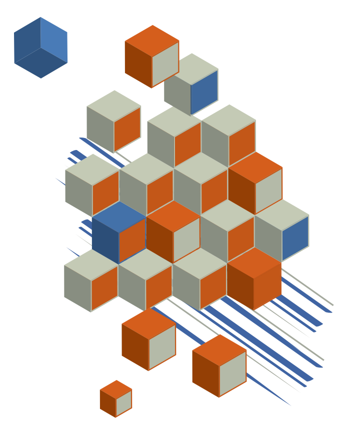
Administration

SIMMS Inventory Management Software 8.0

November 2, 2011



Contents

Administration

This document covers some of the most common tasks administrators perform. These task include creating and maintaining your company database, running SQL scripts, and unlocking transactions.

In addition, this document shows you where to find the information and reports of interest to administrators.

Creating a Company Database

You may want to create another company database in addition to your main company database. This process is the same as when you created your original company database.

After you create a database the Mass Copy Inventory window opens. Use this feature if you want to copy data from an existing database to your new database. After you close the Mass Copy Inventory window, the Setup Step by Step window opens. This window is designed to guide you through the setup process.

Create a Company Database

1. Open the **Administration** menu. Click **Company Manager**.
2. Click **New**.
3. In the **Company Code** text box, type a name for your company's database, and then click **Save**.

   The Operation Information window opens.

   SIMMS begins to create your company database.
4. Click **Next**.

   You will need to click Next several times for SIMMS to continue the setup process.
5. Click **Close**.

   You will need to click Close several times for SIMMS to complete the setup process.

The Mass Copy Inventory window opens.

Copy Data from An Existing Database

Use the Mass Copy Inventory window to copy data from an existing database to your new database. If you do not want to use this feature, close the window to proceed to the next step in the setup process. Note the on-hand quantities from your existing database are not copied to your new database.

1. In the **Importing From** list, select the database from which you want to import data.
2. Select the type of data you want to import.
3. Click **Import**.
4. After SIMMS completes importing the data, a dialog displays confirming the import is complete, click **OK**.
5. Close the **Mass Copy Inventory** window.

The Setup Step by Step window opens.

The Setup Step by Step Window

The purpose of the Setup Step by Step window is to guide you through the setup process. This includes adding your company information, locations, units of measures, and so on. Close the window if you do not want to use this guide.

Maintaining Your Company Database

Back up your company's database often. By doing so, you can restore your database if it is damaged or if information is lost. In addition, frequent backups ensure the information in your backup database is current.

Back Up a Company Database

⚠ ***Warning**: Only backup your database from the computer on which the database resides. Attempts to backup a database from a workstation can lead to errors.*

1. Open the **Administration** menu. Click **Company Manager**.
2. Select your company's database, and then click **Backup**.
3. Click **Save**.

Your company database is saved at **Program File** > **KCSI** > **SIMMS** > **Backup**.

Restore a Company Database

⚠ ***Warning**: Only restore your database from the computer on which the database will reside. Attempts to restore a database from a workstation can lead to errors.*

1. Open the **Administration** menu. Click **Company Manager**.

2. Select your company's database, and then click **Restore**.
3. Locate and select the backup copy of your company's database, and then click **Open**.

Delete a Company Database

1. Open the **Administration** menu. Click **Company Manager**.
2. Select your company's database, and then click **Delete**.

The SQL Assistant

SIMMS' SQL Assistant enables you to run SQL scripts. You can save a script as an SQL file, open that file in the SQL Assistant and run the file again. If your script is a query, you can save its results as an XML file or a Microsoft Excel file. You can open your saved XML file in the SQL Assistant to view it.

⚠ ***Warning****: Potential loss or corruption of data. Changes made using the SQL Assistant are permanent and cannot be reversed. Only users with an advanced understanding of SQL should use the SQL Assistant, and initially only under the direction of KCSI. KCSI is not responsible for any data corruption or changes to the your database that result from running user-generated SQL scripts.*

Run an SQL Query

1. Open the **Administration** menu. Click **SQL Assistant**.
2. Do one of the following steps:
   - Type your SQL query in the window.
   - Click **Open SQL**. Find and select your SQL file, and then click **Open**.
3. Click **Show**.

Run an SQL Command

1. Open the **Administration** menu. Click **SQL Assistant**.
2. Do one of the following steps:
   - Type your SQL command in the window.
   - Click **Open SQL**. Find and select your SQL file, and then click **Open**.
3. Click **CMD Run SQL**. (Click only once).

Save an SQL Script File

1. Open the **Administration** menu. Click **SQL Assistant**.
2. Type your SQL script in the window, and then click **Save SQL**.

Save Your Query Results

1. Open the **Administration** menu. Click **SQL Assistant**.
2. Run your SQL query, and then do one of the following steps:
   - To save your query results as an XML file, click **Save XML**.
   - To save your query results as an Microsoft Excel file (.xls), click **To Excel**.

Open an XML File

1. Open the **Administration** menu. Click **SQL Assistant**.
2. Click **Open XML**. Find and select your XML file, and then click **Open**.

Viewing Reports and Information

View Uncommitted Transactions

Transactions that are not saved are considered uncommitted. You cannot process uncommitted transactions. For example, a sales order that is not saved (uncommitted) cannot be imported into an invoice.

1. Open the **Administration** menu. Click **Uncommitted Transaction Listing**.
2. To view the details of a transaction, select the transaction and then click **Detail**.

View FIFO Allocation

This report list all stock entries with their FIFO cost.

- Open the **Administration** menu. Click **FIFO Allocation**.

View the Log Report

SIMMS records the activities of all users while they are logged into the system. You can view these activities in the Log Report. For instance, you could view who and what changes were made to Global Settings.

1. Open the **Reporting** menu, open the **Reports Center** submenu, and then click **Reports Center**.

2. Click **Administration**, click **Log Report**, and then click **Display**.

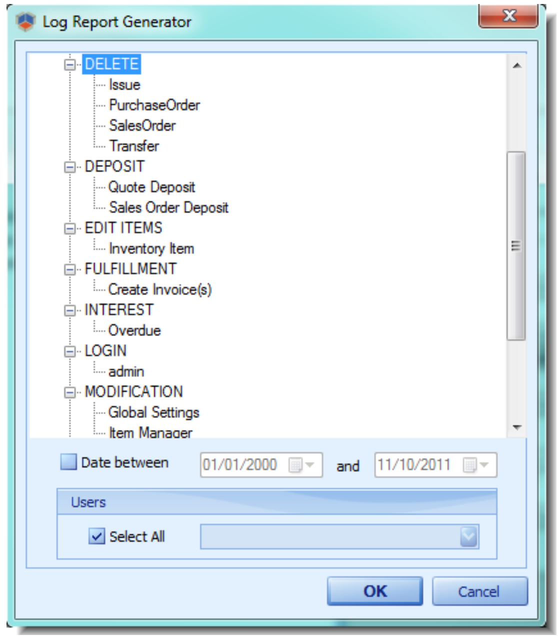


Figure 1: Log Report Generator.

3. Click one of the operations listed in the window, and then click **OK**.

Unlocking a Transaction

Typically, if someone is working on a transaction (receipt, invoice, purchase order, or sales order), other users cannot access that transaction until it is saved. You can, however, access a transaction when opened on another user's computer by unlocking it. By doing so, you can view, edit, delete, or complete the transaction.

Unlock a Transaction

1. Open the **Administration** menu, and then click **Locking Transactions Manager**.
2. Select a transaction, and then click **UnLock**.
3. To view the details of a transaction, select a transaction and then click **Details**.

Deleting Zero Stock Items

When you remove all the items from a location, SIMMS shows the location as having zero (0) stock. SIMMS will only displays these locations for your current session. The next time you login to SIMMS, the locations that had zero (0) stock will no longer display.

You can manually remove locations with zero (0) stock sooner, that is for your current session. Do this if you want the Stock window and reports to only list locations with stock amounts greater than zero (0).

Delete Zero Stock Items

1. Open the **Administration** menu, click **Delete Zero Stock**.
2. A message appears asking you to confirm you want to delete all zero stock records. Click **Yes**.