

User Experience

SYSPRO 8

Reference Guide

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Web Views



Web Views in SYSPRO boost the user experience through an improved user interface that forms part of SYSPRO's User Experience Roadmap of Technology Innovations.

They utilize the latest HTML5 technologies and deliver an uncluttered, simple interface which is similar to browsing the web.

Web Views provide a complete picture on a single screen and have been designed to display the most important information in a manner that is intuitive and simple to use.

They refine the look and feel of your programs and will increase user satisfaction from the improved user experience and user interface.



Understand & Explore

Where does it fit in?

Web Views are self-contained HTML5 pages that can include **Fields, Charts, Cards** and **Tiles**.

You can design and customize your own **Web Views** using the **Visual Designer** program. Once deployed, these **Web Views** can be viewed by pressing **F11** in the program for which one was created.

SYSPRO ships template **Web Views** with the product, which are located in the `\Base\Settings` folder of your SYSPRO installation.



Getting Started

Prerequisites

- Ensure that the **SYSPRO e.net Communications Load Balancer** service is installed and running.
- Ensure that you have configured the **Server name**, **SOAP port** and **REST port** details against the **E.Net Service Details** tab of the **System Setup** program.

You can obtain these details from the `SYSPROWCFHostService.exe.config` file that is located on the server (`\Program Files\SYSPRO\SYSPRO WCF Service\Port-Number`)

Access control

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.

Pre-configured docking layout considerations

If your login is not under role management, then the first time you load an application with **Web Views** enabled (and one does not exist for the docking layout) a pre-configured docking layout is applied providing the system locates a standard one for the application (in the `\Base\Samples` folder of your SYSPRO installation).

The naming convention is `UX_APP_XXXXXXLZ.XML`, where `XXXXXX` indicates the application name (e.g. **Purchase Order Query** for the **Purchase Order Query** program).

If the docking layout is not found and the **Enable minimalist user interface** option is switched on, then all panes (except the web view) are shown as closed.



Deploy & Use

Hints and tips

- You can further refine the look-and-feel of **Web Views** if you enable the **Enable minimalist user interface** option (**System-wide Personalization**).

Tiles

A tile is built specifically around business insights, comprising SQL scripts that surface important enterprise information as events occur - without having to first print reports or execute queries to translate this information into suitable business actions.

For example: You may have a policy that dictates how many backorders are permitted at company level at any given time. A business insight tile that reveals the 'Total backorders for the company' allows you to monitor this dynamically.

Using Tiles

Once you have added a layout **Tile section**, you can add tiles from a number of categories, where each category includes a number of KPIs.

Tiles can be added to individual programs such as **Customer Query** with the key field being **Customer** as a context. Once this context is provided, the tile can show information related to the current key value (e.g. show backorders for a specific customer).

Standard business insights shipped with SYSPRO are stored in the `\Base\Samples` folder. These are named `UX_Tile_??????_xxxxxx.SQL`, where `??????` is the **TileId** that must be unique across all tiles, and `xxxxxx` is a string that briefly describes the tile (e.g. `UX_Tile_SOR001_Backorders_For_Company.SQL`).

Web Cards

A Web Card is also a self-contained HTML5 page built specifically around key fields (e.g. customers, suppliers, stock code, etc.) and derives its data from a business object.

Web Cards can be run as a separate entity in its own window, or embedded in **Web Views**. These can be **Key Cards** (e.g. displaying information for a key field) or **Insight Cards** (displaying information such as bank balances, or sales order commitments).

Using Web Cards

You can pin a Web Card by placing your cursor in the middle of the card and dragging it to the required position. This will keep the card open throughout the run of SYSPRO and information is updated as soon as the key field related to the card is updated.



- This information is not limited to a cell, but could be in a row in a list view.
- You can have as many cards open at the same time as you like.



- Web Cards are displayed on a web view by default and are stored in the `\Base\Samples` folder (named `UX_Card_XX.html`, where `XX` describes the value, or key field that was added to the card).
- Images of the key field can be included and must be defined as a `.BMP` multimedia object category.
- The list of available SYSPRO cards is defined in the `IMPUXC.IMP` file of the `\Base\Store` folder.
- You can define your own Web Cards in the `CUSUCX.IMP` file of the `\Base\Store` folder.

Tasks

Customizing existing Web Views

1. Select the  icon from a window in SYSPRO.
2. Select the **Edit Web View** option from the context menu.

The **Visual Designer** program is loaded.

An administrator can design a web view for use in any SYSPRO program as long as the program was constructed using docking layouts.

Web Views can also be customized per role, but this is done using the **Design UI Layouts** SYSPRO Desktop function.

Creating Web Views

1. From the  icon, select **Design Web View**.

The **Visual Designer** program opens requiring you to indicate whether you want to create the web view using an existing template or create one from scratch.

2. On the **Configure new layout section** screen indicate the elements you want to style.
3. Style the web view according to your preference.
4. Save the web view.

When you return to the program the web view will be displayed.

Task Dialogs



Task dialogs are notification windows that display information which requires you to respond before continuing.

You can customize these dialogs to simplify processes and improve throughput - particularly on transactional screens.

Customizations range from removing buttons and changing the default action button, to preventing the dialog from being displayed at all.



Understand & Explore

Where does it fit in?

Task dialogs require you to respond by selecting a button or option to continue. This ensures that you are aware of the message and take the appropriate action.



Getting Started

Access control

Activity considerations

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

Main menu - Allow to customize task dialogs

Controls whether an operator can customize task dialogs and show dialogs with single buttons as auto-expiring messages (i.e. toast notifications). This must be enabled if you are not customizing at role level.

Setup options

System-wide Personalization

Enable Task Dialog customization

This enables the **Customize Task Dialogs** option on the SYSPRO Ribbon bar (*SYSPRO Ribbon bar > Administration > System-wide Personalization*)

Restrictions and limits

- To customize task dialogs at role level, use the **Design UI Layouts** SYSPRO Desktop function *SYSPRO Ribbon bar > Administration > Customization*.

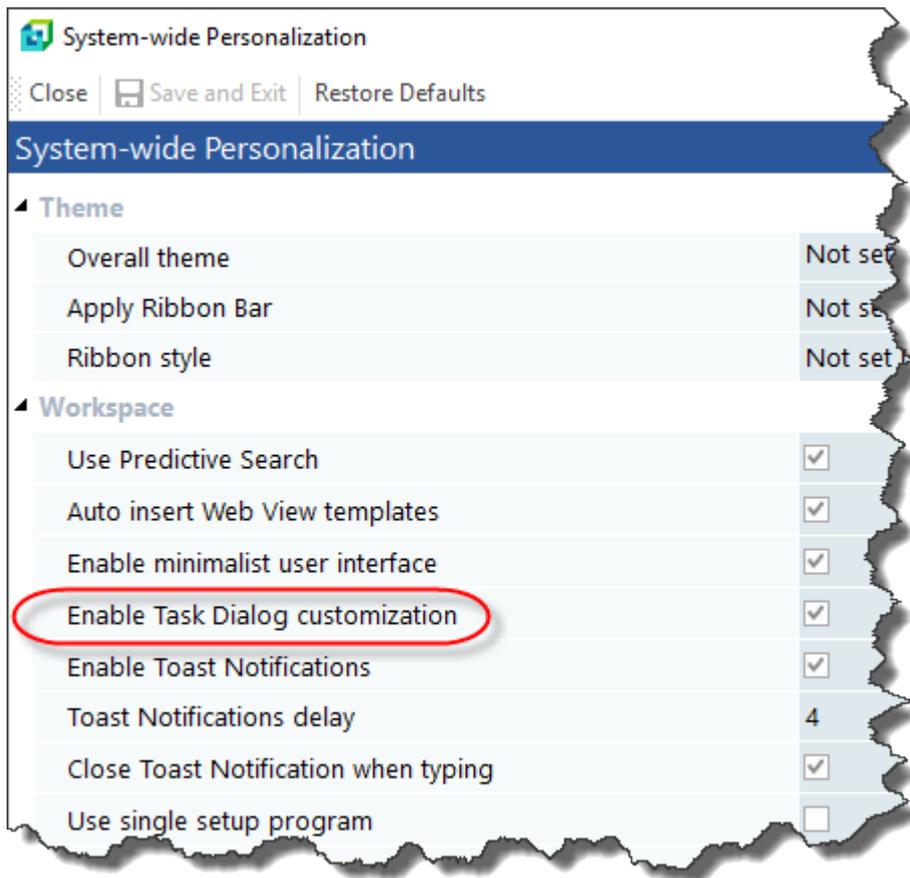
In role-based design, task dialogs are automatically available to be customized.

Deploy & Use

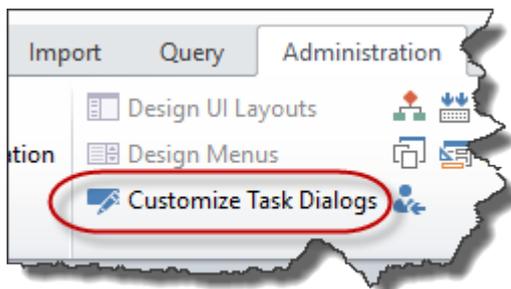
Tasks

How to switch on Task Dialog customization

1. Load the **System-wide Personalization** program (*SYSPRO Ribbon bar > Administration > System-wide Personalization*)
2. Switch on the **Enable Task Dialog customization** option.



3. When next you login to SYSPRO, the **Customize Task Dialogs** option on the **Administration** tab of the Ribbon bar is enabled.





4. If you are not customizing at role level, then ensure that you enable the **Main menu - Allow to customize task dialogs** security activity against the operator.

How to customize Task Dialogs

1. From the SYSPRO Desktop select the **Customize Task Dialogs** option *SYSPRO Ribbon bar > Administration*.
2. Select **Customize** from the **Customize Tasks Dialogs** toolbar and indicate the level of customization required.
3. Select **Start Customization** from the toolbar of the **Customization Level** window.

A dialog is displayed indicating that you are now in design mode.

From this point (until you exit design mode) any task dialogs displayed will include a **Customize this dialog** hyperlink. When selected, a submenu is displayed with a number of options:

Option	Description
Do not show this message	<p>This suppresses the message from being shown.</p> <div> Since the task dialog will not be displayed again, you can only modify or reinstate the default settings by loading the Customize Task Dialogs program and reviewing your task dialog customizations.<p>It is also important that you set the appropriate default button or option to be actioned when suppressing the message dialog (e.g. setting OK as the default button when adding an order line will always add the line).</p></div>
Select default button	This lets you choose which button or option must be treated as the default (e.g. pressing RETURN will action the default button).
Select buttons to show	This lets you choose the buttons or options you want to display (e.g. you want to hide an option that you don't want the operator to action).
Restore default message settings	This removes any customization you have applied to the task dialog.
Refresh this message	This lets you preview the selections you made for the dialog.



4. Select the **Exit Design Mode** function when you have finished customizing task dialogs.

If a task dialog has been customized, then the caption * Customized Task Dialog will be shown in the footer text when running SYSPRO.



The system saves your customization changes automatically as you select any of the customization options. The changes are saved in text files on the server and the system checks these files to determine if a task dialog has been customized.

Each task dialog customization is uniquely identified by the context of the program that caused the message box to appear and the Window title, Instruction text and Content text.

Customized Task Dialogs are saved to the following locations:

Level	Folder & filename
System-wide	\Settings\TaskDialog_SystemWide.txt
By role	\Settings\Role_xxx\TaskDialog.txt The role file is only processed if you are logged in as a role.
By company	\Settings\TaskDialog_Company_companyID.txt
By operator	\Settings\TaskDialog_Operator_operatorID.txt

How to copy customizations between operators, companies and roles

Task dialog customizations are created as text files (*.txt) in the folder \Base\Settings of your SYSPRO installation.

1. Locate the .txt file that contains the customizations you require.

The naming convention depends on the customization level you want to copy:

Customization level	Naming convention
Operator	TaskDialog_Operator_operatorID.txt
Company	TaskDialog_Company_companyID.txt
Role	TaskDialog.txt (copy the file to the relevant role folder)

2. Copy the file and rename it to match the level you want to create (i.e. customizations



done for a particular operator can be copied over to a company or role simply by renaming and/or renaming and moving the file).



Toast Notifications



Toast notifications are notification windows that display information briefly on the screen to alert you of a condition, before disappearing automatically without requiring any operator input.



Understand & Explore

Where does it fit in?

Toast notifications with only a single button are presented as **auto-expiring** messages.



- Although toast notifications cannot be customized in the traditional sense of the word, you can set a delay time to keep the notification displayed on screen and you can configure it to close once you start typing.
- If the message contains a colon character (:) it is treated as a data notification.
You can view the last 20 data notifications by selecting the **Notification** icon from the SYSPRO Ribbon bar.



Getting Started

Access control

Activity considerations

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

Main menu - Allow to customize task dialogs

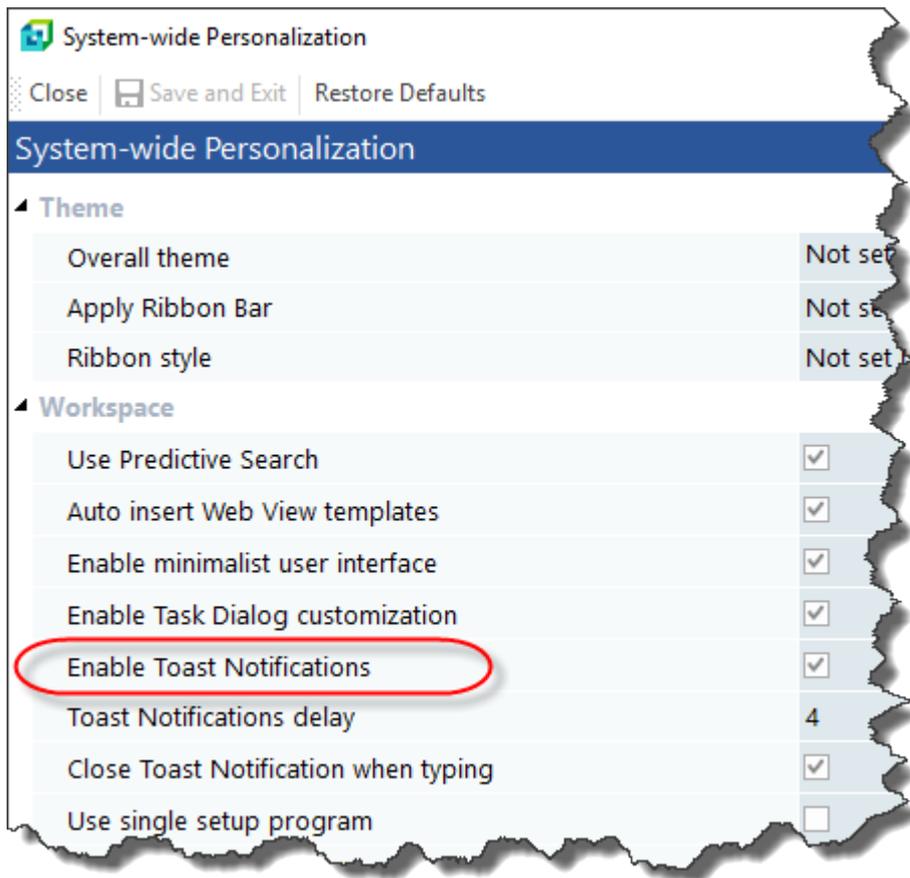
Controls whether an operator can customize task dialogs and show dialogs with single buttons as auto-expiring messages (i.e. toast notifications). This must be enabled if you are not customizing at role level.

Deploy & Use

Tasks

How to switch on Toast notifications

1. Load the **System-wide Personalization** program (*SYSPRO Ribbon bar > Administration > System-wide Personalization*).
2. Switch on the **Enable Toast Notifications** option.





Predictive Search

The **Predictive Search** facility in SYSPRO automatically shows suggestions of search results as you type text into any key field in the product (e.g. stock code, customer, supplier, etc). The search uses a web service (configured within the **System Setup** program) to interrogate the database and return values based on a pre-defined configuration.

Predictive searching helps you get to the information you need effortlessly, by filtering the top records in the database based on what you have already typed. This innovation provides a streamlined process in the selection of records, typically associated with browse or find functions.

Predictive searching is also available for linked tables and custom form tables. Custom form columns can be automatically linked to use predictive searching - the columns only have to be selected, as the joins are done dynamically.



Understand & Explore

Where does it fit in?

When predictive searching is switched on, it applies to all search and browse functions within SYSPRO.



Getting Started

Prerequisites

- This feature is only available for SQL-based companies.
- The **SYSPRO e.net Communications Service** must be installed and you must configure service address details against the **E.Net Service Details** tab of the **System Setup** program.

Restrictions and limits

- The predictive search functionality is controlled by the captions on the forms. If a caption matches one of those in the predictive search configuration, then the predictive search is run.

You cannot selectively disable the search for standard captions.

- The predictive search on custom forms functionality is only supported for linked tables that have a single column as their key. This key must exist on the primary table.

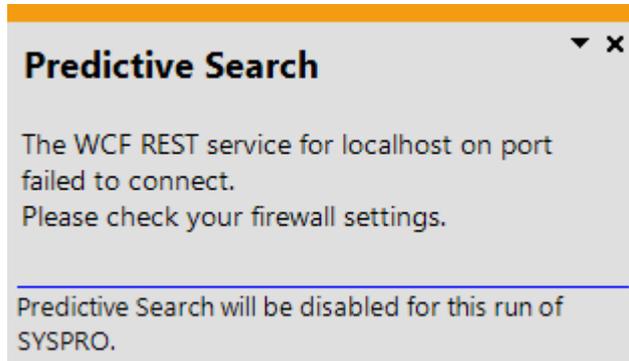
This functionality is not supported for tables that have composite keys.

- The predictive search for the **Non-stocked code** key field applies only to the **Quotations** module. Non-stocked items in **Purchase Orders** and **Sales Orders** are not the same as Non-stocked items in **Quotations**, and are not saved anywhere.



Troubleshooting

Predictive Search



This message indicates that the `REST` port configured in the **System Setup** program has not been configured, or is not specified correctly.

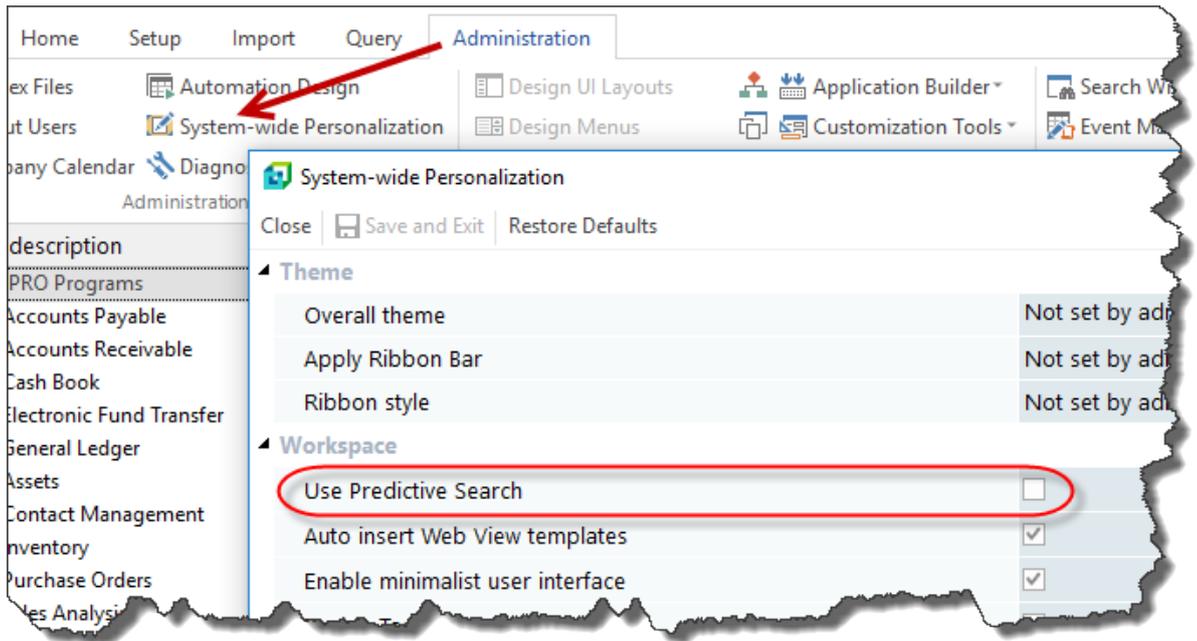
Review your settings against the **REST port** field on the **E.Net Service Details** tab of the **System Setup** program.

Deploy & Use

Tasks

How to switch on predictive search

1. Navigate to the **System-wide Personalization** program. *SYSPRO Ribbon bar > Administration > System-wide Personalization*



2. Enable the **Use Predictive Search** option.
3. Navigate to the **System Setup** program and define the details against the **E.Net Service Details** tab:

Field	Description
Server name	This is the IP address or server name where the SYSPRO e.net Communications Service is installed.
SOAP port	This is the SOAP port that has been configured for the SYSPRO e.net Communications Service .
REST port	This is the REST port that has been configured for the SYSPRO e.net Communications Service .

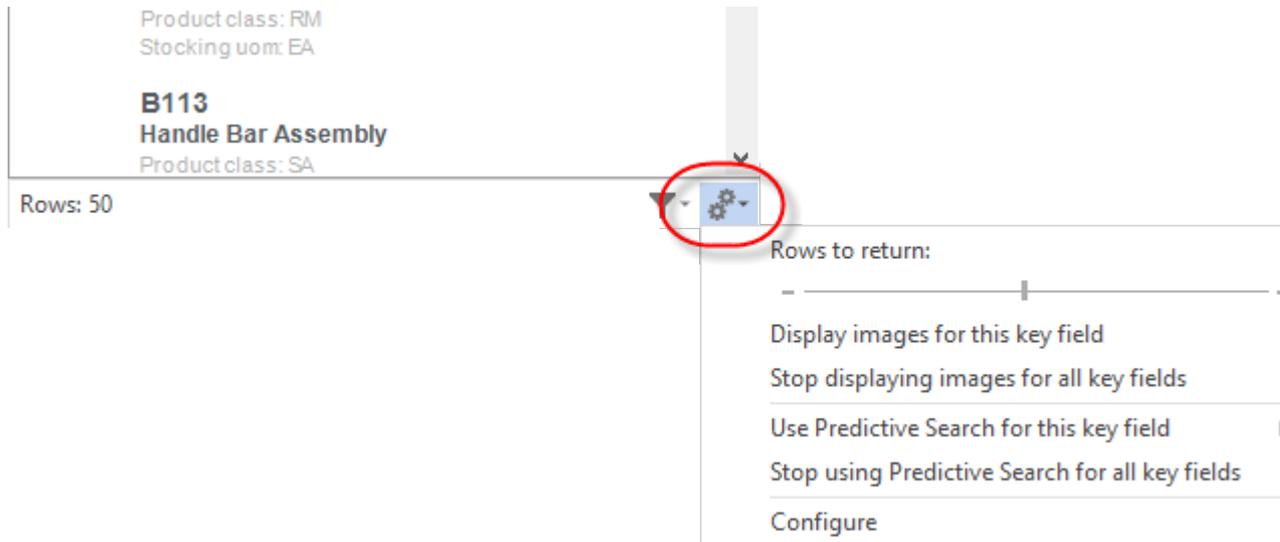
4. Navigate to the **Espresso Search Configuration** program (*Program List > SYSPRO Espresso > Espresso Search Configuration*) and define the key field search configuration parameters required.

These can be used in both the core SYSPRO product and **SYSPRO Espresso**.



How to configure a key field search

1. SYSPRO ships with pre-configured key field searches that are available to use.
2. You can configure your own key field predictive searches from within a search field itself, by clicking the **Settings** icon and choosing **Configure** from the shortcut menu that is displayed:



3. You can create new key field searches on SYSPRO tables, as well as linked and custom form tables.

You can also configure predictive search functionality for your own key fields using the [Espresso Search Configuration](#) program (*Program List > SYSPRO Espresso > Espresso Search Configuration*).



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