

# Business Insights

SYSPRO 8

Reference Guide

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# Business Insights



**Business Insights** is the latest technology embedded in SYSPRO that lets you surface strategic enterprise information as events occur within the system - without having to first print reports or execute queries to translate this information into appropriate business actions.

They are essentially SQL scripts that are exposed as **Tiles** in a SYSPRO web view. These tiles are context-driven and enable you to act instantly on events, facilitating both informed business decisions and sound business behavior.

The key pillar of **Business Insights** is to invoke a shift in ERP from a system of record to a system of engagement.

Previously, business behaviors would be managed using key performance indicators, however, with **Business Insights** you can monitor and view trends, goals, status changes and events. They basically provide an entire workbench - everything a user needs to perform their business function.



## Understand & Explore

### Where does it fit in?

**Business Insights** are used to drive action and collaboration, and can, therefore, be used in conjunction with **SYSPRO Harmony** and the **Favorites** and **To Do List** SYSPRO desktop functions.

SYSPRO's **Business Insights** are packaged as a series of key performance indicators and metrics shipped with the product that you can selectively choose to expose within the product.

Tiles can be added to the main SYSPRO menu to surface company information (e.g. the `total backorders for the company`) or they can be added to specific programs and provide the key field as a context (e.g. the `total backorders for a customer`).

Additionally, when you click on a Business Insight tile, you can drill down to more detailed information displayed in a list view that derives its context from the specific tile measurement parameters.

You can also create administration insights (e.g. failed transactions, users logged in, etc).




## Getting Started

### Activity considerations

You can restrict operator access to **activities** within a program. These are configured using the **Operators** program.

### VBScript editing

Controls whether an operator can edit VBScripts or change customized panes. It also controls whether an operator can access the **Visual Designer** program (displayed from the submenu of the  icon). This does not apply to importing customized panes, which is controlled by the **Allow to import customized panes** activity.

## Prerequisites

- Ensure that the **e.net Communications Load Balancer** service is installed and running and that the e.net service details are correctly configured within the **System Setup** program.

## Restrictions and limits

- Tile definition file names can only include the characters A-Z, a-z, 0-9 and '\_' (underscore) and must end with `.SQL`.

## File locations

### Standard tiles

Standard tiles shipped as part of SYSPRO are stored in the `\Base\Samples` folder and named `UX_Tile_?????_xxxxx.SQL`, where:

- `?????` is the **TileID** (which must be unique across all tiles).
- `xxxxx` is a string that briefly describes the tile (e.g. `UX_Tile_SOR001_Backorders_For_Company.SQL`).

### Custom tiles

Custom tiles must be stored in the `\Plugins` folder and named `CX_Tile_?????_xxxxx.SQL`, where:

- `?????` is the **TileID** (which must be unique across all tiles).
- `xxxxx` is a string that briefly describes the tile.



## Deploy & Use

**Business Insights** are added and customized at operator level. Customization can be done at the time of adding a business insight or web view tile, or edited at a later stage.

Customizations include:

- Setting the tile size
- Assigning icons
- Setting the tile text color

## Categories and Insights

Standard SYSPRO **Business Insights** (i.e. those shipped with the product) include a number of categories, each comprising a list of specific insights:

### Financial KPI

- Average Days to Pay by Branch
- Average Days to Pay by Company
- Average Days to Pay by Customer
- Average Value of Invoices by Branch
- Average Value of Invoices by Company
- Average Value of Invoices by Customer
- Average Value of Invoices by Customer Class
- Average Value of Invoices by Geographic Area
- Average YTD Invoice Value by Company
- Average YTD Value of Invoices By Branch
- Average YTD Value of Invoices By Customer
- Average YTD Value of Invoices By Salesperson
- Customer Days Outstanding by Branch
- Customer Days Outstanding by Company
- Customer Days Outstanding by Customer
- Customers on Hold By Branch
- Customers on Hold by Company
- Customers on Hold by Customer Class
- Days Since Last Sale by Company
- GP Margin as % of Sales by Branch
- GP Margin as % of Sales by Company
- GP Margin as % of Sales by Customer



- Return on Asset by Company
- YTD Sales vs Target for Customers
- Number of Backorders for Company

## **KPI Customer Management**

- Average days to pay for branch
- Average days to pay for customer
- Receivables days outstanding for branch
- Receivables days outstanding for customer

## **KPI Financials**

- Average YTD invoice value for branch
- Average age of stock based on FIFO buckets
- Average age of stock based on inventory movements
- Average days to pay for company
- Customer balance as a percentage of total debtors balance
- Days cover for stock code
- Inventory FIFO current month value for stock code
- Inventory FIFO previous month 1 value for stock code
- Inventory FIFO previous month 2 value for stock code
- Inventory current cost current month value for stock code
- Inventory current cost previous month 1 value for stock code
- Inventory current cost previous month 2 value for stock code
- Inventory last cost current month value for stock code
- Inventory last cost previous month 1 value for stock code
- Inventory last cost previous month 2 value for stock code
- Inventory warehouse costing current month value for stock code
- Inventory warehouse costing previous month 1 value for stock code
- Inventory warehouse costing previous month 2 value for stock code
- Percentage of total debtors balance for branch
- Receivables days outstanding for company
- Return on assets for company
- Value of stock on hand for warehouse



- WIP Ledger balance summary

## **KPI Marketing and Sales**

- Average YTD invoice value for company
- Average YTD invoice value for salesperson
- Average invoice value for branch
- Average invoice value for company
- Average invoice value for customer
- Average invoice value for customer class
- Average invoice value for geographic area
- Days since last sale for company
- GP margin as percentage of sales for branch
- GP margin as percentage of sales for company
- GP margin as percentage of sales for customer

## **KPI Operations**

- WIP at a glance labor cost
- WIP at a glance labor issued
- WIP at a glance material cost
- WIP at a glance material issued
- WIP at a glance total WIP
- WIP at a glance total hours booked

## **Metric Customer Management**

- Average YTD invoice value for customer
- Customers on hold for a branch
- Customers on hold for company
- Customers on hold for customer class

## **Metric Lot Batch Management**

- Number of lots nearing expiry for company
- Number of lots nearing expiry for stock code
- Number of lots nearing expiry for warehouse
- Number of lots on hold for company
- Number of lots on hold for stock code





- Number of lots on hold for warehouse

## Metric Marketing and Sales

- Cycle time customer order processing
- Number of backorder lines for branch
- Number of backorder lines for customer
- Number of backorder lines for salesperson
- Number of backorder lines for stock code
- Number of backorders for branch
- Number of backorders for company
- Number of backorders for customer
- Number of backorders for customer selection
- Outstanding orders for customer


## Metric Operations

- Number of active jobs
- Number of active jobs for customer
- Number of active jobs for stock code

## Tasks

### Deploying a standard tile

1. Select the **Design Web View** (or **Edit Web View**) option from the **Customize and control this application** icon (⚙️).  

The icon is available on the toolbar of the main SYSPRO window as well as on each toolbar of a SYSPRO program.
2. From the **Visual Designer** program, select the **Add layout section** function.
3. From the **Configure new layout section** window, select **Tile Section**.
4. Optionally enter a **Section title** at the **Widget title** placeholder and assign an icon to the tile if required.
5. Select the **Add section** function.
6. Click in the add tile block (designated by the  icon).  

A list of KPI and Metric categories are displayed. The number of available insights are indicated by a number in brackets alongside each tile category.
7. Drill down into a category and select the tile you want to deploy.



You can optionally choose the tile width, text and tile background color as well as assign an icon.

8. Select **Add tile** to assign the tile to the current layout section.

Continue adding tiles to the current layout section or to a new layout section.

9. Select **Save and Exit**.

Your tile will be displayed in the web view, immediately showing the appropriate insight information.



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