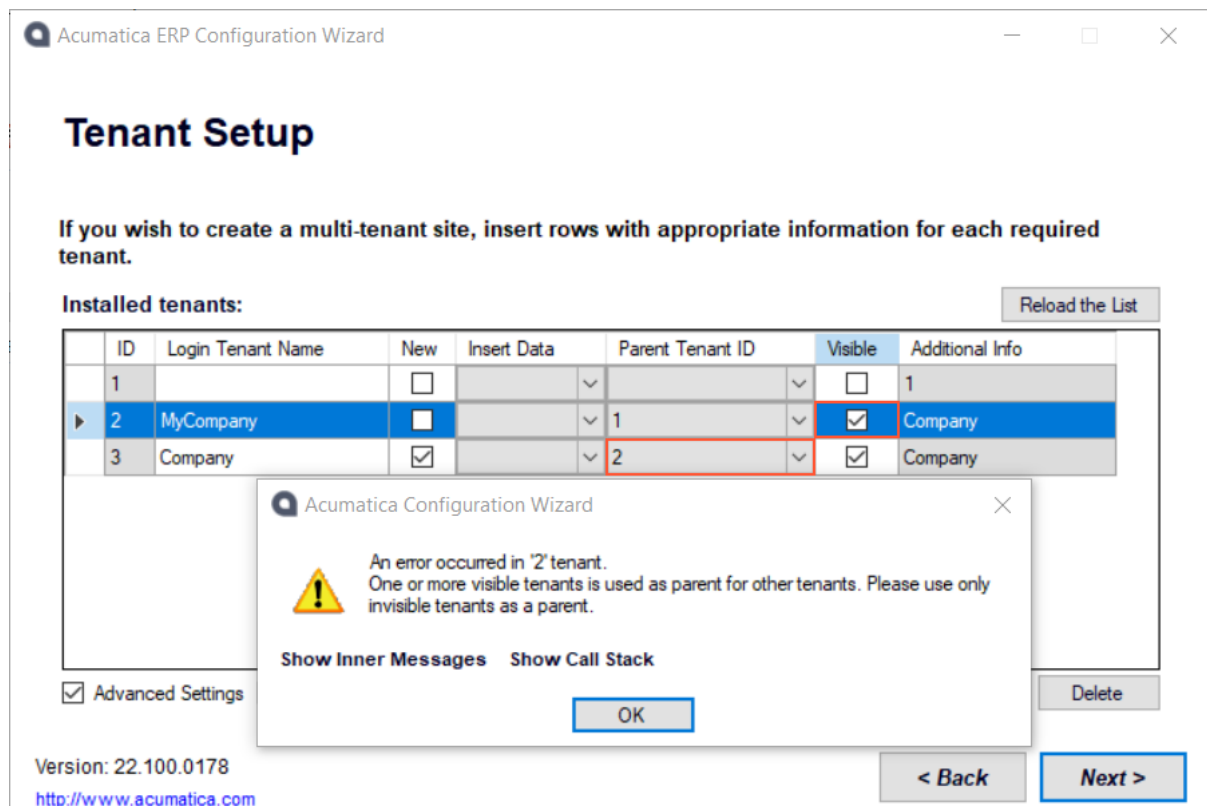


Figure: Error indicating that only an invisible tenant can be used as a parent

10. In the warning dialog, click **OK**.

The system automatically clears the **Visible** check box in the line with the *MyCompany* tenant.

11. On the Tenant Setup page, to which you return, do the following:
 - a. Make sure that the **Visible** check box is selected only in the line with the new tenant.
 - b. Make sure 2 is selected as the **Parent Tenant ID** in the line with the new tenant.
 - c. Click **Next**.
 12. On the Confirm Configuration page, review your changes and click **Finish**.
 13. Wait while the application instance settings are updated, and click **OK**.
- You have modified the tenant list for the application instance.

Additional Information

The following concept is outside of the scope of this course but may be useful to some readers. You can use the link below to get additional information.

The Perform Database Maintenance option

The **Perform Database Maintenance** option is found on the Welcome page of the Acumatica ERP Configuration Wizard. The option provides you with the ability to create a new Acumatica ERP database, upgrade an existing database with a current version of the database schema, repair the database schema, and set up tenants. For more information, see [To Perform Database Maintenance](#).

Lesson 6: Upgrading

In this lesson, you will learn about upgrading Acumatica ERP.

Updates to Acumatica ERP provide functional enhancements and new functionality. Updates are distributed in builds (as installation packages). Builds include fixes to issues that have been reported and may also contain functionality improvements. Builds are cumulative—each new build contains everything from previous builds, along with any new fixes. Thus, you do not have to install a previous build before you install the latest build.

You obtain the latest Acumatica ERP builds in the [Acumatica Community](#) and use your partner login and password to access the site.

You download the installation package file to the server and perform the update procedure on the server where the current version of the Acumatica ERP Configuration Wizard is installed. You first install the product's software components on the server by running the installation package, and then update the application instances and their databases by using the Acumatica ERP Configuration Wizard.

Lesson Objectives

You will do the following:

- Upgrade the Acumatica ERP Tools
- Upgrade the application instance
- Upgrade only the site of the application instance

Possible States of the Application Instance

To see which instances and databases you need to update, you should check the state of your application instances and databases.

The Application Maintenance page of the Acumatica ERP Configuration Wizard displays the state of each instance, as shown in the following screenshot.

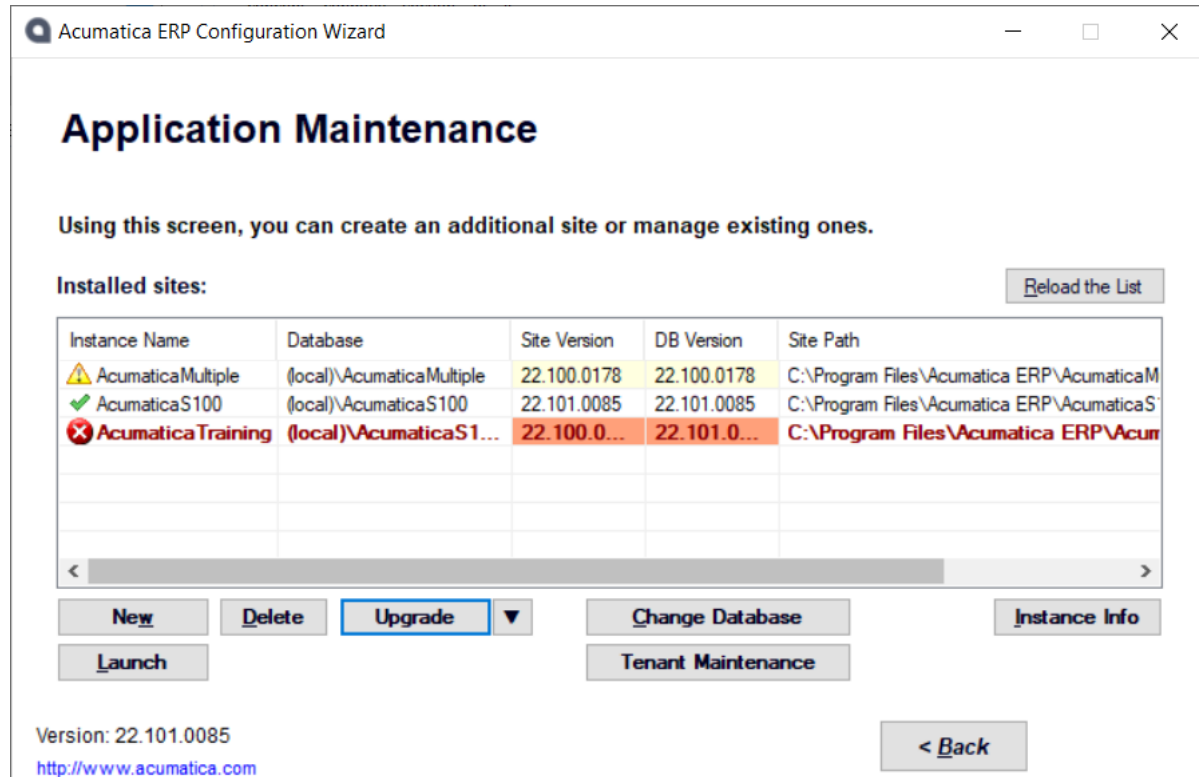


Figure: Application Maintenance page

With regard to system versions, keep in mind that there are three versions you can note on this page:

- The version of the Acumatica ERP Configuration Wizard that is installed on your server. You can see this version in the lower left corner of the Application Maintenance page.
- The application instance version, which is displayed in the **Site Version** column for the application instance.
- The database version, which is displayed in the **DB Version** column for the application instance.

On the Application Maintenance page, in the list of installed sites, you can see the following icons indicating the state of each application instance:

- *Green check mark*: Indicates that the instance and the associated database are up to date. (That is, the versions of the application instance, the database, and the Acumatica ERP Configuration Wizard are the same.)
- *Yellow triangle with exclamation point*: Indicates that the instance and the instance database are outdated. (That is, the version of the application instance is same as the version of the database and is older than that of the installed Acumatica ERP Configuration Wizard.) You may need to update the application instance and the database, but if you don't, the application instance will still work.
- *Red circle with a white X*: Indicates that the instance or the database (depending on which has an older version) requires update; that is, the versions of the instance and the instance's database are different. You must update the one whose version is older.

This icon is also displayed when the database of an instance has not been found, or when the version of an instance or a database or both are higher than the current version of Acumatica ERP Configuration Wizard.

Note the following points about versions:

- The site version and the database version must be the same.
- The Acumatica ERP Configuration Wizard version cannot be lower than the site or database version.
That is, you first upgrade Acumatica ERP Configuration Wizard, and then you may upgrade the site and the database. If you don't upgrade the site and the database, they continue functioning.
- You can upgrade only the site, only the database, or both the site and the database.
- You cannot use Acumatica ERP Configuration Wizard with a higher version to deploy an application instance with a lower version.
- Versions of the system which are lower than the current version can be installed only by first uninstalling the current version of the Acumatica ERP Configuration Wizard and then installing the desired version. The instances with higher version will remain functioning.

Step 6.1: Updating an Application Instance by Using Acumatica ERP Configuration Wizard

The general process of upgrading the system by using the Acumatica ERP Configuration Wizard, which is installed on the server, is the following:

1. If necessary, back up all configuration files and databases used by the application instances.
2. If necessary, notify users about the upcoming update.
3. Download an installation package, and run it to upgrade the Acumatica ERP Configuration Wizard.
The procedure is the same as for installing Acumatica ERP Configuration Wizard, which is described in Step 2.2.
4. Use the Acumatica ERP Configuration Wizard to update the database and the application instance.

In this step, you will update the *AcumaticaTraining* instance from the previous version to a newer version.

Downloading and Installing Acumatica ERP

To download a newer version of Acumatica ERP and install it, perform the following instructions:

1. Open [Acumatica Community](#).
You will need your partner login and password to access the site.
2. In the **Product** menu on top of the page, click **2022 R1**.
The page where you can find the latest release and prior releases of the selected Acumatica ERP version and read the release notes is displayed.
3. To download the Acumatica 2022 R1 Update 1, click the corresponding link in the **Prior Releases** section.
The number of the release is 22.101.0085. The page with the release opens.
4. In the **Download Links** section, click the Acumatica ERP 2022 R1 Update 1 link to download the `AcumaticaERPInstall.msi` Windows installer package.
5. Install the newer version of the Acumatica ERP Configuration Wizard, as described in Step 2.2.

Updating an Acumatica ERP Instance

To update the *AcumaticaTraining* instance from the previous version to one you have just installed, perform the following instructions:

1. In the Start menu, find and click **Acumatica ERP Configuration** to open the Acumatica ERP Configuration Wizard.
2. On the Welcome page, click **Perform Application Maintenance**.
On the Application Maintenance page, which opens, in the list of existing application instances, notice that all the instances have yellow triangles with exclamation points.
3. In the list of application instances, click the line with the *AcumaticaS100* instance and click the **Upgrade** button.



You can use the **Update only Website** and **Update only Database** commands, which you can find in the dropdown list to the right of the **Upgrade** button, to update the Acumatica ERP database without updating the site or to update the site without updating the database.

4. In the confirmation dialog box, click **Yes** to continue the update.
5. In the **SQL Server Authentication** dialog box, which opens during the upgrade, leave the **Windows Authentication** option selected by default, and click **OK** to start the update.

The time required for the update depends on the performance of your database server, the differences between the old and current versions of the database schema, the hardware configuration of the server, and the current system load.



During the upgrade, the system may ask you to stop the application pool that is used for the instance being upgraded. In this case, click **Yes** to proceed.

When the update of the instance is finished, the Acumatica ERP Configuration Wizard updates the list of instances, as shown in the screenshot below.

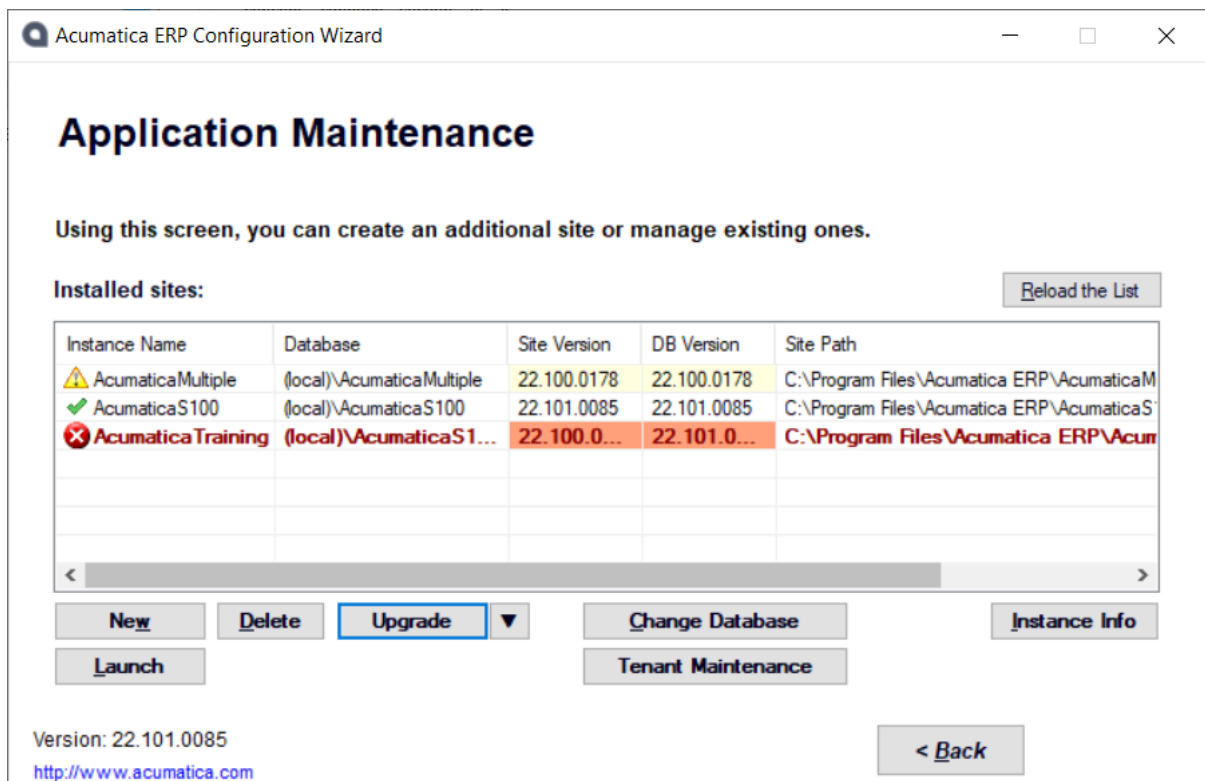


Figure: Successful update of one instance

The *AcumaticaS100* site and its database have the same version as the Acumatica ERP Configuration Wizard does, which is indicated by the green checkmark.

The *AcumaticaMultiple* site and its database have the same version, but it is lower than the version of the Acumatica ERP Configuration Wizard, which is indicated by an exclamation point in a yellow triangle.

The *AcumaticaTraining* site and its database have different versions because the database is used by the *AcumaticaS100* instance and has been updated. This is indicated by a red circle with a white X.

6. Click the line with the *AcumaticaTraining* instance, and click **Launch** to open the instance.

On the instance Sign-In page, the system displays the alert message that says that the update was unsuccessful and the site version (22.100.0178) differs from the database version (22.101.0085).
7. Go back to the Acumatica ERP Configuration Wizard, and in the list of existing application instances, click the line with the *AcumaticaTraining* instance.
8. In the dropdown list to the right of the **Upgrade** button, click **Update only Website**.
9. When you are prompted, click **Yes** to continue the update.



During the upgrade, the system may ask you to stop the application pool that is used for the instance being upgraded. In this case, click **Yes** to proceed.

When the update of the website is finished, the Acumatica ERP Configuration Wizard updates the list of instances. The site of both the *AcumaticaS100* instance and the *AcumaticaTraining* instance has the same version as their database and the Acumatica ERP Configuration Wizard. This is indicated by the green checkmark.

10. Click the line with the *AcumaticaTraining* instance, and click **Launch** to open the instance.

On the instance Sign-In page, the system does not display the alert message anymore.

Additional Information

The following concepts are outside of the scope of this course but may be useful to some readers. You can use the link below to get additional information.

Scheduling the Lockout of the System

Before you start updating your system, we recommend that you schedule the system lockout, specifying when the system will be unavailable. A message alerting users about the system lockout will be displayed on the Sign-In page. When the lockout is in effect, non-administrative users won't be able to enter the system; they will see a message indicating that the site is under maintenance. After finishing the update, you must manually unlock the system. For more information, see [To Schedule the System Lockout](#) and [To Unlock an Acumatica ERP Instance](#).

Lesson 7: Configuring Time-Outs and Reminders

In this lesson, you will learn how to configure time-outs for the Acumatica ERP instances. You will change the default values for the following time-outs:

- Session time-out: The number of minutes a session can be idle before it is terminated
- Cookie time-out: The number of minutes a user can be authenticated by the Acumatica ERP website.
- Query time-out: The number of seconds an operation can take before the system times out
- Report query time-out: The number of seconds a report generation query can take before the system times out

You will also learn how to turn on reminders and the display of the total number of tasks for the current user. In the Acumatica ERP system, a reminder is a notification dialog box that appears automatically to a user when someone has set a reminder for a task or event for which this user is responsible. In such a dialog box, the user can proceed to the task or event, or postpone or dismiss it.

You can access all settings related to time-outs by using the `web.config` file, which is the configuration file of your Acumatica ERP website. The file is located in the application folder of your website. By using `web.config`, you can specify standard ASP.NET configuration settings and Acumatica product-specific settings.

Once you complete this lesson, you will have the new settings for the Acumatica ERP instance configured.

Lesson Objectives:

You will do the following:

- Specify a new session time-out setting
- Specify a new cookie time-out setting
- Specify a new query time-out setting
- Specify a new report query time-out setting
- Turn on reminders

Step 7.1: Configuring the Session Time-Out

In this step, you will specify the new session time-out value for your Acumatica ERP website. The session timeout is the time interval between requests for a given session (for a particular user) before this session is terminated. The

authentication cookie specifies the number of minutes after which the cookie will expire and the user will no longer be authenticated.

When the session or authentication cookie times out, the Acumatica ERP user is automatically redirected to the Sign-In page.

By default, the session expires when the user has not made a request or refreshed the Acumatica ERP webpage for 60 minutes (the session time-out is set to 60 minutes, as is the cookie time-out). The time-out values must be integers that represent the number of minutes.

To change the time-out value, you change the session time-out and cookie time-out values in the `web.config` file of the application instance website.



When you perform this configuration in a non-testing environment, make sure that all users of your website are warned about the site restart so that they can save all documents.

In this step, you will set the session time-out to 100 minutes.

To update the default session time-out for the *AcumaticaS100* application instance, perform the following instructions:

1. Open the `web.config` file for your Acumatica ERP instance.

If you have completed Part 1 of this training, the configuration file for your application instance is located in `%Program Files%\Acumatica ERP\AcumaticaS100`.



You might need to provide administrative permissions to be able to save the changes you will make to the `web.config` configuration file.

2. In the file, find the snippet in the `<sessionState>` section that starts with the following parameters.

```
<sessionState cookieless="UseCookies" mode="Custom"
  customProvider="PXSessionStateStore" timeout="60">
```

3. Change the `timeout="60"` setting to `timeout="100"`, where *100* is the new session timeout value in minutes.

The following screenshot demonstrates the updated settings.

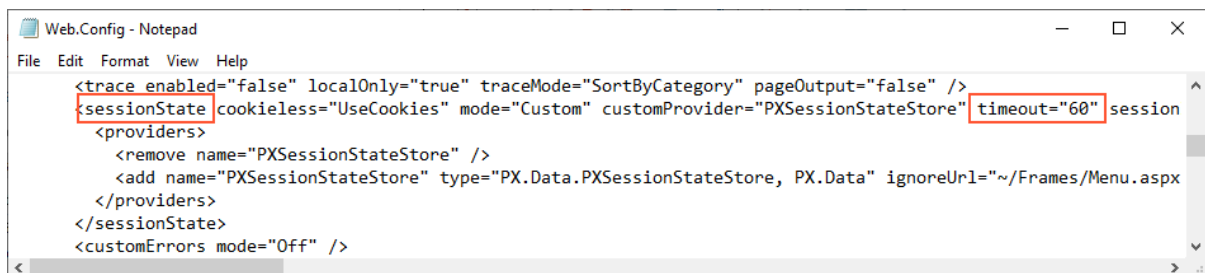


Figure: The updated session timeout

4. In the file, find the `<formsAuth>` section that contains the following parameters.

```
<formsAuth loginUrl="Frames/Login.aspx" timeout="60" />
```

5. Change the `timeout="60"` setting to `timeout="100"`, where *100* is the new authentication cookie timeout value in minutes.
6. Save the `web.config` file.

This automatically restarts the website.

Until now, for your Acumatica ERP instance, you have set the session to be abandoned 100 minutes after it is idle. Now you have to make sure that the Application Pool Idle Time-out value in the Internet Information Services (IIS) Manager is greater than the session time-out and cookie time-out values for your website.

7. In the Start menu, find and click **Internet Information Services (IIS) Manager** to open the Internet Information Services (IIS) Manager.
8. In the left **Connections** pane, click **Application Pools**, and in the list of available application pools on the server, click the application pool that you use on your website. If you have completed Part 1 of this training, click **DefaultAppPool**.
9. In the right **Actions** pane, click **Advanced Settings**.
10. In the **Advanced Settings** dialog box, which opens, in the **Idle Time-out (minutes)** box, make sure that the value is greater than both the session time-out value and the cookie time-out value, which you set in Instructions 3 and 5, respectively.

The following screenshot demonstrates that the Application Pool Idle Time-out value is greater than 100 minutes, which is the new value for both the session time-out and the cookie time-out. If the value were not greater, IIS could recycle the application pool before the session has expired.

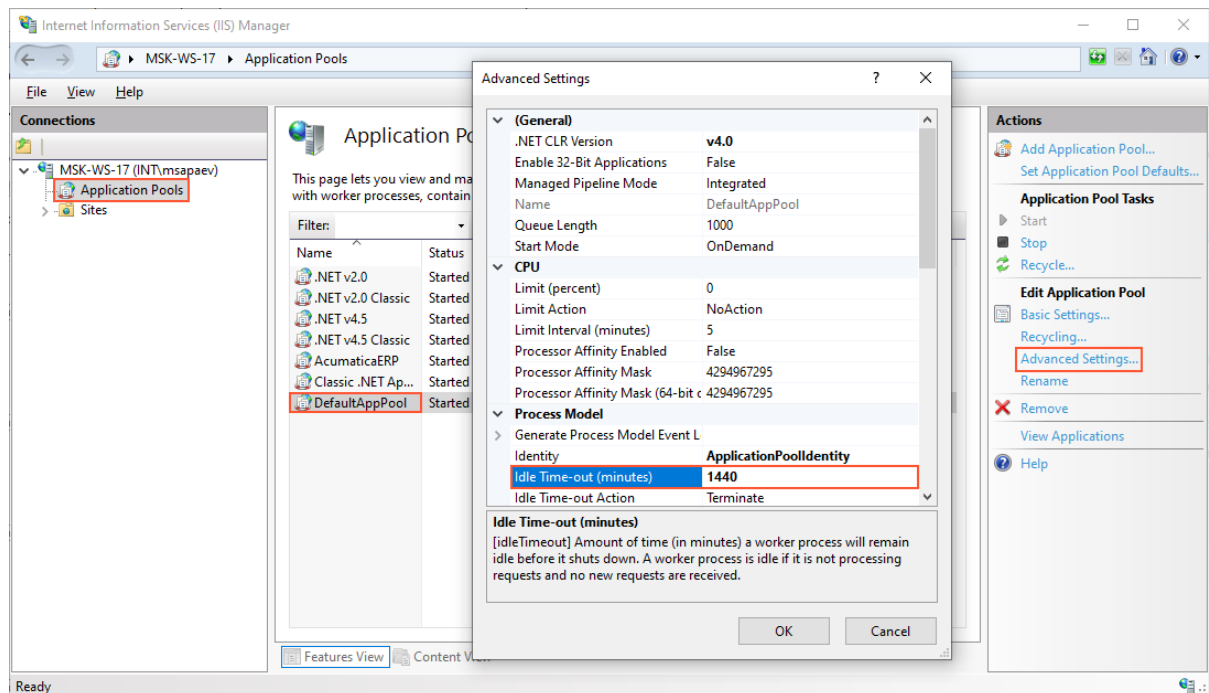


Figure: The idle time-out value of the application pool

Step 7.2: Configuring the Query Time-Out

In this step, you will specify a new query time-out value for your Acumatica ERP website. The query time-out is a value that specifies the number of seconds the system waits before a timeout error occurs when a query is executed.

By default, the query time-out is set to 30 seconds. In this step, you will increase the time for the execution of a query to 60 seconds. To change it, you will update the `web.config` file of the application instance website.



When you make the changes in the `web.config` file of the production site, make sure that all users are warned about the site restart so that they can save all documents.

To configure the query time-out for the *AcumaticaS100* application instance, perform the following instructions:

1. Open the `web.config` file for your Acumatica ERP instance.

If you have completed Part 1 of this training, the configuration file for your application instance is located in `%Program Files%\Acumatica ERP\AcumaticaS100`.



You might need to provide administrative permissions to be able to save the changes you will make to the `web.config` configuration file.

2. In the file, find the snippet in the `<providers>` section that starts with the following parameters.

```
<add name="PXSqlDatabaseProvider" type="PX.Data.PXSqlDatabaseProvider, PX.Data" ... />
```

Here ... represents the other parameters, which depend on your website settings.

3. Add the `queryTimeout="60"` setting to this line, where *60* is the new query timeout value in seconds, as shown below.

```
<add name="PXSqlDatabaseProvider" type="PX.Data.PXSqlDatabaseProvider,
PX.Data" ... queryTimeout="60" />
```

The following screenshot demonstrates the updated settings.

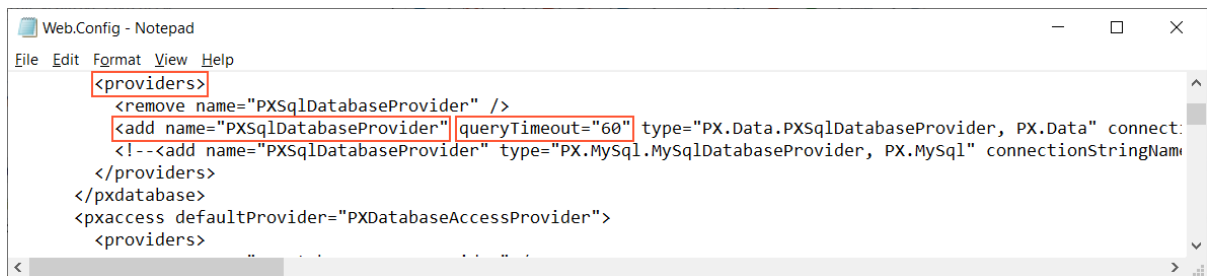


Figure: The updated query timeout

4. Save the `web.config` file.

This automatically restarts the website with the new setting in effect.

Step 7.3: Configuring the Report Time-Out

When your application is running a report with a large number of records being processed, the operation can take a while. An example of such a report can be a general ledger report that covers multiple periods.

By default, the system has a report processing time-out that is set to 300 seconds. If a report takes longer to execute, the operation is aborted. If you want to extend the amount of time permitted by the Acumatica ERP system for generating a report, you can increase it by modifying the `web.config` configuration file of the application instance.

In this step, you will set the report time-out to 10 minutes (600 seconds).



When you perform this configuration in a non-testing environment, make sure that all users of your website are warned about the site restart so that they can save all documents.

To change the default report time-out for the *AcumaticaS100* application instance, perform the following instructions:

1. Open the `web.config` file for your Acumatica ERP instance.

If you have completed Part 1 of this training, the configuration file for your application instance is located in `%Program Files%\Acumatica ERP\AcumaticaS100`.



You might need to provide administrative permissions to be able to save the changes you will make to the `web.config` configuration file.

2. In the file, find the snippet in the `<providers>` section that starts with the following parameters.

```
<add name="PXSqlDatabaseProvider" type="PX.Data.PXSqlDatabaseProvider, PX.Data" ... />
```

Here ... represents the other parameters, which depend on your website settings.

3. Add the `reportQueryTimeout="600"` setting to this line, where `600` is the new report timeout value in seconds, as shown below.

```
<add name="PXSqlDatabaseProvider" type="PX.Data.PXSqlDatabaseProvider,
PX.Data" ... reportQueryTimeout="600" />
```

The following screenshot demonstrates the updated settings.

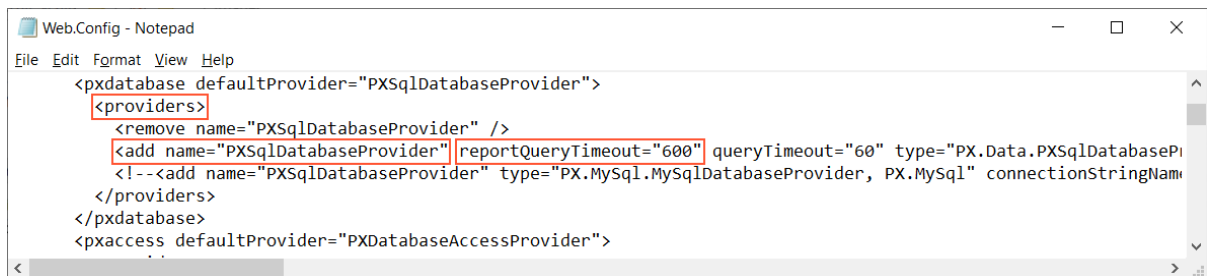


Figure: The updated report timeout

4. Save the `web.config` file.

This automatically restarts the website with the new setting in effect.

Step 7.4: Turning On Reminders

Acumatica ERP provides a feature to draw users' attention to upcoming tasks and events: the reminder functionality.



A user can click the **Reminders** button (🔔) in the info area to see the events and tasks that are overdue or approaching their due dates, if reminders have been configured for the tasks. When a reminder has gone off, the user can snooze, dismiss, or open the details of the task or the event. The reminders are also displayed automatically to the users when the predefined reminder date has come.

In this step, you will enable the reminder functionality for the website, which by default is turned off. Reminders themselves have to be set up explicitly by the system users for a task or an event.

To turn on the reminder functionality for the *AcumaticaS100* application instance, perform the following instructions:

1. Open the `web.config` file for your Acumatica ERP instance.

If you have completed Part 1 of this training, the configuration file for your application instance is located in `%Program Files%\Acumatica ERP\S100`.



You might need to provide administrative permissions to be able to save the changes you will make to the `web.config` configuration file.

2. In the file, find the snippet in the `<appSettings>` section that contains the following settings.

```
<add key="ReminderVisible" value="false" />
<add key="ReminderRequestPeriod" value="60" />
<add key="ReminderActiveMode" value="false" />
```

3. Change the following key values:

- `ReminderVisible: true`
- `ReminderActiveMode: true`

The following screenshot demonstrates the updated settings.



Figure: The updated reminder functionality settings

4. Save the `web.config` file.

This automatically restarts the website with the new setting in effect.

Additional Information

The following concept is outside of the scope of this course but may be useful to some readers. You can use the link below to get additional information.

Your Acumatica ERP Working Environment

You can personalize your account in ways to make it easier to use the system. Your personal settings will be available only to you; other users will not be affected.

You can specify the following settings for your Acumatica ERP working environment:

- The time zone used for displaying times in the system
- The date and time formats and the numbering format to be used for your user account
- The home page you want to be displayed when you sign in to the system
- The business date that will be used on the records that you add to the system or edit in the system
- The list of your favorites, which are the forms that you access most frequently

For a more comprehensive description of the system settings available to a user, see [Managing Your Basic Working Environment: General Information](#) and [Managing Favorites: General Information](#).

Lesson 8: Uninstalling the Acumatica ERP Configuration Wizard and Deleting Application Instances

In this lesson, you will learn how to delete unnecessary application instances and how to perform "clean" uninstalling.

Lesson Objectives

You will do the following:

- Learn about the deletion of application instances
- Learn about uninstalling the Acumatica ERP Configuration Wizard
- Delete an application instance by using the Acumatica ERP Configuration Wizard

Step 8.1: Deleting an Application Instance

You can use the Acumatica ERP Configuration Wizard to delete an existing application instance. Deleting a website (that is, an instance) removes this website from Internet Information Services and cleans up the virtual folder related to the website. The instance's database stays untouched—you can delete it by using the database management tools. Deletion of an instance also does not delete any customized pages and files; they remain in the %Program Files%\Acumatica ERP*<instance_name>*\App_Data folder.

In this step, you will delete the *AcumaticaTest1* application instance.

Perform the following instructions:

1. In the Start menu, find and click **Acumatica ERP Configuration** to open the Acumatica ERP Configuration Wizard.
2. On the Welcome page, click **Perform Application Maintenance**.
3. In the list of existing application instances, click the line with the *AcumaticaTest1* instance, and click **Delete**, as shown in the following screenshot.

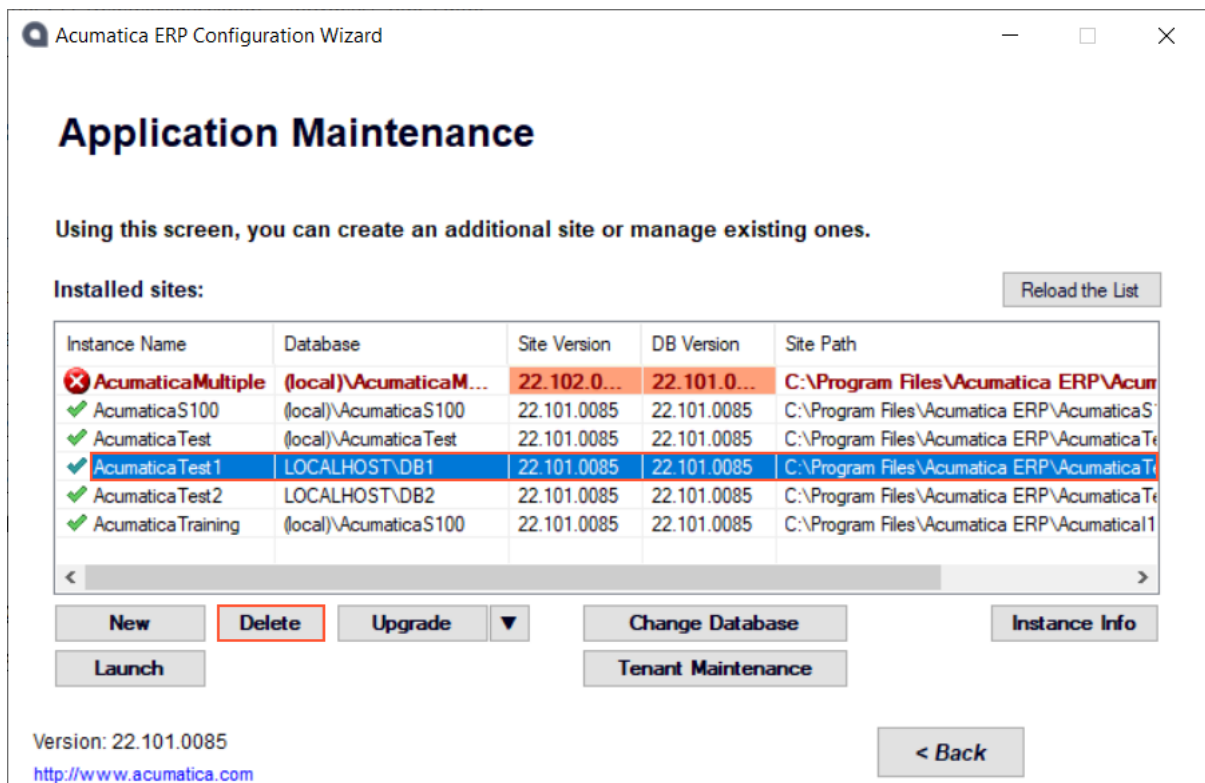


Figure: Deletion of the selected instance

- In the confirmation dialog box, click **Yes**.
- Wait while the instance is deleted, and click **OK**.

The application created under the default site in Internet Information Services (IIS) when Acumatica ERP was installed has been deleted. The Application Maintenance page is refreshed and *AcumaticaTest1* is no longer on the list.

Uninstalling the Acumatica ERP Configuration Wizard

You can uninstall the Acumatica ERP Configuration Wizard on the application server by using the standard Windows procedure. The uninstalling process removes only the applications and tools that have been installed by the Acumatica ERP installer package. All the instances, databases, and customizations that exist are kept intact and functional.

You might need to uninstall Acumatica ERP Configuration Wizard if you want to install earlier versions of Acumatica ERP. If you uninstall the current version and then install the needed earlier version, you will be able to deploy application instances with earlier versions. Existing application instances or databases will not be removed or altered; they will only get the yellow triangle with the exclamation point instead of the green check mark on the Application Maintenance page of the Acumatica ERP Configuration Wizard.

The general procedure of completely uninstalling Acumatica ERP from the application server is the following:

- For each application instance, unpublish any customizations.
- Use the Acumatica ERP Configuration Wizard to delete all application instances.
- On the application server computer, uninstall Acumatica ERP Configuration Wizard from Programs and Features.

The relevant registry data is removed as well as the program group item.



The above procedure does not affect the following entities:

- Databases created by the application: If you need to delete a database, do so manually by using SQL Server tools.
- Directories on the file system used by the application: If needed, manually delete the empty directories on the file system and the program group items.

Part 3: System Configuration and Management

In this part of the course, you will learn how you can specify settings that are shared across all the functional areas of Acumatica ERP. Some of the configuration settings, such as those that define numbering sequences and the structure of segmented keys, must be provided during the initial system setup and cannot be modified later. Other configuration is outside of the scope of the course and can be performed at any time later. This includes the defining of the working calendar, countries, and states.

In particular, you will perform the following tasks:

- Learning about the format of numbering sequences
- Creating numbering sequences
- Learning about built-in segmented keys
- Creating and configuring segmented keys
- Populating the list of values for segments
- Learning about identifiers for business accounts and defining a *BIZACCT* key
- Creating a wiki and wiki content

Lesson 9: Numbering Sequences

Acumatica ERP uses *numbering sequences* to automatically generate a new number or ID each time a user creates an object of the particular type. Numbering sequences are used for general ledger batches, invoices, bills, payments of various types, transfers, allocations, schedules, and other objects in the system.

In this lesson, you will learn about numbering sequence parameters and the process of their creation.

Lesson Objectives

You will do the following:

- Learn about numbering sequences and subsequences
- Create a new numbering sequence
- Create a numbering sequence that uses prefixes

About Numbering Sequences

You can use the predefined numbering sequences without changes, or you can modify them to suit your organization's needs. Also, you can create new sequences. If your organization has branches, numbering sequences for documents associated with branches can be split into subsequences which have different prefixes or specify different ranges of numbers.

Numbering Sequence Parameters

Each numbering sequence is defined by parameters set on the [Numbering Sequences](#) (CS201010) form. The system uses the following parameters to calculate numbers it assigns to new objects:

- **Start Number:** The number to be used first in this numbering sequence.
- **End Number:** The number to be used last in this numbering sequence.

- **Last Number:** The number most recently assigned to an object in this numbering sequence. Each time it assigns a number to a new object, the system updates this field.
- **Numbering Step:** The increment used in the numbering sequence to generate the next number; for each new number, this increment is added to the rightmost numerical portion of the last number used.

You can set other parameters of the numbering sequence:

- **Start Date:** The date when this sequence will take effect. For sequences that include subsequences, this parameter lets you specify a date when each subsequence first becomes effective.
- **Warning Number:** The minimum number that generates a warning that available numbers will be used up soon. When this number (and each number that exceeds it) is assigned, the system displays a warning. If the end number is near or has been reached for a numbering sequence, you should create a new sequence in the appropriate functional area and assign it to this object type.
- **New Number Symbol:** An alphanumeric string (of up to 15 characters) used to indicate that a new number for an object will be assigned.

Format of Identifiers

Acumatica ERP generates numbers or object IDs for a numbering sequence as alphanumeric strings. The precise format of the numbers is defined by the numbering sequence parameters, such as the start number and the end number, set on the Numbering Sequences form. The same number of characters must be used for all parameters in a numbering sequence; the system issues a warning if the format of any parameter differs.

A numbering sequence may have numbers that start with a prefix, an alphanumeric string that ends in an alphabetic character. The system automatically detects a prefix in the start number when alphabetic characters are used. If a prefix is used, auto-numbering is applied to only the rightmost numeric positions. The same prefix must be used for the start, warning, and end numbers.

Suppose, for example, that you want to create sequences to automatically assign meaningful IDs to sales orders of different types. For different order types, different two-letter abbreviations are used. For general sales orders (the SO type), you might set the start number as S0000001, the warning number as S0995000, and the end number as S0999999. For cash sales orders, you might set the start number, warning number, and end number as CS000001, CS997000, and CS999999, respectively. Note that all these numbers use the same prefix followed by six digits.

Subsequences

A numbering sequence may consist of just one subsequence or multiple subsequences. Each subsequence can be intended for a different branch or starting on a specific date. Subsequences can be helpful when, for example, an organization uses different invoice numbers in each season of the year. If the organization has branches, it is convenient when document reference numbers indicate a specific branch of origin by a branch-specific prefix or range of numbers.

Each subsequence is defined by a branch, start date, start number, end number, numbering step, and start date, and numbers are assigned as follows:

1. The first new object is assigned the start number depending on the branch and the start date. (The start number is also assigned to the last used number.)
2. The rightmost numerical portion of the second number and subsequent numbers for the same branch is equal to that of the last number plus the numbering step. The last number value is updated.
3. When the start date specified for any subsequence occurs, the system switches to using that subsequence.



The numbers available in one subsequence cannot be used in another subsequence of the same sequence.

Usage Tips

Follow these tips when you define numbering sequences:

- Objects get numbers in the order in which they are created. If you use the same numbering sequence to identify objects of different types, successive numbers can be assigned to objects of different types. The disadvantage of this approach is that objects' identifiers won't help you distinguish between their types.
- If you use similar numbering sequences for different document or objects that might be listed on the same form, duplicate numbers may occur, which could confuse users. It is better to define a numbering sequence so that the start number of one sequence exceeds the end number of the previous one, or to use different prefixes for each numbering sequence. These approaches ensure that duplicate numbers will not occur.

Step 9.1: Creating a Numbering Sequence for Service Orders

Acumatica ERP contains several built-in numbering sequences that can be used in different system functional areas. You can modify them, or create other numbering sequences. In this step, you will define the simple numbering sequence for service orders.

Perform the following instructions:

1. Launch the *AcumaticaS100* application instance and sign in with the *admin* username and the password you specified in Step 3.2.
2. On the [Enable/Disable Features](#) (CS100000) form, enable the *Advanced Financials* and *Subaccounts* features.
3. On the form toolbar of the [Numbering Sequences](#) (CS201010) form, click **Add New Record** and specify the following settings in the Summary area:
 - **Numbering ID:** SMORDER
 - **Description:** Service Order
 - **New Numbering Symbol:** <NEW>

The value you have entered in this box will be shown for users. Each time users create a new entity with this numbering sequence, for example a service order, they will see <NEW> in the identifier box. When a new entity is saved, it is automatically assigned the next number available for this type of objects in accordance with the numbering sequence.

You leave the **Manual Numbering** check box cleared, which is the default value.



When importing your vendor data, you can temporally disable your auto-numbering if you wish to import your vendor identifiers from your client's legacy system. You would do so by selecting the **Manual Numbering** check box for the corresponding sequence ID. Once your vendors have been imported, you can update the **Last Number** field of your sequence with your last vendor ID imported, and clear the **Manual Numbering** check box. Any vendor that is added after re-instituting the auto-numbering will have a number assigned by the system using the assigned numbering sequence.

4. On the table toolbar, click **Add Row** and specify the following settings in the added line, as shown in the screenshot below:
 - **Start Number:** 0000000
 - **End Number:** 9999999
 - **Numbering Step:** 1 (the system automatically assigns this value)

Numbering Sequences ☆

[Icons: Save, Undo, Add, Delete, Copy, Paste, Find, Previous, Next, End]

* Numbering ID:

* Description:

☐ Manual Numbering

* New Number Symbol:

[Icons: Refresh, Add, Delete, Split, Merge]

* Start Number	* End Number	* Start Date	* Last Number	* Warning Number	* Numbering Step
<input type="text" value="0000000"/>	<input type="text" value="9999999"/>	1/1/1900	0000000	9999899	1

Figure: Numbering sequence for service orders

5. Save your changes to the numbering sequence.

Step 9.2: Defining a Numbering Sequence for Vendors

In this step, you will define the numbering sequence for vendors. Your organization would like to have their vendor ID starting with the prefix V and apply a six digit auto-numbering sequence when creating a new vendor. The format of the vendor ID should look like V000001, V000002, and so on. You will configure the system to be able to accommodate that requirement starting by configuring the numbering sequence for the vendors.

Perform the following instructions:

1. On the form toolbar of the [Numbering Sequences](#) (CS201010) form, click **Add New Record** and specify the following settings in the Summary area:
 - **Numbering ID:** VENDOR
 - **Description:** Vendor account
 - **New Numbering Symbol:** <NEW>
2. On the table toolbar, click **Add Row** and specify the following settings in the added line, as shown in the screenshot below:
 - **Start Number:** V000000
 - **End Number:** V999999

Numbering Sequences ☆

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* Numbering ID: 🔍

* Description:

☐ Manual Numbering

* New Number Symbol:

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* Start Number	* End Number	* Start Date	* Last Number	* Warning Number	* Numbering Step
V000000	V999999	1/1/1900	V000000	V999899	1

Figure: Numbering sequence for vendors

3. Save your changes to the numbering sequence.

Additional Information

The following concepts are outside of the scope of this course but may be useful to some readers. You can use the links below to get additional information.

Input Validation Options

You can create input masks to help users enter data in specific format for such fields as phone numbers, postal codes, and tax ID numbers. Also, you can use regular expressions to validate that the values user enters in the field not only comply with the input format but meets specific rules requirements. For more information, see [Managing Input Validation Options](#).

Input Masks

Input masks may be created to help users enter data in the required format. Masks are used, for example, for phone numbers, postal codes for countries and states, and tax registrations. Moreover, regular expressions can be created to validate the entered values, since the values for some fields must meet not only input format requirements but also specific rules. For more information, see [Examples of the Usage of Masks and Regular Expressions](#).

Lesson 10: Segmented Keys

Different types of accounts and other system entities have identifiers, which you design to meet your organization requirements. These identifiers can have any number of segments, for instance you can even define segments that denote specific division, department, region, or cost center. Using segments helps you to make identifiers more meaningful for users and reduces the input errors. Segmentation is set by using the predefined *segmented keys*.

In this lesson, you will learn about segmented keys, segment values and the process of configuring the segmented key.

Lesson Objectives

You will do the following:

- Learn about the predefined set of segmented keys
- Learn about the configuration of the keys
- Learn about validation of segments
- Configure a segmented key with one segment
- Configure a key with multiple segments
- Populate a list of possible segment values
- Learn about specifics of the *BIZACCT* key
- Configure the *BIZACCT* key

Identifier Segmentation

General ledger accounts and subaccounts, as well as other objects in the system, have identifiers. An identifier is a unique alphanumeric string assigned to an object for its identification.

Identifiers are typically segmented: composed of segments whose values help users remember the meanings of identifiers. For example, general ledger subaccount identifiers could contain the following segments: a two-character regional branch code, a one-digit department number, and a three-character product type. Thus, the subaccount identifier CA-1-T32 would denote a subaccount of the California branch (CA), department 1, related to the product T32.

In Acumatica ERP, a *segmented key* is a system entity that holds the definition of the structure of identifiers for a certain type of objects and serves as a template when a user creates an identifier for a new object of the type.

Built-in Segmented Keys

Acumatica ERP provides the following built-in segmented keys, which can be used only for the intended types of accounts or objects:

- *ACCGROUP*: Used for the identifiers of account groups in project management.
- *ACCOUNT*: Used for the identifiers of general ledger accounts.
- *BIZACCT*: Used for the identifiers of business accounts; this segmented key is the parent key of the *COMPANY*, *BRANCH*, *VENDOR*, *CUSTOMER*, and *EMPLOYEE* segmented keys.
- *BRANCH*: Used for the identifiers of branches; this segmented key inherits its structure from the *BIZACCT* key.
- *CASHACCOUNT*: Used for the identifiers of branch-specific cash accounts.
- *COMPANY*: Used for the identifiers of companies; this segmented key inherits its structure from the *BIZACCT* key.
- *CONTRACT*: Used for the identifiers of contracts; this segmented key inherits its structure from the *PROJECT* key.
- *CONTRACTITEM*: Used for the identifiers of contract items.
- *COSTCODE*: Used for the identifiers of cost codes. By default, the key has one segment of four numeric symbols.
- *CUSTOMER*: Used for customer identifiers; this segmented key inherits its structure from the *BIZACCT* key.
- *EMPLOYEE*: Used for the identifiers of company employees; this segmented key inherits its structure from the *BIZACCT* key.
- *ITEMCLASS*: Used for the identifiers of item classes.
- *INLOCATION*: Used for the identifiers of warehouse locations.
- *INSITE*: Used for the identifiers of warehouses.
- *INSUBITEM*: Used for the subitem codes (that is, identifiers) of inventory items.
- *INVENTORY*: Used for the inventory IDs of stock and non-stock items.

- *LOCATION*: Used for the identifiers of customer and vendor locations.
- *MLISTCD*: Used for the identifiers of mailing lists.
- *PROJECT*: Used for the identifiers of projects and project templates; this segmented key is the parent key for the *CONTRACT* and *TMCONTRACT* keys.
- *PROTASK*: Used for the identifiers of project tasks.
- *SALESPER*: Used for salesperson IDs.
- *SUBACCOUNT*: Used for the identifiers of general ledger subaccounts.
- *TMCONTRACT*: Used for contract templates; this segmented key inherits its structure from the *PROJECT* key.
- *TMPROJECT*: Used for project templates; this segmented key inherits its structure from the *PROJECT* key.
- *VENDOR*: Used for vendor identifiers; this segmented key inherits its structure from the *BIZACCT* key.

If your organization requires new types of objects in a specific Acumatica ERP functional area, you can create new segmented keys.

Configuring Segmented Keys

During initial system setup, on the [Segmented Keys](#) (CS202000) form, you must define the following for each segmented key:

- How many segments the key has
- What is the length of each segment
- Whether the segment should be validated on input

Consider these factors as you decide how to configure each key:

- You may define as many segments as you want as long as the total length of all segments does not exceed the underlying field's maximum length. The total does not include the user-defined character (such as a hyphen) used to separate the segments when the object identifiers are displayed.
- An identifier may be non-segmented; that is, it may consist of only one segment.
- One segment per key can be defined as auto-numbered, which means that a numbering sequence is assigned to it.
- Although you may add a segment to or remove one from a segmented key after identifiers have been created, these actions may have unpredictable results.

Once you have configured the segmented key for a type of objects, use the [Segment Values](#) (CS203000) form to populate the list of values for segments that will not be auto-numbered. When you add new values for a segment on the [Segment Values](#) form, the system automatically converts the value (if such an option was selected) and checks whether the value meets the input mask requirements.

After the segmented key is configured and its segments are populated, a user can create an object of the type, entering its identifier by selecting values for each of its segments.

For example, general ledger accounts are created using the [Chart of Accounts](#) (GL202500) form, subaccounts are created on the [Subaccounts](#) (GL203000) form, and warehouses are created by using the [Warehouses](#) (IN204000) form. When a user creates an account, subaccount, or other object, the user will see the input mask that shows the number of segments and the length of each.

Inheritance in Relation to Segmented Keys

On some forms, users can select objects of different types from the same lookup list. For example, when preparing time sheets, employees can specify either a project or a contract on which they spent their work hours. For this, identifiers of such objects should have similar structures. To enforce similar structures of identifiers for two or more types of objects, inheritance of segmented keys (on which identifiers are based) is used. One segmented key (a child key) inherits its structure from another segmented key (a parent key) means that the child key has

the same number of segments as the parent key, and all its segments have the same lengths as the respective segments of the parent key. By default, the child key will have the same structure as the parent key, and the segment values specified for the parent key will be available for identifiers based on the child key. However, you can make identifiers based on a child key distinguishable at a glance from identifiers based on the parent key in the following ways:

- For an alphanumeric segment, you can enter different sets of values for the parent and child key segments
- For an auto-numbered segment, you can assign numbering sequences with different properties, for example, with different prefixes as seen in *CONTRACT* segmented key which inherits its structure from the *PROJECT* segmented key.

Segment Validation

You can configure input validation options, described below, to reduce some input errors that may occur when identifiers are composed of segment values. Although validation can be used for any segmented key, this section describes how validation options work for general ledger accounts and subaccounts.

For segments with the **Validate** option selected on the [Segmented Keys](#) (CS202000) form, users choose from the predefined segment values. With this option selected, when a user creates a new account or subaccount, the user does the following:

- Sees the input mask with the character specified as a separator for the key.
- Double-clicks the segment to open the list of possible values, or points at any segment and presses F3.
- Selects the value for the segment from the list.

If the **Validate** option is not selected for a segment, users can enter new values while they create accounts or subaccounts. The new values will be validated only in accordance with the segment definition: the type of string and its length. When users enter a string in a segment of the identifier, the string will not be added to the list of segment values.



If a general ledger account has a one-segment identifier, segment validation cannot be turned off and users can create accounts only by selecting them from the list of segment values.

Validation of Accounts and Subaccounts on Data Entry Forms

Once created, accounts and subaccounts can be used on various documents in the general ledger, accounts payable, and accounts receivable functional areas, and can be selected on inquiry and processing forms. Acumatica ERP also provides a validation option for using subaccounts. The **Allow Adding New Values On the Fly** check box on the [Segmented Keys](#) (CS202000) form controls how the user specifies subaccounts:

- If the option is not selected, the user can specify subaccounts only by selecting them from the list of available subaccounts. Thus, before subaccounts can be used on data entry forms, they must be created on the [Subaccounts](#) (GL203000) form.
- If the option is selected, subaccounts on data entry forms can be entered segment by segment; the user selects each segment value from the appropriate list of predefined segment values. New segment values cannot be created during data entry. New subaccounts created segment by segment are not added to the list of subaccounts.

The **Allow Adding New Values On the Fly** setting is helpful when the number of segments and the number of values in each segment could produce so many combinations that it would be labor-intensive to enter all subaccounts in advance.

The **Allow Adding New Values On the Fly** setting is also used for subitems defined by the *INSUBITEM* key.

Step 10.1: Configuring a Segmented Key

In this step, you will learn how to configure segmented keys. You will use the [Segmented Keys](#) (CS202000) form to define the size, segmentation, and edit mask for the codes that will be used to identify the accounts in your chart of accounts. You will configure the *ACCOUNT* segmented key to have a maximum size of six characters, consist of a single segment, and allow only numeric characters in all positions.

Perform the following instructions:

1. Launch the *AcumaticaS100* application instance, and sign in with the *admin* username and the password you specified in Step 3.2.
2. On the [Segmented Keys](#) (CS202000) form, in the Summary area, select *ACCOUNT* in the **Segmented Key ID** box.

Notice that the *By Segmented Key* lookup mode is selected in the Summary area for the segmented key (you cannot select another lookup mode for the *ACCOUNT* segmented key). In this mode, when a user is typing the identifier of a GL account on the data entry form, the system displays the list of existing identifiers that contain the typed string. The user can select one of the existing values from the list. The **Allow Adding New Values On the Fly** check box is cleared and unavailable in this lookup mode.

3. In the table, double-click the only row with a segment ID of *1* so you can edit it.
4. Change the settings of this row to the following (see the screenshot below):

- **Length:** 6
- **Edit Mask:** *Numeric*

Notice that the **Length** value in the form Summary area is automatically updated to match the total length of all the segments of the key.

Segmented Keys ☆ CUSTOMIZATION TOOLS ▾

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* Segmented Key ID: ACCOUNT 🔍

Parent:

Lookup Mode: By Segmented Key

☐ Allow Adding New Values On the Fly

Specific Module: 🔍

Numbering ID: 🔍 ✎

* Description: Account

Max Length: 10

Length: 6

Segments: 1

🔄 + × VIEW SEGMENT |⇄| ☒

Segment ID	* Description	Length	Align	Edit Mask	Case Conversion	Valida	Auto Number	* Separator
1	GL Account	6	Left	Numeric	Uppercase	<input type="checkbox"/>	<input type="checkbox"/>	-

Figure: Adjustments to the ACCOUNT segment key

5. Save your changes to the segmented key.

Step 10.2: Defining Subaccount Structure with Multiple Segments

In this step, you will use the [Segmented Keys](#) (CS202000) form to define the size, segmentation, and edit mask for the segments that will be used to identify your *SUBACCOUNT* key structure. You will configure the *SUBACCOUNT* key so that it will have two segments.

Perform the following instructions:

1. On the [Segmented Keys](#) (CS202000) form, in the Summary area, select *SUBACCOUNT* in the **Segmented Key ID** box.
2. In the Summary area, in the **Lookup Mode** box, select *By Segment: All Avail. Segments*.
The **Allow Adding New Values On the Fly** check box is selected automatically.
3. In the table, double-click the only line with the segment ID of 1 to allow editing.
4. Change the settings of the segment with the ID of 1 as follows (see the screenshot below):
 - **Description:** Department
 - **Length:** 3
 - **Edit Mask:** *Alphanumeric*
 - **Validate:** Selected
5. On the table toolbar, click **Add Row** to add the second segment of the subaccount key, and specify the following settings in the new row:
 - **Description:** Sales Region
 - **Length:** 2
 - **Edit Mask:** *Unicode* (selected automatically)
 - **Validate:** Selected

Notice that the **Length** value in the form Summary area is automatically updated to match the total length of all the segments of the key.

Segmented Keys ☆ CUSTOMIZATION TOOLS ▾

* Segmented Key ID:
 Max Length:

Parent:
 Length:

Lookup Mode:
 Segments:

☒ Allow Adding New Values On the Fly

Specific Module:

Numbering ID:

* Description:

VIEW SEGMENT

Segment ID	* Description	Length	Align	Edit Mask	Case Conversion	Validate	Auto Number	* Separator
1	Department	3	Left	Alphanumeric	Uppercase	<input checked="" type="checkbox"/>	<input type="checkbox"/>	-
2	Sales Region	2	Left	Unicode	Uppercase	<input checked="" type="checkbox"/>	<input type="checkbox"/>	-

Figure: Adjustments to the SUBACCOUNT segment key

6. Save your changes to the segmented key.

Step 10.3: Defining Segment Values

In this step, you will define the acceptable values for each validated subaccount segment. You will learn how to configure the segmented values by entering the values by hand.

For example, the company tracks expenses by departments. They wish to be able to code some of their accounting activity, for examples, expenses or fixed assets, for those departments. The *SUBACCOUNT* structure has already been defined to contain a segment intended for coding this information. To facilitate data entry accuracy, the segment has been setup to allow only valid values that were predefined.

In this step, you will define that valid list of values and their corresponding descriptions by typing the data into the [Segment Values](#) (CS203000) form.

Perform the following instructions:

1. On the [Segment Values](#) form, in the Summary area, select *SUBACCOUNT* in the **Segmented Key ID** box. In the **Segment ID** box, leave the department segment with the ID of 1, which is selected by default.
2. In the table, add for the department segment six possible values listed in the following table by clicking **Add Row** on the table toolbar for each and specifying the listed value and description in the row (see the following screenshot).

Value	Description
000	Non-Specific
ADM	Administrative
CON	Consulting
DEV	Development
FIN	Finance
SAL	Sales

Notice that you cannot enter more than three symbols to the **Value** column, because in Step 10.2, you have set the length of this segment to 3.

Segment Values ☆ CUSTOMIZATION TOOLS ▾

Segmented Key ID:
 Segment ID:
 * Description:

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*Value	Description	Active
000	Non-Specific	<input checked="" type="checkbox"/>
ADM	Administrative	<input checked="" type="checkbox"/>
CON	Consulting	<input checked="" type="checkbox"/>
DEV	Development	<input checked="" type="checkbox"/>
FIN	Finance	<input checked="" type="checkbox"/>
SAL	Sales	<input checked="" type="checkbox"/>

Figure: Values defined for the Department segment of the SUBACCOUNT key

3. Save your changes to the segment values.

Step 10.4: Uploading Segment Values

In this step, you will learn how to configure the segmented values by uploading a file.

For example, the company tracks expenses by sales region. The second segment of the *SUBACCOUNT* segment key has been designated as the segment that will be used to code activity to these sales regions. In this exercise you will use the file upload functionality to quickly load an Excel file provided with the course with a list of sales regions and their descriptions into the list of possible values for the second segment of the subaccount structure.

Perform the following instructions:

1. On the [Segment Values](#) (CS203000) form, in the Summary area, select *SUBACCOUNT* in the **Segmented Key ID** box.
In the **Segment ID** box, select 2.
2. On the table toolbar, click **Load Records from File** (⬆).
3. In the **File Upload** dialog box, which opens, select the file path to the `Sales_Region_Segment_Values.xlsx` file, which is provided with the course, and click **Upload**.
4. In the **Common Settings** dialog box, which opens, leave the default settings, and click **OK**.
5. In the **Columns** dialog box, which opens, leave the current mapping, and click **OK**.

The system uploads sales regions. Make sure that the uploaded list of sales regions looks as it is shown in the following screenshot.

Segment Values ☆ CUSTOMIZATION TOOLS ▾

Segmented Key ID: SUBACCOUNT

Segment ID: 2

* Description: Sales Region

Value	Description	Active
00	Non-specific	<input checked="" type="checkbox"/>
AK	ALASKA	<input checked="" type="checkbox"/>
AL	ALABAMA	<input checked="" type="checkbox"/>
AR	ARKANSAS	<input checked="" type="checkbox"/>

Figure: Values uploaded for the Sales Region segment of the SUBACCOUNT key

6. Save your changes to the segment values.

Business Accounts

In Acumatica ERP, *business accounts* are used to store information related to customers, vendors, and employees, as well as similar information about your company branches (which is used on outgoing documents).

Acumatica ERP gives you flexibility in configuring identifiers for these business accounts. If needed, you can use similar but different identifiers for customers, vendors, and employees. The same business account can be both your customer and your vendor, with a separate identifier for each capacity. Also, customers and vendors can be organized into a hierarchy that reflects their actual business relationships.

Identifiers for Business Accounts

You can decide upon and configure the rules for creating business account identifiers during system deployment. The *BIZACCT* segmented key, which you define using the [Segmented Keys](#) (CS202000) form, is used for configuring the general structure of identifiers for business accounts, including accounts for your company branches. This structure includes the overall identifier length, the number of segments, and the type of segments.

Before you configure the key, consider the information you would like to include in branch, vendor, customer, and employee IDs. Make such decisions as how many segments the identifiers will have, whether the segments should be validated, whether auto-numbering should be used for one of the segments, and whether values for each segment should be validated. You also need to decide whether to use the *BIZACCT* segmented key directly for branches, vendors, customers, and employees or to configure separate keys based on *BIZACCT*, as the following subsections describe.

Once you have defined all needed segmented keys, you use the [Segment Values](#) (CS203000) form to enter the valid values for segments that should be validated.

Using BIZACCT Directly for Vendors, Customers, and Employees

Once you have configured the *BIZACCT* segmented key, it can be used by default for vendor, customer, and employee identifiers. This should work well for your company if you do not mind having one set of values for validated segments, regardless of whether the identifier happens to be a vendor, customer, or employee identifier.

Configuring Separate Identifiers for Vendors, Customers, and Employees

If you want these three types of identifiers to look different at a glance, use the [Segmented Keys](#) (CS202000) form to configure the *VENDOR*, *CUSTOMER*, and *EMPLOYEE* segmented keys, all of which inherit their structure (number of segments, segment types, and overall length) from the *BIZACCT* key. If *BIZACCT* has an auto-numbered segment, consider using either different prefixes for numbering sequences for each type of identifier or different ranges of numbers for each sequence.



For the *CUSTOMER*, *VENDOR*, and *EMPLOYEE* segmented keys, you can configure only minor differences, such as different sets of values for validated segments, or different prefixes for the auto-numbering sequences if one of the segments in the *BIZACCT* key was configured as an auto-numbered segment.

Using Parent Accounts

In Acumatica ERP, your company's customers and vendors can be organized into hierarchies with parent and child companies to reflect the relations among the companies while allowing you to preserve each as a separate entity in the system, if needed. Any of your company's vendors or customers can be a parent of another vendor or customer.

When you create a vendor or customer business account, you can specify the identifier of its parent in the **Parent Account** box on the **General** tab of the [Vendors](#) (AP303000) form or on the **Billing** tab of the [Customers](#) (AR303000) form. On either form, this field displays for selection all vendor and customer identifiers based on the *BIZACCT* segmented key, so that you can pick the appropriate vendor or customer as a parent.

Step 10.5: Configuring the BIZACCT segmented key

In this step, you will learn how to define the parent segmented key in order to meet some specific numbering sequences requirements: have the vendor ID auto-numbered with the prefix *V*.

To meet this goal, you also need to configure *BIZACCT* to define the length of the numbering sequence. *BIZACCT* is the parent key for the *COMPANY*, *BRANCH*, *VENDOR*, *CUSTOMER*, and *EMPLOYEE* segmented keys. It is associated with the account used for your company branches in the system.

Perform the following instructions:

1. Launch the *AcumaticaS100* application instance and sign in with the *admin* username and the password you specified in Step 3.2.
2. On the [Segmented Keys](#) (CS202000) form, in the Summary area, select *BIZACCT* in the **Segmented Key ID** box.
3. In the table, double-click the only line with the segment ID of *1* to allow editing, and change its **Length** to 15.
4. Save your changes to the *BIZACCT* segmented key.
5. In the Summary area, in the **Segmented Key ID** box, select *VENDOR*.
In the Summary area, notice that the *BIZACCT* segmented key is selected in the **Parent** box, and in table, the **Override** column has appeared. This column is displayed for only the segmented keys that have a parent segmented key.
6. In the **Numbering ID** box, select the *VENDOR* numbering sequence, which you have created in Step 9.2 and which supports numbering like *V000001*, *V000002*, and so on (see the following screenshot).

Segmented Keys CUSTOMIZATION **TOOLS** ▾

* Segmented Key ID: Max Length:
 Parent: Length:
 Lookup Mode: Segments:
☐ Allow Adding New Values On the Fly
 Specific Module:
 Numbering ID:
 * Description:

VIEW SEGMENT

Segment ID	* Description	Override	Length	Align	Edit Mask	Case Conversion	Validate	Auto Number	* Separator
1	Business Account	<input type="checkbox"/>	15	Left	Unicode	Uppercase	<input type="checkbox"/>	<input type="checkbox"/>	-

Figure: Adjustments to the VENDOR segment key

7. Save your changes to the VENDOR segmented key.

Lesson 11: Wiki and Wiki Content

In Acumatica ERP, a wiki is a repository of working materials or a knowledge base where you can store such information as Help articles, internal manuals, instructions, marketing materials, and plans. You can create and maintain a number of wikis of different purposes.

Acumatica wikis offer the following features:

- Instant availability of information for intended users
- A variety of security options to make the wikis safe, including multilevel access rights based on user roles
- Configurable approval procedures
- Easy-to-remember markup
- Quick keyword search or full-text search of a particular wiki
- Article version control
- File attachment management

By using Acumatica wikis, users can create, edit, and share information. Organizations can easily create specialized wikis for sharing information within project teams, within and across departments, or with external users. Wiki users can share policy and procedure manuals, employee manuals, business plans, individual plans, task lists, and other frequently updated documents and benefit from wiki version tracking and security.

The file attachments feature enables users to link files in any format to wiki articles. Acumatica ERP provides a predefined wiki Help, which includes the complete set of online documentation.

You use the document management functionality in Acumatica ERP to create, update, and customize wikis. It also helps you administer user access to wikis and wiki articles.

Lesson Objectives

You will do the following:

- Create a wiki

- Create a wiki article and add it to the wiki
- Create an article with the attached file
- Learn about role-based access to wiki articles

Step 11.1: Viewing the Existing Wiki

Acumatica ERP provides a predefined wiki Help, that includes the complete set of online documentation. As with any other wiki, the Help wiki can be modified, if needed. However, we strongly recommend that you restrict the ability to modify the Help wiki.

You can access the Help dashboard, which is the main navigation page of Acumatica ERP documentation, by clicking the **Open Help** button in the Info area in the upper-right corner of the top pane of the Acumatica ERP screen, and then clicking *Acumatica Educational Resources* on the Help menu, which opens (see the following screenshot).

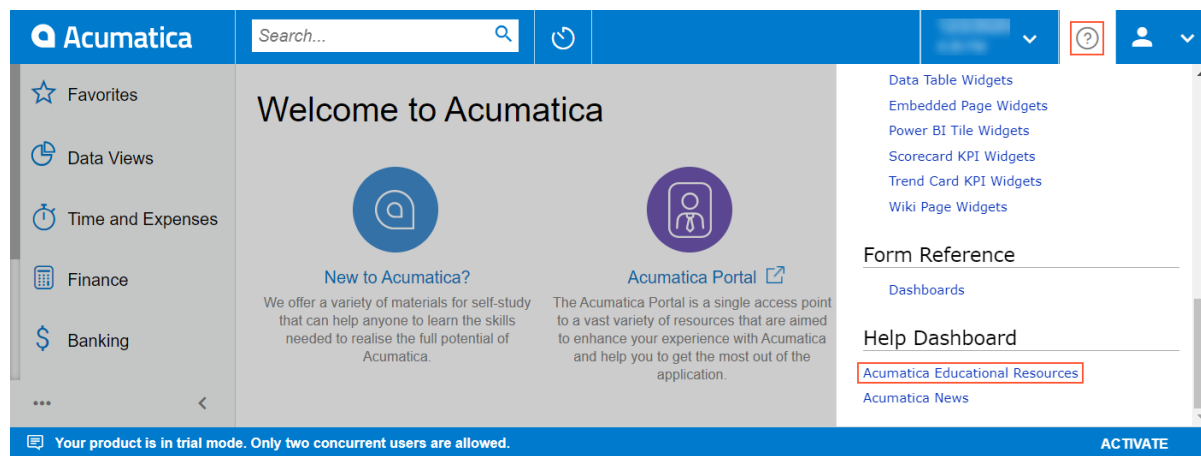


Figure: Accessing the Help dashboard

Do the following to see how the online Help is implemented in the system:

1. Launch the *AcumaticaS100* application instance, and sign in with the *admin* username and the password you specified in Step 3.2.
2. Open the *Wiki Site Map* (SM202010) form.

The left pane contains a tree-like structure of all the wikis configured in your organization with all the folders within them. The wikis are represented as first-level nodes.

3. In the left pane, click the node icon to the left of the *Installation Guide* wiki to expand the node and view the hierarchical structure of this wiki.

The right pane displays the list of its items (folders and articles) with their details, as shown in the screenshot below. Notice that some wikis have a one-level list of folders, while other wikis have multiple levels.

On the screenshot, you can see the **Folder** column. In this column, you can select and clear check boxes to indicate whether or not the article is a folder that can contain other articles or folders. A folder appears as a node in the wiki tree. By clearing the check box, you can make the selected folder an article only. If the folder that you are making an article contains folders or articles, they will be moved to the parent folder that holds this article.

The **Number** column has a number representing the order of the article in the wiki tree.

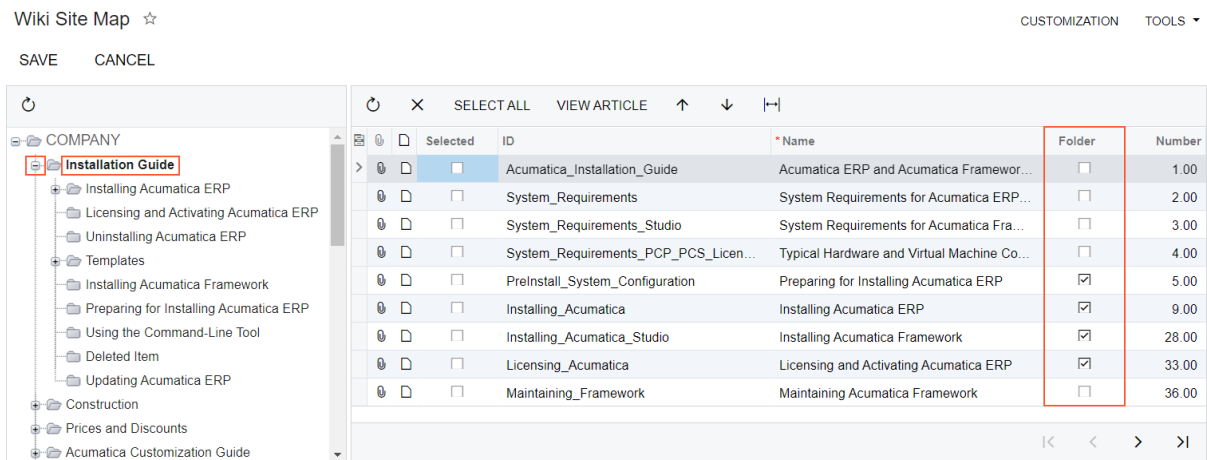


Figure: Reviewing Installation Guide node

- Open the [Wiki](#) form (SM202005). In the **ID** box of the Summary form (**General** section), select *System Administration*.

The settings of the selected wiki are shown on the form. You can review and modify the settings of the wiki, add the wiki to (or delete it from) the site map, change the access rights to wiki folders, and apply tags for the articles in the wiki.

Step 11.2: Creating a Wiki

In Acumatica ERP, a wiki is a repository of working materials or a knowledge base where you can store such information as Help articles, internal manuals, instructions, marketing materials, and plans. You can create and maintain a number of wikis of different purposes.

Acumatica ERP supports user-created wikis. In this step, you will create a new wiki.

On the [Wiki](#) (SM202005) form, perform the following instructions:

- On the form toolbar, click **Add New Record** to create a new wiki, and specify the following settings in the Summary area (see the screenshot below):
 - ID (General section):** `Company Processes`
 - Title (General section):** `Company Internal Processes`
 - Hold on Edit (Approval section):** **Selected**
This indicates that the **Hold** check box is selected by default for a new wiki article in this wiki. A user can clear the **Hold** check box before saving the article to publish the article or to begin the approval process.
 - Require Approval (Approval section):** **Cleared**
This indicates that the approval is not required for publishing wiki articles in this wiki.
 - Section (Modern UI section):** `Administrator`
This box contains the name of the section in which the card for this wiki will be displayed on the Help dashboard. The **Show on Help Dashboard** check box is selected by default, which indicates that the card for this wiki will be displayed on the Help dashboard.
 - Sequence (Modern UI section):** `60`
 - Site Map Location (Classic UI section):** `Help`
This box contains the location of the wiki on the site map. If you leave this box blank, the wiki will not appear in the system.
 - Site Map Title (Classic UI section):** `Company Internal Processes`

When you select the location of the wiki in the **Site Map Location** box, the system populates the **Site Map Title** box with the value in the **Title** box of the **General** section on this tab, but you can change this default value, if needed.

2. On the **Wiki Settings** tab, in the **Look and Feel** section, specify the following settings:
 - **Style:** *Help*
 - **Print Style:** *Help Print*
3. In the **Dashboard Description** section, enter *Internal processes of the company*.

Wiki

NOTES FILES CUSTOMIZATION TOOLS

SAVE UNDO REDO DELETE LEFT ARROW RIGHT ARROW CLEAR WIKI

GENERAL

* ID: Company Processes

* Title: Company Internal Processes

Created by: admin admin

Created: 4/13/2022 1:05 PM

MODERN UI

☒ Show on Help Dashboard

Section: Administrator

Sequence: 60

Default Article:

APPROVAL

☒ Hold on Edit

☐ Require Approval

* Approval Group:

Approver ID:

CLASSIC UI

Site Map Location: Help

Site Map Title: Company Internal Processes

WIKI SETTINGS ACCESS RIGHTS TAGS LOCALES

LOOK AND FEEL

Style: Help

Print Style: Help Print

Article Type: Article

DASHBOARD DESCRIPTION

Internal processes of the company.

Figure: A new wiki

4. On the form toolbar, click **Save** to create the wiki.
After creation of the wiki, you can configure access rights to it.
5. In the table on the **Access Rights** tab, for the *Administrator* role, select *Delete* in the **Access Rights** column.
The *Administrator* role is assigned to the *admin* user account (to which you are signed in).
6. On the table toolbar of the **Tags** tab, click **Add Row**, and in the **Description** column of the added row, enter *Employee Processes*.
7. Save your changes to the wiki.
8. In the Info area in the upper-right corner of the top pane of the Acumatica ERP screen, click the **Open Help** button.
9. In the Help menu, which opens, in the **Help Dashboard** section, click *Acumatica Educational Resources*.
In the Help dashboard, which opens in a new browser tab, a new card with the *Company Internal Processes* wiki has appeared in the *Administrator* section, as shown in the following screenshot.

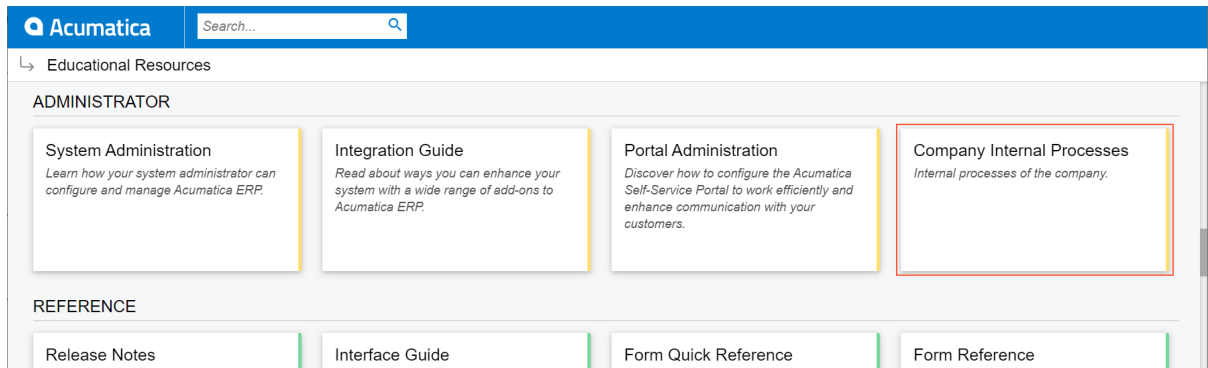


Figure: The card of the new wiki on the Help dashboard

Step 11.3: Creating a Wiki Article

In this lesson, you will create a new article and add it to the existing wiki.

Perform the following instructions:

1. In the Info area in the upper-right corner of the top pane of the Acumatica ERP screen, click the **Open Help** button.
2. In the Help menu, which opens, in the **Help Dashboard** section, click *Acumatica Educational Resources*.
3. In the Help dashboard, which opens in a new browser tab, in the *Administrator* section, click the *Company Internal Processes* wiki card.
4. On the wiki toolbar, click **Add New Article**.
5. On the **Content** tab of the Wiki Editor form, which opens, specify the following settings:
 - **Article ID:** `QuotationProcess`
 - **Name:** `Quotation Process`
 - **Article Type:** *Wiki* (selected by default)
 - **Parent Folder:** *Company Internal Processes*
6. Copy and paste the following text to the article box, as shown in the screenshot below:

Step 1. Create a service order type with the ''Quote'' behavior on the [HelpRoot_FormReference\Fs_20_23_00|Service Order Types] ([~/?ScreenId=FS202300|FS202300]) form.{br}{br}

Step 2. Create a quote on the [HelpRoot_FormReference\Fs_30_01_00|Service Orders] ([~/?ScreenId=FS300100|FS300100]) form by selecting a service order type with the ''Quote'' behavior and specifying the following information for the service order, as described in Service Order Entry:

*The customer and its location

*The company's branch, its location, and optionally, the room at the branch location where the appointments take place

*The date and time information of the service order

*The services that are provided for this service order

*Optional: The included inventory items

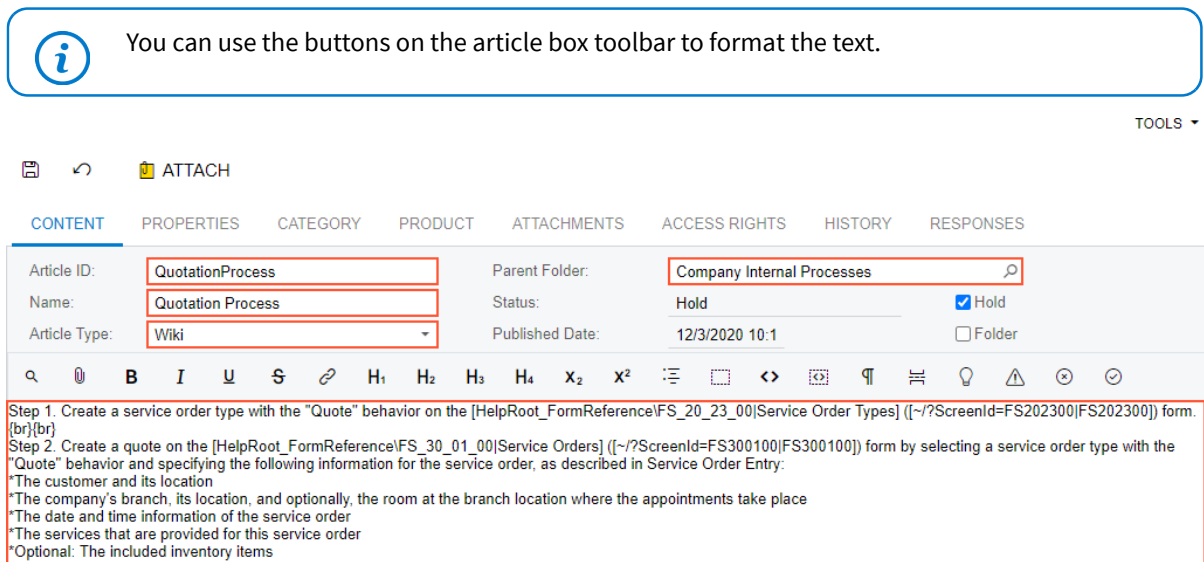


Figure: The created article

7. On the formatting toolbar, click **Preview** to see how the article will look.
8. Open the **Properties** tab, and in the **Keyword** box, enter *Quote*.
9. In the **Version Tags** table, click **Add Row** on the table toolbar to create a new line for tags, and in the created line, select *Employee Processes*.
10. Save your changes.
11. Click **Edit Current Article** on the form toolbar.
12. On the **Content** tab, clear the **Hold** check box.
13. Save your changes to the article.

The article appears in the left pane.

When you save the article with the **Hold** check box cleared, the status of the article changes to *Published* if publishing approval is not required or *Pending* if publishing approval is required. You have configured the wiki so that approval is not required, and the article is published.

Step 11.4: Creating a Wiki Article with an Attachment

In this lesson, you will create a new article and add it to the existing wiki by using the wiki toolbar button.

Perform the following instructions:

1. On the [Wiki Site Map](#) (SM202010) form, in the left pane, click the *Company Internal Processes* node.
The right pane displays the articles that this wiki contains.
2. In the right pane, click the row with the *Quotation Process* article, and on the table toolbar, click **View Article**.
The selected article is displayed.
3. On the toolbar, click **Add New Article**.
4. On the **Content** tab of the Wiki Editor form, which opens in the same tab, specify the following settings:
 - **Article ID:** Logo
 - **Name:** Logo Usage

Notice that *Company Internal Processes* is selected in the **Parent Folder** box.

5. To attach the file, do the following:
 - a. On the form toolbar, click **Attach**.
 - b. In the **File Upload** dialog box, which opens, select the *Acumatica_Logo.jpg* file, which is provided with the course, and click **Upload**.



The maximum size of the file you can attach is 25,000 KB.

- c. In the **File Link Editor**, which opens, click **OK**.
The dialog box closes and the file is attached to the article.
6. To get the link to the uploaded file, do the following:
 - a. On the **Attachments** tab, click the line with the uploaded file in the table, and on the table toolbar, click **Get Link**.
 - b. In the dialog box that opens, copy the link from the **Wiki Link** box.
 - c. Click **Close** to close the dialog box.
7. On the **Content** tab, paste the link to the article box, as shown in the following screenshot.
8. Add the following text to the article before the attached image: Please follow the usage rules shown here when using our logos.
{br/}{br/}.

TOOLS ▾

Figure: The article with the attachment

9. On the formatting toolbar, click **Preview** to see how the article will look after you save your current edits.
10. In the **Keyword** box of the **Properties** tab, enter *Logo*.
11. Save your changes.
12. Click **Edit Current Article** on the form toolbar.
13. On the **Content** tab, clear the **Hold** check box.
14. Save your changes to the article.

Access to Wiki Articles

In Acumatica ERP, you configure all access, including access to the wiki, by using roles. Each role is collection of functions a user with the role may access. Acumatica ERP provides several built-in roles and a number of predefined roles with names and abilities that vary by reseller. Your company may need to redefine roles or create new roles to effectively separate employee duties in accordance with established internal policies. Wiki access management involves configuring new roles, modifying existing roles, and assigning roles to users to allow them to perform the required tasks in the wikis.

Role Setup

Generally, for roles whose users work with wikis, access should be configured to the following:

- Particular wikis for which the roles will edit, publish, or create new articles (which might include templates or announcements).
- Forms in the document management functional area that users with the role will use to rename and move articles in the wiki site map, view and compare article versions, and publish articles.
- Forms in the user security functional area to create new roles or modify existing ones for wiki users and to configure approval procedures.

For example, a small or mid-sized company might have the following wiki-related roles, which differ by the level of access to wikis and by the tasks users with the role may perform:

- *Internal User*: Users with this role can view the Help wiki (that is, they have *View Only* access to it) and access their personal user settings. Such a role would be assigned to each internal user (one who is employed by your company) in the system. The rights of the role may be extended to provide access to other wikis that include public materials.
- *Wiki Author*: These users can view and edit published and unpublished wiki articles, create new articles and folders, move articles between folders, and publish articles. The role may have access to Help (if the company policy allows modification of Help), to another wiki that contains the company internal instructions and manuals, or to other work documents.
- *Wiki Administrator*: Users with this role manage the access rights other roles have to wikis, folders, and files. Users with the role may create new wikis and wiki styles and set up approval procedures for the publishing of articles. The role should have full access to all wikis.

Your company may create additional wikis for corporate use. When you create new wikis, wiki folders, and articles, the existing roles will not have access to them. You will need to establish proper access rights to those items by modifying existing roles or creating new ones.

Access to Wiki Articles

You can set the access each role has to the wikis available in your company by using the [Wiki Access by Role](#) (SM202015) form. If the company has multiple wikis, you set access for each of the wikis separately. You can set access rights to a particular article or folder by using the **Access Rights** tab when you open the article in the Wiki Editor form.

The following levels of access rights are available for all items (wikis, folders, or articles) in all wikis:

- *Not Set*: If all roles have *Not Set* access, the system allows all operations for a user with the role. Once the access rights of at least one role have been changed to any other option, the system prohibits access for users with all roles that have *Not Set* access rights.
- *Inherited*: The access rights users with the role have to the article are defined by the type of access rights specified for the node this article belongs to.
- *Revoked*: If the role has this level of access rights, the system doesn't allow a user with the role any access to the item.
- *View Only*: A user with the role can view the published article or the published folder and all enclosed published items.
- *Edit*: The system allows a user with this role to edit the article.
- *Insert*: The system allows a user with this role to edit the article or folder, create new articles, and initiate the approval process for publishing for the item if such approval is requested for the wiki. This level allows higher and lower levels of access to be set to the articles.
- *Publish*: A user with this role can edit, create, and publish articles if such approval is required for the wiki. This level allows setting higher and lower levels of access to the items.
- *Delete*: A user with this role can edit the article, delete it, or, for a folder, create new articles within it.

If a particular level of access rights is set for a wiki, by default, that level is inherited by all articles and folders in the wiki. You can, however, set different levels of access rights for articles and folders within the wiki.

For users whose roles allow them to edit articles (with *Edit* or higher access rights), you may want to grant access to the following forms, so that these users can insert and update graphics within articles:

- [Search in Files](#) (SM202520)
- [File Maintenance](#) (SM202510)

Additional Information

The following concepts are outside of the scope of this course but may be useful to some readers. You can use the links below to get additional information.

Configuring Wiki Appearances

In Acumatica ERP, you can easily modify the styles used to display the articles in wikis and the styles used to print wiki articles. For more information, see [Wiki Style Examples](#).

Making wiki articles visible and invisible

You can make a wiki article that was created on Self-Service Portal visible in Acumatica ERP as well. At a later time, you can remove the visibility of the wiki article that you made visible in Acumatica ERP. For more information, see [To Make a Wiki Article Visible in Acumatica ERP](#).

Comparing Wiki Article Versions

When you work with an Acumatica ERP wiki, you can store the history of each article so that you can answer any questions about who changed what and when the changes occurred. Not only can you compare versions, but you can also revert to previous ones. For more information, see [To Compare Wiki Article Versions](#).

Wiki Approval Procedures

Articles in a wiki must be published to be seen by all users. An organization may require articles to be approved by authorized employees before they may be published. In Acumatica ERP, you can configure approval procedures by using roles and wiki functionality. For more information, see [Wiki Approval Procedures](#).