



# SYSTEM MAINTENANCE

## Introduction

This section of the manual will take the user through an overview of the basic System Maintenance.

- A. Conceptual Overview of the System** – We will review your basic system structure, what initial settings need to be established and those settings that will require ongoing maintenance.
- B. Basic File Maintenance Training** – This step involves the defining and gathering of your basic set up requirements for each user to be able to access your ACS/MASTER system.

**NOTE: It is strongly suggested that access to System Maintenance be restricted to Administration, ACS Customer Support and IT personnel only.**

# **Application Computer Systems, Inc. System Maintenance**

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## A. CONCEPTUAL OVERVIEW OF THE SYSTEM

Your ACS/MASTER system is divided into 4 BASIC SECTIONS:  
Service Repair / Distribution / Accounting / System

For the purposes of this training, we will be reviewing **SYSTEM**.

**NOTE:** When selecting SYSTEM from your ACS/MASTER options; the information available to each user will depend upon each user's Security Level and the ACS/MASTER modules and applications purchased and installed. Should you have questions, or not see the options reviewed below, please contact your System Administrator or ACS Customer Support.

Upon selecting **SYSTEM**, you may see one or all of the following options:

**System Maintenance**  
**Security Maintenance**  
**Data File Change Maintenance**

**New Installation Menu**  
**Data File Load Maintenance**  
**Security Update from Excel**

### **System Maintenance**

From this option we will be covering the following:

User Maintenance  
SpeedSearch Security Maintenance  
Purge System Log File

Generate Executive Summary  
Printer Maintenance

### **Data File Load Maintenance**

These options allow the user to utilize pre-defined Excel spreadsheets for the purpose of loading data files. These files include:

Customer Master File Load  
Customer Ship-To Master File Load  
Vendor Master File Load  
Inventory Master File Load  
Inventory On Hand Quantity Load  
Inventory Cost/Price Load  
Inventory Catalog Load

Customer Notes Load  
Vendor Purchasing Address Load  
G/L Chart of Accounts Load  
Equipment File Load  
Inventory Synonym Load  
Inventory standard Cost to Register  
Inventory Print to Register Load

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## **Data File Change Maintenance**

These options are used to change information in the Master files. These files include:

Customer Master File Change  
Ship-To Master File Change  
Customer Notes Change  
Vendor Master File Change  
Vendor Purchase Address Change

Inventory Master File Change  
Inventory Item Synonym Change  
Inventory Price and Cost Change  
Inventory Standard Cost Change  
Inventory List Price Change

## **New Installation Menu**

This function allows the user to select from Pre-defined Standard Data that can be uploaded into your system when configuring settings for each module. These options include standard settings for Service Repair, Inventory, Accounts Payable, Accounts Receivable, Payroll, General Ledger and Company Settings.

## **Security Maintenance**

ACS/Master provides a quick and simple way to establish security for all system functions utilizing an Excel Spreadsheet format. This process works in conjunction with individual User security levels set up in User Maintenance.

Please see the Security Maintenance portion of your manual for detailed training information.

## **Security Update from Excel**

Once Security Maintenance has been completed, it becomes necessary to UPLOAD the Security Settings configured on your Excel Spreadsheet to your ACS/MASTER security files.

Please see the Security Maintenance portion of your manual for training information.

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## B. FILE MAINTENANCE TRAINING

This section will review the fundamental information necessary to set up the "structure" of your ACS/MASTER system. This will include global company settings as well as individual user information.

### System Maintenance

It is important to restate that access to the System Maintenance portion of your ACS/MASTER Software should be restricted to Administration, ACS Customer Support and IT ONLY and that NO CHANGES be made without consulting ACS Customer Support.

### User Maintenance

**System → System Maintenance → User Maintenance**

For a user to have access to your ACS/MASTER system, it will be necessary to establish a unique User ID for each person/user.

The screenshot shows the 'User Maintenance (ACS MASTER 8.0)' window. The 'User ID' field is highlighted with a blue selection box. The 'Valid Firms' and 'Printers' fields are represented by grids of 10 empty boxes each. The 'User Preferences' section includes checkboxes for 'Char Input Field Type', 'Case Conversion Key', 'Upper Case Key', 'Maximum PF Files', 'PF File ID', 'Allow Menu Jumping', and 'Interface'. The 'Color Selection' section has three columns for 'Base', 'Window 1', and 'Window 2', each with 'Background' and 'Foreground' color pickers. At the bottom, there is a 'Valid' grid of 10 empty boxes and three buttons: 'OK', 'Cancel', and 'Delete'.

### System Maintenance Field Options

**User ID:** Enter a unique 3 alpha/numeric character User ID

**Name:** Enter up to 24 characters to identify this User ID

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**Security Level:** Select a security level for this user  
Enter a number from 0 (lowest) through 9 (highest)  
This number identifies the user's security level. Both users and menus are assigned security levels. Menus of the same security level or lower than the user's are accessible.  
See the *System Security Maintenance* section of this manual for further information regarding Security Levels for Users.

**Valid Firms:**

- Enter the 2-digit code of each company accessible by the user
  - Select "F1" to grant access to all companies
  - Select the magnifying glass or "F3" to select from a list of companies
- Up to 18 different companies can be entered.

**Printers:**

- Enter the codes of all printers to be accessible by the user
  - Select the magnifying glass or "F3" to select from a list of printer codes
- Up to 18 different printers can be entered.

**Password:** During the initial set up of a new User ID, this password field will be left blank. The Password will be established by the user upon logging in for the 1<sup>st</sup> time, using the FILE drop-down menu. See the *Navigation* training portion of this manual for detailed instructions for setting passwords.

**Default Menu:** This field will contain the 3-character identification of the main menu for this user. Most users will be using the SYS menu; however, special menus exist for various types of users. If you wish to create menus specific to Accounting functions, or Service Repair functions, this is possible. Simply contact your ACS Project Manager or Customer Support for assistance. See the *Security Maintenance* section of your manual for a detailed explanation of Default Menu use in controlling security.

**NOTE:** Unless the *Allow Menu Jumping* field is set to Y, the user is not permitted access any higher up the hierarchy of the menu system than this default menu.

**Default Firm:** When multiple companies have been established, the Default Firm is used at the time of log in to determine which firm will be "opened"

**Email Address:** Enter the email address for this user if desired.

**User Preferences Options**

**Char Input Field Type:** This field will default to B and should not be changed.

**Case Conversion Key:** This field will default to 12 and should not be changed.

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**Upper Case Key:** This field will default to 9 and should not be changed.

**Favorites Menu:** This field is associated with the Favorites Drop-Down menu which is covered in the *Navigation* training portion of your installation manual.

**Maximum Number of PF Files:**

-Enter 1 to 99 as the maximum number of files you can save as print-to-file images on your hard drive. These files are accessible to this specific user only.

-Press Enter to accept the default of 9.

**NOTE:** When the maximum number of files has been reached, the user will receive a warning saying that the oldest document in the PF file will be deleted to save the new document you are printing. It is suggested that this file be reviewed regularly to remove any old information.

**PF File ID:** This field should default to the User ID and should not be changed

**Allow Menu Jumping:**

-Check this box to enable jumping between menus

-Leave this box blank to disallow menu jumping

Menu jumping is only allowed in the Character version of ACS/MASTER and enables the user to move from one menu to another by entering the menu's 3-character code.

**NOTE:** Menu Jumping will allow the user access to menus higher up in the hierarchy of the menu system than their security level permits.

**Interface:** This field should default to W and should not be changed.

**Color Selection**

**Background/Foreground:** User "F3" to select from a list of color options in each of these fields.

For terminals with color display, you can specify background and foreground color for screens and for windows 1 and 2. Windows 1 and 2 are the displays that appear from sub-menus or lookups. Color selections have no effect on a monochrome terminal display.

**Valid Divisions:** This field is only available if your ACS/MASTER installation included multiple Divisions. In which case you would select the Divisions you wish to make available to this user.

When you finish making entries to the fields, the system issues the following prompt: "Is The Above Information Correct?"

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- Select "OK" to accept the data and continue
- Select "Cancel" or "Delete" to return to the User ID without saving.

## Printer Maintenance

**System → System Maintenance → Printer Maintenance**

Generally, your installation process will include the configuration of your system printers. However, if new printers are added to your system, it will be necessary to contact ACS Customer Support to assist you in the configuration process.

Printer Maintenance (ACS MASTER 8.0)

File Edit Favorites Help

Printer ID A1 Alps 2100 Initial Form Feed?

Font Option 1

Description 12cpi Letter Quality

Font Hex Codes 121B21001B7831

Compressed or Std? S

OK Cancel Copy Delete

v8.0.0 | sym\_gb | [OK]=Correct, <F2>=Change, D=Delete Char PP



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## Generate Executive Summary

### System → System Maintenance → Generate Executive Summary

Part of your Speedsearch function includes the Executive Summary Option for Summary Analysis and Calendar display. To access the most current information, it will be necessary to run the Generate Executive Summary function.

Upon selecting this option, your system will issue the following prompt reflecting the current date:

**OK to generate the Executive Summary as of mm/dd/yyyy?**

When the update is complete you will receive the following prompt reflecting the current date:

**Executive Summary generated as of mm/dd/yyyy**

For more detailed Executive Summary information please see the *Speedsearch* portion of your installation manual.

**AR And AP Analysis**

	Future	May	April	March	Prior	Total
Accts Rec	0	0	1,824	3,883	357,657	363,364
Accts Pay	0	0	0	0	37,690	37,690

**Order Analysis**

	Prior	May	June	July	Future	Total
Sales Orders	159,299	0	0	0	0	159,299
Purchase Orders	88,792	0	0	0	0	88,792

**Sales Analysis**

	Future	May	April	March	Prior	Total
Sales Analysis	0	0	1,573	349	451,959	453,880
Gross Profit	0.00%	0.00%	99.00%	-61.98%	11.25%	11.50%

**Inventory Analysis**

	On-Hand	Committed	Available	Work-In-Process
Inventory	537,715	18,187	519,528	80,881

Last Generated 05/11/2010

OK Cancel Calendar

v8.0.0 sys\_qc PP

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## SpeedSearch Security Maintenance

**System → System Maintenance → Speedsearch Security Maintenance**

Your Speedsearch function allows the user to access specific Customer, Vendor, Inventory, Sales Order and Job information without ever have to access specific modules. Because all information available through the use of Speedsearch may not be appropriate for all users; Speedsearch Security has been created which allows you to control what data is available to each level of security assigned to ear user.

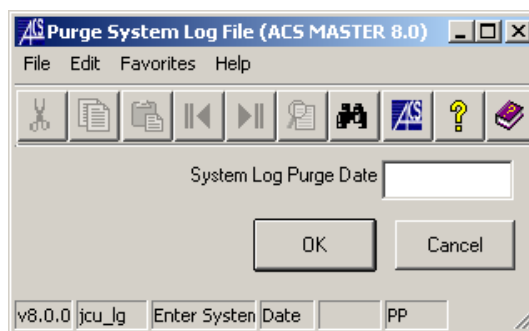
For complete training information regarding Speedsearch security, please see the *Security* section of your manual.

## Purge System Log File

**System → System Maintenance → Purge System Log File**

***NOTE: It is important that this function be set to Administrative Security Levels only. It is strongly suggested that your users NOT HAVE ACCESS to this level of System Maintenance.***

Because your ACS/MASTER system keeps a log of all system access by User ID#, it may become necessary to purge or remove old records due to the size of this file. Use this option to establish the date through which log records will be purged. The records for this date will also be removed.



**NOTE:** All User Log information will be removed upon entering the date and selecting OK. There will not be any report generated by this function and the information deleted cannot be retrieved.

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## Data File Load Maintenance

### System → Data File Load Maintenance

As you begin the process of setting up your ACS/MASTER system, you will find that each module has specific information that must be set up or created. Some of this information will be specific to your company; such as, Customers and Vendors. While other information more generic; such as, Service Repair Labor Codes and Job Types.

To assist you in the process of entering specific Customer information, Vendor information, Inventory Item detail, General Ledger Chart of Accounts etc, we have provided Data File Load capabilities. These predefined Excel load spreadsheets, along with instructions for uploading data to your ACS/MASTER system will be provided and reviewed by your Project Manager. However, the LOAD function options are located in Data File Load Maintenance.

- Customer Master File Load
- Customer Ship-To Master File Load
- Vendor Master File Load
- Inventory Master File Load
- Inventory On Hand Quantity Load
- Inventory Cost/Price Load
- Inventory Catalog Load
- Customer Notes Load
- Vendor Purchasing Address Load
- G/L Chart Of Accounts Load
- Equipment File Load
- Inventory Synonym Load
- Inventory Standard Cost To Register
- Inventory Price To Register Load

**NOTE:** This process requires that all other settings, codes and tables be established before any detail information may be loaded.

Using the Excel spreadsheets, it is a simple process of entering information into the specific columns of the spreadsheet. Because this information will populate your Customer, Vendor, Inventory or GL Chart of Account files, some of the requested information will need to be defined before the spreadsheet can be created.

In the example on the next page you will find the first seven columns of the AR Customer Load spreadsheet. If you compare the information required on the spreadsheet to the AR Customer Maintenance screens, you will find that each Customer Maintenance field is represented on the Excel Spreadsheet. The spreadsheet is designed to provide the same information in a more friendly data entry format.

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## ACS\_customer\_load

Once this information has been entered on the spreadsheet for each customer, it can be uploaded into your ACS/MASTER system using the Data File Load Maintenance options. The next step will be to view your error log and make any necessary changes to the data and reload the spreadsheet.

1	Field Heading -->	Customer	Customer		Address	Address		
2	Field Heading -->	Firm Number	Name		Line 1	Line 2	City	
3	Opt/Man/Default/Validated -->	M	M	O	O	O	O	O
4	Text/Number/Date -->	N	T	T	T	T	T	T
5	Length --->	2	6	30	24	24	24	22
6								
7								

As you begin this process, it is suggested that you contact ACS Customer Support so that we may review your system to be certain all of the necessary settings have been established.

## Data File Change Maintenance

See Data File Load and the *Data File Load and Change* manual for more information.



## **Application Computer Systems, Inc. System Maintenance**

### **Security Maintenance and Security Update from Excel System → Security Maintenance**

Your ACS/MASTER system actually gives you 3 separate levels of determining system security.

- Security Maintenance
- Speedsearch Security Maintenance
- Service Repair Job Inquiry Security Maintenance

Each of these options is reviewed in detail in the *System Security* sections of your manual.