System Maintenance

David Harris

Product Support Team Lead

Timing and Agenda

November 21, 2022 -10:00-11:30 AM

Day 1

Lesson 1.1: Tailoring the User Interface

Lesson 1.2: Using Company Logos

Lesson 1.3: Modifying the Color Theme

November 22, 2022 -10:00-11:30 AM

Day 2

Lesson 2.1: Managing Tenants by Using the Web Interface

Lesson 2.2: Working with Snapshots

Lesson 2.3: Scheduling Automated Processing

Timing and Agenda

November 23, 2022 -10:00-11:30 AM

Day 3

Lesson 2.4: Publishing Customization Projects

Lesson 3.1: Monitoring System Health

Lesson 3.2: Maintaining Database by Using the Web Interface

Lesson 3.3: Building Search Indexes

Lesson 3.4: Updating Acumatica ERP by Using the Web Interface

Day 1

Part 1: Tailoring the Appearance of the Acumatica ERP Instance

Cherrylake, Inc.
Acumatica Customer Since 2013

Lesson 1.1: Tailoring the User Interface

Learning Objectives

In this lesson, you will learn how to do the following:

- Modify the set of workspace menu items on the main menu by using Menu Editing mode
- Modify the contents of a workspace by using Menu Editing mode
- Change a form location on the main menu by modifying the system site map

Figure: The system in Menu Editing mode

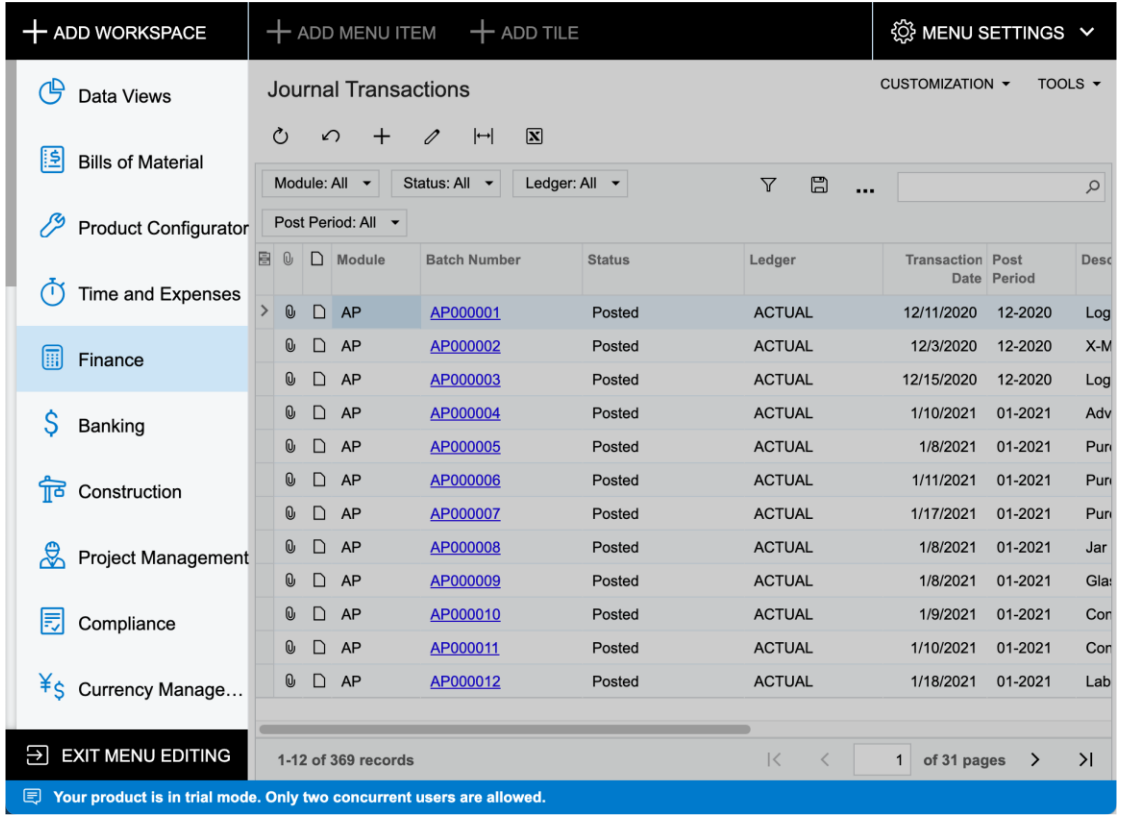


Figure: The Workspace Parameters dialog box

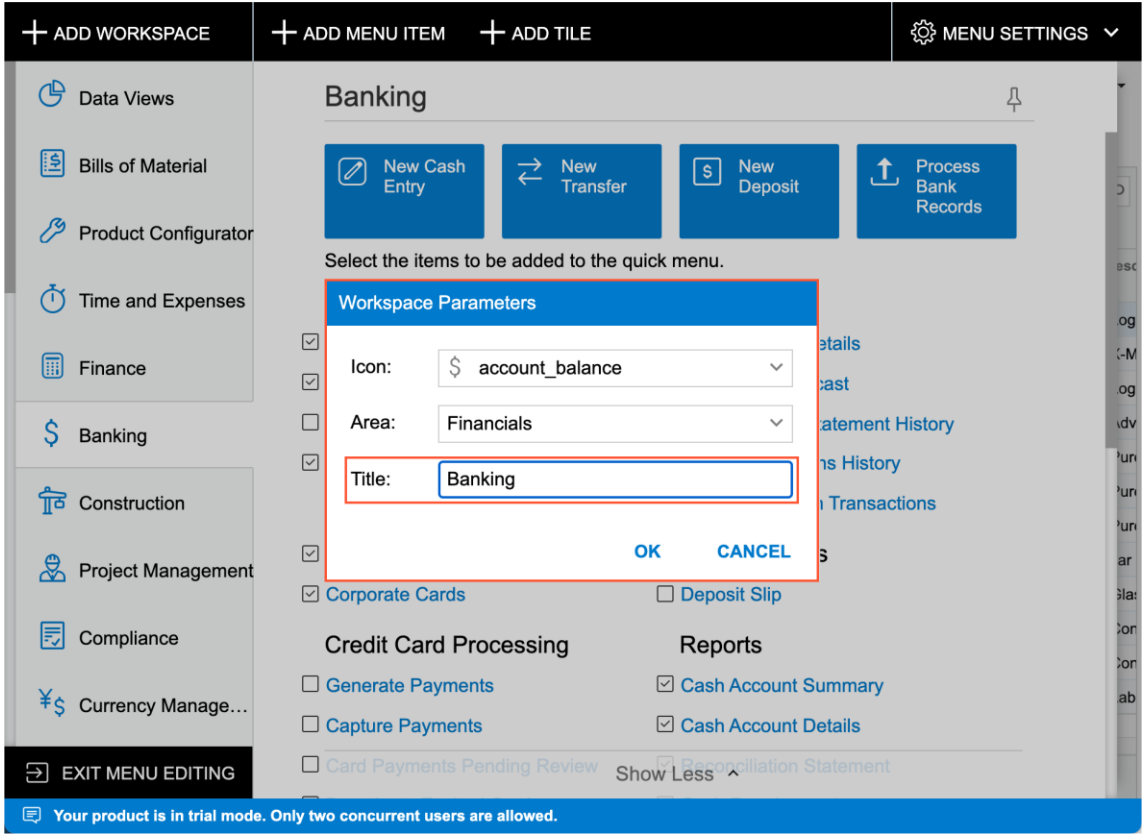


Figure: The deletion of a workspace from the main menu

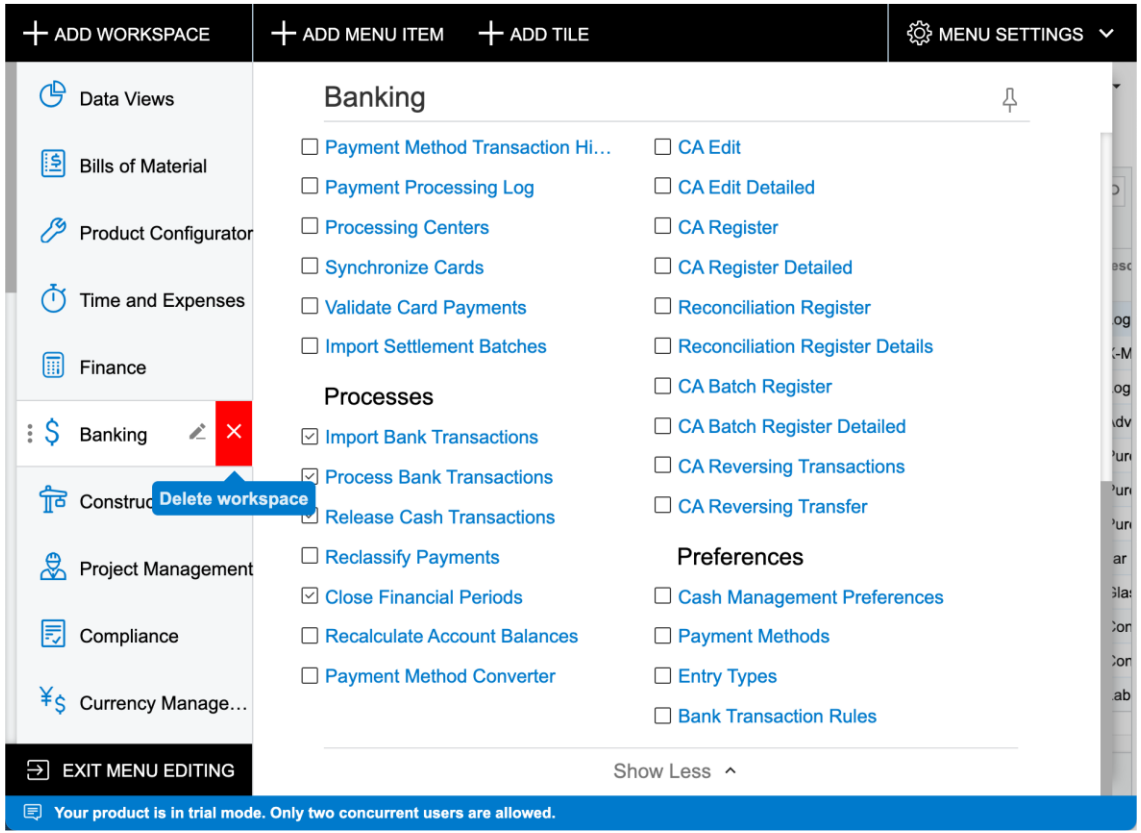


Figure: The changing of the Construction workspace location

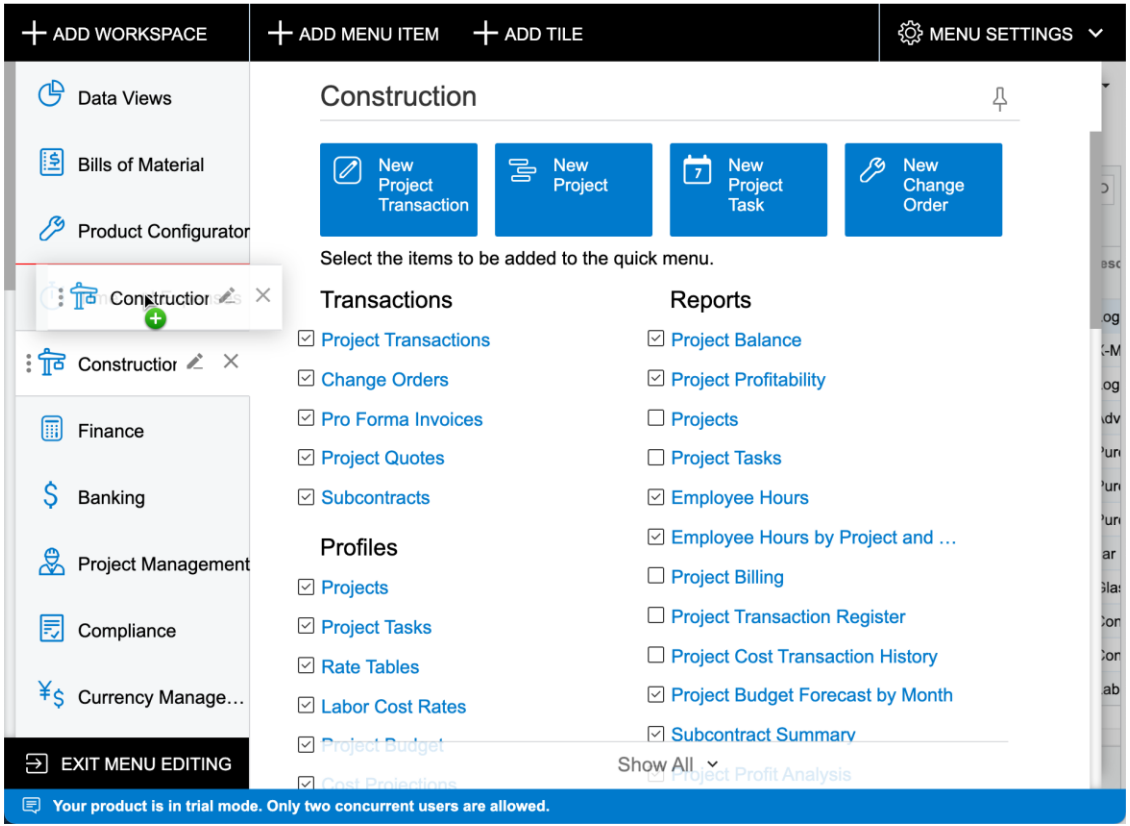


Figure: The addition of a custom workspace

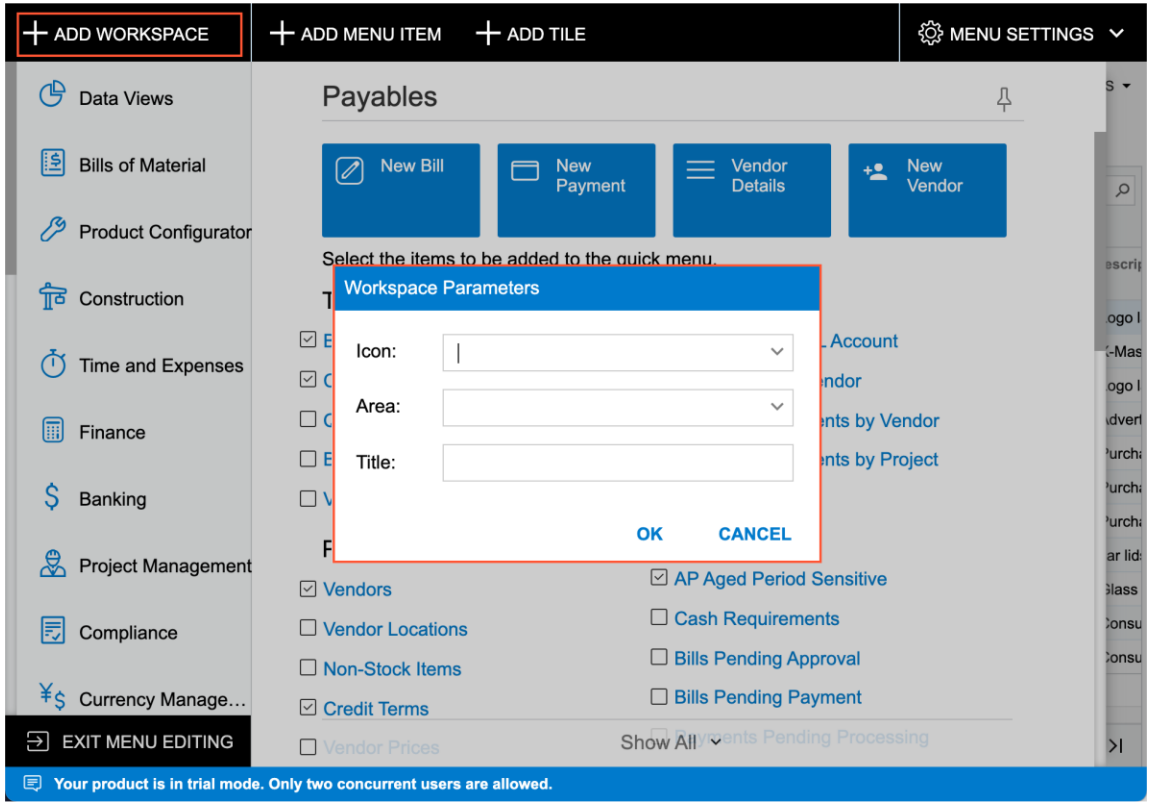


Figure: The creation of a new tile

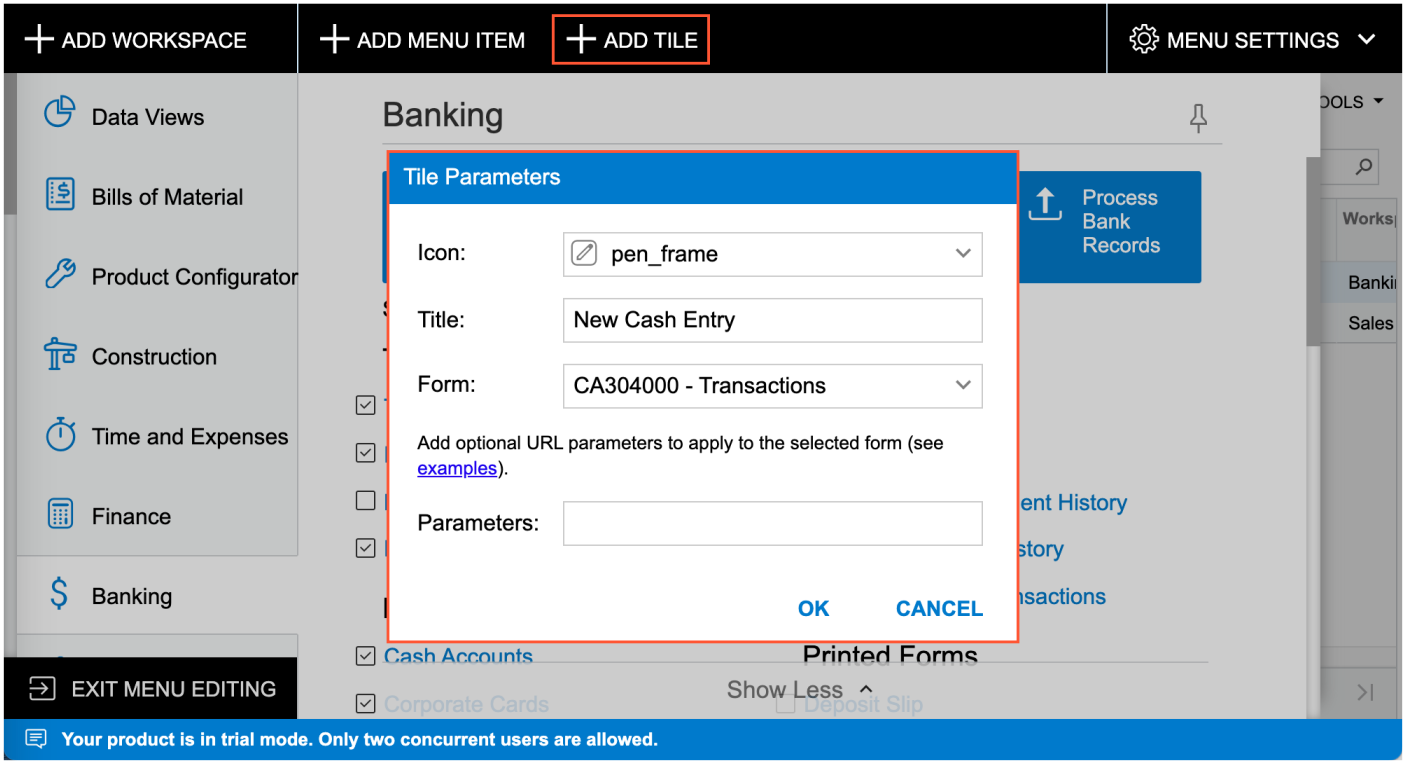


Figure: The correspondence of form UI elements with the URL parameters

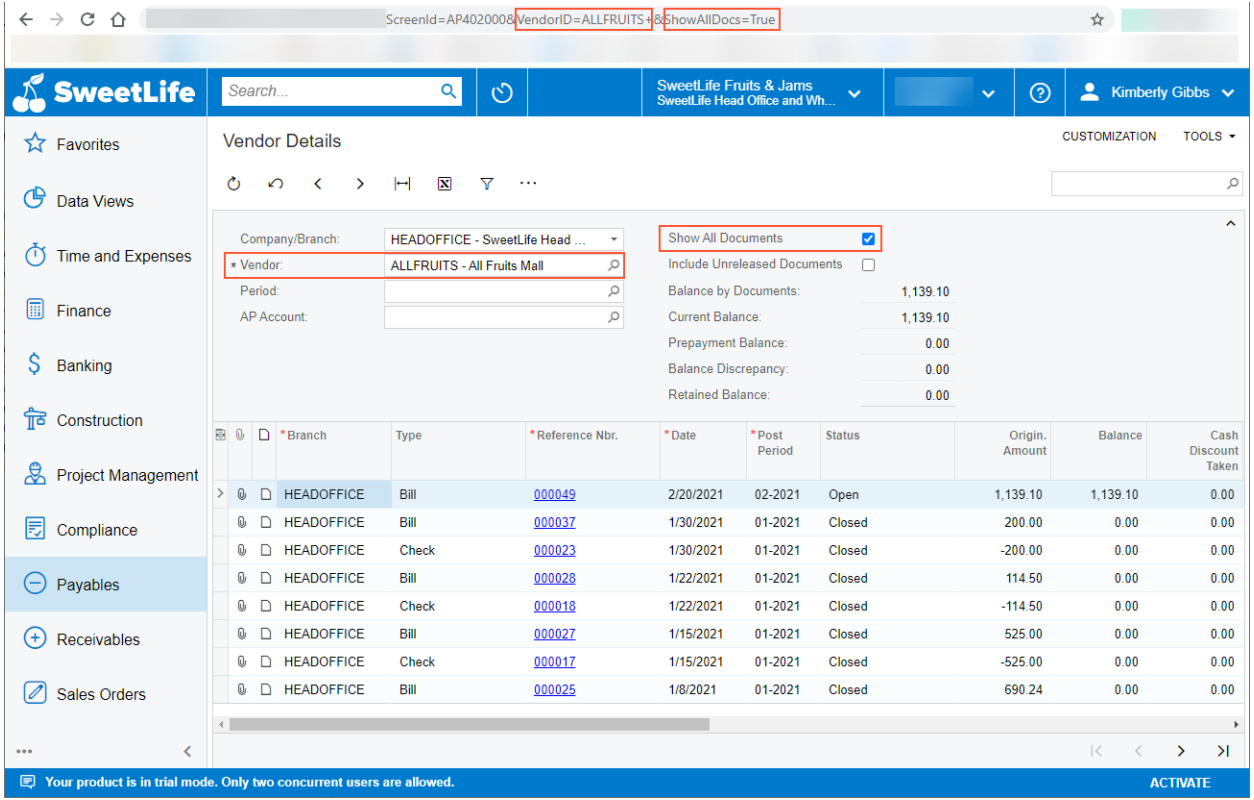


Figure: The inspection of a form element

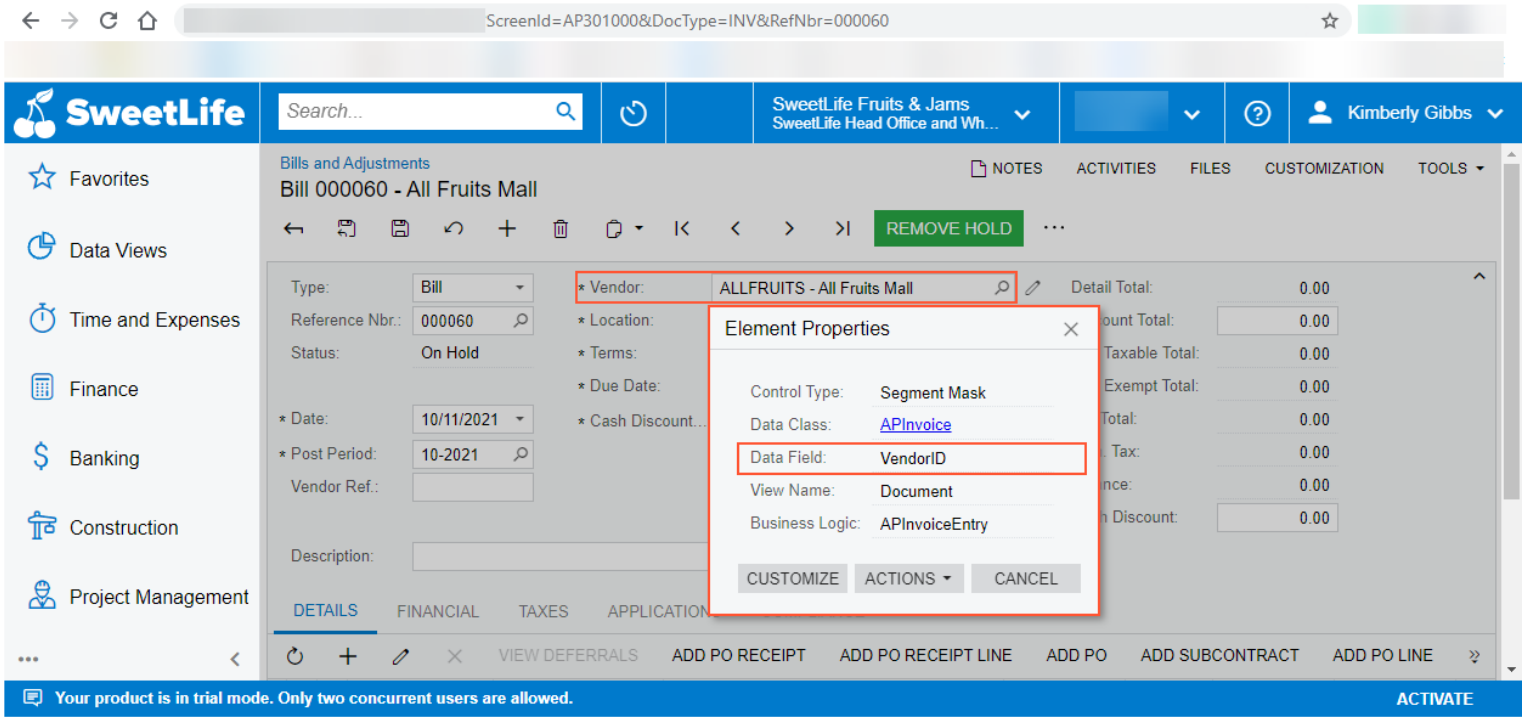


Figure: The specification of parameters for a tile

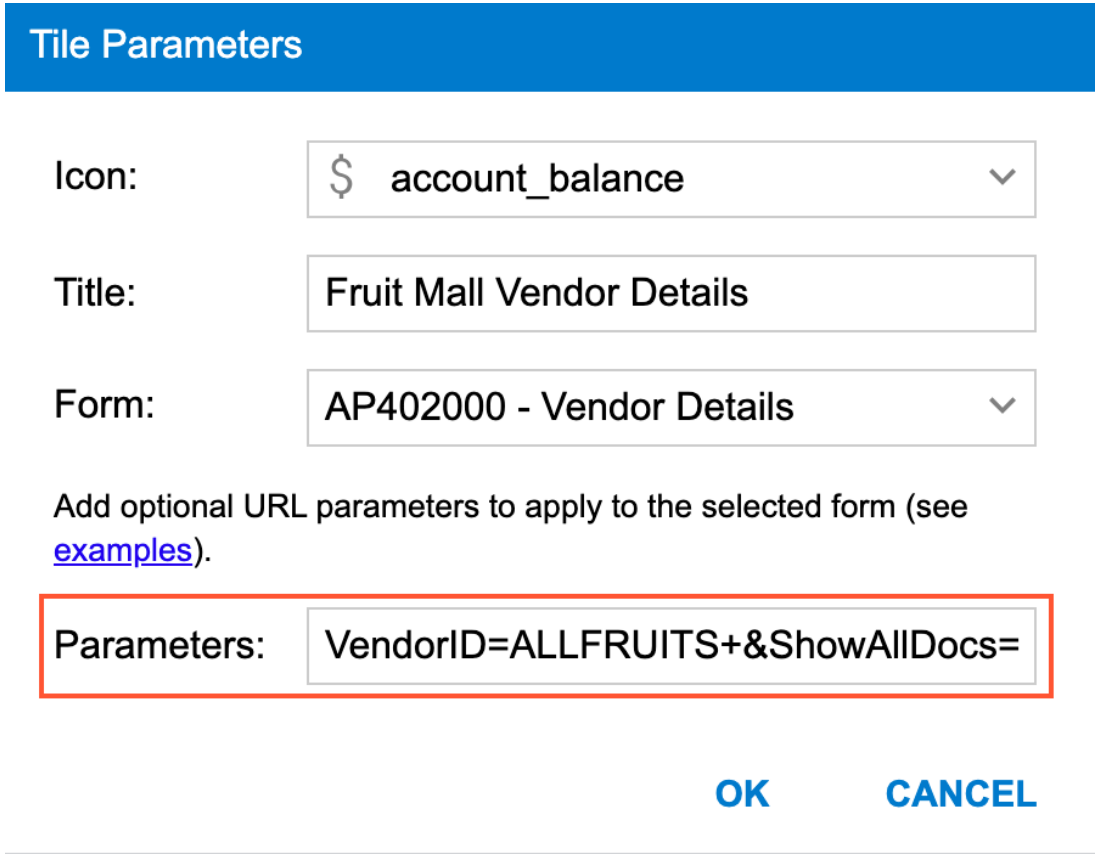


Figure: The deletion of a tile from a workspace

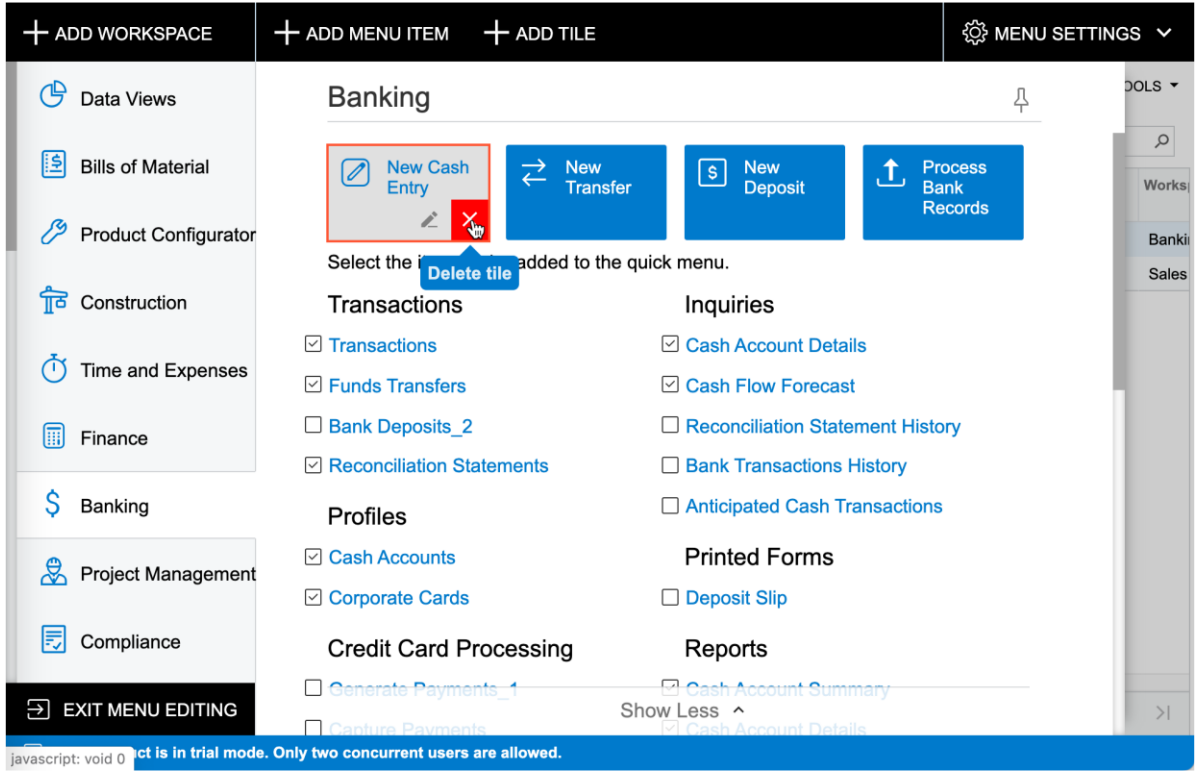


Figure: The selection of a check box for adding the link to the quick menu

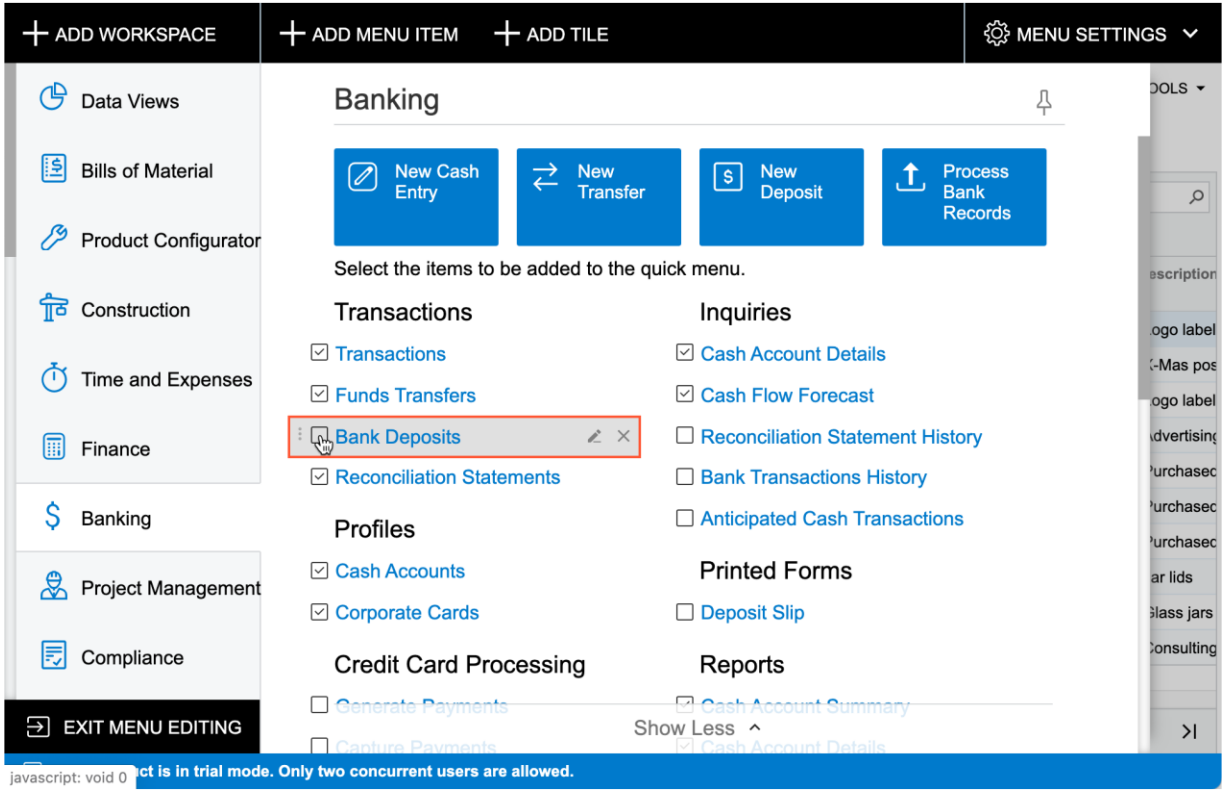


Figure: The removal of a link to a form from a workspace

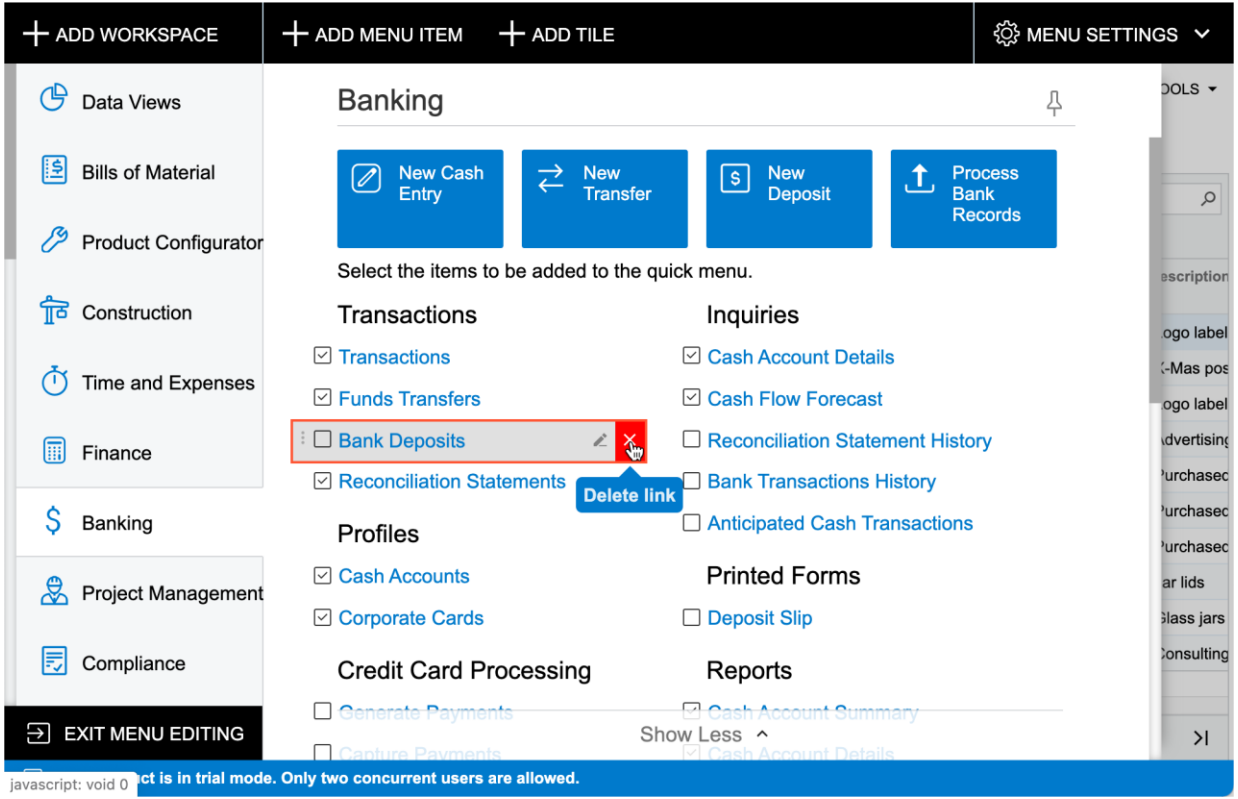


Figure: The addition of a link to the form to a workspace

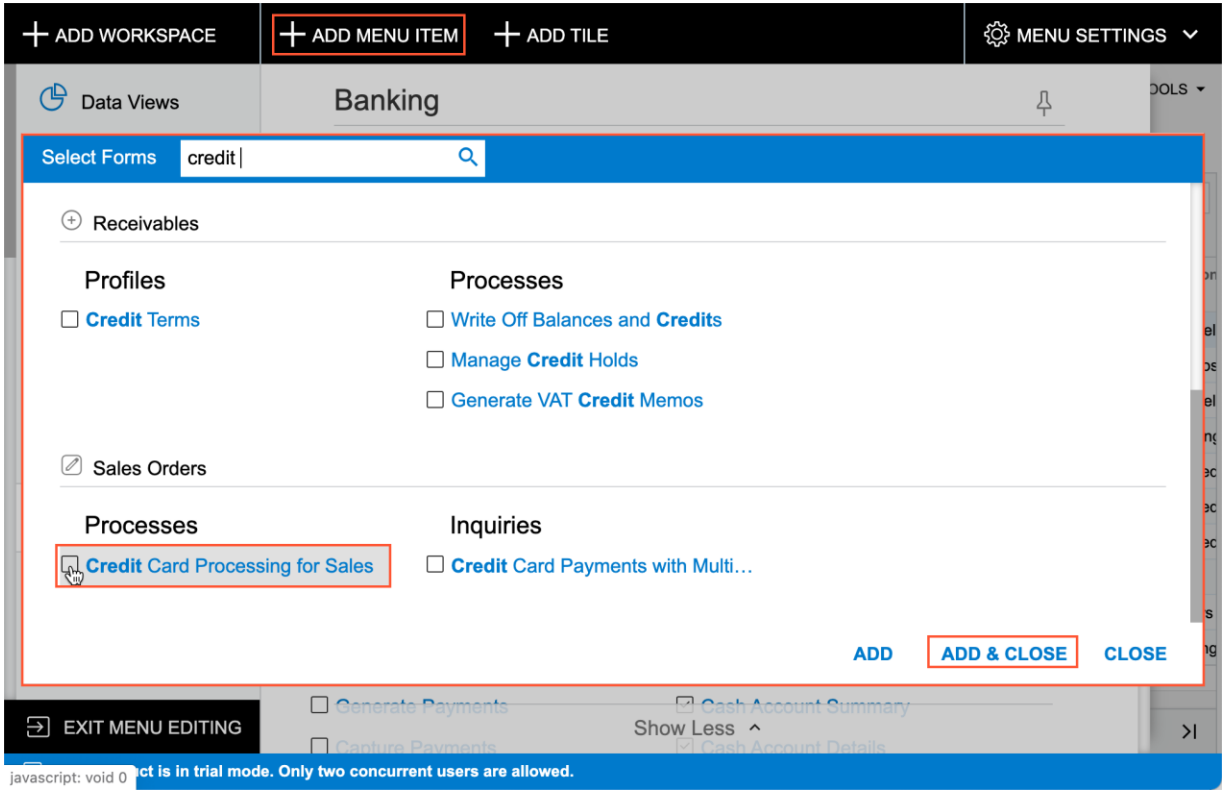


Figure: The addition of a new category

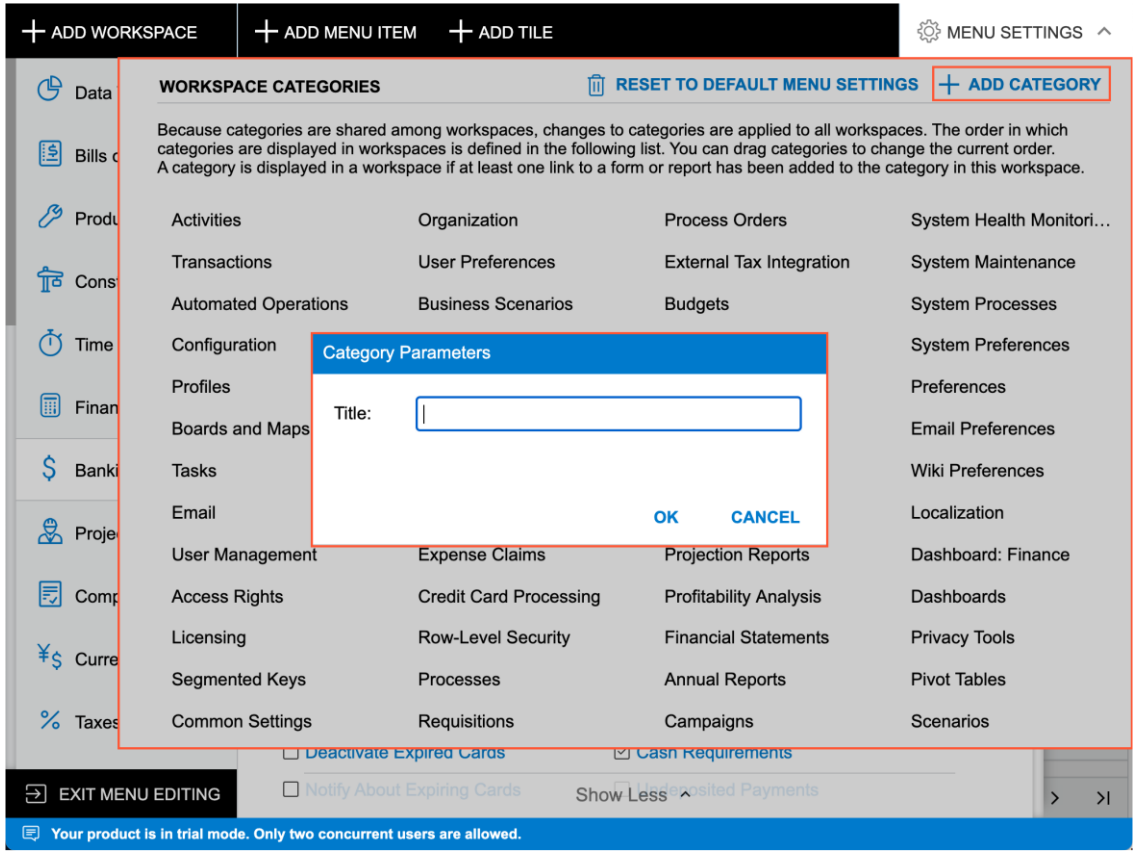
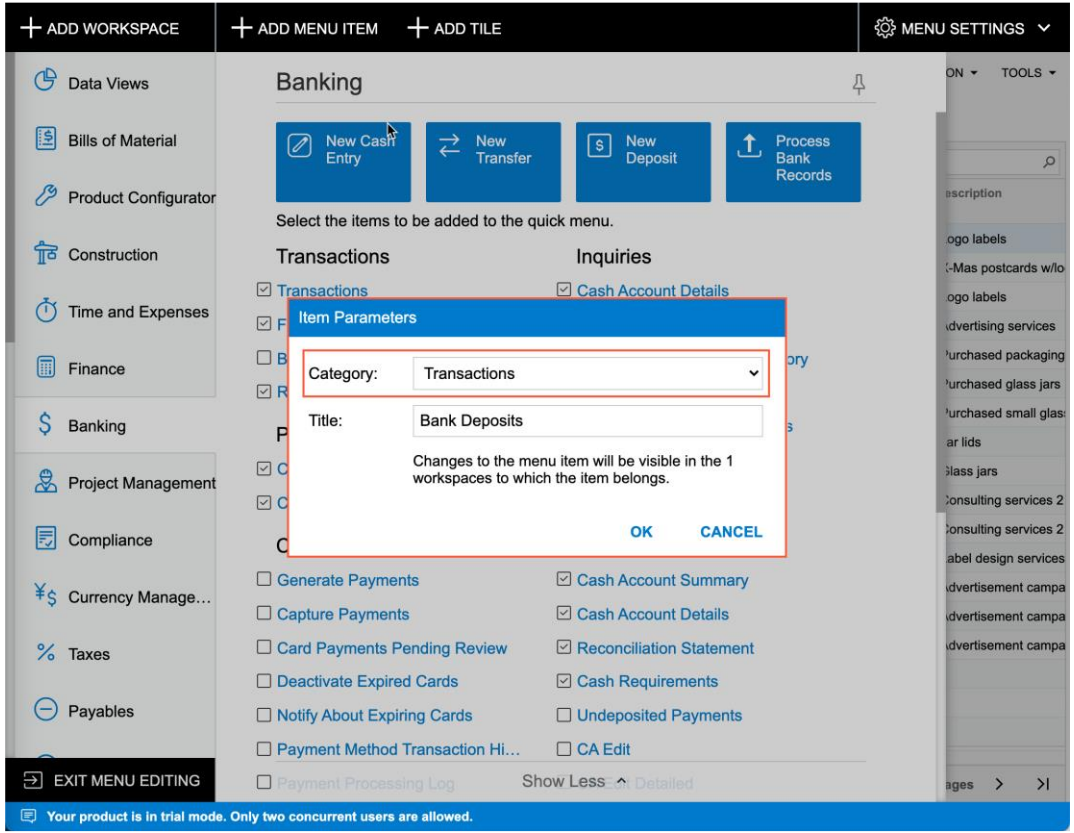


Figure: Changing of the category for a link to a form



User Interface: To Configure a Workspace

Story

Suppose that a customer support manager of the Muffins & Cakes company has asked you, the system administrator, to create a new workspace for quick access to customer support representatives' most used forms.

You have been asked to initially include the Customers (AR3030PL) and Cases (CR3060PL) forms in this workspace.

The workspace should be pinned to the main menu panel by default.

Also, the manager requested that you add a new tile for the quick creation of cases from Allen's Bakery, the company's highest-priority customer, for juicer repair.

Figure: The Quick Access workspace in Menu Editing mode

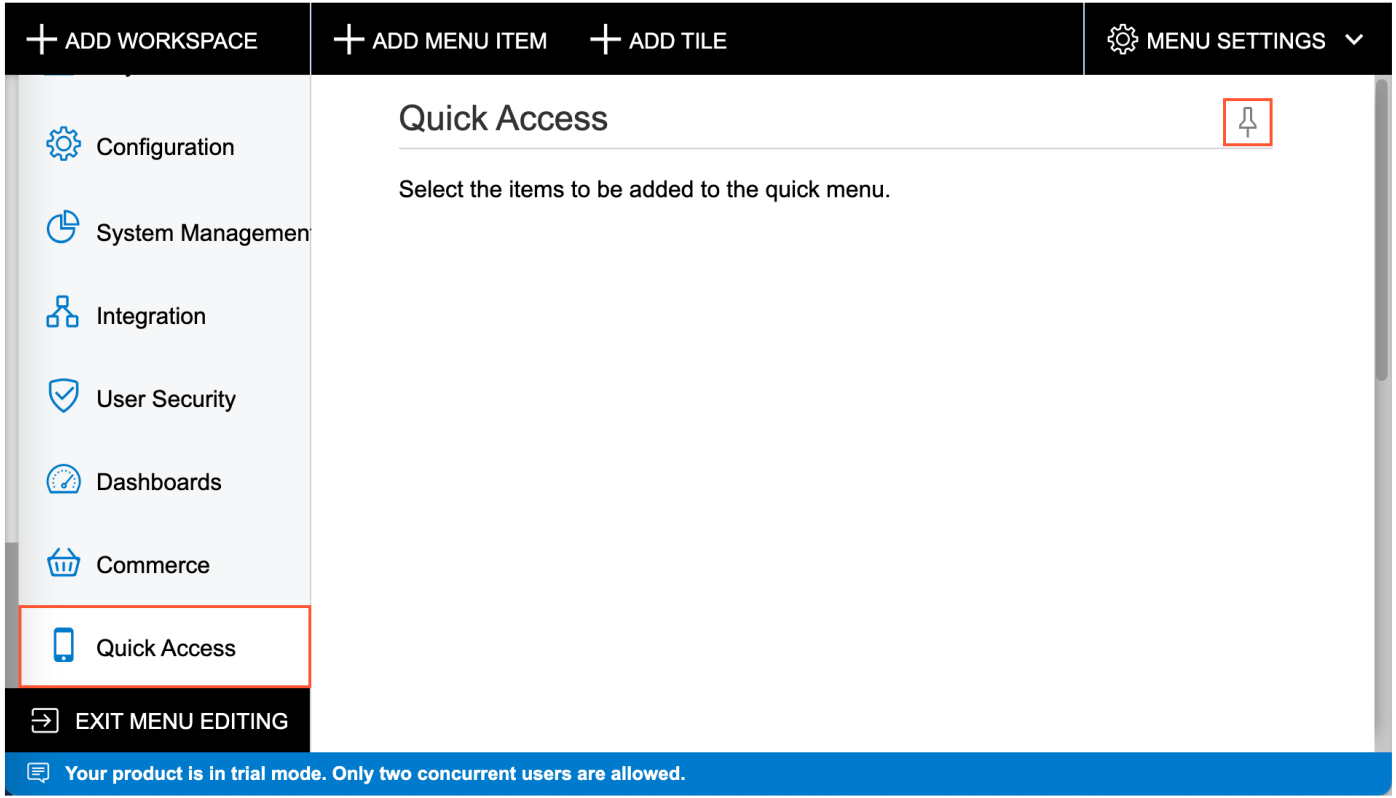


Figure: The new tile on the Quick Access workspace in Menu Editing mode

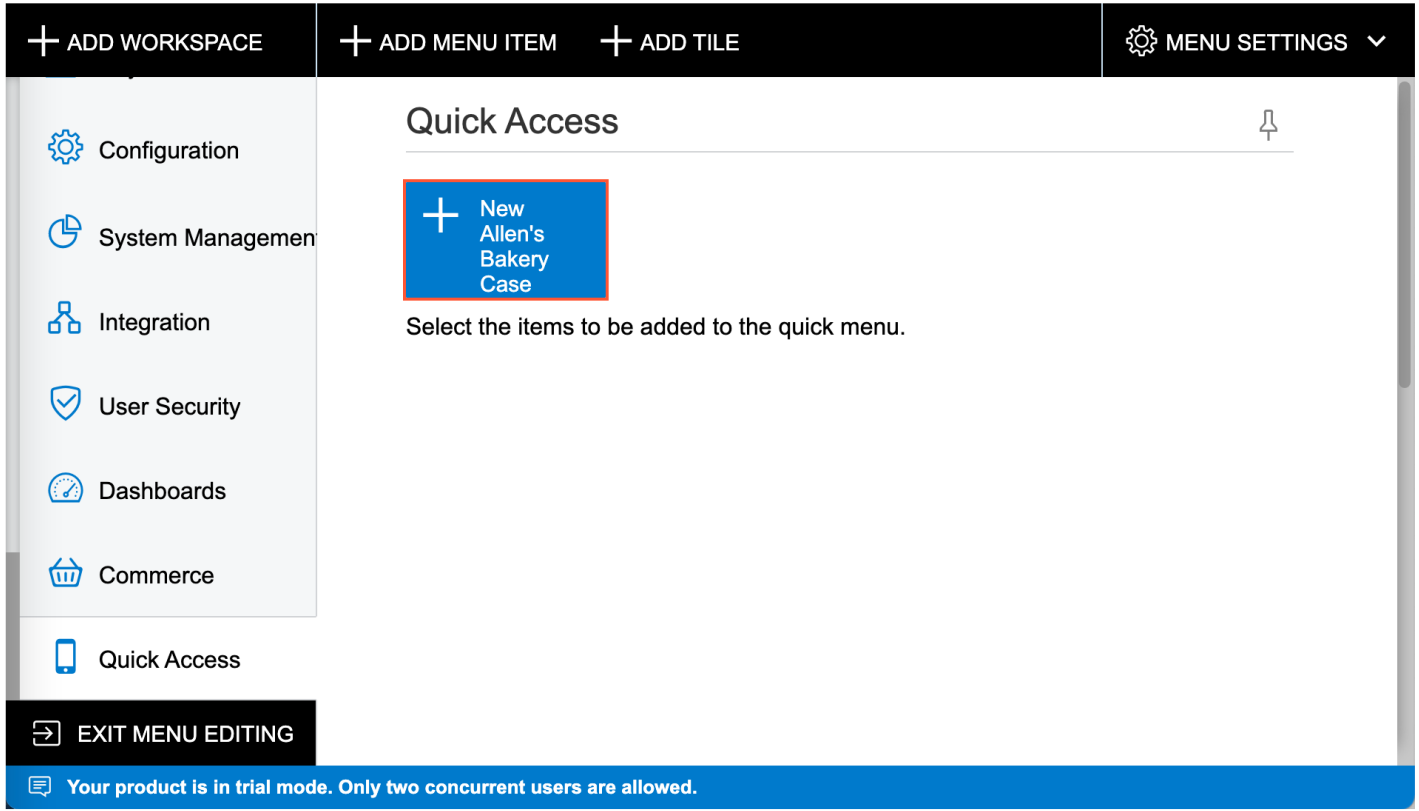


Figure: The selection of the Customers item in the Select Forms dialog box

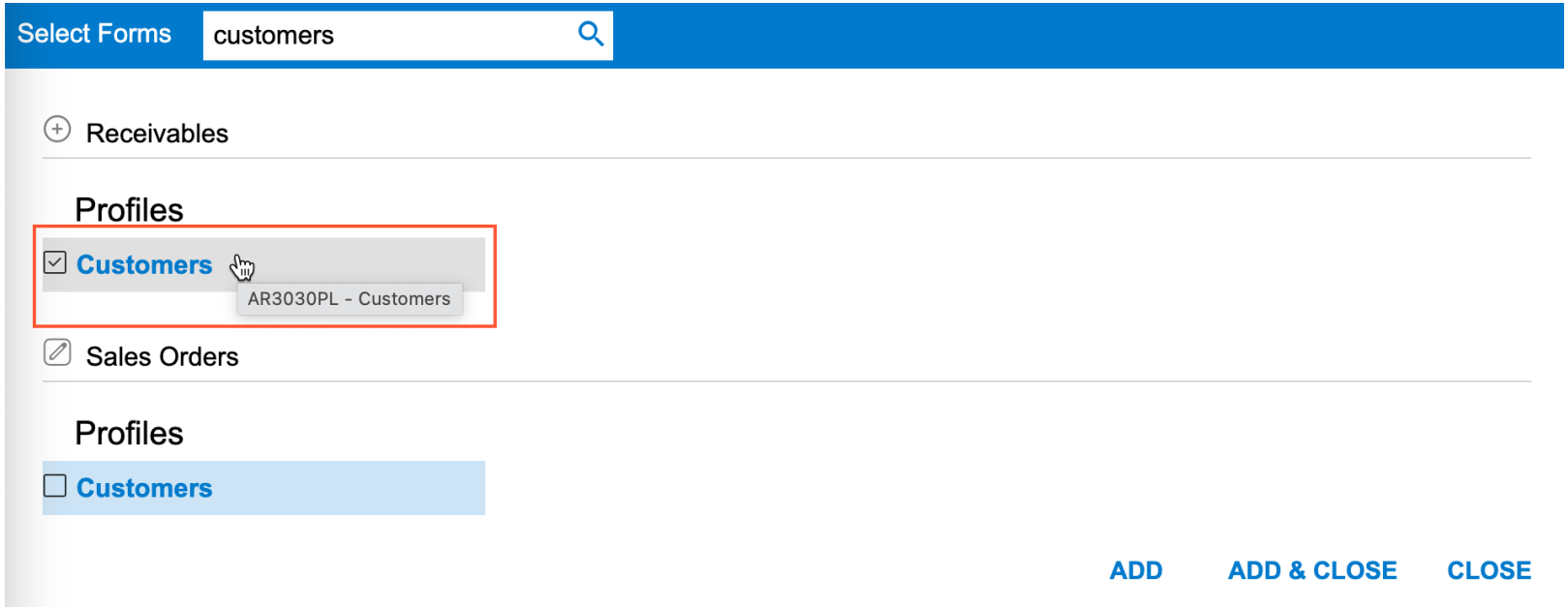
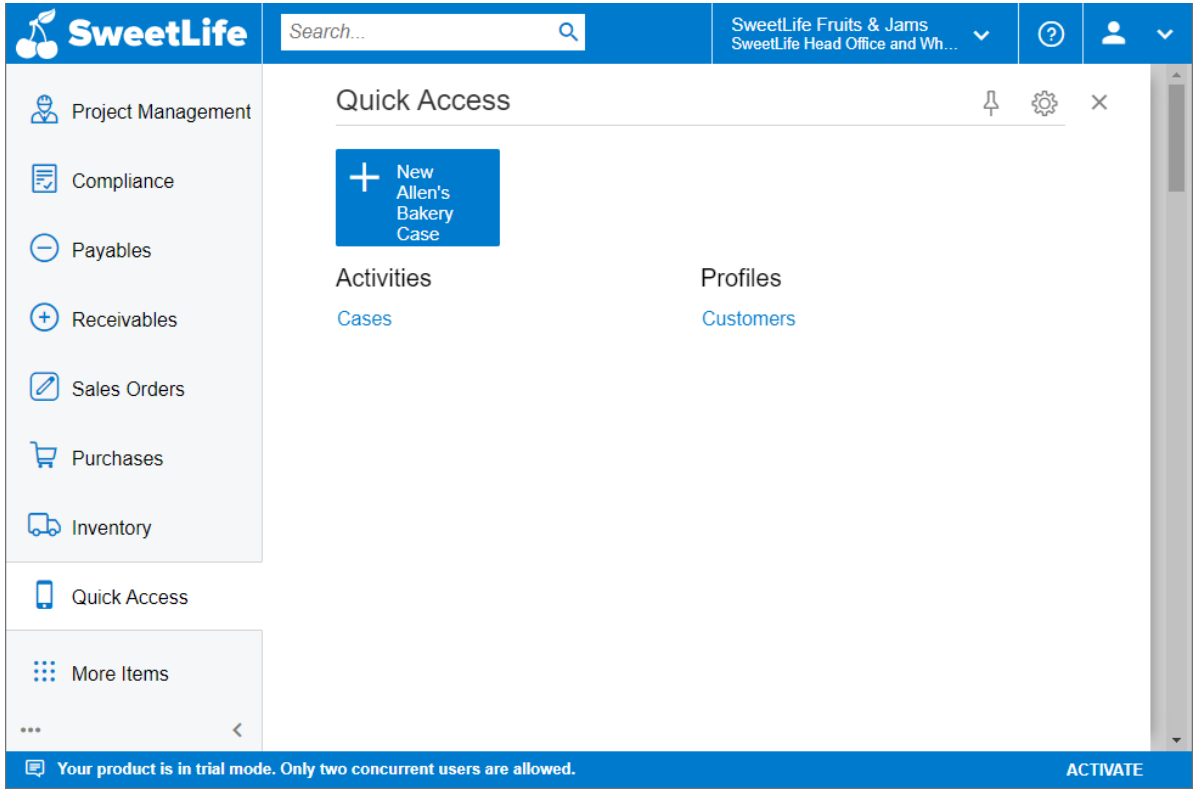


Figure: The Quick Access workspace



Lesson 1.2: Using Company Logos

Learning Objectives

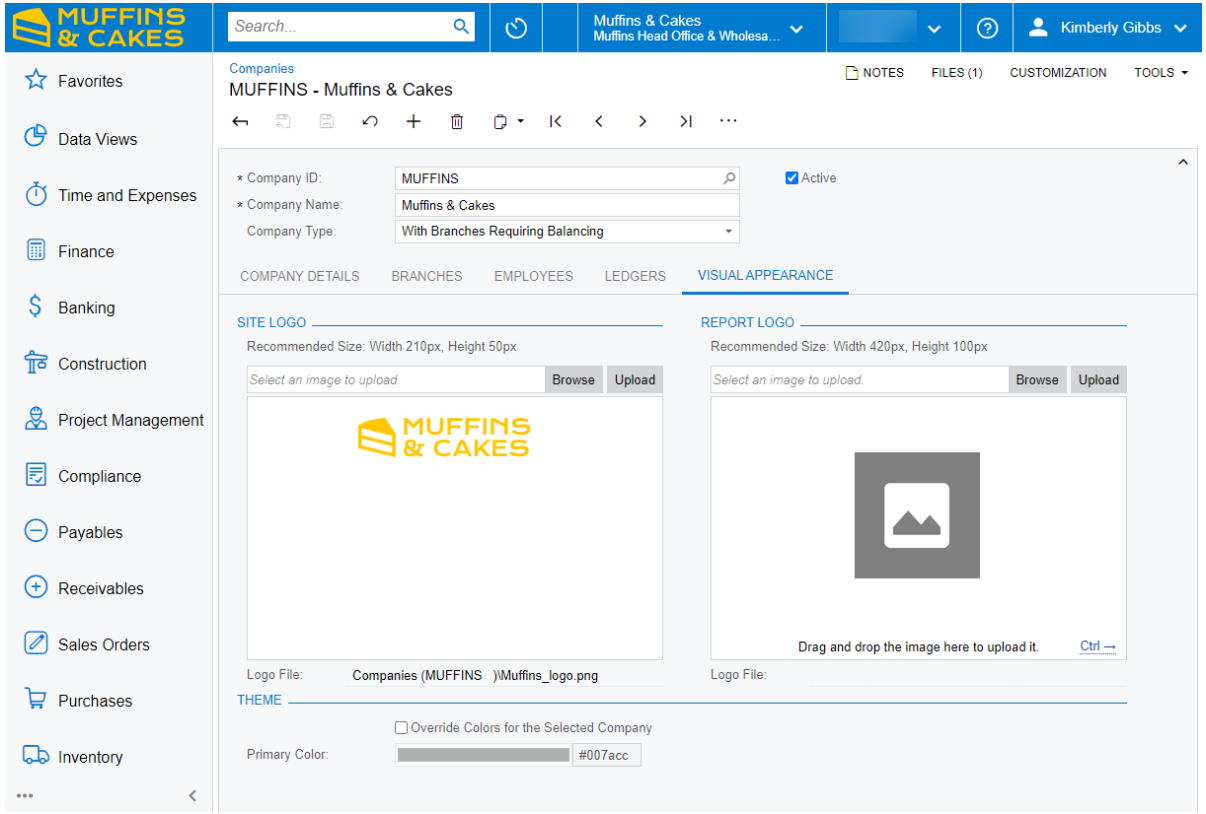
In this lesson, you will learn how to display a company logo on the UI for your Acumatica ERP company or a company branch.

Company Logo Usage: To Set Up a Logo

Story

Suppose that you are a system administrator at the Muffins & Cakes company. You need to configure the user interface to have a specific look and feel for the company, so you are starting with adding to the UI the company logo the designer has prepared for you.

Figure: New logo on the screen



Lesson 1.2: Using Company Logos

Learning Objectives

In this lesson, you will learn how to do the following:

• Change the primary color of the color theme selected for your Acumatica ERP tenant

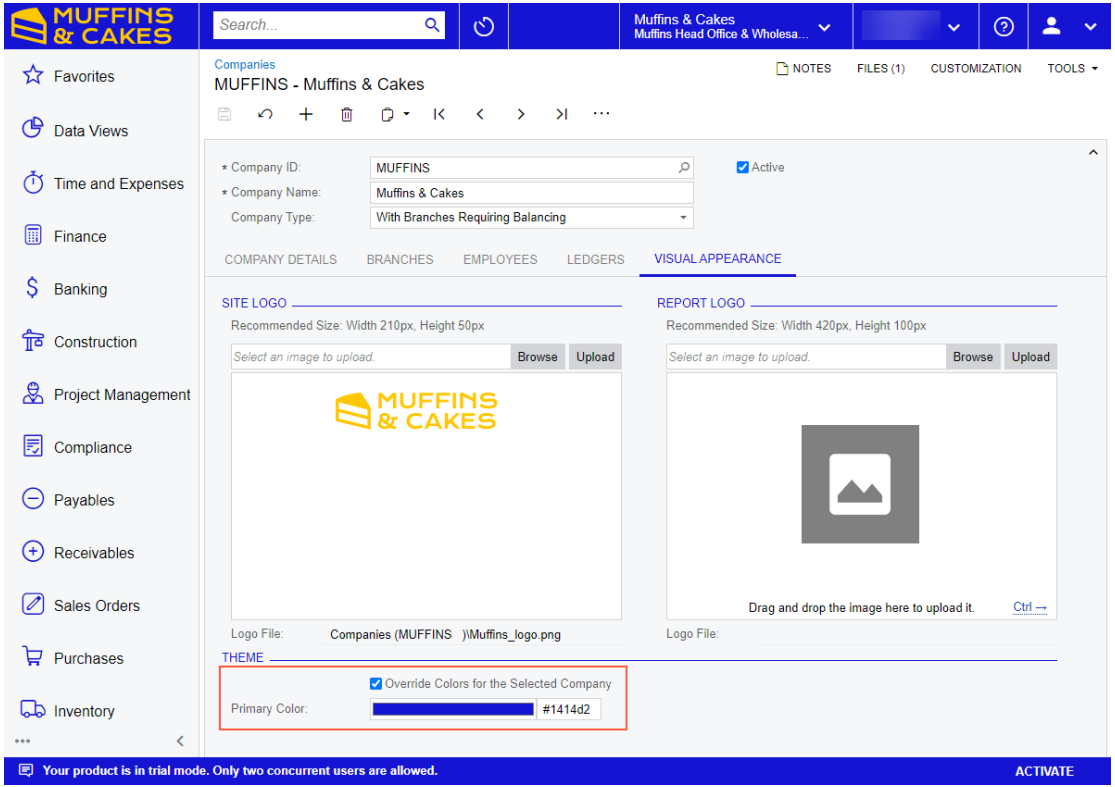
• Override the primary color of the color theme selected for your Acumatica ERP tenant on the company and branch level

Color Theme: To Change the Primary Color

Story

Suppose that a manager of the Muffins & Cakes company has asked you to change the default color theme for the company's user interface so that it complies with the Muffins & Cakes company's style guidelines and corporate colors. Acting as a system administrator, you will change the primary color.

Figure: The company color theme after the change of the primary color



Day 2

Part 2: Managing Tenants, Snapshots, Customization Projects, and Scheduled Processing

Devil's Peak Brewing Company
Acumatica Customer Since 2016

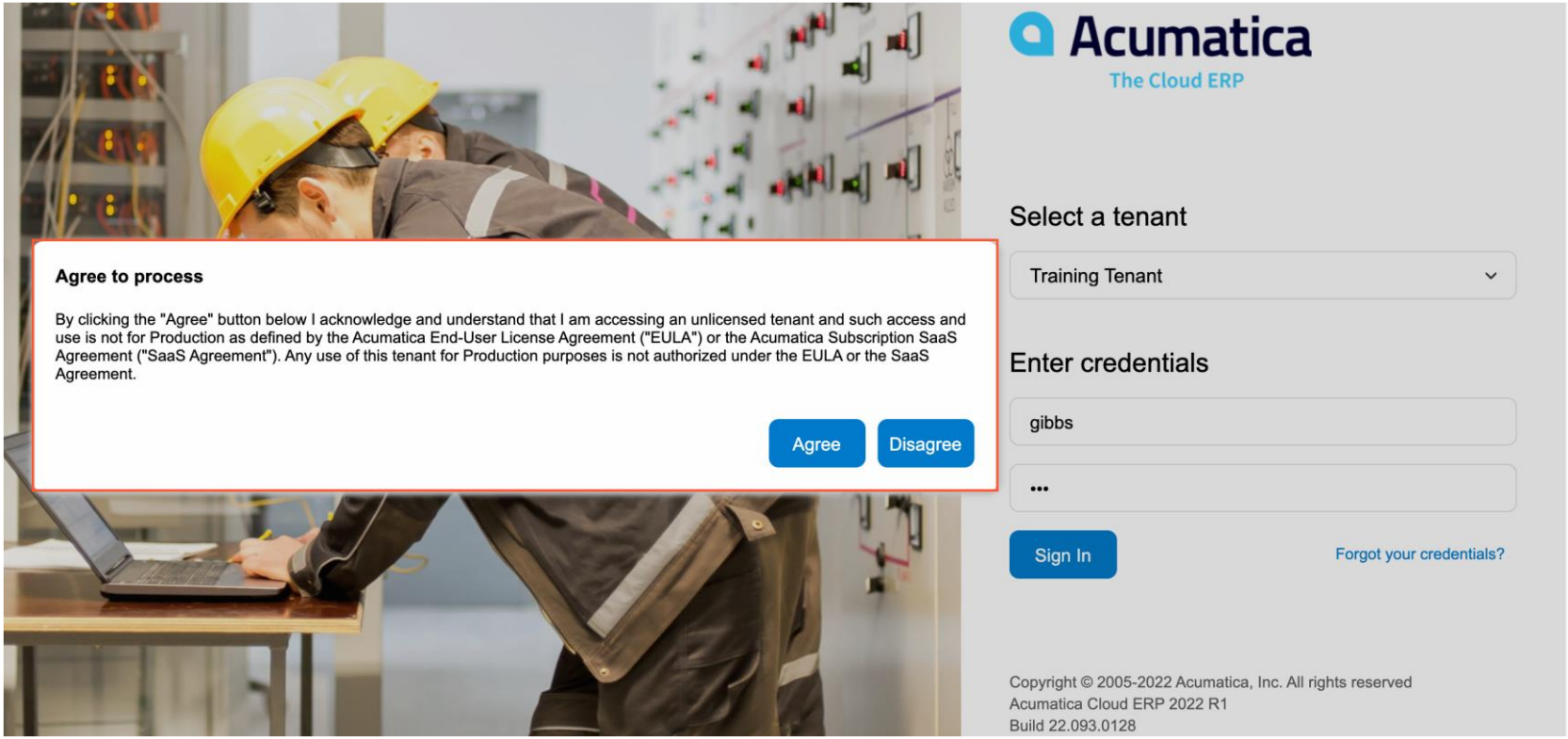
Lesson 2.1: Managing Tenants by Using the Web Interface

Learning Objectives

In this lesson, you will learn how to do the following:

- Create a tenant for testing purposes
- Copy an existing tenant for testing purposes
- Convert a production tenant to a test tenant
- Delete a tenant

Figure: Confirmation dialog box for signing in to a test tenant



Tenants: To Create a Test Environment

Story

Suppose that SweetLife Fruits & Jams has a new hire (a system administrator) who should complete training during their probation period. To complete the training, the new system administrator needs an empty tenant and a copy of the production tenant. Acting as the system administrator, you will create two test tenants, one with an out-of-the-box company and another with all the data of production tenant. When the new system administrator completes the training, you will delete the empty tenant.

Lesson 2.2: Working with Snapshots

Learning Objectives

In this lesson, you will learn how to do the following:

- Take a snapshot of tenant-specific content
- Export a snapshot to external storage
- Review the manifest.xml file of the snapshot to find out its details
- Import a snapshot
- Restore a snapshot in a destination tenant

Snapshots: To Take, Restore, and Delete a Snapshot

Story

Suppose that SweetLife Fruits & Jams has a new hire, Alberto Jimenez, who should complete a training course during his probation period. To complete the training, the new employee needs a copy of the production tenant.

Acting as a system administrator, you need to create a test tenant for the new employee. To save space, you will take a snapshot whose content is limited to settings and business accounts of the production tenant, instead of copying all production tenant data. You will toggle the snapshot visibility and restore this snapshot for the test tenant. Then you will delete the snapshot.

Figure: The new tenant with the default workspaces

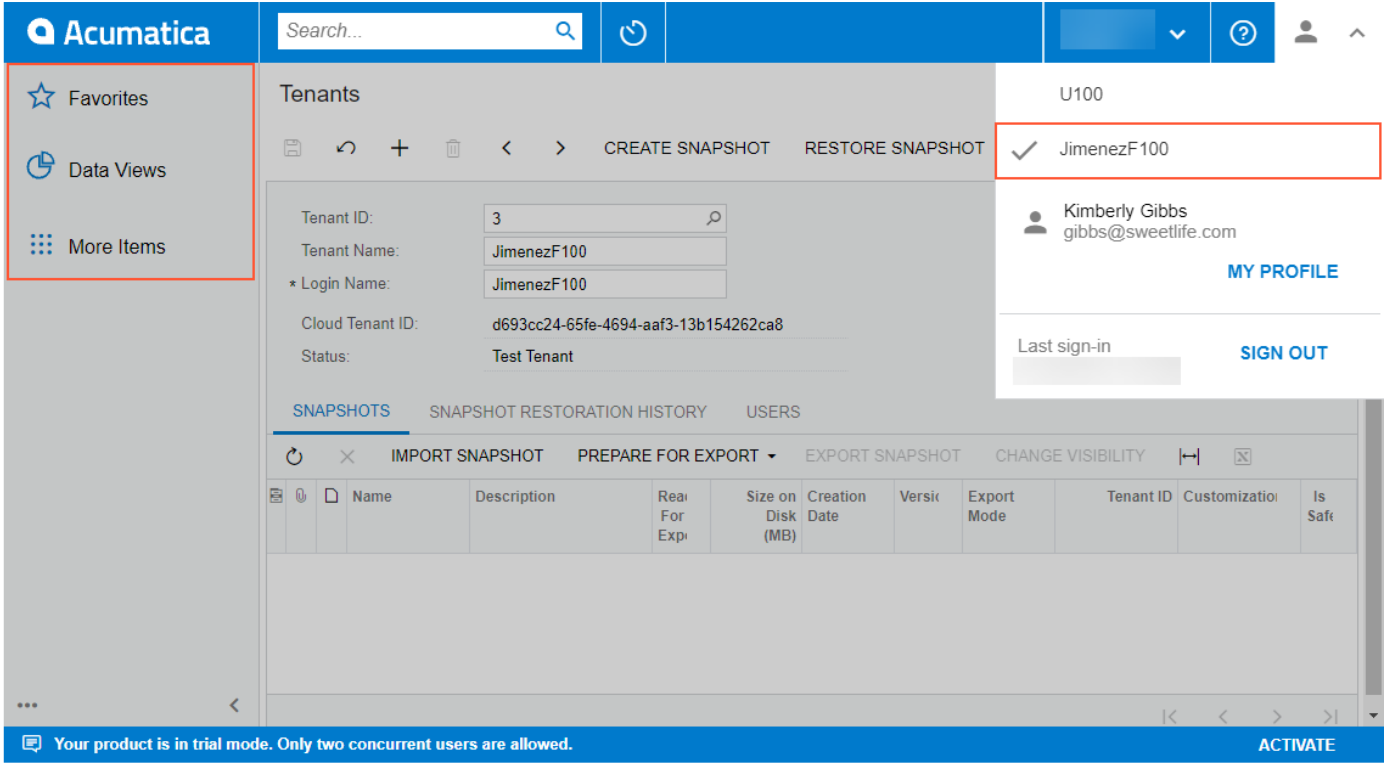


Figure: Name of the source tenant specified for the snapshot

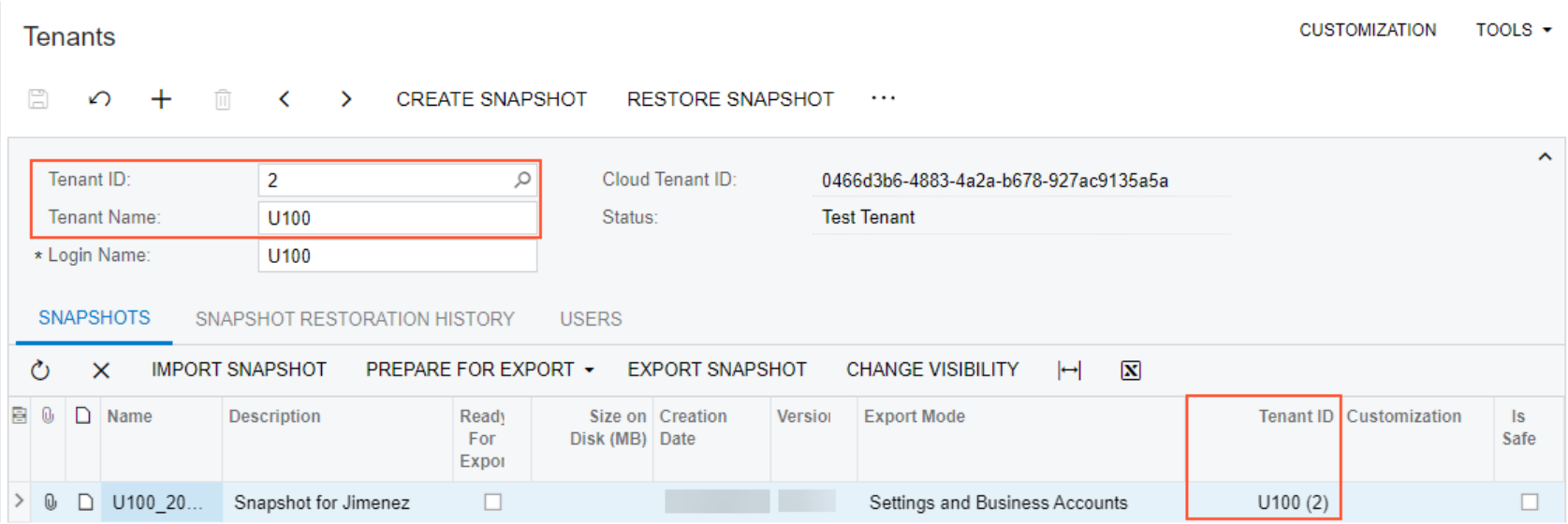
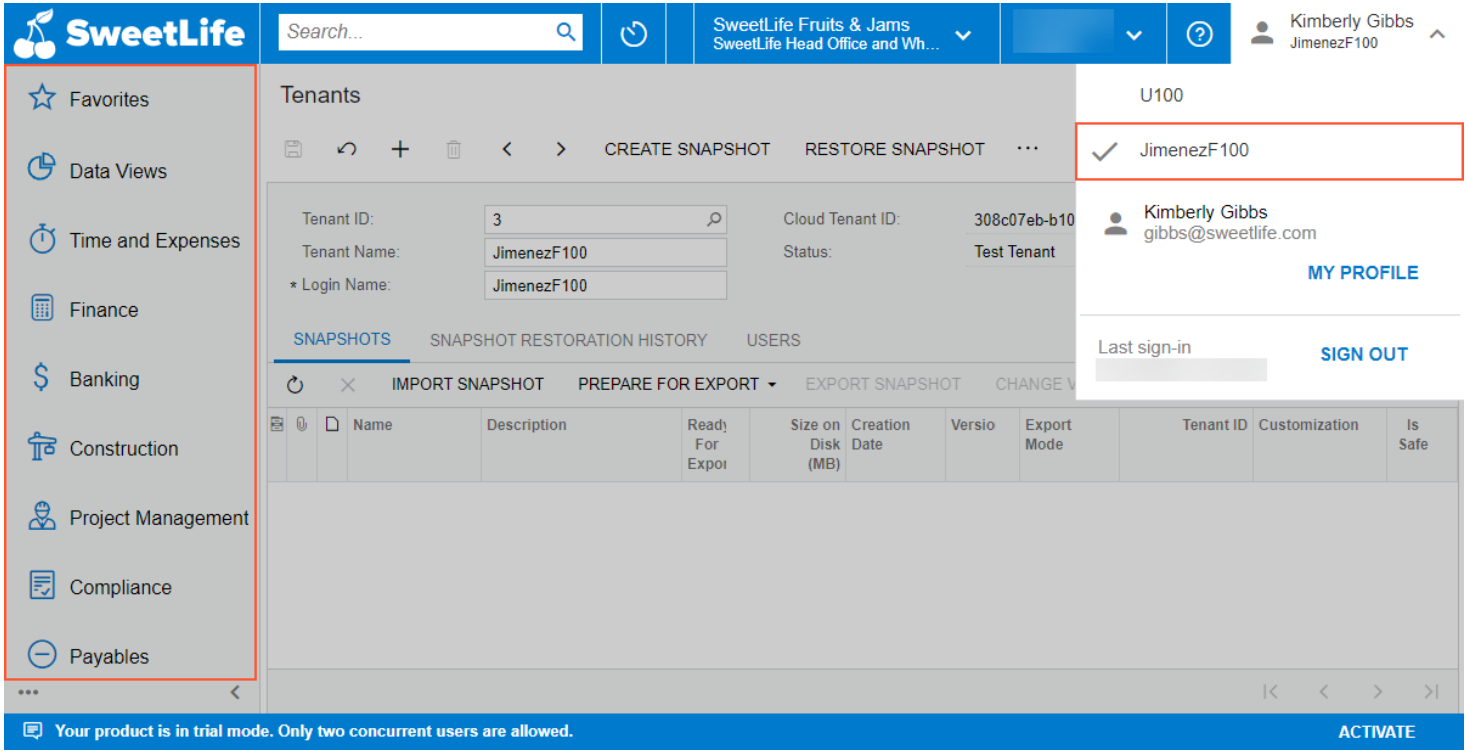


Figure: A test tenant with the data from the restored snapshot



Snapshots: To Export and Import a Snapshot

Story

Suppose that SweetLife Fruits & Jams has a new hire, Peter Lai, who should complete training during his probation period. To complete the training, the new employee needs a copy of the production tenant. Acting as a system administrator, you need to create a tenant in a sandbox (an instance of Acumatica ERP that has no production tenants) for the new employee. To move data between instances, you export a snapshot of the production tenant and import it to the test tenant. To save space, you take a snapshot with content limited to the settings and business accounts of the production tenant, and you prepare this snapshot for export.

Lesson 2.3: Scheduling Automated Processing

Learning Objectives

In this lesson, you will learn how to do the following:

- Schedule automatic processing
- View the history of executions
- Delete the history of scheduled processes

Figure: The Selection area of a form with the ability to select a specific operation

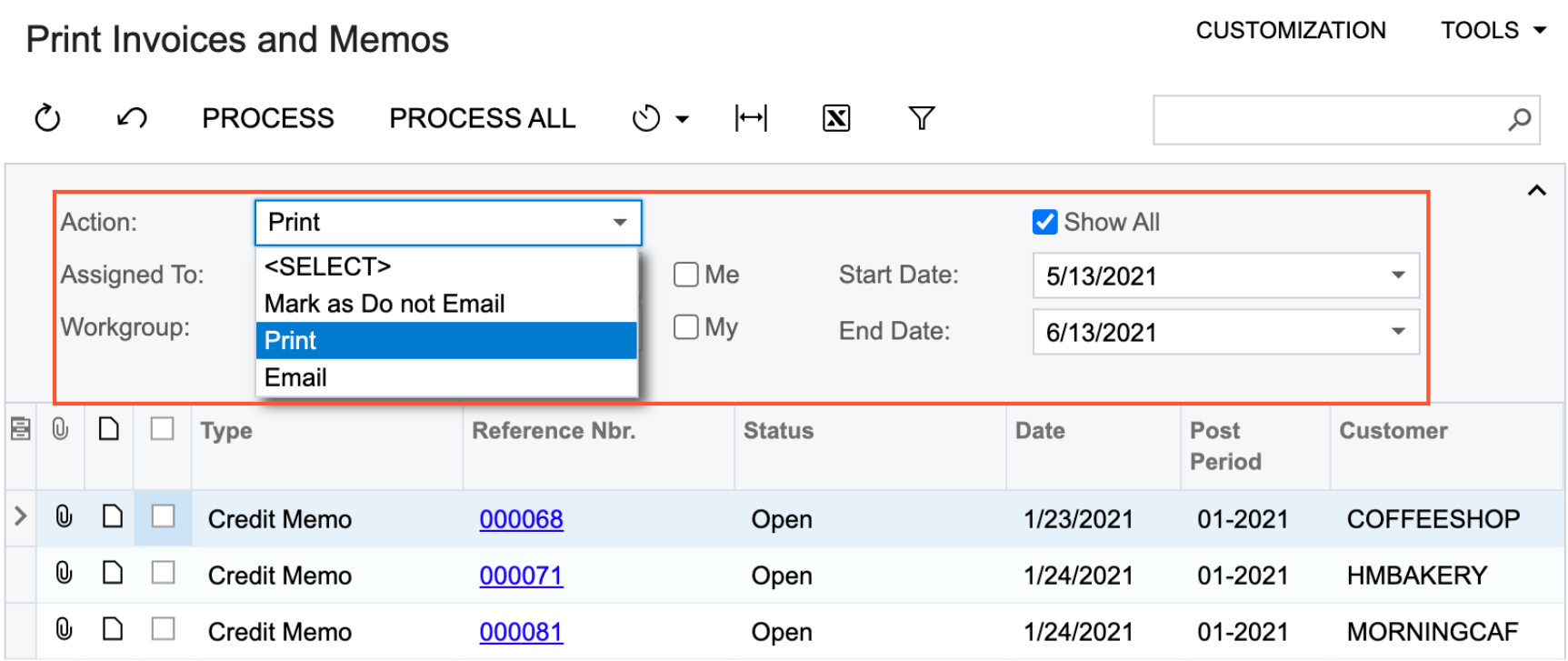


Figure: The condition specified in the Selection area being copied to the Filter Values tab of a schedule

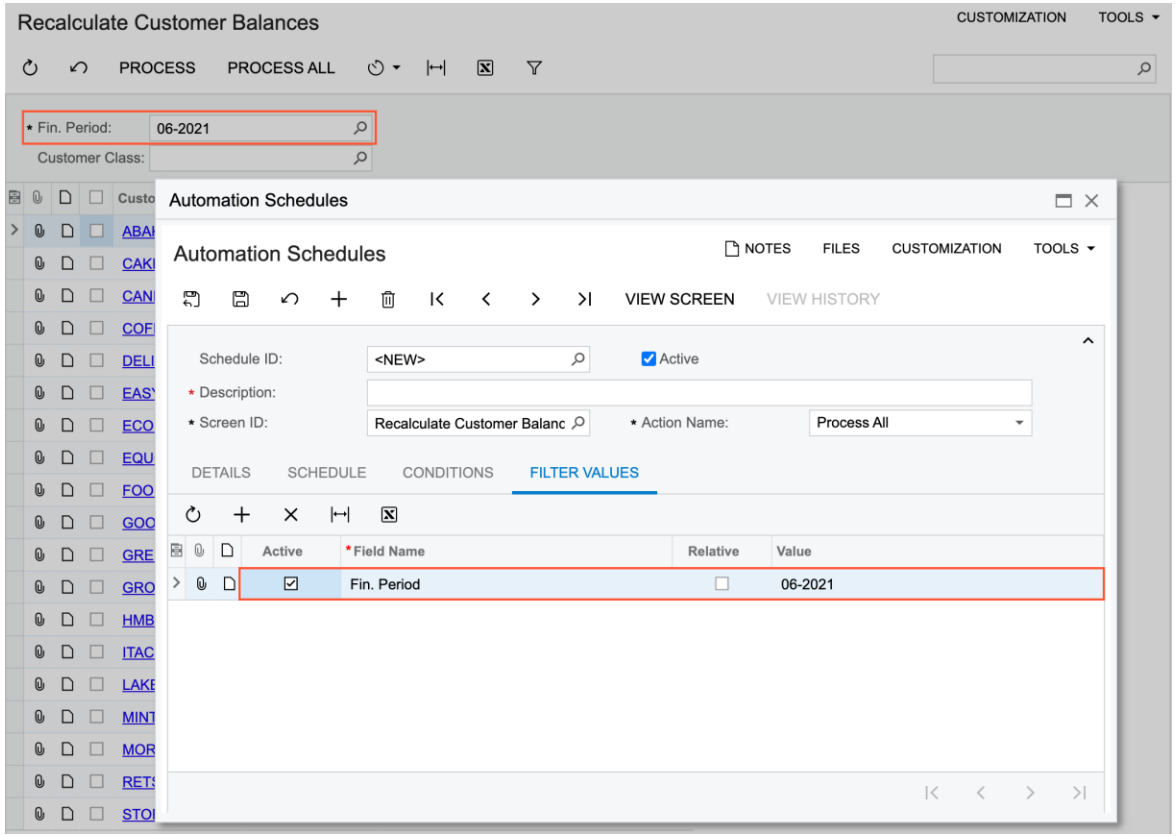


Figure: Application of a simple filter to the Amount column

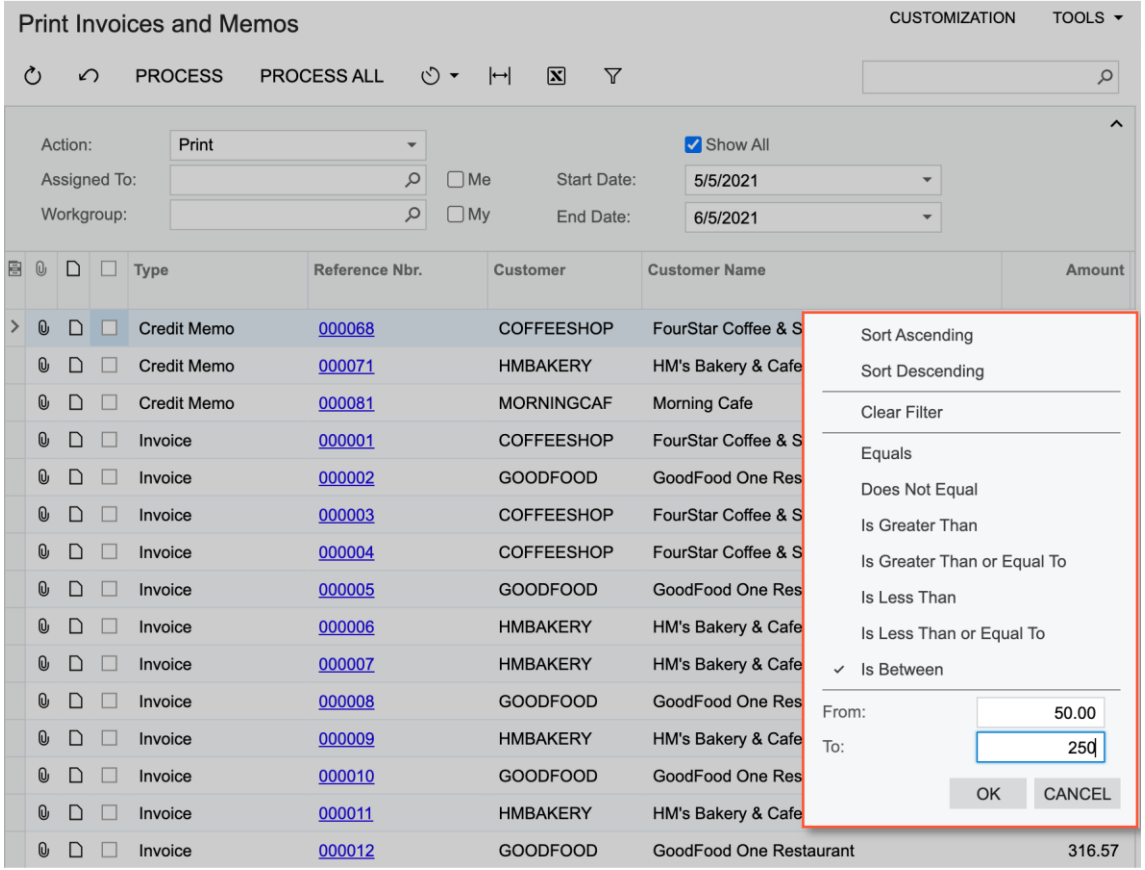


Figure: The copied condition of a simple filter applied to the Amount column

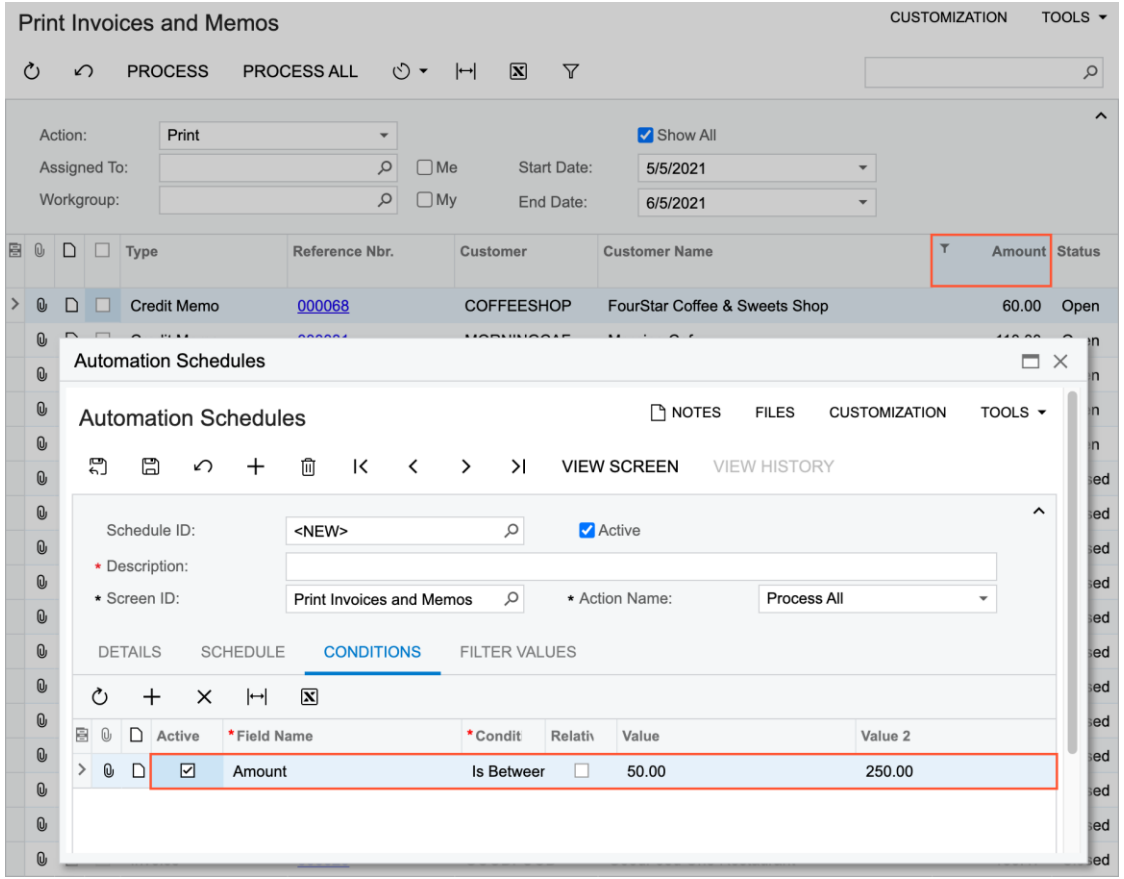


Figure: Schedule execution based on days

Automation Schedules

NOTES FILES CUSTOMIZATION TOOLS

VIEW SCREEN VIEW HISTORY

Schedule ID: Release AP docs, less than 3

Active

* Description: Release AP docs, less than 300

* Screen ID: Release AP Documents

* Action Name: Release All

DETAILS SCHEDULE CONDITIONS

SCHEDULE TYPE

- Daily
- Weekly
- Monthly
- By Financial Period

SCHEDULE DETAILS

* Next Execution Date: 6/14/2021

Every: 2 Day(s)

EXECUTION TIME

Starts On: 12:00 AM

* Next Execution Time: 12:00 AM

Stops On:

Exact Time

Every: 00:00

Figure: Schedule execution based on weeks

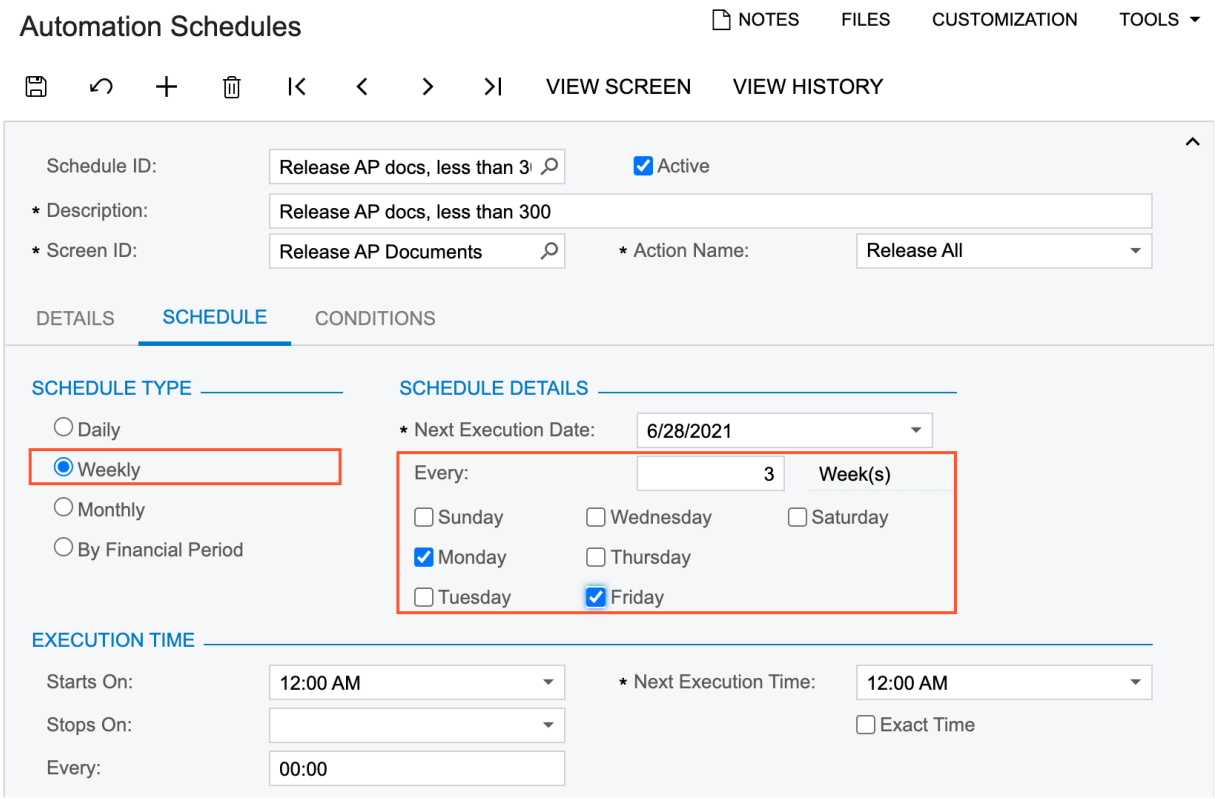


Figure: Schedule execution based on months

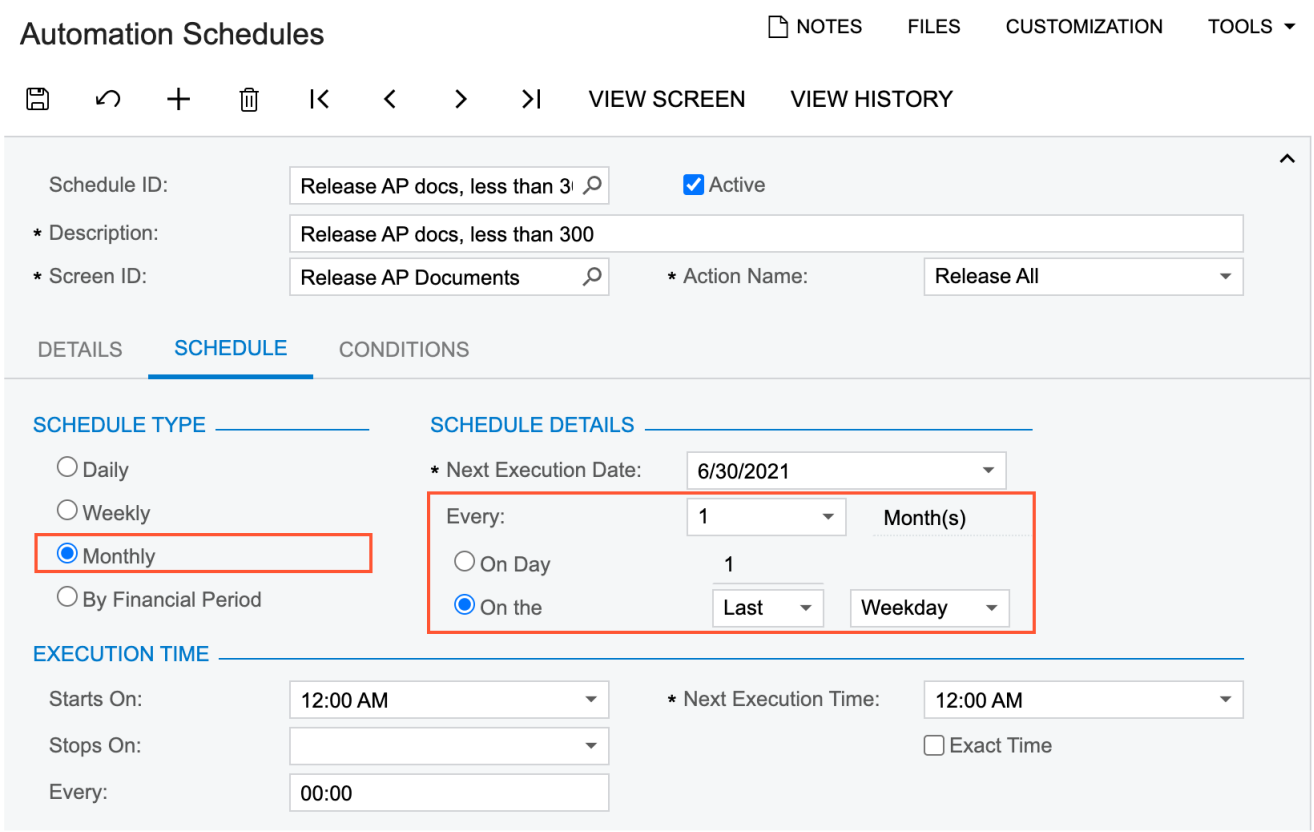


Figure: Schedule execution based on the dates of financial periods

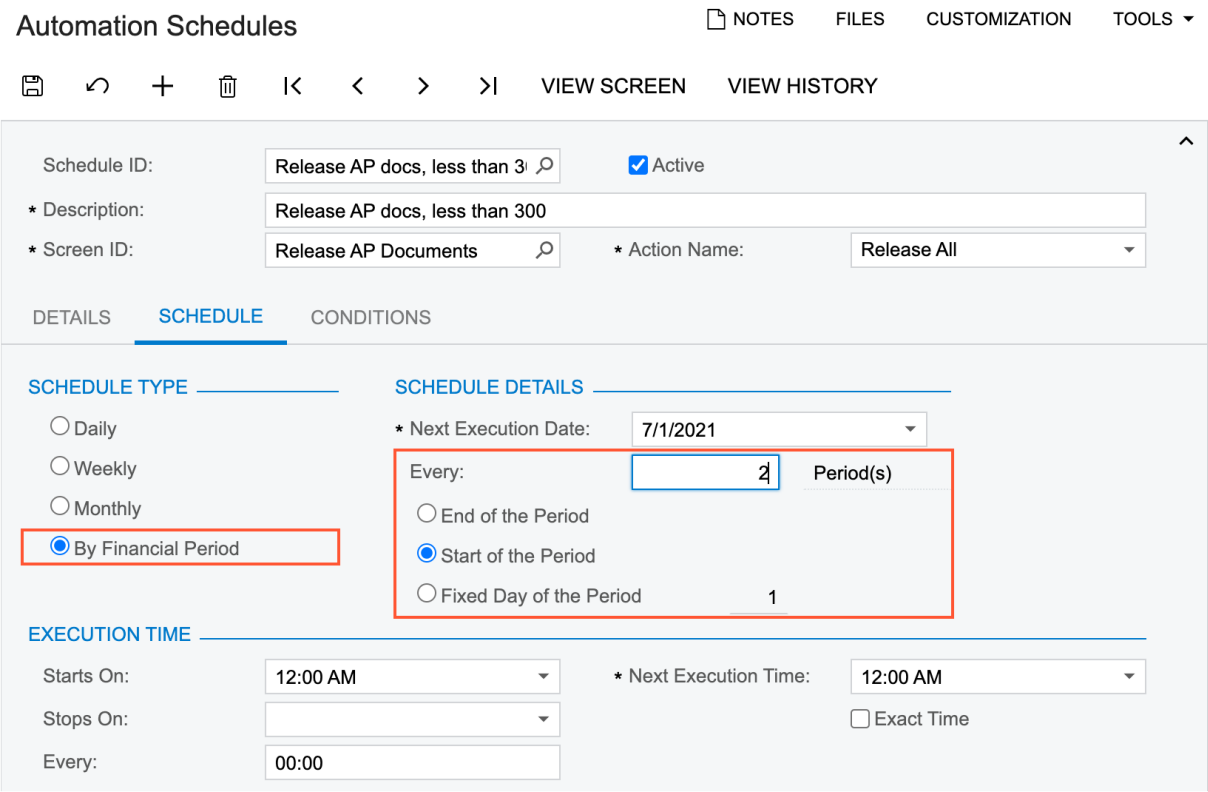


Figure: Schedule execution in successive sessions

Automation Schedules

NOTES FILES CUSTOMIZATION TOOLS

VIEW SCREEN VIEW HISTORY

Schedule ID: <NEW>

Active

* Description: Release AP bills less then 300

* Screen ID: Release AP Documents

* Action Name: Release All

DETAILS SCHEDULE CONDITIONS

SCHEDULE TYPE

- Daily
- Weekly
- Monthly
- By Financial Period

SCHEDULE DETAILS

* Next Execution Date: 6/6/2021

Every: 2 Day(s)

EXECUTION TIME

Starts On: 1:00 AM

Stops On: 2:00 AM

Every: 00:02

* Next Execution Time: 1:00 AM

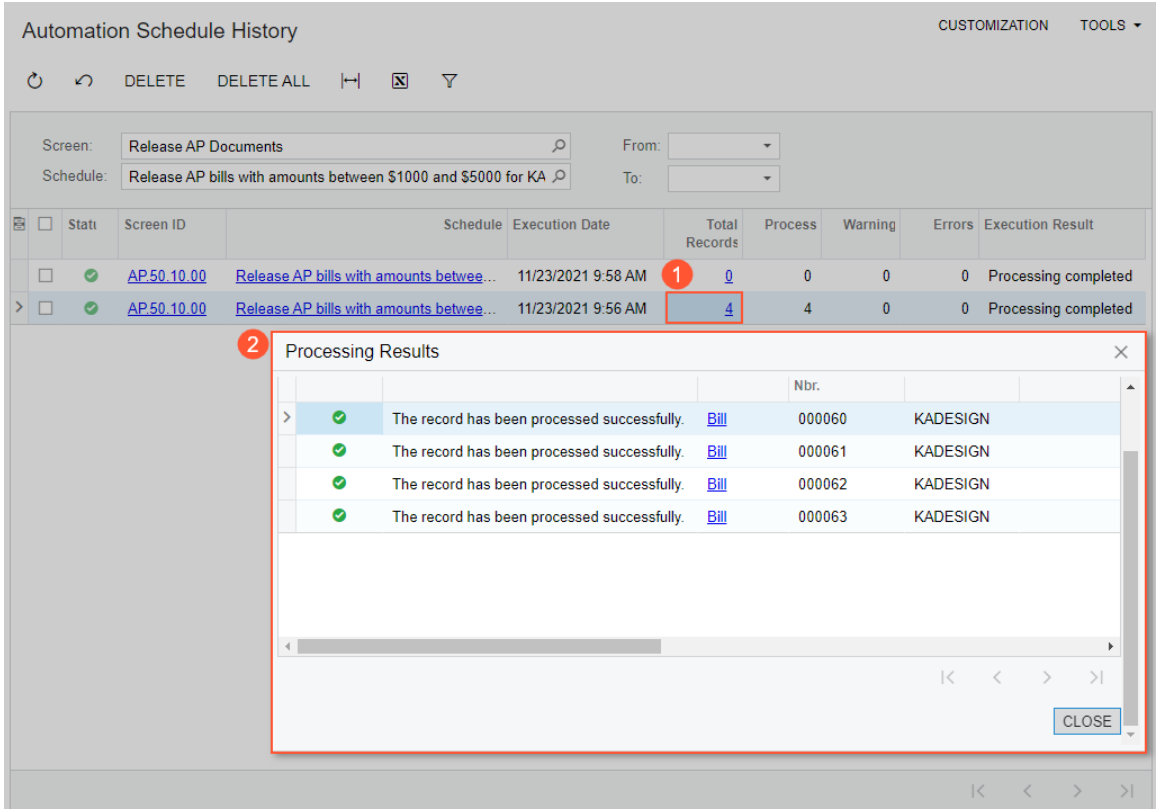
Exact Time

Automated Processing: To Configure Scheduled Processing

Story

Suppose that in the SweetLife Fruits & Jams company, AP clerks enter the bills into the system on a daily basis. The accountant does not need to manually release bills for the Karn Design Inc. vendor with amounts more than $1000 USD and less than or equal to $5000 USD. These bills should be released automatically to free up the accountant's time. You, as the system administrator, need to schedule this processing—that is, automate the release of AP documents that have the Balanced status, KADESIGN vendor, and amounts equal to or more than $1000 USD and less than or equal to $5000 USD.

Figure: The processing results of a particular schedule execution



Day 3

Lesson 2.4: Publishing Customization Projects

Learning Objectives

In this lesson, you will learn how to do the following:

- Import deployment packages to a tenant
- Publish multiple customization projects to an instance
- Unpublish the projects

Customization Projects: To Publish Projects

Story

Suppose that SweetLife Fruits & Jams has decided to investigate new business opportunities. For this purpose, the company has received the PhoneRepairShop and Yogifon customization projects from a third-party vendor for a trial run. Acting as the system administrator, you need to apply these customizations to a sandbox (an instance of Acumatica ERP that has no production tenants).

Customization Projects: To Publish Projects

The customization projects will introduce the following functionality.

Customization Project	Website Changes	Metadata
Yogifon	Adds a predefined field (**Type**) to the **General** tab (**Account Address** section) of the *Customers* (AR303000) form.	• Adds the Open Sales Orders by Customers (GI400001) generic inquiry to the database and to the site map • Adds a user-defined field (**Network Type**) to the *Customers* form • Adds the **SO Open by Customers** non-programmable command, which a user clicks to open the corresponding generic inquiry
PhoneRepairShop	Adds two forms: Repair Services (RS201000) and Serviced Devices (RS202000). The company will use these forms to manage the lists of repair services that are provided and devices that can be serviced, respectively.	• Adds the **Phone Repair Shop** workspace • Adds the Serviced Devices (RS2020PL) generic inquiry, which is configured as the entry-point form for the Serviced Devices (RS202000) form • Adds the forms and generic inquiry to the site map • Adds test data—that is, predefined services and devices

Figure: The Compilation dialog box

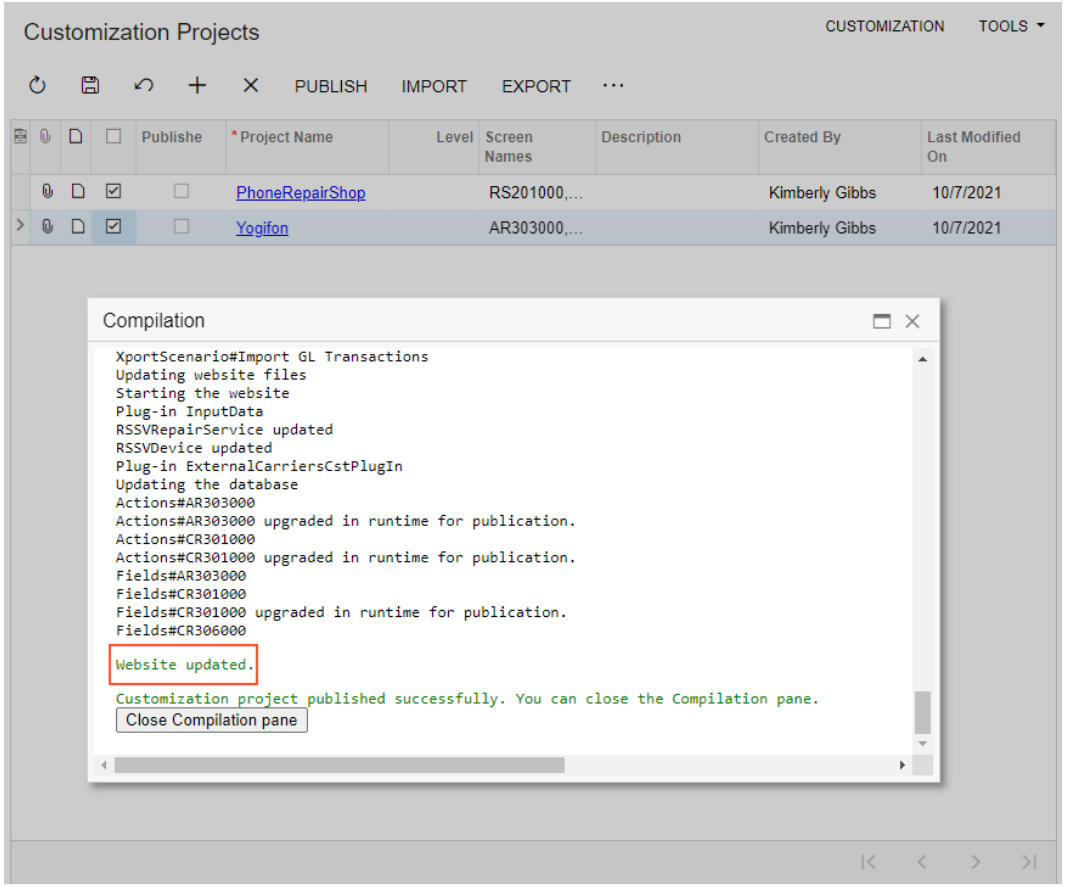


Figure: The changes introduced by the Yogifon customization project on the Customers form

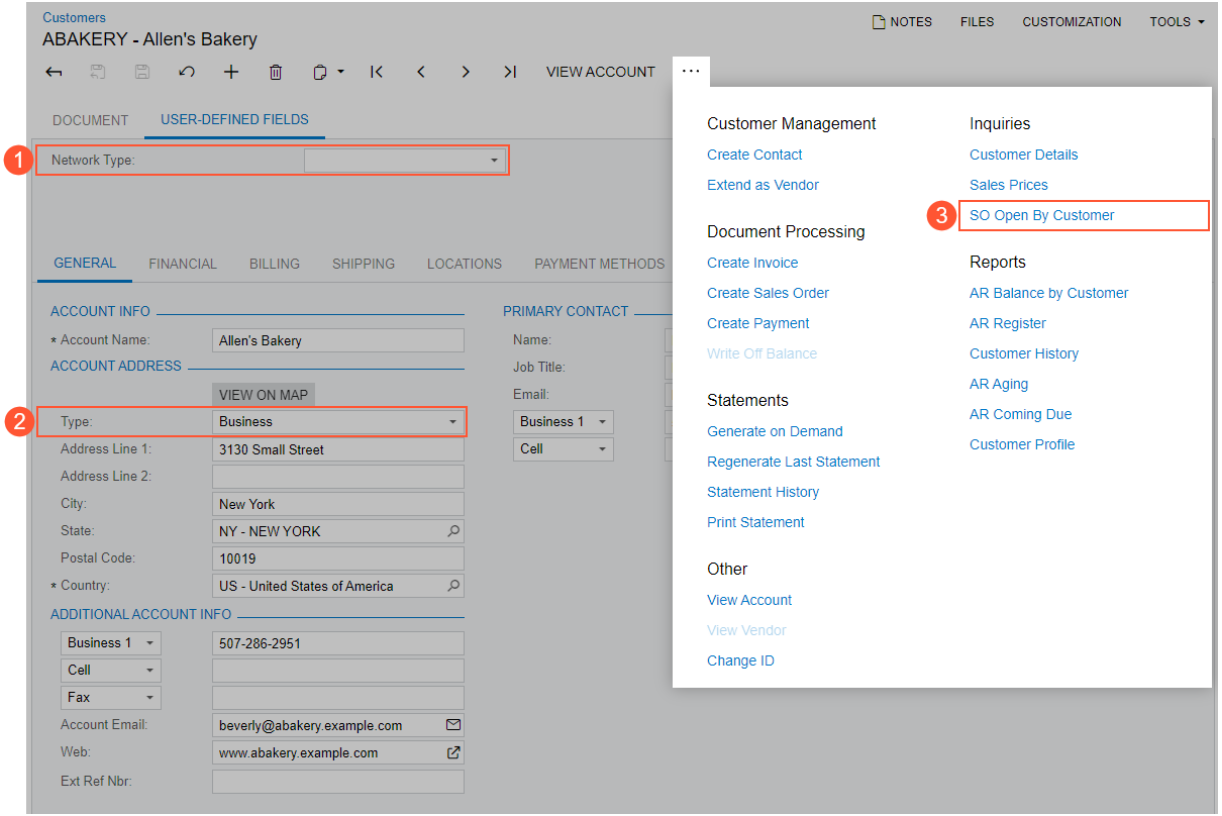


Figure: The new Phone Repair Shop workspace

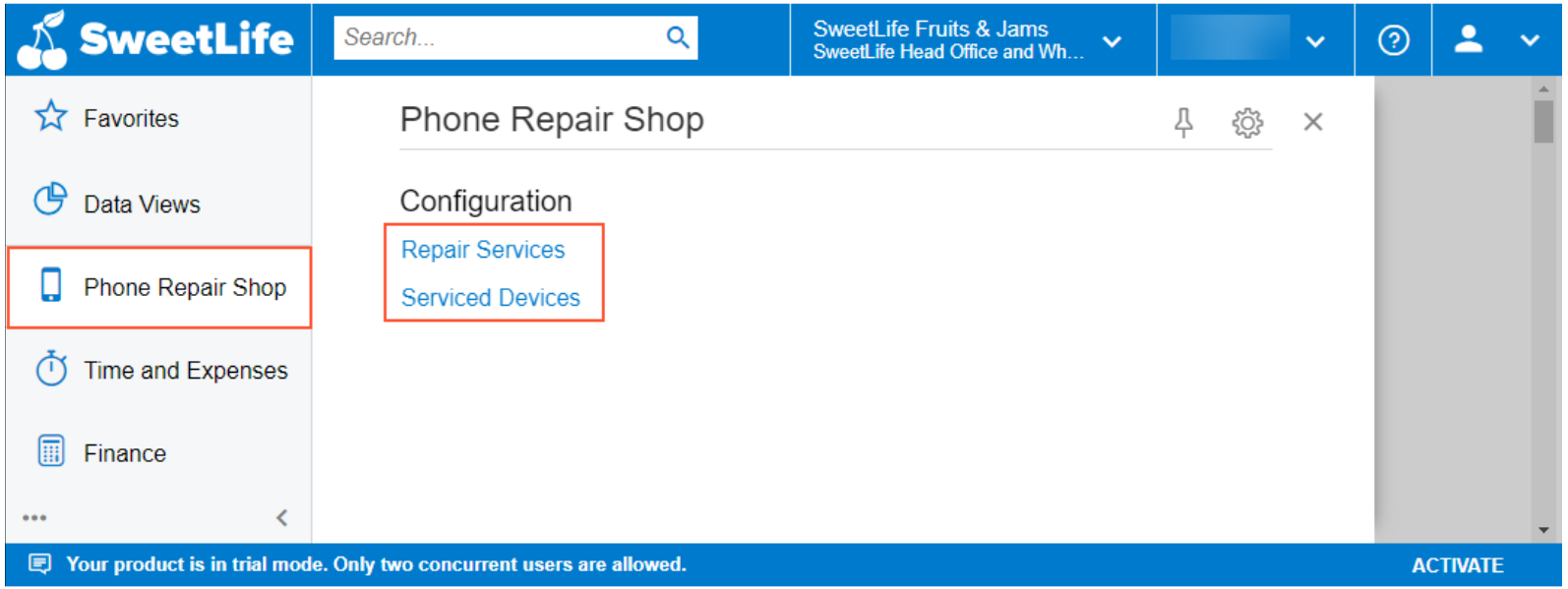


Figure: The new Repair Services form with the test data

Repair Services

CUSTOMIZATION TOOLS

* Service ID	* Description	Active	Walk-In Service	Requires Prepayment	Requires Preliminary Check
BATTERYREPLACE	Battery Replacement	☑	☑	☐	☐
LIQUIDDAMAGE	Liquid Damage	☑	☐	☑	☑
SCREENREPAIR	Screen Repair	☑	☑	☐	☐

Figure: Unpublished customization packages

Customization Projects

CUSTOMIZATION TOOLS

PUBLISH IMPORT EXPORT ...

Published	* Project Name	Level	Screen Names	Description	Created By	Last Modified On
☐	PhoneRepairShop		RS201000,...		Kimberly Gibbs	10/12/2021
☐	Yogifon		AR303000,...		Kimberly Gibbs	10/12/2021

Figure: The forms for which you have cleared the check boxes in the Workspaces column

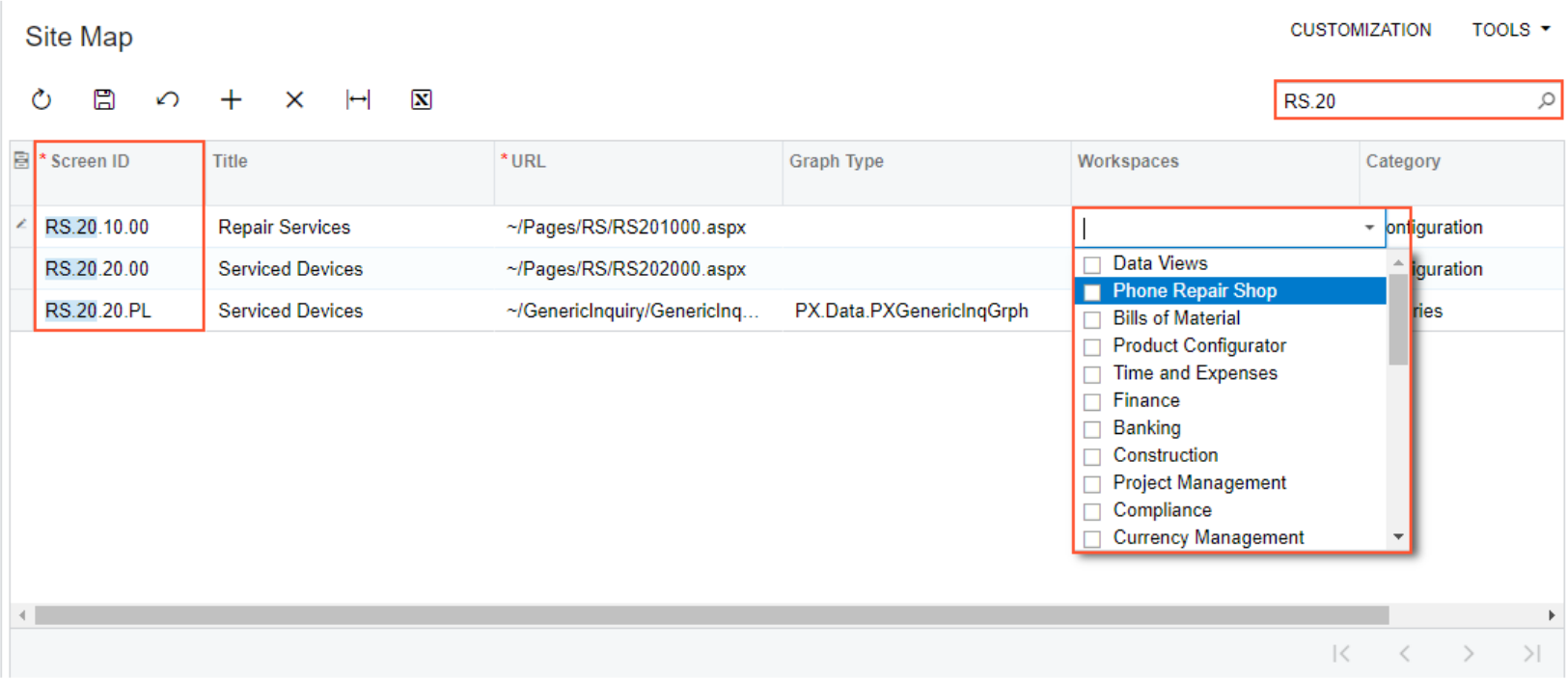
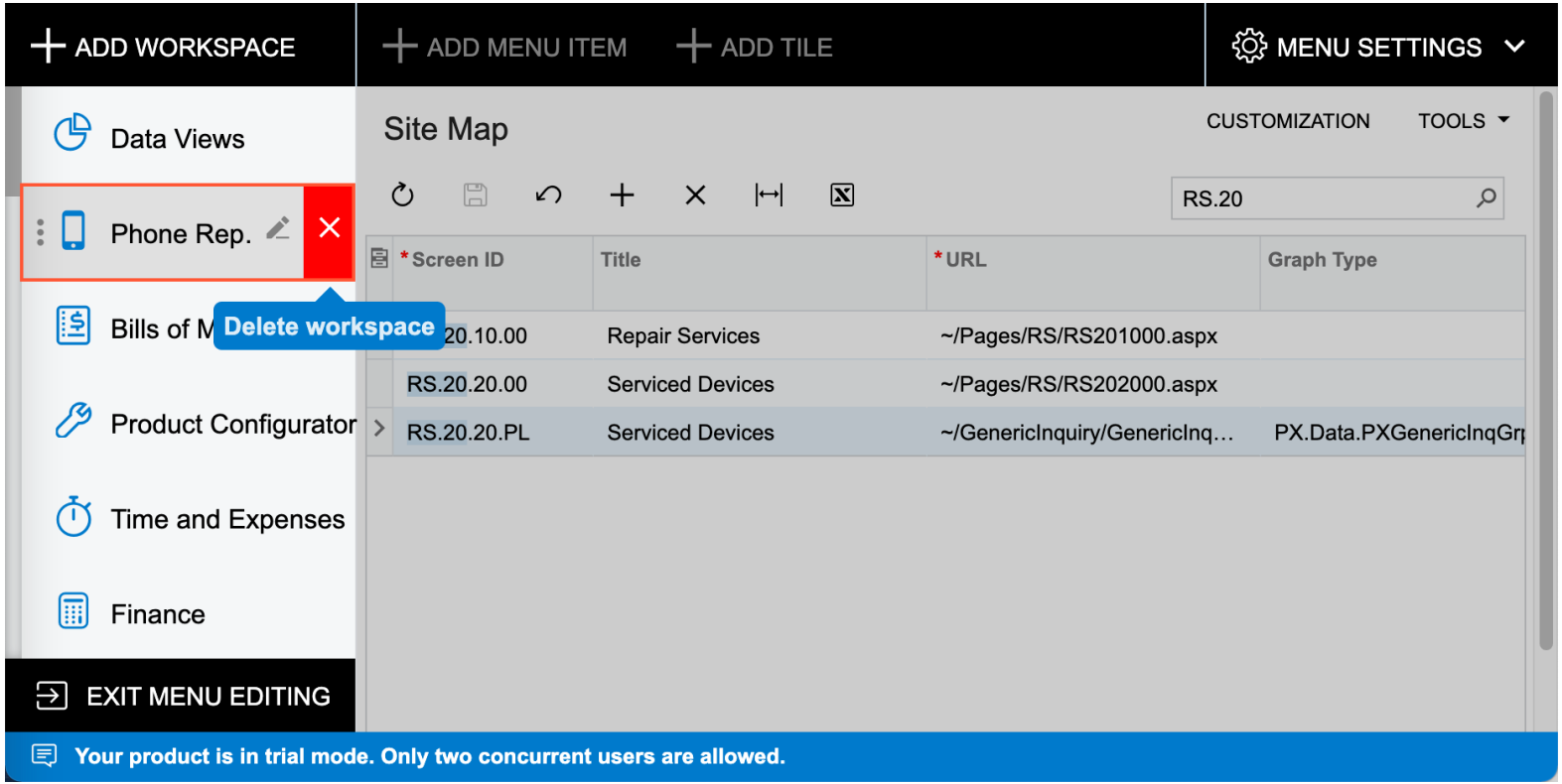


Figure: Deletion of a workspace



Part 3: Maintaining System Health

Ray Allen Manufacturing
Acumatica Customer Since 2014

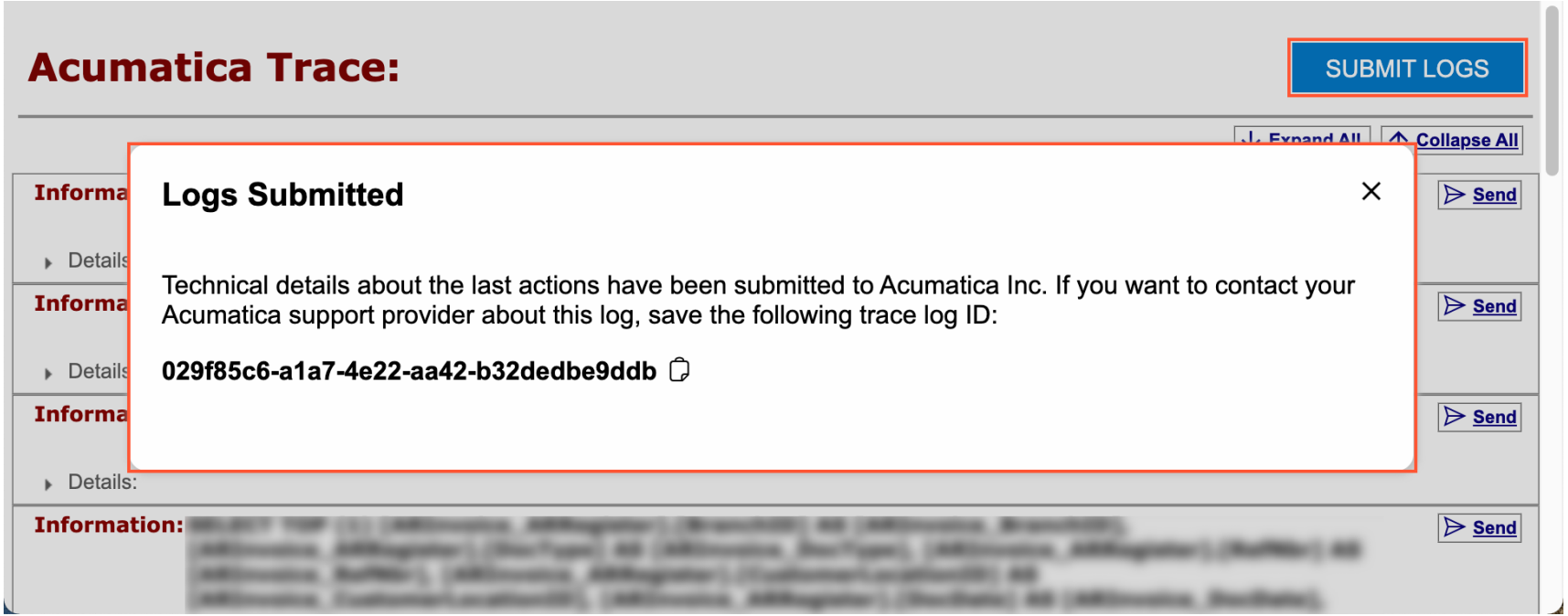
Lesson 3.1: Monitoring System Health

Learning Objectives

In this lesson, you will learn how to do the following:

- Monitor currently running processes, and discover and analyze any threads that are currently frozen or no longer responding
- Review the list of active users
- Track memory and CPU utilization
- Analyze a log of system events
- Monitor the statuses of push notifications and business event queues
- Use the Request Profiler tool
- Use the Developer Tools of the browser

Figure: The submission of performance logs



System Health: To Monitor Performance

Story

Suppose that your colleague complains that the Acumatica ERP instance sometimes has slow progress during the creation of a snapshot and when the colleague works with the Journal Transactions (GL301000) form. You need to find out what is going wrong and perform the needed actions to restore system performance.

Lesson 3.2: Maintaining Database by Using the Web Interface

Learning Objectives

In this lesson, you will learn how to do the following:

- Monitor the size of a database
- Optimize a database
- Clean up a database

System Health: To Monitor Performance

Story

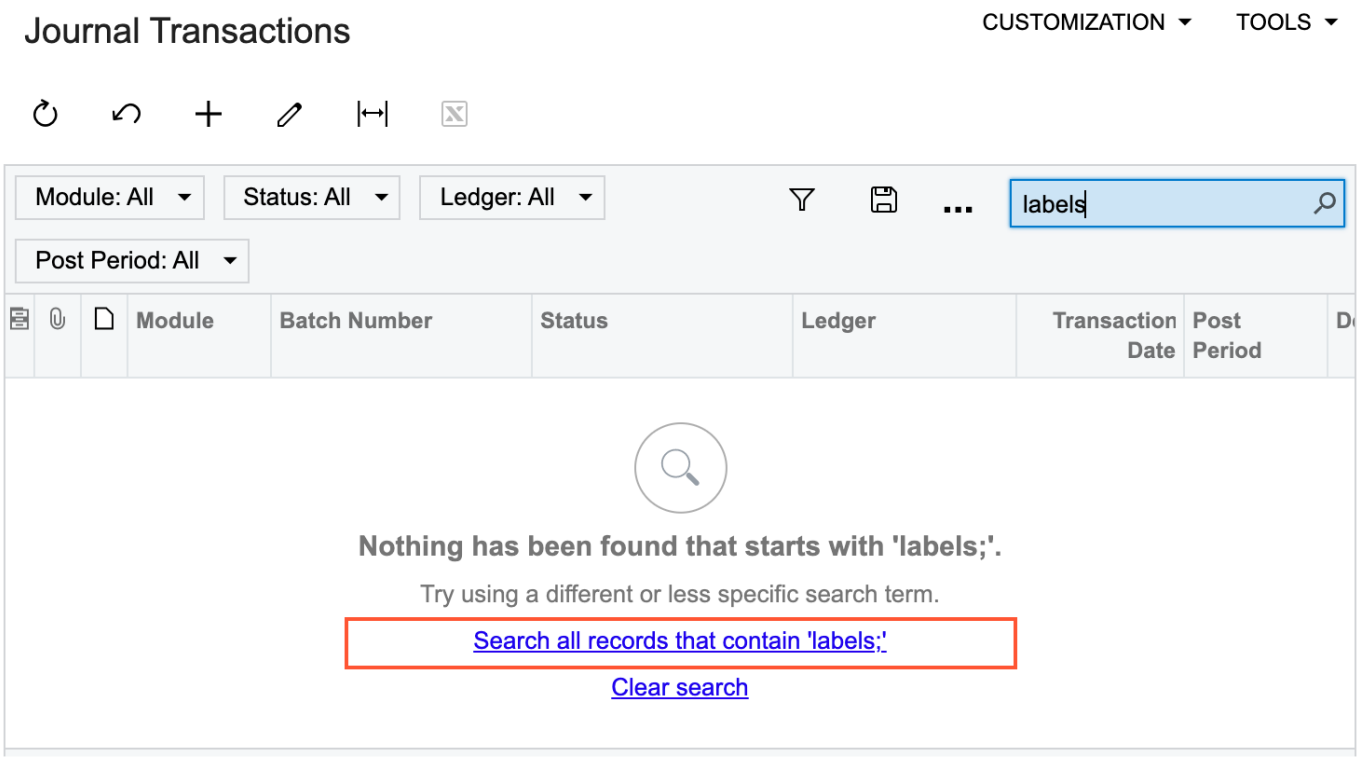
Suppose that as the number of employees of SweetLife Fruits & Jams has grown and more users perform operations in Acumatica ERP, the database has significantly grown too. System administrators perform a regular review of the database. Now, acting as a system administrator, you need to review the database usage and pay special attention to the space used by the database.

Lesson 3.3: Building Search Indexes

Learning Objectives

In this lesson, you will learn how to build search indexes.

Figure: The system offers the link to perform the search with the Contains condition



Search Indexes: To Rebuild Search Indexes

Story

Suppose that the users of the system have started complaining that the system does not return any search results when users search for a customer profile. Acting as the system administrator, you need to investigate the issue, and the first step you plan to take is rebuilding the search index for customer profiles.

Lesson 3.4: Updating Acumatica ERP by Using the Web Interface

Learning Objectives

In this lesson, you will learn how to do the following:

- Configure update preferences
- Prepare for update
- Schedule the system lockout and unlock the system afterward
- Install a minor update

Figure: Notification about a new version

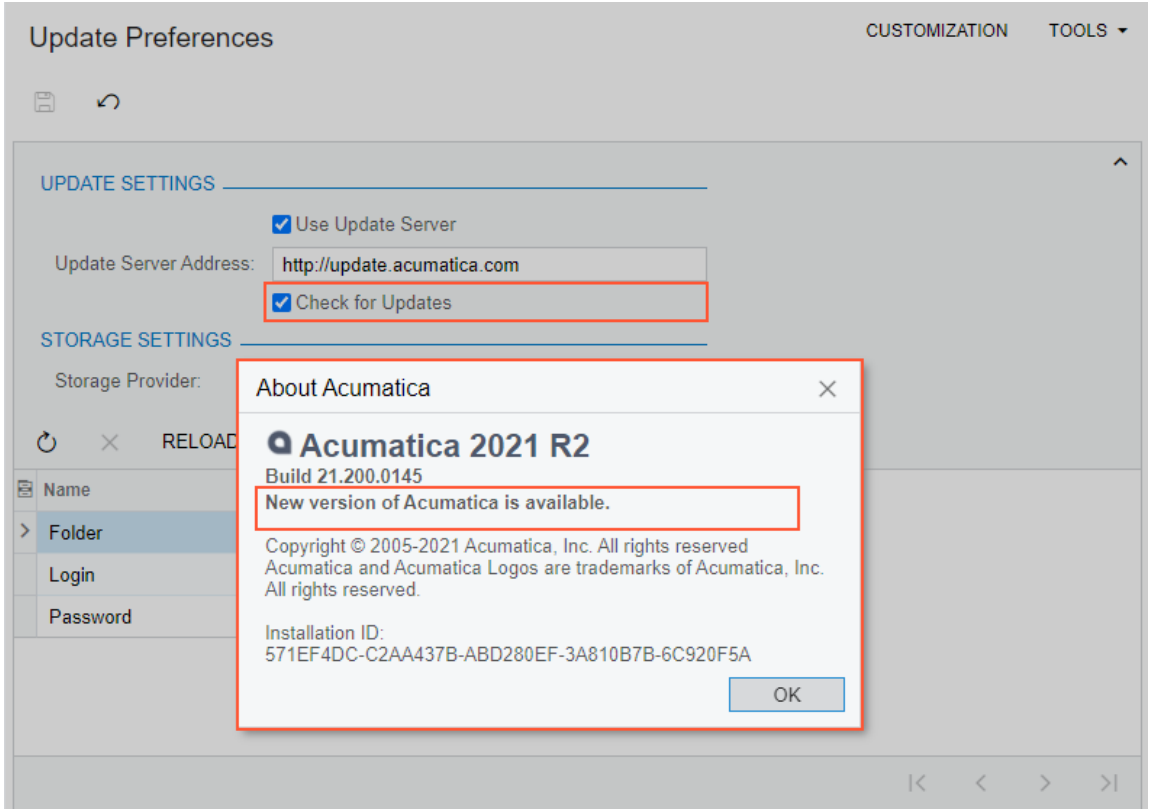


Figure: An update available for download from the Acumatica update server

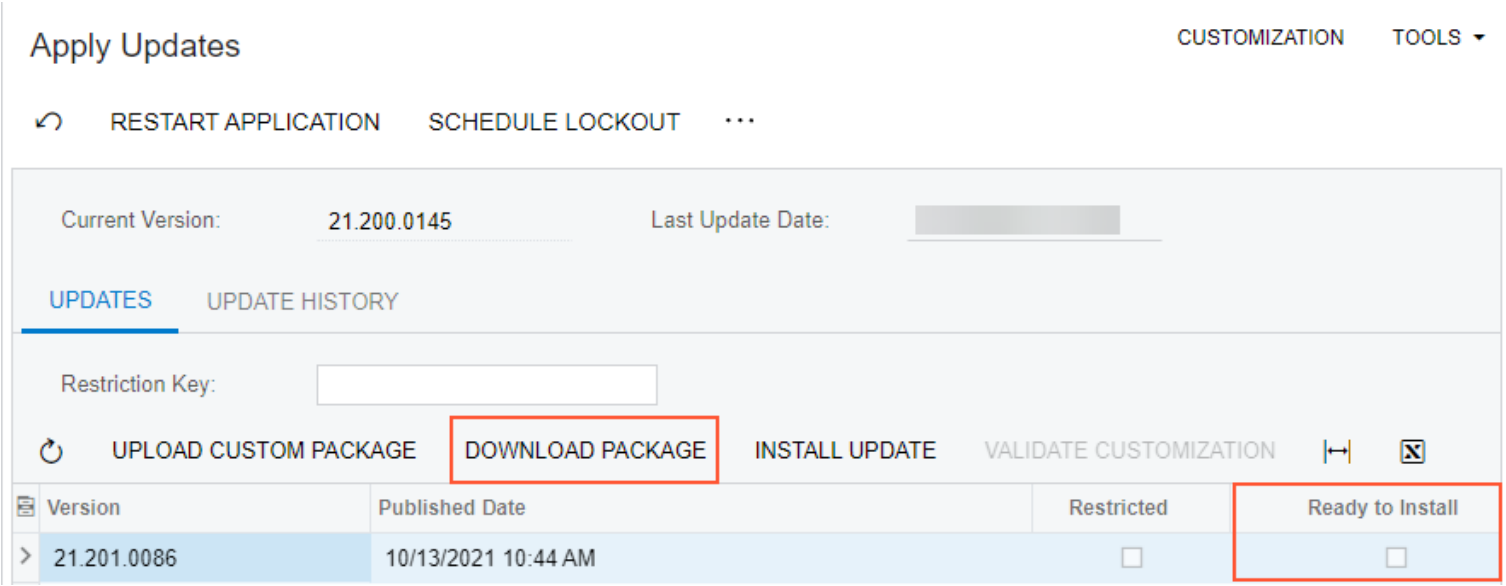
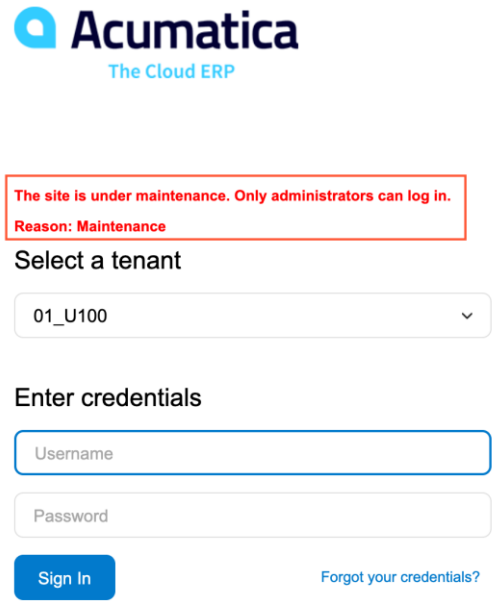


Figure: A lockout message on the Sign-In page



Update of Acumatica ERP: To Update an Instance by Using the Web Interface

Story

Suppose that your company deployed Acumatica ERP on-premises. Acting as the system administrator, you have received notification that a new minor update is available and approved the update installation with your manager.

Figure: Uploaded installation package that is ready for installation

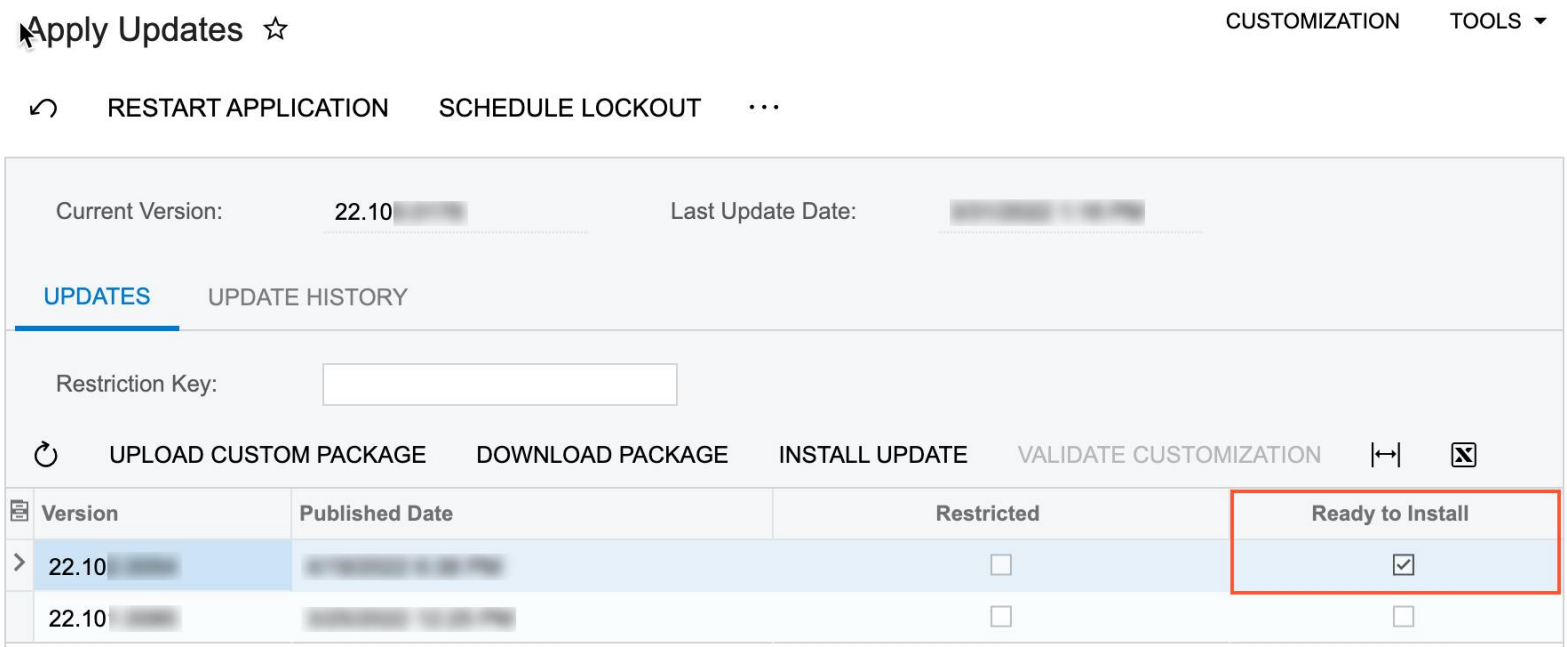


Figure: The Maintenance page with the warning

Site is under maintenance and can not be accessed at this time.
Reason: Maintenance

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The Cloud ERP

Thank you

David Harris