

Infusion Monthly Housekeeping Checks



Primary Responsibility

System Administrator

Objective

To ensure the database is kept in good order.

Outcomes

Under normal circumstances, the process will run and complete with out any error messages.

If an error is reported, please contact Empower Business & Accounting Solutions asap (021 996 441, trevor@empowerbusiness.co.nz).

Please provide a screenprint or note any error message to help with issue resolution.

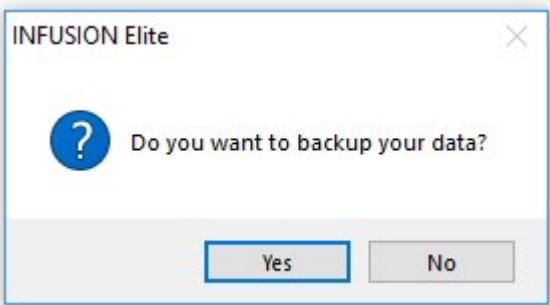
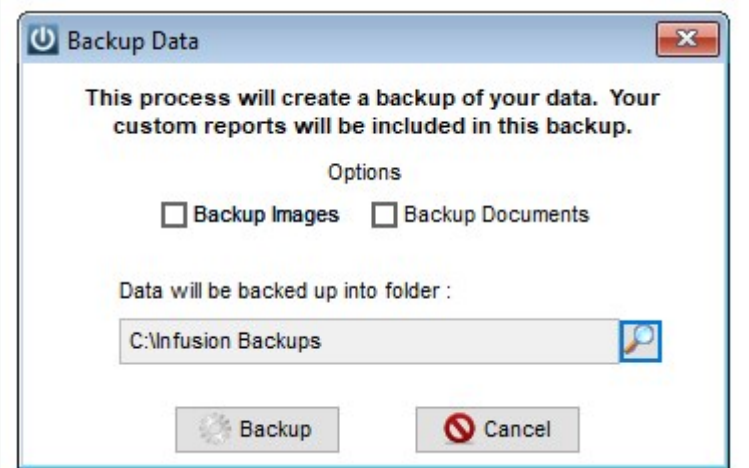
Step by Step Instructions

This procedure can only be run when the user has exclusive access to the system. We recommend it is run at least once per month. In order not to inconvenience other users, we recommend this procedure is run outside of normal business hours.

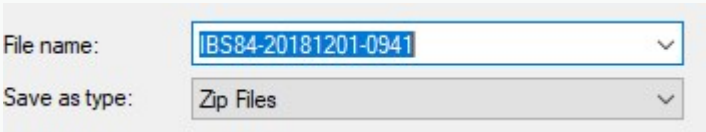
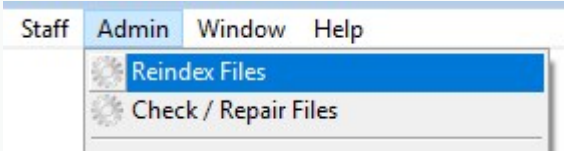
The procedure can be used for both local installations and Hosted versions of Infusion.

ROLE RESPONSIBLE	STEP
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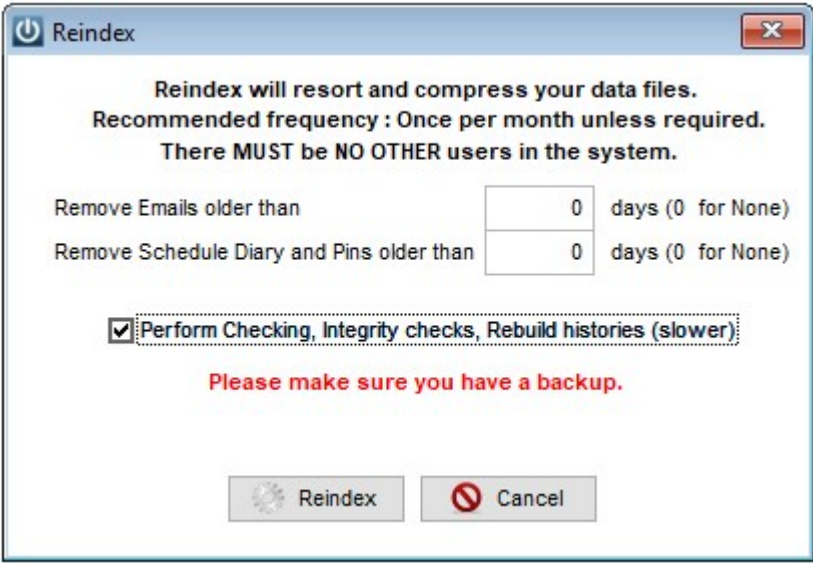
ROLE RESPONSIBLE	STEP
	<p>System Backup NB A backup should still be created even if other backup processes are run on the server, including Hosted.</p>
System Administrator	<p>Ensure all users are logged out of Infusion. You can find out if anyone else is logged into the system by going to Admin Other Who's Logged In.</p>
System Administrator	<p>Once you are the only user in the system, click on Exit. You will see the following message:</p>  <p>Click on Yes.</p> <p>Note: If you do not see this message when logging out, it means either someone is still logged in, or your user settings do not permit you to do backups.</p>
System Administrator	

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ROLE RESPONSIBLE	STEP
	<p>Select the folder where you wish to save your backup. Preferably this should be a location that is not the same as the Infusion system. e.g. memory stick, separate hard drive, or cloud storage.</p>
<p>System Administrator</p>	<p>Infusion will automatically create the file name. This is made up of the Infusion version number, the date and the time.</p>  <p>Click Save.</p>
<p>System Administrator</p>	<p>The time taken to do the backup will depend on the size of the system data files and the location you are saving to.</p>
<p>System Administrator</p>	<p>Once the backup is completed, the system will shut down.</p>
<p>Run Reindex and Integrity Checks</p>	
<p>System Administrator</p>	<p>Log back into Infusion.</p>
<p>System Administrator</p>	<p>Go to Admin Menu and select the Reindex Files Option</p> 

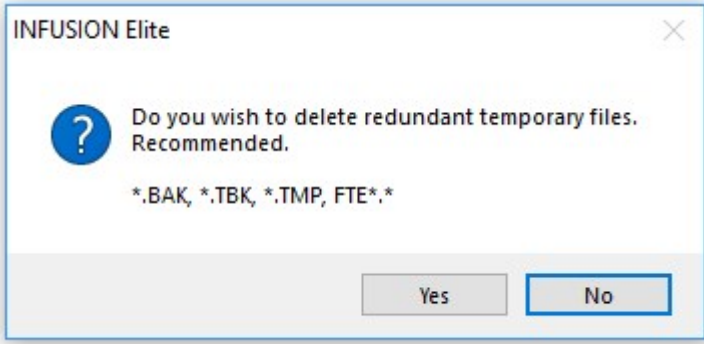
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ROLE RESPONSIBLE	STEP
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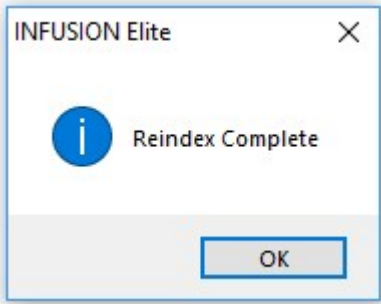
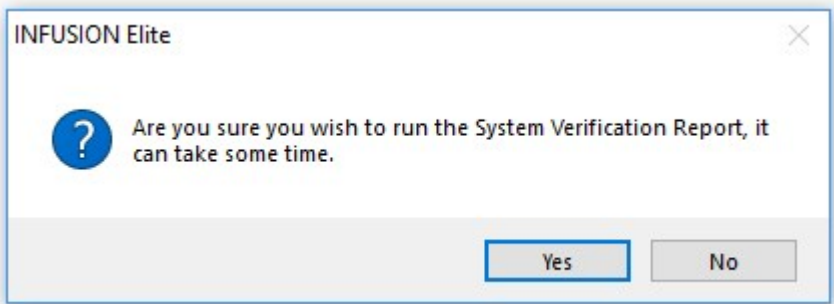
System Administrator	 <p>Enter the number of days you wish to keep the mails sent from Infusion available. 7 Days will normally be sufficient. Leave Remove Schedule Diary at zero.</p>
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System Administrator	Click on Reindex
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You will see the reindex and integrity checks running, and then this message:

System Administrator	 <p>Click on Yes.</p>
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ROLE RESPONSIBLE	STEP
System Administrator	 <p>Click OK.</p>
Run the System Verification Report	
System Administrator	Go to Admin System Reports System Verification
System Administrator	 <p>Click Yes.</p>
System Administrator	<p>All of the totals should agree. See report example: System Verification Sample</p> <p>If any differences are reported, please contact Empower Support.</p>
System Administrator	Advise all users thar Infusion is available again.

Time Expectations

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In normal circumstances, the housekeeping checks should take no longer than 15 minutes.

Advice

If you need any help with this procedure please contact:

Trevor Huett , Empower Business & Accounting Solutions

021 996 441 trevor@empowerbusiness.co.nz

Disclaimer

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