



## **Configuration**

Edition 4

Monitor ERP System AB



# Configuration

This guide is meant for system administrators.

The configuration concerns actions to take prior to training and the subsequent go live in the ERP system Monitor G5.

The ERP system consists of a database server and an application server which you install on the computer which should be the Monitor G5 Server. A Windows client is included in the purchase of the ERP system and this should be installed separately on the computers where the ERP system should be run. There is also web client for the ERP system. The web client is either run in a regular web browser or as an app for Android and IOS. The app is available at Google Play and at Apple App Store. To be able to use the app and the web client the Monitor G5 Web server must be installed and your firewall must also be configured. Description of these installations and how to configure the firewall is available in separate documents delivered together with the installation programs.

The server is updated using a program called *Monitor Installation manager*. The program becomes installed when the Monitor G5 Server is installed. Windows clients are automatically updated when they are started for the first time after the server program has been updated.

After the installation, Monitor G5 should be configured by the system administrator, Monitor responsible, and qualified personnel. You need to create scheduled backup of the company's databases. Read more about this in the "Create and schedule backup" on page 17 section.

There are also different default system settings which you should go over, check, and maybe change based on how the company will use the system. Different basic data should also be registered. This work must also to a certain

extent be performed if the company converts/migrates from the previous generation of Monitor. It is also possible to import basic data (parts, part balances, customers, suppliers) from another ERP system. These imports are performed directly in Monitor G5. This work is normally done after the installation but before you start the training in the system.

Examples of basic data are users and these should then be assigned roles linked to user rights. This needs to be done so members of the personnel can log in to Monitor G5 and access different procedures. Basic data is also parts, BOM and routing, work centers, customers, suppliers, schedules, posting dimensions, etc. Parts with balances, locations, batch numbers, and suppliers can be imported from another ERP system or spreadsheet application. Read more about the work concerning basic data and settings in the "Basic data and settings" on page 53 topic.

When basic data has been registered and all settings have been controlled, the system administrator should also create one or more test databases which should then be used when training in the system. Read more about this in the "Create test databases" on page 27 section.



We recommend that registration of basic data and controlling/changing default settings should best be done in consultation with consultants/instructors from Monitor ERP System AB.

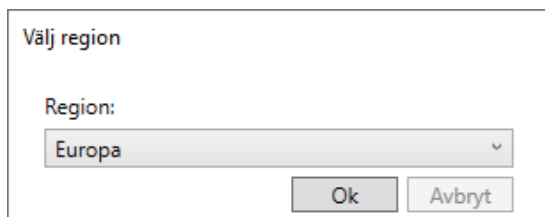
## MONITOR Installation manager

When installing Monitor G5 Server for the first time, the program *MONITOR Installation manager* will also be installed, and a shortcut is created to the program on the computer desktop.

The installation manager is a program where the administrator downloads and installs updates and other components for Monitor G5. The program is also used to activate additional company databases. The installation manager also checks that installed options and adaptations are available in a compatible version before you can update Monitor G5. If Monitor G5 Server is installed for SQL Anywhere, then the installation manager is also used to create backup tasks and test companies.

The installation manager automatically connects to Monitor's distribution servers which supply new update packages.

The first time you start the installation manager a dialog is shown where you should select the region where your Monitor G5 Server is installed. You can choose between *Europe* and *China*. There are distribution servers for these regions. The China option regarding region should be selected in order to improve the performance during updates if the server is located in China. The Europe region should be selected for Europe and the rest of the world. It is possible to change region afterwards in the installation manager. This should then be done under the *Settings* tab.



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The installation manager is self-updating. This means that when new versions of the program are launched, the program will automatically become updated when you start it.

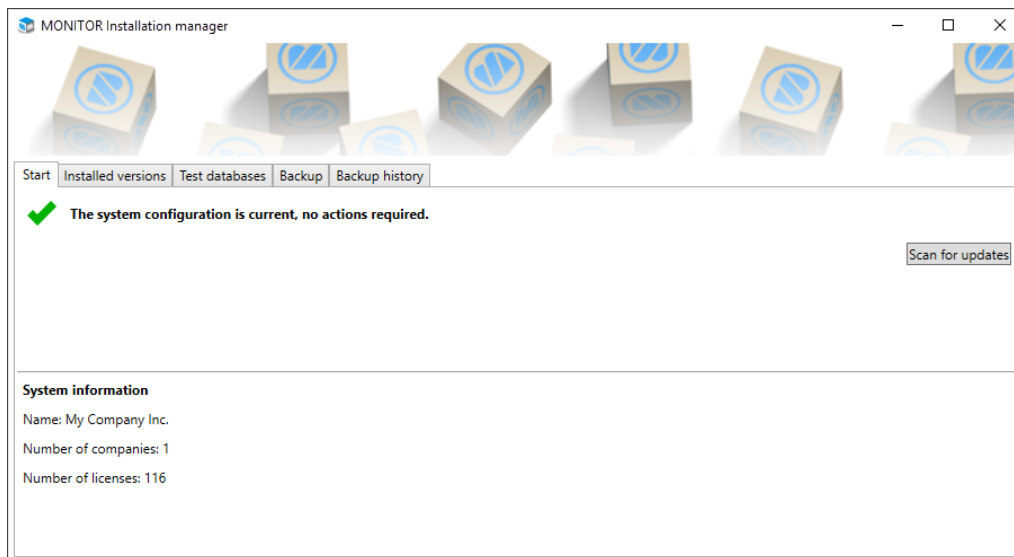
The functions of the installation manager are described in the following pages.



The installation manager communicates with the distribution server via TCP port 443. That port must be open for outbound traffic in the firewall. Otherwise, an error message is shown in the dialog where you select region. The DNS names of the distribution servers are *cdn-eur-01.monitorerp.com* and *cdn-chn-01.monitorerp.cn*.


## Scan for updates

Under the *Start* tab, a check is made to see if there are any updates available for the system. This takes place automatically when you have started the installation manager but you can also start the check manually by using the *Scan for updates* button. Such updates can be, for example, additional licenses or a new company which have been delivered to your system by Monitor ERP System AB. A new company must be activated here.



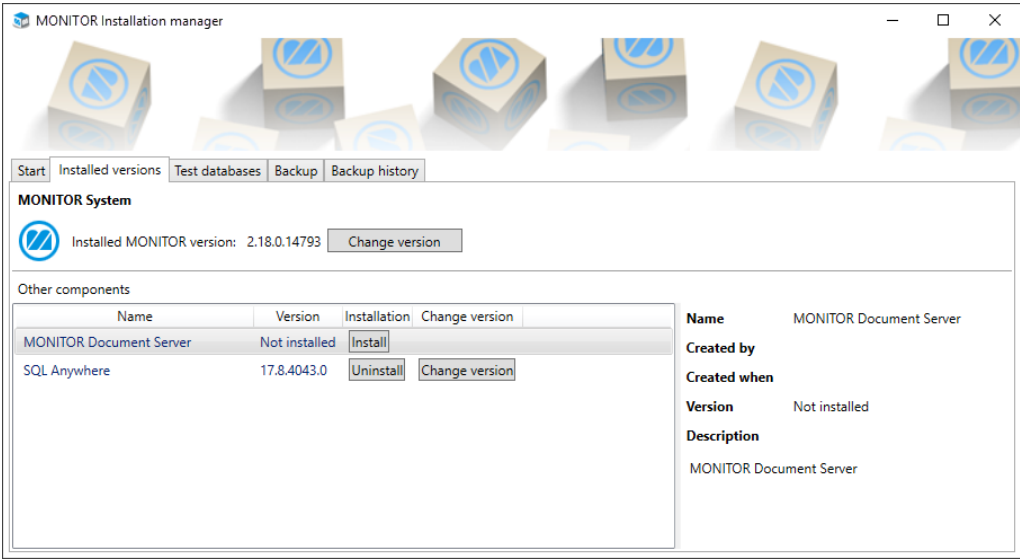
This check/scan for updates runs automatically once a day against Monitor's distribution server. Normally, the administrator does not have to do this manually. You can also force a check/scan for updates by using the

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 **Synchronize** button in backstage in the Windows client for Monitor G5. This can be made by the user with the role *MONITOR responsible*.

## Update Monitor G5 and components

Under the tab *Installed versions* you will see the currently installed version of Monitor G5. Here you install updates of Monitor G5 via the *Change version* button. Under this tab you also install and update other components in the system, via the buttons *Install* and *Change version* in the section *Other components*. Next to each installed component you see the current version. If a component is not installed it will say *Not installed*.





You update Monitor G5 or a component in the same way. Read more about how to update Monitor G5 in the installation document "Update Monitor G5 Server" on page 12.

### Create and copy test databases

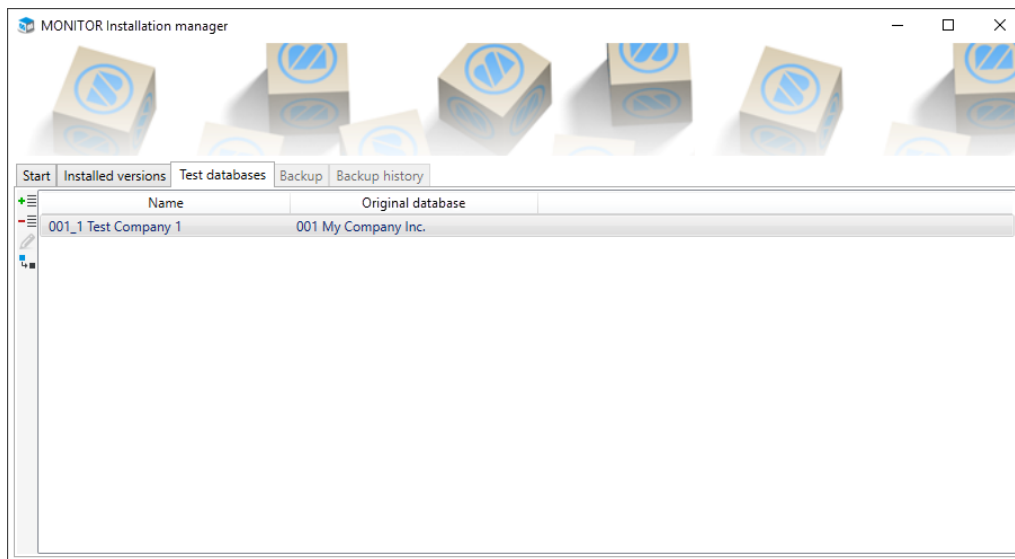


This applies if Monitor G5 Server is installed for SQL Anywhere.

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Under the *Test databases* tab you can create test databases and copying tasks. When creating a test database or when creating a copy task, it is possible to activate scheduled copying of actual database to test database. You can run the copying task manually from here. For scheduled copying tasks you can update the scheduling, which is saved in the *Task Scheduler* in Windows.



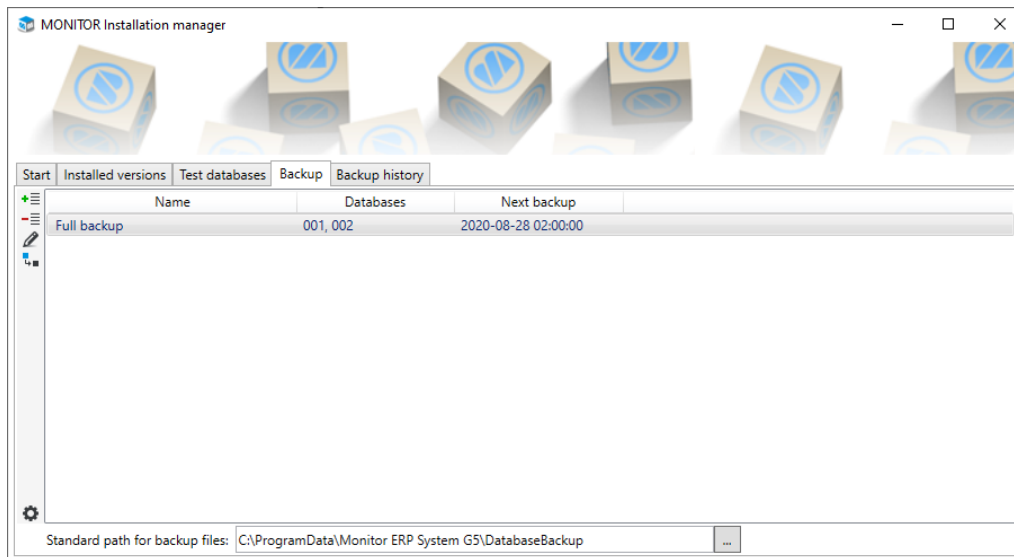
Read more in the "Create test databases" on page 27 topic.

## Administer backup of databases



This applies if Monitor G5 Server is installed for SQL Anywhere.

Under the *Backup* tab you create and schedule backup tasks for the actual (production) databases. Here you can also modify backup tasks. When needed, it is also possible to manually start a backup. For scheduled backup tasks you can update the scheduling, which is saved in the *Task Scheduler* in Windows. For backup tasks which have been run you can see logs that are updated after each run. At the bottom of the tab there are also general backup settings for all backup tasks.



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Under the *Settings* tab you can configure a *Standard path for backup files*. The standard path will be used as default backup folder when new backup tasks are created. Please note! For all backup tasks it is possible to change the path to the backup folder. This will apply for the specific backup task.

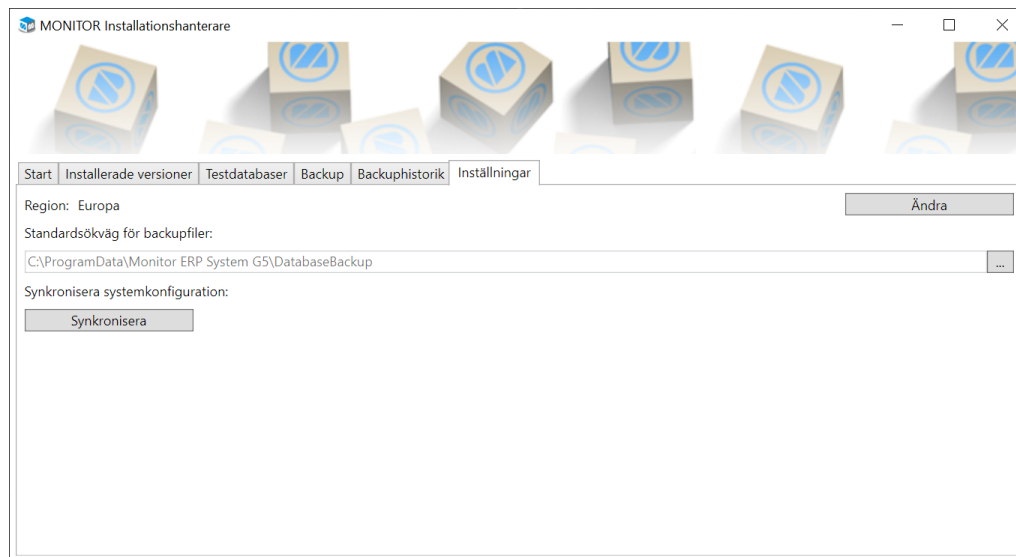
Read more in the "Create and schedule backup" on page 17 topic.

## Settings

Under the *Settings* tab you can change the region for the installation manager. By clicking the *Change* button you can choose *Europe* or *China*.

Here you also configure a *Standard path for backup files*. This applies if Monitor G5 Server is installed for SQL Anywhere. The default standard path is "C:\ProgramData\Monitor ERP System G5\DatabaseBackup".

You can also synchronize the system configuration here by using the *Synchronize* button. The same function is also available in the backstage of the Windows client for Monitor G5. See the *Synchronize system* topic.



## Update Monitor G5 Server

*MONITOR Installation Manager* is used to update the software for Monitor G5 Server. There is a shortcut to the program on the desktop of the server.

The update of Monitor G5 Server is completely automated. How long the update takes depends on how many databases you have in the system and the size of these databases.

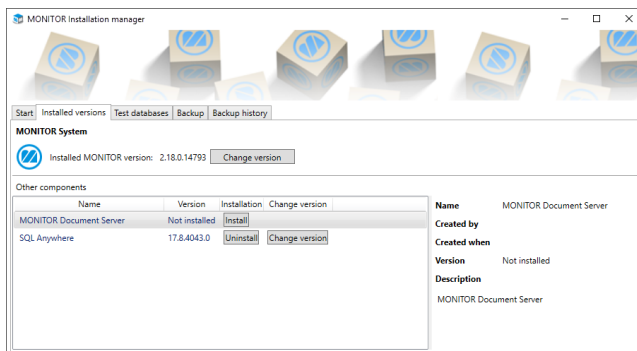


### **Please note the following before you start an update!**

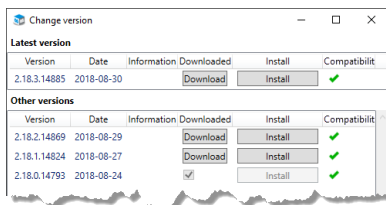
- » No users can be logged in to Monitor G5 when you run the update!
- » If you have installed options, such as, MI, Webshop, VSLI, or TimeCard, you must update these according to the instruction for each separate option/product in connection to when you update of the Monitor G5 Server. These options are NOT updated via the MONITOR Installation Manager!
- » If Monitor G5 Server is installed for SQL Anywhere, with a separate database server, the following applies: If it turns out that the component SQL Anywhere must be updated in the MONITOR Installation Manager, you should contact the Monitor Support Center and order an update package for SQL Anywhere. Then you should also update SQL Anywhere on the separate database server.
- » If Monitor G5 Server is installed for Microsoft SQL Server, you must make sure you have a current and updated backup of the databases before you update the Monitor G5 Server.
- » Effective from Monitor G5 version 2.44 (inclusive), Microsoft .NET Framework 4.8 or newer must be installed on your server before the update of Monitor G5 can begin.

## Install an update of Monitor G5 Server

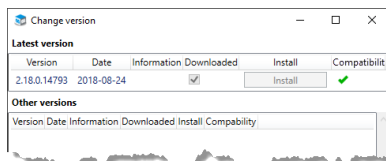
1. Start the MONITOR Installation Manager and select the *Installed versions* tab. Your installed (current) version is shown at the top of the tab. Click the button called *Change version*.




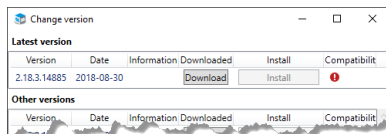
2. In the next step you see if there is a newer version to download and install. If there are more than one newer version to install under *Other versions*, you can choose the latest version under *Latest version*. Make sure that the version is compatible with your installed version. Then a green check mark ✓ is shown in the *Compatibility* column.



If there is no newer version you will see your current version under *Latest version* and it is empty under *Other versions*.



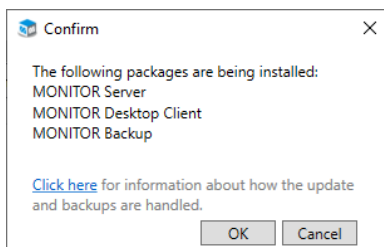
If the version is not compatible with your installed version this is shown in the *Compatibility* column with an error symbol . A tooltip over to the error symbol will let you know what is not compatible. In most cases it is a component which you first need to update, for example, SQL Anywhere.



To update a component you use the *Install* button under *Other components*. This must be done before you go ahead with the update of the Monitor G5 Server in the next step seen below.

3. Click the *Install* button in order to install the version. You can also click the button *Download* if you only want to download a version. After the download, a filled checkbox shows that the version is downloaded. You should then click the *Install* button in order to install the version.
4. When you have clicked *Install*, a dialog window shows the packages which will be installed. Click *OK* to confirm and start the installation.





First, a backup is run for all the databases. This backup run only includes databases which are run on SQL Anywhere. By clicking the hyperlink "Click here" in the dialog window you find a description of how the backup and update of the databases should be done. Backup and update are completely automated. During the update a migration of the databases is made. You see the processes for backup and migration in separate windows.

When the updates is completed you will be directed back to the tab *Installed versions*. At the top of the tab you now see the version you have updated to, as your installed version. It takes approximately 30 to 60 seconds for the server service to start after an update.

5. Close the installation manager. If you have installed any options (optional products), you should update these separately, see below.
6. The users can do a first startup of their Monitor G5 client after the update is completed. The clients will update automatically during the startup.

## Update options

If you have installed options, such as, MI, Webshop, VSLI, and TimeCard, you also need to update these after you have updated the Monitor G5 Server.

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1. Follow the instructions regarding how to update each option.

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## Create and schedule backup

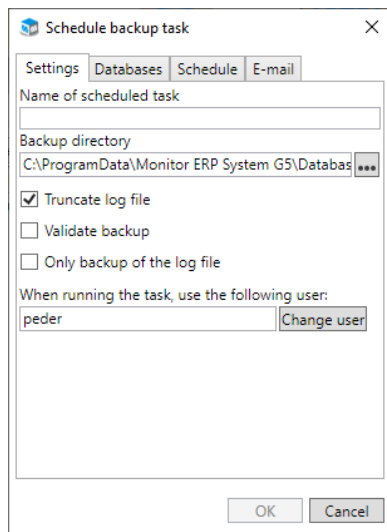


This instruction concerns backup of MONITOR systems on the SQL Anywhere database engine. The backup of MONITOR systems on Microsoft SQL Server is created and scheduled in the regular tool for backup of SQL Server.

*MONITOR Installation manager* is used to create and schedule backup tasks of company databases in Monitor G5.

### Create backup task

1. Go to the *Backup* tab in the installation manager and click the button *New backup task* +☰.



Screenshot of the "Schedule backup task" dialog box. The "Settings" tab is selected. The "Name of scheduled task" field is empty. The "Backup directory" field contains "C:\ProgramData\Monitor ERP System G5\Databas" followed by a browse button "...". There are three checkboxes: "Truncate log file" (checked), "Validate backup" (unchecked), and "Only backup of the log file" (unchecked). The "When running the task, use the following user:" section has a text field with "peder" and a "Change user" button. At the bottom are "OK" and "Cancel" buttons.

2. Under the *Settings* tab you enter a *Name of scheduled task*.

The default *Backup directory* for a new backup task is according to the *Standard path for backup files* setting under the *Settings* tab. This is where the backup files\* are saved. You can select a different backup directory for the backup in question.

*Truncate log file* (default) means the current log file "monitor.log" is cleared of transactions after the backup task has run. Truncation is recommend in order to minimize the size of the log file.


*Validate backup* means that the backup files are validated after the backup task has run. This validation is performed in a separate session of the database server and checks that the backup files are not corrupt.

*Only backup of the log file* means that only the log file "monitor.log" is included in the backup. A reason to activate this setting may be that you need to run backup tasks very frequently (e.g., every hour), because there are many transactions made in the database in a short time. Then you can choose to only backup the log file (which is quick to run a backup task on). If a reset should be necessary, it is possible to recreate the database by using the most recent regular backup task of the database file and log file, plus all the separate log files in chronological order for this backup task.



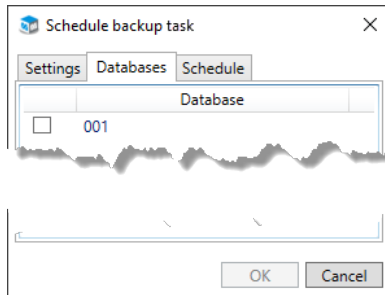
**Please note!** A backup task which only backups the log file should be created as a separate backup task. For this backup task there must be a regular backup task which does not have this setting activated, and which runs, for example, 1 time per 24 hours.


Configure the *When running the task, use the following user* setting. It is by default the logged in user (in Windows). But you can enter a different user by using the *Change user* button. Then you should enter the password of that user.

3. Under the *Databases* tab you mark the database to include in the backup task. This will activate the *OK* button. By clicking that button you will create a manual backup task. You have then to enter the *Password* for the selected user that will run the task (see step 7 below). You run manual backup via the button *Start*  under the *Backup* tab in the installation manager.

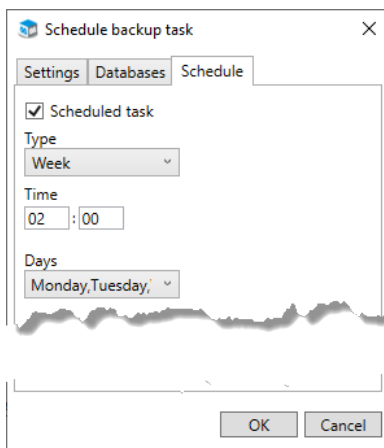
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4. If you want to create a scheduled backup task, go to the *Schedule* tab instead of clicking the *OK* button. There you create the scheduling of the backup task. An alternative that you subsequently use the *Edit backup task* button  under the *Backup* tab.

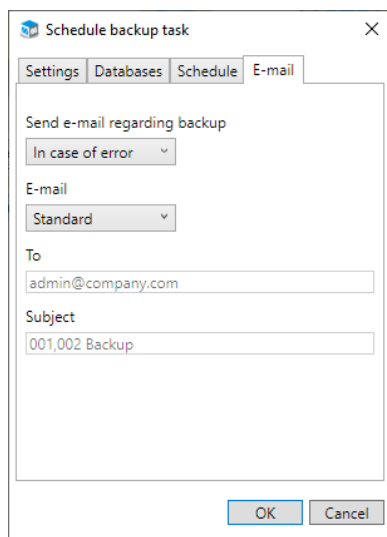
Under the *Schedule* tab you activate *Scheduled task*.



Select *Type*. The options are *Week*, *Month*, and *Last day of the month*.

Enter a *Time* and the *Days* or *Months* on which the backup task should be performed. If *Type* has been set to *Month*, you also get to select a *Date* in the months when the backup task should be performed.

5. Under the *E-mail* tab you configure if and when e-mail should be sent in connection to when the backup task is run.



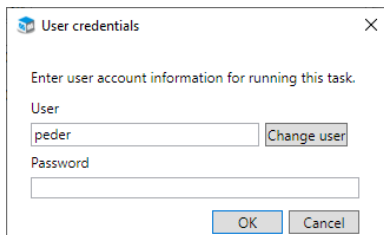
The screenshot shows a dialog box titled "Schedule backup task" with a close button (X) in the top right corner. It has four tabs: "Settings", "Databases", "Schedule", and "E-mail". The "E-mail" tab is selected. Inside the tab, there are two dropdown menus: "Send e-mail regarding backup" with the option "In case of error" selected, and "E-mail" with the option "Standard" selected. Below these are two text input fields: "To" with the value "admin@company.com" and "Subject" with the value "001,002 Backup". At the bottom right are "OK" and "Cancel" buttons.

Configure the *Send e-mail regarding backup* setting. Here you decide if an e-mail should be sent *Always*, *In case of error*, or *Never*. The default option is *In case of error*. This means an e-mail is sent only if the backup task failed. If you select *Always*, it means an e-mail will be sent also in cases when the backup task was been performed. Choose the *Never* option if you do not want an e-mail to be sent regardless of if the backup task has been performed or if it has failed.

Configure the *E-mail* setting to *Standard* or *Manual*. *Standard* is the default option and this will use the general e-mail settings for receiver and subject. If you select *Manual*, you can change this information in the *To* and *Subject* fields for the backup task in question. You can enter more than one e-mail address by separating them using semicolon (;) in the *To* field.





6. Click *OK* in the dialog to create the backup task. A scheduled task is then also created in the Windows *Task Scheduler*.
7. Finally, you have to enter the *Password* for the selected user that will run the task. Then click *OK*.



The backup files are copies of the current database file "monitor.db" and the current log file "monitor.log". An additional copy is also created here of the current log file, with today's date and time in the file name; "monitorYYYY-MM-DD HHMMSS.log". This means that log file will never be overwritten when the backup task is run the next time. All files are saved in a sub-folder with the same name as the actual (live) database folder, for example "001".


**Please note!** The backup files "monitor.db" and "monitor.log" are overwritten each time a backup task is run! That is why it is important to always backup the entire backup folder after the backup task has run. Save the backup copies in a protected location.

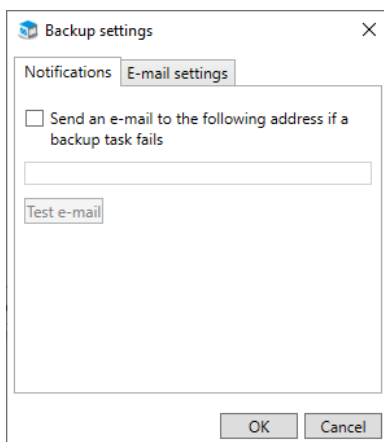
### Change scheduled backup task


1. If you need to make changes to an existing backup task, you select the task under the *Backup* tab and click the *Edit backup task* button  (this button is active if you mark a backup task).
2. Make the changes you wish to do under the respective tabs *Settings*, *Databases*, *Schedule*, and *E-mail*, and then click the *OK* button.
3. When you have made the changed you must also transfer these changes to the task in the *Task Scheduler* in Windows. This is done using the *Update the scheduled tasks* button  under the *Backup* tab.

### General backup settings

The general backup settings concerns notifications sent via e-mail when running backup tasks, and when copying tasks for test companies. Here you can also configure settings regarding communication with your e-mail server. You only need to configure these settings once. These settings will then apply by default for all backup tasks and copying tasks for test companies, that you create.

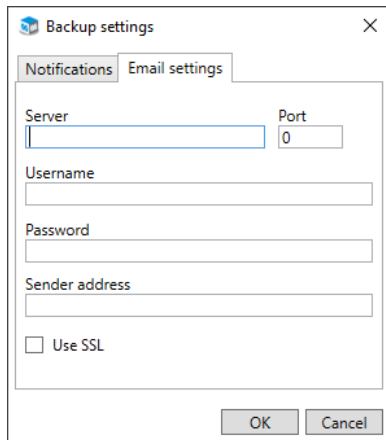
1. Click the *Backup settings...* button  at the bottom left corner of the *Backup* tab in the installation manager.
2. Under the *Notifications* tab you can activate that notifications should be sent via e-mail to one or several receivers which have entered in the field. You can enter more than one e-mail address by separating them using semicolon (;) in the field. With the *Test e-mail* button you can send a test e-mail to receivers to test the function. Receiver/recipient of notifications can also be entered per backup task.



Detailed information about successful and failed runs of backup task is saved in a log file for each backup task- You access such logs via the *Logs* button  under the *Backup* tab.

3. Under the tab called *E-mail settings* you configure which *Server* (e-mail server) and *Port* to use to send notification via e-mail. You also enter a *User name* and *Password* for a Windows account which have permission to send e-mail via the entered e-mail server. In the *Sender address* field you enter an e-mail address which will function as the sender of the notifications. Activate *Use SSL* if the e-mail server requires it.

Then you should also enter which *Port* the e-mail server uses for SSL.



The screenshot shows a 'Backup settings' dialog box with a close button (X) in the top right corner. It has two tabs: 'Notifications' and 'Email settings', with 'Email settings' currently selected. The 'Email settings' tab contains the following fields and controls:

- Server**: A text input field.
- Port**: A small text input field containing the value '0'.
- Username**: A text input field.
- Password**: A text input field.
- Sender address**: A text input field.
- Use SSL**: A checkbox that is currently unchecked.

At the bottom of the dialog box are two buttons: 'OK' and 'Cancel'.


4. Click the *OK* button when you have completed the general backup settings.

## Create test databases



This instruction concerns creating of test databases for MONITOR systems on the SQL Anywhere database engine.



*MONITOR Installation manager* is used to create test databases which are copies of actual databases. You create test databases under the *Test databases* tab. They are used in training purpose or for different tests that should not be performed in the actual database.

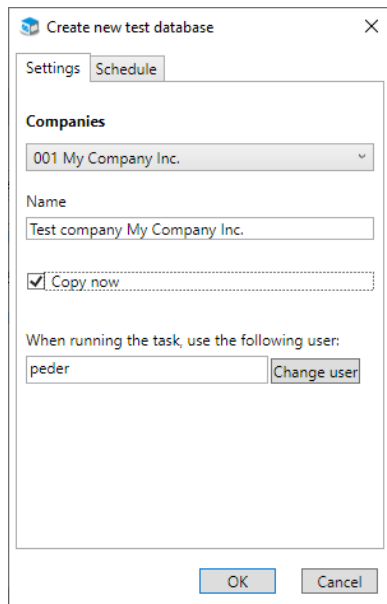
An existing test database can, when needed, be replaced with an actual database to get a recent copy to use as test database. This is done manually using the *Copy new test database* button  under the *Test databases* tab. An existing test database can also be copied regularly via a scheduled copying task. This can be configured when you create the test database or afterwards.



- » Existing user accounts are loaded from the actual/live database. However, test databases do not require user licenses so you are free to add additional user accounts in your test databases.
- » Scheduled and automatic events will be deactivated by default in test databases, but can be run manually. This applies to the following events: net requirement calculation, forwarding of authorization and reminder of authorization via e-mail (when EIM is used), loading from e-mail inboxes (e.g. in CRM), Agent tasks, and monitoring tasks. The search indexing in test databases will also be turned off. The purpose of these deactivations and turning off the search indexing is to save system resources on the server.

### Create a test database


1. In the installation manager you go to the *Test databases* tab and click the *Create new test database* button  .



The screenshot shows a dialog box titled "Create new test database" with a close button (X) in the top right corner. It has two tabs: "Settings" (selected) and "Schedule". Under the "Settings" tab, there is a "Companies" section with a dropdown menu showing "001 My Company Inc.". Below this is a "Name" text field containing "Test company My Company Inc.". There is a checkbox labeled "Copy now" which is checked. Below that is a text field for the user name, containing "peder", and a "Change user" button. At the bottom of the dialog are "OK" and "Cancel" buttons.

In the dialog shown you select *Company* under the *Settings* tab (i.e. the actual/production/live database you wish to copy).

You can change the *Name* of the test database. The default name is "Test company [Your company name]".

The alternative *Copy now* is selected by default. Then the original database will be copied to the test database by the selected user, directly when it is created. This can also be done using the *Copy new database* button  under the *Test databases* tab.

If the *Copy now* setting is activated, configure the *When running the task, use the following user* setting. It is by default the logged in user (in Windows). But you can enter a different user by using the *Change user* button.

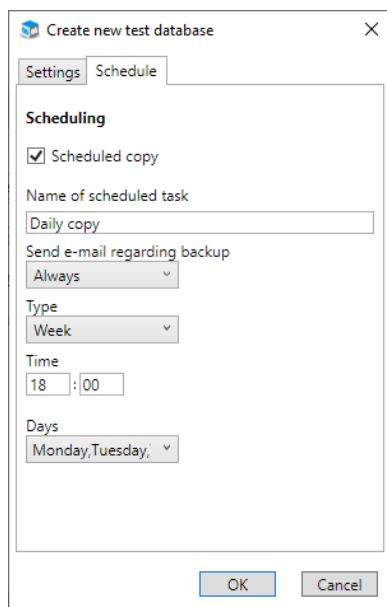
If you do not need to have a scheduled copying of the database, you close the dialog with the *OK* button and the test database is created.

If the *Copy now* setting is activated, you have then to enter the *Password* for the selected user that will run the task (see step 4 below).

A manual copying task called "Copy new data ([test database number])" is created and is shown under the test database. In the Windows *Task Scheduler* the corresponding manual tasks are also created.

If you require a scheduled copying task of the test database, you go to the *Schedule* tab instead of clicking the *OK* button. Alternatively, you can add a scheduled copying task subsequently (see below).

2. Under the *Schedule* tab you activate *Scheduled copy* of the test database. The purpose is to get a current copy of the production/actual/live database on a regular basis which you can then use as test database.




The screenshot shows a dialog box titled "Create new test database" with a close button (X) in the top right corner. It has two tabs: "Settings" and "Schedule". The "Schedule" tab is active. Under the "Scheduling" section, there is a checked checkbox for "Scheduled copy". Below this is a text field for "Name of scheduled task" containing the text "Daily copy". There is a dropdown menu for "Send e-mail regarding backup" set to "Always". Another dropdown menu for "Type" is set to "Week". A "Time" field shows "18 : 00". A "Days" dropdown menu is set to "Monday,Tuesday,". At the bottom are "OK" and "Cancel" buttons.

Enter a *Name of scheduled task*.

Configure the *Send e-mail regarding backup* setting. Here you decide if an e-mail should be sent *Always*, *In case of error*, or *Never*. The default option is *Always* and this means an e-mail will always be sent when a copying task has been performed. If you select the *In case of error* option, an e-mail is sent only if the copying task failed. Choose the *Never* option if you do not want an e-mail to be sent regardless of if the copying task has been performed or if it has failed.

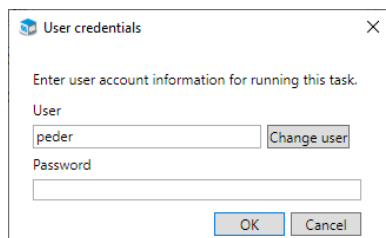


You configure general e-mail settings (such as, receiver, sender, and e-mail server) via the  button which you find under the *Backup* tab, and these apply to all copying tasks.

Select *Type*. The options are *Week*, *Month*, and *Last day of the month*. *Type* is by default set to *Week*.


Enter a *Time* and the *Days* or *Months* on which the copying task should be performed. If *Type* has been set to *Month*, you also get to select a *Date* in the months when the copying task should be performed.

3. Click *OK* in the dialog to create the test database.
4. Finally you have to enter the *Password* for the selected user that will run the task. Then click *OK*.

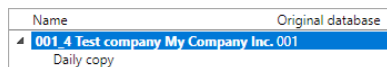


A scheduled copying task is then created and is shown under the test database. There you see the name you entered for the scheduled task. In the Windows *Task Scheduler* the corresponding scheduled tasks are created.

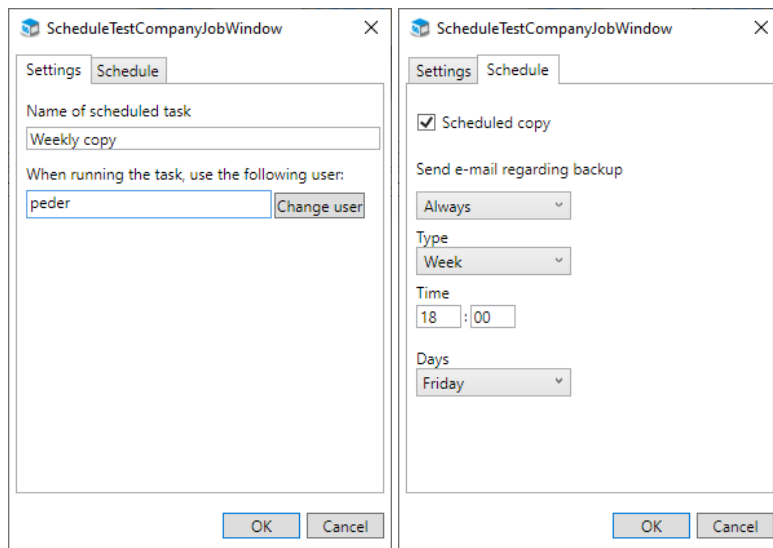
## Add scheduled copying task

1. If you subsequently need to add a scheduled copying task for a test database, select the test database under the *Test databases* tab and click the *Add scheduled copy* button  (this button is active if you mark the test

database).

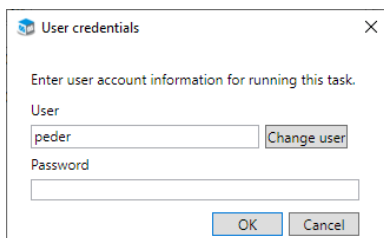


2. Name and configure the copying task you want in the respective tabs *Settings* and *Schedule* and click the *OK* button.




3. Enter the *Password* for the selected user that will run the task. Then click *OK*.

4.



A dialog box titled "User credentials" with a close button (X) in the top right corner. The text inside says "Enter user account information for running this task." Below this, there are two input fields: "User" and "Password". The "User" field contains the text "peder" and has a "Change user" button to its right. The "Password" field is empty. At the bottom of the dialog, there are "OK" and "Cancel" buttons.

## Change scheduled copying task


1. If you need to change a scheduled copying task, you select the copying task under the test database under the *Test databases* tab and click the *Edit copy* button  (this button is active if you mark a copying task under the test database).

Name	Original database
001_4 Test company My Company Inc. 001	
Daily copy	

2. Make the changes you wish to do under the respective tabs *Settings* and *Schedule* and then click the *OK* button.

## Configuration

The image displays two side-by-side screenshots of the 'ScheduleTestCompanyJobWindow' dialog box. The left screenshot shows the 'Settings' tab, where the 'Name of scheduled task' is 'Weekly copy' and the user selected is 'peder'. The right screenshot shows the 'Schedule' tab, where 'Scheduled copy' is checked, 'Send e-mail regarding backup' is set to 'Always', 'Type' is 'Week', 'Time' is '18:00', and 'Days' is 'Friday'. Both windows have 'OK' and 'Cancel' buttons at the bottom.

- When you have made the changes you must also transfer these changes to the task in the *Task Scheduler* in Windows. This is done using the *Update the scheduled tasks* button  under the *Test databases* tab.



Users who are logged in on the test company will automatically become logged out from Monitor G5 when the copy to the test company takes place. This is good to know, especially if you use scheduled copying.

## Create backup using SQL Anywhere backup tool



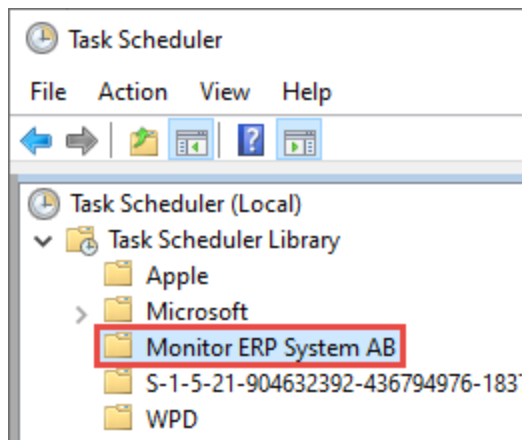
This instruction for backup applies if the company databases and the database engine (SQL Anywhere) are installed on a separate database server. In such cases you manually create and schedule backup of the company databases by using SQL Anywhere's backup tool. This description also applies when creating and scheduling a copying of the company database to a test company. The backup of MONITOR systems on Microsoft SQL Server is created and scheduled in the regular tool for backup of SQL Server.

### Copy SQL Anywhere backup tool to the database server

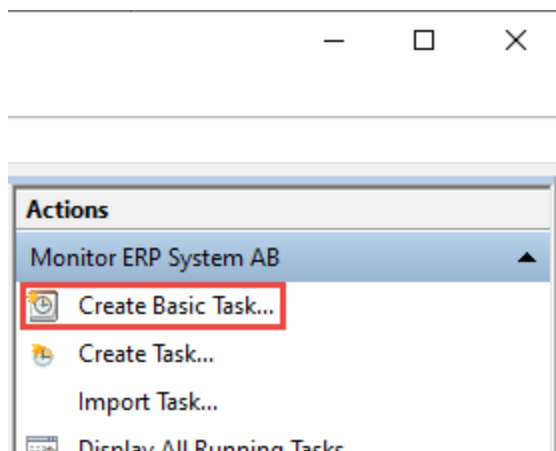
1. Open the Explorer in Windows on the application server (the MONITOR server) and go to the folder called *C:\Program Files (x86)\Monitor ERP System AB\MONITOR Installation Manager*.
2. Copy the sub-folder called *SqAnywhereBackupTool* to a network resource or a USB memory.
3. Go to the root folder *C:\Program Files (x86)\Monitor ERP System AB* for the application server.
4. Also copy the file *certificate.rsa* to the *SqAnywhereBackupTool* folder on the network resource or the USB memory stick.
5. Open the Explorer in Windows on the database server where the SQL Anywhere database engine and the company databases by are installed.
6. Copy the folder called *SqAnywhereBackupTool* from the network resource or the USB memory stick to *C:\* on the database server. This will create the path *C:\SqAnywhereBackupTool*.

### Create scheduled activity for backup or copying to test company in Windows Task Scheduler

1. Open the *Task Scheduler* in Windows on the database server.
2. Mark the *Monitor ERP System AB* folder under *Task Scheduler Library* in the left section.




- a. If the *Monitor ERP System AB* folder is missing you should create a folder with that name under *Task Scheduler Library*. This is done by right-clicking that folder and selecting *New folder...* And giving the new folder the name *Monitor ERP System AB*.
3. When you have marked the *Monitor ERP System AB* folder, select *Create Basic Task...* In the right section called *Actions*.



4. Enter a name and a description for the activity in the dialog that appears. Click *Next* >.

Create Basic Task Wizard ✕

 Create a Basic Task


Create a Basic Task	Use this wizard to quickly schedule a common task. For more advanced options or settings such as multiple task actions or triggers, use the Create Task command in the Actions pane.
Trigger	
Action	Name: <input type="text" value="MONITOR Backup"/>
Finish	Description: <input type="text" value="Daglig backup av databaserna 001 och 002"/>

< Back Next > Cancel



5. Choose when to run the activity. *Daily* is the default and recommended option for backup of databases. For copying to test company you choose one of the options regarding how often you want to copy to the test company. Click *Next >*.

Create Basic Task Wizard

 Task Trigger

Create a Basic Task

Trigger

Action

Finish

When do you want the task to start?

☒ Daily

☐ Weekly

☐ Monthly

☐ One time

☐ When the computer starts

☐ When I log on

☐ When a specific event is logged


< Back

Next >

Cancel



6. In *Start* you select date and time for when the activity should start. In the *Recur every* field you enter how often the activity should be repeated. It is recommended to run the activity every day when backup is concerned. When copying to test company is concerned, you can enter any interval of your choice. Click *Next* >.

Create Basic Task Wizard

 Daily

Create a Basic Task

Trigger

Start: 2021-10-19  23:59:59  ☐ Synchronize across time zones

Daily

Recur every: 1 days


Action

Finish

< Back Next > Cancel

7. Choose *Start a program* for the activity. Click *Next >*.

Create Basic Task Wizard ✕

 Action

Create a Basic Task

Trigger

Daily

**Action**

Finish

What action do you want the task to perform?

☒ Start a program

☐ Send an e-mail (deprecated)

☐ Display a message (deprecated)


< Back   Next >   Cancel

## Configuration

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8. Click the *Browse...* button and select the *Monitor.SqlAnywhere.BackupTool.exe* file in the folder called *SqlAnywhereBackupTool*.
9. In the *Add arguments* field you need to add arguments according to the following example.
10. Leave *Start in* empty. Click *Next >*.

Create Basic Task Wizard

 Start a Program


Create a Basic Task

Trigger	Program/script:	
Daily	<input type="text" value="c:\Program Files\Microsoft SQL Server\90\Tools\Binn\sqlanywhere\sqlanywherebackup\Monitor.SqlAnywhere.BackupTool.exe"/>	<input data-bbox="1334 436 1495 473" type="button" value="Browse..."/>
Action	Add arguments (optional):	
<b>Start a Program</b>	<input --mt="" backup="" c"="" status"="" type="text" value="b "/>	
Finish	Start in (optional):	<input type="text"/>

< Back   **Next >**   Cancel

11. Activate the *Open the Properties dialog for this task when I click Finish* checkbox. Click *Finish* >.

Create Basic Task Wizard

 Summary

Create a Basic Task

Trigger  
Daily  
Action  
Start a Program  
**Finish**

Name: MONITOR Backup

Description: Daglig backup av databaserna 001 och 002

Trigger: Daily; At 23:59 every day

Action: Start a program; "C:\Program Files (x86)\Monitor ERP System AB\MONITOR I

☒ Open the Properties dialog for this task when I click Finish

When you click Finish, the new task will be created and added to your Windows schedule.

< Back Finish Cancel



12. Click the *Change User or Group...* button in the dialog which opens, and enter the Windows account that will run the activity. It is normally the same account which runs the service for the application server (the MONITOR server) or an administration account. Also activate the *Run whether user is logged on or not* and *Run with highest privileges* settings. Click the *Settings* tab.

**MONITOR Backup Properties (Local Computer)**

General Triggers Actions Conditions Settings History

Name: MONITOR Backup

Location: \Monitor ERP System AB

Author: MONITOR\peder

Description: Daglig backup av databaserna 001 och 002

Security options

When running the task, use the following user account:

MONITOR\peder Change User or Group...

☐ Run only when user is logged on

☒ Run whether user is logged on or not

☐ Do not store password. The task will only have access to local computer resources.

☒ Run with highest privileges

☐ Hidden

Configure for: Windows Vista™, Windows Server™ 2008

OK Cancel

13. Activate the setting called *Run task as soon as possible after a scheduled start is missed*. Then click *OK*.

MONITOR Backup Properties (Local Computer) X

General Triggers Actions Conditions Settings History

Specify additional settings that affect the behavior of the task.

☒ Allow task to be run on demand

☒ Run task as soon as possible after a scheduled start is missed

☐ If the task fails, restart every: 1 minute

Attempt to restart up to: 3 times

☒ Stop the task if it runs longer than: 3 days

☒ If the running task does not end when requested, force it to stop

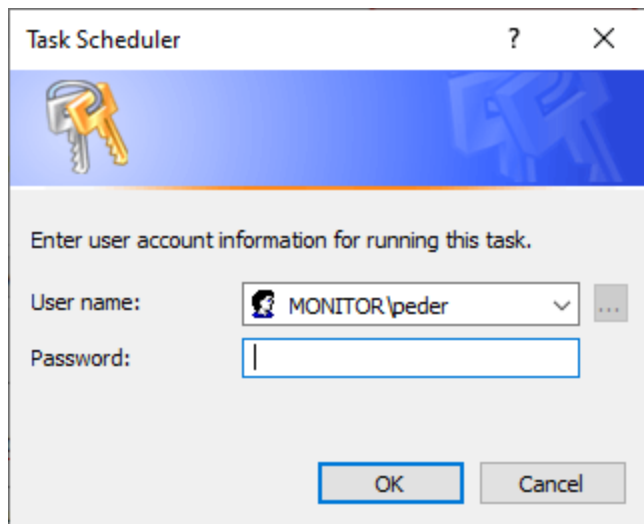
☐ If the task is not scheduled to run again, delete it after: 30 days

If the task is already running, then the following rule applies:

Do not start a new instance

OK Cancel

14. Finally, this dialog window is displayed where you have to enter the password for the Windows account that will run the activity. Then click *OK*.





## Basic data and settings

Here the basic data which should be registered is described as well as the default settings which should be controlled and possibly modified, before the company starts using Monitor G5 in the daily business. Basic data is users, parts, work centers, BOM and routing, customers, suppliers, etc. In addition to this, you need to register basic data in different tables used by other basic data, for example different terms, part codes, prices, etc.

Parts, customers, and suppliers can be imported to Monitor G5 from other ERP systems and spreadsheet applications. For parts which you have imported it is also possible to import balances, locations, and batch numbers. These imports are performed using text files containing information exported from the other ERP system or spreadsheet application.

When it is time to go live you should have registered the most important basic data, so that the staff can start working in Monitor G5 with registering orders etc. As time passes you will add additional basic data of different types.

If the company converts from Monitor G4 most data and settings will be included. However, there is certain basic data which has to be registered again and new settings you have to configure.



We recommend that registration of basic data is done in consultation with instructors/consultants from Monitor ERP System AB. When training in Monitor G5 you will also go through basic data and its settings. Then you can discuss how to apply Monitor G5 in order to obtain the best use of the system.

## General registers

Here you find a description of basic data and settings to be registered and controlled by qualified personnel in the *General registers* module after installation of Monitor G5.

*First-time start* applies when the company has not previously used Monitor G5. *Migration* applies when the company has migrated/converted from Monitor G4.

Explanations regarding actions and settings are included in the online help function for the respective procedure.

Actions	When	Affected procedures	Explanation
Register/control company data	First-time start, Migration	Company information	Register company information and check that all existing information is correct, such as currency, bank account, language, country, addresses, etc. Add a company logotype (to be displayed on different documents, e.g. invoices).



Actions	When	Affected procedures	Explanation
Check calendar	First-time start, Migration	Calendars	Check the calendar included in the system and mark, if applicable, "working day between holidays" days as off-days. Register more calendars if needed. There are two system settings which determine which calendars should be used for calculation of payment date, and for calculation of due date for invoices. If warehouses are applied you should also select a calendar per warehouse in the procedure <i>Company information</i> .
Check the system settings	First-time start, Migration	System settings	Go through all system settings and change the default settings if needed.
Create templates for desktop configurations	First-time start, Migration	Desktop templates	Create templates, if needed, for common desktop templates which the users can apply. An alternative is to let the users themselves create own desktop configurations under backstage.
Register user rights groups	First-time start, Migration	User rights groups	Register, if needed, own user rights groups for the users if the included roles which can be applied on users are insufficient.

Actions	When	Affected procedures	Explanation
Register/update user	First-time start, Migration	Users, Authorization settings – EIM	Register and update users and apply roles, or user rights groups and user-specific user rights. Add default printers for the users, for example printer for shipping documents. Configure which users who should be allowed to log in to the web client. If Electronic invoice management (EIM) will be applied you will also need to configure settings for authorization of supplier invoices.
Register departments	First-time start	Departments	It is mandatory to select department for personnel in the personnel records and for work centers in the work center register.
Register employees	First-time start, Migration	Personnel records – General	Register employees and link to department and user. Information to register is for example that the person is a reference, a seller, etc. You can also link a picture/image to the person.
Register/change paths	First-time start, Migration	Paths, File path list	Register paths to external files which should be possible to link to records. Edit existing paths to already linked files.

Actions	When	Affected procedures	Explanation
Register export and import paths	First-time start, Migration	Settings for export/import	Register export and import paths for payment files, SIE files, invoice files, etc. Register login info to nShift Delivery or nShift Web-TA.
Register/check currencies, update exchange rates	First-time start, Migration	Currencies	Register and check which currencies and rate types should be used. Configure schedule for automatic update of exchange rates.
Register shipping services	First-time start, Migration	Shipping services	Register shipping services and templates for shipment (based on your account settings at nShift Delivery, the or nShift Web-TA).
Add settings for incoming e-mail	First-time start, Migration	Settings for incoming e-mail	Add settings for an Exchange or IMAP server which should be used for incoming e-mail to Monitor G5. Also add inboxes for e-mail accounts used for different types of e-mails.
Create scheduling of data mining to BI	First-time start, Migration	Settings for BI	Create one or more scheduling items of data mining to BI. For each scheduling item you can configure which companies and data sources to include. Mined data is then used in the <i>BI</i> procedure in the Purchase and Sales module.

Actions	When	Affected procedures	Explanation
Check document settings	First-time start, Migration	Document settings, Document templates – Manufacturing order	Check the default settings for documents, as e.g. quote, inquiry, and invoice, and for manufacturing order documents you should check operation document, material document, and traveler.
Check the number series	First-time start, Migration	Number series	Check the start number <i>Next number</i> in the number series. By default this should be one number higher than the <i>Greatest number used</i> . If e.g. credit invoices should use the same number series as invoices, you should uncheck the setting <i>Active</i> for the credit invoice number series.
Register/check other tables including basic data	First-time start, Migration	Multiple procedures	Register, check, and complement information in other tables for basic data in the <i>General registers</i> (e.g. terms, cause codes, order types, languages, currencies, countries, etc.).
Register different categories	First-time start	Categories, Discount categories	Register the categories to be used for parts, customers, suppliers, etc. Register the needed discount categories.

Actions	When	Affected procedures	Explanation
Register/control financial data	First-time start, Migration	Multiple procedures	Register and control data for accounting year, voucher number series, standard accounts, VAT settings, bank settings, and invoicing plans. Create the posting matrix consisting of customer groups, supplier groups, product groups, posting groups, sales accounts, and purchase accounts. Create budget charts.
Create additional texts, payment reminder texts	First-time start, Migration	Document texts	Create additional texts for the documents and document groups which will be used. It is possible to create an additional text on the document intended for printout and also an additional text intended to be used when the document is sent by e-mail. Document groups are linked to different addresses for the company/warehouse, customer, and supplier. Also create payment reminder texts, to be printed on payment reminders.

Configuration

Actions	When	Affected procedures	Explanation
Import part balances, locations, batch numbers.	First-time start	Balance import	Import part balances, locations, and batch number on parts, if any. The import is performed using a text file which is tab-separated or comma-separated. This import is normally done in the preparation phase before the go live (actual start up).

## Manufacturing

Here you find a description of basic data and settings to be registered and controlled by qualified personnel in the *Manufacturing* module after installation of Monitor G5.

Explanations regarding actions and settings are included in the online help function for the respective procedure.

Actions	When	Affected procedures	Explanation
Register work centers	First-time start	Work center register	Register the work centers that should be available in the manufacturing. It is for example machine groups, manual work, pool groups, and subcontract groups.
Register/control production schedules	First-time start	Production schedules	Register and check start and end times, as well as break times in the production schedules. A daytime schedule and an "off work" schedule are included in the system.
Register/control schedule cycles	First-time start	Production schedule cycles	Register and control the number of days in the schedule cycles. One schedule cycle spanning one week (7 days) is included in the system. Work centers use schedule cycles if the option <i>Hourly planning or Capacity via schedule</i> has been selected as time precision.
Create BOM and routing	First-time start	BOM and routing	Create BOM and routing for all manufactured parts.

## Purchase

Here you find a description of basic data and settings to be registered and controlled by qualified personnel in the *Purchase* module after installation of Monitor G5.

Explanations regarding actions and settings are included in the online help function for the respective procedure.

Actions	When	Affected procedures	Explanation
Register basic data for BI	First-time start	Basic data – SRM	Register basic data needed for the SRM (Supplier Relationship Management). This is activities, supplier status, district, and supplier types. A few supplier status items are included as examples.
Import suppliers	First-time start	Supplier import	Import suppliers from another ERP system The import is performed using a text file which is tab-separated or comma-separated. In the import procedure you configure the format template to make it correspond with what should be imported to the supplier register. Please review all settings for the suppliers.
Register other cash flows	First-time start	Other cash flows	If needed you can register other cash flows of the type <i>Outgoing payment</i> .



Actions	When	Affected procedures	Explanation
Register inboxes for EIM	First-time start, Migration	Scan supplier invoices	If you will use Electronic invoice management (EIM) you also need to register paths to inboxes where scanned invoices are saved.

## Sales

Here you find a description of basic data and settings to be registered and controlled by qualified personnel in the *Sales* module after installation of Monitor G5.

Explanations regarding actions and settings are included in the online help function for the respective procedure.

Actions	When	Affected procedures	Explanation
Register basic data for CRM	First-time start	Basic data – CRM	Register basic data needed for the CRM (Customer Relationship Management). This is activities, customer status, district, and customer types. A few customer status items are included as examples.
Import customers	First-time start	Customer import	Import customers from another ERP system. The import is performed using a text file which is tab-separated or comma-separated. In the import procedure you configure the format template to make it correspond with what should be imported to the customer register. Please review all settings for the customers.
Register other cash flows	First-time start	Other cash flows	If needed you can register other cash flows of the type <i>Incoming payment</i> .

## Stock

Here you find a description of basic data and settings to be registered and controlled by qualified personnel in the *Stock* module after installation of Monitor G5.

Explanations regarding actions and settings are included in the online help function for the respective procedure.

Actions	When	Affected procedures	Explanation
Register basic data for parts	First-time start	Basic data – Part	Register basic data which will be used for parts. This is activities, units, part codes, CN codes, ABC codes, alloy codes/mark-ups, package types, goods types, and codes for other part identities. A few units are included as examples.
Import parts	First-time start	Part import	Import parts from another ERP system. The import is performed using a text file which is tab-separated or comma-separated. In the import procedure you configure the format template to make it correspond with what should be imported to the part register. Please review all settings for the parts.

## Time recording

Here you find a description of basic data and settings to be registered and controlled by qualified personnel in the *Time recording* module after installation of Monitor G5.

Explanations regarding actions and settings are included in the online help function for the respective procedure.

Actions	When	Affected procedures	Explanation
Register basic data (attendance and work)	First-time start	Basic data – Attendance, Basic data – Work	Register basic data for attendance recording and work recording, e.g. salary types, time banks, codes for indirect work, and interruption codes.
Register overtime schedules and work schedules	First-time start	Schedules	Register the overtime schedules and work schedules to be used by employees, An overtime schedule must be selected for a work schedule.
Register working hour cycles	First-time start, Migration	Schedule cycles	Register the schedule cycles to be used for employees.
Register parameter groups	First-time start, Migration	Parameter groups	Register and control settings for parameter groups. If needed you should complement with more parameter groups for the employees.

Actions	When	Affected procedures	Explanation
Add terminal users	First-time start	Terminal settings	Add a terminal user for each recording terminal and select the properties for the respective recording terminal.
Register/complement personnel information	First-time start, Migration	Personnel records – Time recording	Register employees or add information to personnel already existing. Enter information regarding attendance and work recording. The module which in the previous generation of MONITOR was called <i>Workshop info</i> is now called <i>Time recording</i> and the <i>Update employee</i> procedure is now called <i>Personnel records – Time recording</i> .

## Accounting

Here you find a description of basic data and settings to be registered and controlled by qualified personnel in the *Accounting* module after installation of Monitor G5.

Explanations regarding actions and settings are included in the online help function for the respective procedure.

Actions	When	Affected procedures	Explanation
Register dimensions	First-time start	Dimensions	Register the dimensions to be used when posting. Three different dimensions are included from start: cost center, cost unit, and project.
Import bookkeeping	First-time start	Export/Import, Opening balance	Import bookkeeping from SIE file. If you do not have access to an exported SIE file from the previous bookkeeping/accounting program you must manually enter the opening balance (OB) and transactions.
Check chart of accounts	First-time start	Chart of accounts	Check the accounts which should be used in the chart of accounts and complement with settings, for example the dimensions which should be used.
Create headings for accounts and SRU codes	First-time start	Basic data – Chart of accounts	Create headings for accounts and SRU codes The headings are used for accounts in lists. When handling SRU codes you can also enter a code at reversed sign.

Actions	When	Affected procedures	Explanation
Register automatic posting and automatic allocations	First-time start	Automatic postings, Automatic allocation	If needed you can register automatic posting and automatic allocations.
Register different posting methods	First-time start	Register posting method	Register different posting methods used by Stock accounting and Management accounting*. Posting method refers to rules for how different types of transactions should be posted.
Configure the right period	First-time start	Change period/accounting year	If it is not the right period you should change period and select which periods should be open and closed.
Create custom (own) accounting reports	First-time start, Migration	Create accounting report	There are some standard reports included in the program. When needed, it is possible to create customized reports. Please note! This applies also if you migrate from the previous generation of Monitor G5.
Register basic data for projects	First-time start	Basic data – Project	Register basic data which will be used in projects. There are some project types, income, and costs included in the program.

## Configuration

Actions	When	Affected procedures	Explanation
Register basic data for budget	First-time start, Migration	Basic data – Budget	Register basic data which will be used in budgets in the accounting. What you register in this procedure are budgets (parallel budgets) and budget charts.
Register basic data for fixed assets register**	First-time start	Basic data – Fixed assets register	Register basic data for the fixed assets register. What you register in this procedure are fixed assets groups, depreciation settings, fixed assets types, and locations.
Import fixed assets objects**	First-time start	Fixed assets import	Import fixed assets objects via text files. The purpose is to be able to import fixed assets objects to the fixed assets register from another system, for example Excel.

\* If you have the option *Management accounting*.

\*\* If you have the option *Fixed assets register*.



## Training, preparations, and actual startup

When information and settings have been registered and controlled in Monitor G5 it is time for a training phase.

Prior to the training you will be given access to the e-learning platform Monitor Academy where you find courses related to Monitor G5.

During the training phase, consultants/instructors from Monitor ERP System AB work through basic data and order flows with the affected personnel.

After the training phase a preparation phase begins. Then for example a balance import is performed to give parts current balances on locations. If the company has converted from Monitor G4, then personnel from Monitor ERP System AB will make a final control of the data migration and final migration of the database to a Monitor G5 database. For documented settings of user rights, system settings, and other information, a synchronization is made. The affected personnel in the company will then perform a control and approve the migration/conversion.

After the preparation phase you are ready to go live in Monitor G5 for the company's operations.