

SYSPRO 8 Post Installation

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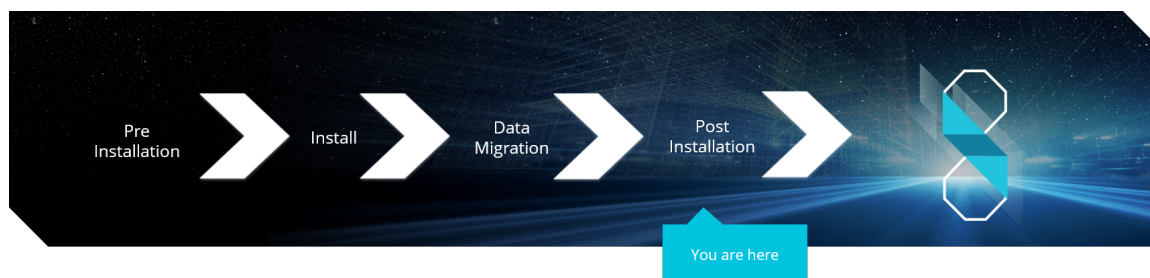




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SYSPRO 8 Post installation



Audience: You have just installed SYSPRO 8.

Just a few more things to review to ensure that everything functions correctly.

Post Installation Checks

1. Services

- Start up the SYSPRO Services.

2. Licensing

- Apply the licensing for new modules and users (if any) in the **Company Setup** program.
- Update the company settings for any new modules.

3. Data conversion

- The upgrade from SYSPRO 7 Update 1 to SYSPRO 8 converts all ISAM data into SQL tables.
- Please run the **SQL Server Diagnostic** program to ensure database integrity.

4. Check port numbers

- Ensure that all port numbers configured in the **System Setup** program are correct.

5. Security

- Review and assign the security features required for all users, including electronic signatures, operator activities and role-based security.



- This is only required for first time installations.
If you have upgraded from SYSPRO 7 Update 1, your security settings will be retained.
- If any users require denied access to Custom Form Query business objects, you can enable this now.

6. Custom software

- Install any customized software and verify that it functions as expected in the new version of the software.

7. Reports

- Ensure that all Report Writer and SYSPRO Reporting Services reports work as required.

8. Confirm software

- Verify that the software works as expected.

9. Financial checks

- Check all your balances against the balances printed prior to the upgrade and conversion.

10. Operator login


- Deselect the **Prevent further logins** setup option in the **Company Setup** program. This will allow users to log back into the system.
- Notify users that they can now use the new software.

11. Optional: Archive Migration

If during the data migration you elected not to convert your archive data, you have the option of performing this at a later stage using the **Archiving Migration** program.

12. Optional: Bin to Serial Linkage

If you wish to make use of the new improved bin to serial linkage feature - which enables you to accurately determine where serials reside in a warehouse from the perspective of bins - enable the **Associate serials by bin** setup option (**Setup Options > Configuration > Distribution > Inventory**).



For more information on this feature, please refer to the **Bin to Serial Linkage** topic guide, available on the SYSPRO 8 Microsite.

13.Third party applications

Any previously installed software should be re-installed or set up to work with SYSPRO 8.

Please check with the relevant third party developers for information regarding this.

SYSPRO 8 Hotfixes

SYSPRO will provide hotfixes in order to deploy software updates during the release of SYSPRO 8.

You will be notified via email whenever hotfixes relevant to you become available.

What are Hotfixes?

A hotfix is the minimum software required to provide a solution for a specific problem experienced by one or more customers. These can also include any relevant dependencies.

The following types of hotfixes will be available:

- **Mandatory**

These hotfixes can't be uninstalled as they fix a critical issue.

- **Customer Specific**

These hotfixes address an specific customer's issue and can be uninstalled if required.

How to deploy Hotfixes?

You will use the **SYSPRO Installer** application to deploy all hotfixes.

Once you have installed **SYSPRO 8 Server** for a deployment group, any relevant and available hotfixes will then be listed against each relevant deployment group.



Only when running the **SYSPRO Installer** application on the server on which the **SYSPRO 8 Server** component has been installed, will the relevant hotfixes be displayed.

Archive Migration

When running the **Conversion of Databases to SYSPRO 8 Format** program, you are able to indicate if you wish to convert / migrate your archive data at a later stage.

The **Archiving Migration** program allows you to convert archived information from SYSPRO 7 formats to SQL in SYSPRO 8, if not already done so during the initial conversion.

The archive data that can be converted from this program includes:

- ECC BOM archive data will be converted from XML to SQL
- WIP archive data will be converted from XML to SQL
- Sales order archive data will be converted from XML to SQL
- Lot archive data will be converted from ISAM to SQL

Prerequisites

The relevant archive files must be available on the server for these to be processed correctly:

- ECC BOM archives = XML document
- WIP archives = XML document
- Sales order archives = XML document
- Lot archives = ISAM file

Restrictions and limits

- Archive data will not be available in SYSPRO 8 until it has been converted using this program.

Further information

For more detailed information regarding the **Archiving Migration** program (IMPPAM), please refer to the **Archiving Migration** reference guide.

Summary of New Features



The following is a summary of the new features in SYSPRO 8, according to our SYSPRO product pillars. For further information about each item, please refer to the [SYSPRO 8 Microsite](#).

Always On

Our *Always On* product pillar considers a Cloud-first approach, covering aspects of webification, deployment, flexible consumption, diverse accessibility, scalability and high availability.

New *Always On* features available in the SYSPRO 8 Release Candidate include:

- **Improved Deployment**
 - Controlled software releases three times per year for improved stability
 - Hotfixes for interim discrepancies repairs
 - Install, uninstall, repair
 - Notification of specific discrepancy repair availability
- **Improved System Availability**
 - Balance functions within SYSPRO are now completed within minutes, reducing downtime for a highly available system.
 - Ensuring the health of your database is paramount, the SQL health check ensures that all tables, columns, indexes, keys etc. are as they should be and if required, adds missing items.
- **Improved System Scalability**
 - Improved memory handling and scalability with 64bit architecture
 - Re-engineered e.net architecture
 - Re-engineered server architecture
 - Simplified service infrastructure
- **Improved Performance, SQL focused and Load Balanced**
- **Simplified administration and SQL Server setup**
- **Open Reporting API**

The Open Reporting API maximizes collaboration between SYSPRO and external systems by providing the ability to generate documents and distribute to external and integrated systems, reducing the need for duplication. Documents or reports can be quickly and efficiently requested and transferred to the external system via a published API.
- **New Espresso features:**
 - SFDC (Shop Floor Data Collection)
 - Customer Workbench
 - Printing reports and documents
 - Xpress Cart (Quick Order Entry)
 - Script Editor
- **SYSPRO Avanti**

SYSPRO Avanti Web based version is accessible on any device, on any platform, from anywhere and is available both on-premise and in the cloud. Simplified and engaging, the web based version removes the requirement for client installations, virtualization or desktop emulation software.

Coming soon

The following features will be available in the general release of SYSPRO 8:

- **Administration Dashboard**

- Single view of system activities
- Insights providing at-a-glance values and drill-down
- Notifications when limits approaching or reached

- **Health Check, WIP - Balance function**

The Health Check Service innovation is designed to reduce scheduled downtime to a bare minimum, improving your core business process availability.

- **Cloud-first Server-side**

In our on-going commitment to be a cloud-first organization, SYSPRO will provide you with the choice to use SQL on-premise as you do now or to connect to SQL Azure. With SQL Azure, a cloud-based managed database, there is no need for an on-premise SQL Server or the purchase thereof. Consumption and cost is based on database usage, you only pay for what you use. SQL Azure is scalable and elastic, addressing your business growth.

System of Engagement

Transitioning ERP from a system-of-record to a system-of-engagement by improving intuitiveness, ease-of-use, surfacing business insights and promoting collaboration.

New *System of Engagement* features available in the SYSPRO 8 Release Candidate include:

- **Business Insights**

Business Insights is a feature within SYSPRO that accelerates the business process by driving positive, proactive business behavior and enhancing a workforce's decision-making and action-taking capabilities.

By surfacing relevant information pertinent to specific users and pushing it to them in an intuitive, self-explanatory, easy-to-use interface, Business Insights empowers individuals within an organization to meet goals, targets and deadlines, collaborate with others and perform to their full potential. All while measuring their own KPI's and managing their own work-lists.

- **General UI Improvements**

- Predictive searching helps you effortlessly get to the information you need by filtering the top items in the database based on what you have already typed. This innovation provides a streamlined process in the selection of items typically associated with browse or find functions.
- Search Configuration allows you to customize the fields searched by Predictive Search (including Custom fields), as well as which fields should be returned in the search results.
- A minimalist user interface applies default characteristics to the SYSPRO User Interface and in this way applies a consistent and authentically pleasing style across the entire product. The refinement of the look and feel of your programs can result in increased user satisfaction from the improved UX and UI.
- Toast Notifications are Task dialogs with only a single button which are presented as auto-expiring messages. These notifications are displayed briefly on the screen to alert you of a condition, before disappearing automatically without requiring any operator input.

- Message Boxes or Task dialogs are notification windows that display information which requires you to respond by selecting a button or option to continue. If you feel that too many notification windows are being displayed, you can customize these task dialogs to improve throughput, particularly on transactional screens. These customizations range from removing buttons and changing the default action button, to preventing the dialog from being displayed at all.
- Predictive Search – Add Custom Search Fields: This enhancement incorporates custom form fields into the Predictive Search.

- **Single Company Setup Program**

In SYSPRO 8 all the SYSPRO company setup options are controlled within a single setup program: **Setup Options (IMPCFG)**.

- **Webviews**

- With leading HTML technology SYSPRO Webviews provides rich web content and enables you to quickly and easily surface only the information that you require, as and when you need it. Now, you can get a complete view of your customer from a single screen, in a simplified, uncluttered format, without having to navigate to a new application. Web based interface providing access to SYSPRO via HTML5 on any device and on any platform.
- HTML 5 Visual Designer: By using the Visual Designer, you can tailor and personalize your user interface so that it is meaningful and visually appealing to you. SYSPRO also provides an on-boarding step-by-step guide on how to create your own personalized view.
- HTML 5 Application Designer: Administrators can customize standard webview templates to meet their organizations information requirements.
- Standard Webview Templates: With leading HTML technology SYSPRO Webviews provides rich web content and enables you to quickly and easily surface only the information that you require, as and when you need it.

- **Harmony: Social ERP**

Bringing the social media aspect into the core of ERP, Harmony allows posting and collaboration within the network of the organization using real-time information from the SYSPRO database. Core ERP data surfaces as you are composing your 'Beat'. Harmony answers the needs of the modern-day workforce by incorporating a familiar social media-type interface on which to do business.

Embedded within the SYSPRO software, Harmony has been designed to simplify the user experience and increase user engagement. Through a rules-based engine, it surfaces and pushes relevant business and operational information to the right people, thereby encouraging enterprise-wide collaboration, which in turn improves productivity throughout the organization.

Harmony provides the equivalent of a newsfeed or notifications, auto-populate conversations with relevant information, based on key ERP components the user chooses to 'follow'. Instead of needing to go into the system to retrieve pertinent information, the system intelligently pushes it to you, alerting the user of activities related to those components.

Data Sentiment enables a complete spectrum picture of customer opinion about your services or products for informed and strategic decision making. Visual cues (the equivalent of emoticons) help alert users by attaching sentiment to specific items. Key notes attached to these items are detected to reveal the tone in terms of the state of a particular event, customer or component etc. which tracks potential future issues before they arise regarding customer service and happiness.

Predictive analytics are used to reveal trends that provide actionable insight. Vast quantities of structured and unstructured data is aggregated and processed to begin to reflect trends and offers recommendations on actions to be taken.

Coming soon

The following features will be available in the general release of SYSPRO 8:

- **Workbench / Workspace**

Role-based workbenches provides users the complete tools and information needed to perform their role efficiently and effectively. The customizable Workbenches represent aspects most relevant to a user's touch points with SYSPRO on a single dashboard and with actionable insights being only one click away – for example profit margins against targets, or backorder information, credit management, order fulfilment rates or inventory stockouts.

- **Additional Office 365 Integration**

Microsoft Office 365 allows users to access the latest version of Word, Excel, PowerPoint and more, wherever they go and on all devices. With Office 365 integrated into SYSPRO, there is no need for a separate desktop installation of Office 365 for users to be able to make use of all the great Office 365 features.

Innovation / Future Proof

Future-proofing your ERP investment by leveraging emerging technologies and the latest innovations, delivering business value and competitive advantage.

Coming soon

The following features will be available in the general release of SYSPRO 8:

- **Machine Learning**

Recommendations: Artificial Intelligence Machine Learning processes the mass of data that emerges and aggregates this to begin to reflect trends and provide suggestions as to actions that need to be taken.

Anomaly Detection: Machine Learning (AI) Harnesses Big Data with predictive analytics. The rules based engine works together with the data mining service and allows you to create complex triggers and perform actions without using SQL triggers.

Confidence: Machine Learning (AI) Harnesses Big Data with predictive analytics. This collaboration and integration gives the "big picture" business benefits across the board, instantly surfacing developments.

- **SYSPRO BOT**

Artificial Intelligence means customers deal with an intelligent and human-like chatbot which answers queries quickly. Chatbots answering and even predicting customer queries automates customer service to free up resources within the business. The (AI) web robot resides within the SYSPRO ERP ecosystem and streamlines business functions through natural conversations with the BOT.

Optimize Operations

Optimizing business operations ensuring the on-going development of relevant functionality and governance for the improvement of business efficiencies.

New *Optimize Operations* features available in the SYSPRO 8 Release Candidate include:

- **Improved Bins to Serial Linking**

In SYSPRO 8, the linking of serial numbers to bin locations is being enhanced. Previously no direct link existed, potentially creating scenarios where the stock bin records were not in synchronization with the serial numbers for the stock code. This improved linkage provides improved traceability of stock serial tracking across warehousing functions.

- **Preferred Supplier**

Preferred Supplier with priority, provides for the management of your sourcing strategies for materials, for the recommended selection of suppliers during your purchasing cycle.

- **AP Payment Cycle without Check/Remittance Print**

A payment cycle can now be completed without first needing to print a check remittance.

- **AP/AR Exchange Rate Revaluation**

This functional enhancement provides for better visibility, control and management of variances associated to purchase price variances and exchange rates in the purchasing cycle and sales cycle.

- **Tax Projects – Electronic Submissions**

Supplementary Information: A tax reporting business object has been developed that produces a generic tax activity report in XML. This extract has the ability to be used in the creation of statutory tax reports.

Coming soon

The following features will be available in the general release of SYSPRO 8:

Distribution Operations

- **Multiple Units of Measure**

This innovation sees the introduction of allowing the same SKU to be stocked in multiple units of measures with associated costs and packaging requirements. Supplier and customer orders will allow for the specific designation of which unit of measure to transact in.

- **Pricing Engine - One Point of Capture and Maintenance (AP/AR)**

The Generic Pricing Engine provides for a centralized means of managing the process of maintaining prices and their prioritization rules for all sales and purchasing activities. The pricing engine will allow for the establishment of pricing hierarchies, pricing rules managed via a rules based engine, the recording and auditing of pricing changes and the production of price lists.

- **Request for Quotes**

Request for Quotes (RFQ) extends collaboration to your suppliers by providing for the automated quote process and servicing of the RFQ by the supplier, integrated into your procurement process, enhancing operational efficiencies.

- **Return to Vendor**

Return to Vendor (RTV) realizes a formalized return to vendor process allowing for the management, auditing and reporting of goods returned to suppliers ensuring minimum wastage.

- **Shared Services - Centralized Procurement**

Shared Services for Procurement centralizes the procurement process, reducing cost and promoting better purchasing contract control, auditing, monitoring, negotiation and lowering of administrative costs.

- **Stock Items - Hierarchies**

The Inventory Hierarchies innovation allows for the definition and classification of stock code hierarchies. This innovation assists in the reporting of aggregated stock codes and for the analysis of inventory at an aggregated level.

- **Stock Items – Attributes**

Stock item attributes allows for the creation of specific properties against the stock code master record. This functionality extends beyond the current custom form fields allowing for the creation of different properties against different stock codes and for the better identification of stock codes for selection based on their properties in both transactions and reporting.

Financial Operations

- **AR Credit Management Reminders**

Dunning: Dunning Credit Management reduces risk and aids collections by providing the credit department with management, control and reporting tools.

- **Automatic Ledgers Balancing and Reconciliation**

Ledger Reconciliations provides improved ledger reconciliation management through the balancing and identification of outstanding tasks and transactions in the sub-ledgers.

- **Detailed Posting to Control Accounts**

This enhancement sees the ability to post to control accounts in full detail.

- **Multi-Currency**

Multi-currency capabilities have been added to enhance Multi-Currency per Account, allowing the use of any number of currencies during any transaction, against a single account. This innovation allows for the processing of debtor payments in other currencies beyond their default and the ability to pay a supplier in a number of currencies.

- **Multi-Periods**

Removal of concept of Current/Previous1/Previous2: Currently in SYSPRO you are limited to post either into the current financial period or into the prior period 1 or 2 depending on whether the period is still open or not. The removal of this restriction sees the application of the transaction date in the determination of which financial period a transaction should be posted to. The governing aspect of whether the period is open or closed still applies.

- **Multi-Site-Shared AP/AR**

Multi-site Shared services (Payables and Receivables) optimizes management capabilities with enhanced debtor and creditor centralized management across multiple sites and legal entities.

- **Remove Balance Functions from Period Ends**

Health Check Balancing AR: Balance functions in certain modules are currently either tied together with month-ends, which are de-coupled or form part of a 'day-end, week-end or month-end' function. By moving the checking of imbalances to the SQL Health Check Service, it removes the necessity to run the balance function within the module.

In addition, if an imbalance is identified, the out-of-balance correction function can then be run to specifically target only the issues encountered.

This function is now highly SQL optimized so we are able to vastly reduce the current time taken to perform this function - in some instances from hours and minutes, to seconds-thus, greatly improving system availability.

- **Shared Services – Centralized Procurement**

This innovation allows organisations to define a shared services centralized procurement model, where multiple legal entities (SYSPRO companies) are able to centralize the procurement function.

Centralizing the procurement process reduces costs and promotes better purchasing contract control, auditing, monitoring, negotiation and lowering of overall administrative costs.

Manufacturing Operations

- **CAD Integration**

CAD Integration facilitates the integration of the engineering design process into the manufacturing process and enables collaboration among the aspects of master data management, engineering change and bill of materials management.

- **Nesting**

Job Nesting provides the ability to nest multiple jobs utilizing the same raw material or components, reducing wastage and optimizing raw material usage, optimizing use of resources and reducing the cost of operations.

- **Plant Maintenance**

Plant Maintenance innovation introduces the ability to maintain assets and their service related schedules, integrate the service, resource and materials requirements, track associated costs against the assets and provide the management control for the whole process.

- **Service Insourced/Outsourced**

Will allow for the management of the process associated to service rostering, service-work-to-lists, recording labor and material usage associated to a field service ticket and the financial transactions thereof.

- **SYSPRO's Manufacturing Operations Management**

- Capable to Promise

Allows for a rapid answering of when a manufactured item will be capable to promise by overlaying the requirement directly over the planned manufacturing schedule. Visibility, control and monitoring of immediate variance management is boosted and optimized.

- Factory Performance and Loss Management solution

Provides out of the box factory performance and loss analytics to allow your organization to drive to world class standards for overall labor effectiveness (OLE), overall equipment effectiveness (OEE) and total effective equipment performance (TEEP). The solution utilizes Six Big Loss analysis to identify, classify and quantify your loss enabling you to determine the countermeasures that will help to reduce them.

- Lean Manufacturing and Continuous Improvement

Helps to drive lean six sigma continuous improvement initiatives with management alerts, issue logging and workflow, online documents and more.

- Advanced Planning and Scheduling

SYSPRO's Manufacturing Operations Management Solution incorporates an advanced, finite capacity based, planning and scheduling (APS) system allowing you to quickly and accurately schedule while minimizing downtime. The solution enables organization to create accurate schedules that factor in constraints around tooling, machines, personnel and inventory. Manufacturers are then able to make smarter use of materials and resources helping them deliver to customers faster and in the most cost-effective way possible.

- Shop Floor Data Collection and Tracking

The solution provides manufacturers with real-time shop floor visibility, helping to eliminate manual processes and increase productivity. It enables you to execute production plans while simply and accurately capturing and measuring activities on the factory floor such as labor hours, materials issued, quantities reported, scrap and more.

- Smart Factory

SYSPRO's innovative solution enables you to Connect Equipment to digitize your factory by collecting data from your machines and other devices automatically. This capability allows SYSPRO to 'talk' to devices, using this data to optimize and streamline the business. In terms of future-proofing your business by embracing industry 4.0, the technology offers the foundation to building your Smart Factory. By embedding interactive technology in key machines, manufacturers can look to creating more intelligent manufacturing processes – Combining humans with machines, resources with processes and systems.

Additional resources

Reference Guides

SYSPRO's Reference Guides are primarily module-based and cover aspects of the user interface at program level. This includes detailed field and function explanations as well as notes and warnings regarding the usage of an application program within SYSPRO. These guides also extend to feature topics within the system (e.g. Tax, Security, Language Translation, etc.) and include implementation considerations. Please refer to the SYSPRO [InfoZone](http://infozone.syspro.com/support) for details on how to obtain these guides (<http://infozone.syspro.com/support>).

Support

SYSPRO's [InfoZone](#) provides up-to-date information about the product as well as more advanced tutorials for registered users.

Newsletter

As part of SYSPRO's ongoing commitment to keeping you informed about the latest product developments, a regular newsletter is distributed to the SYSPRO community. The newsletter covers many aspects of SYSPRO ranging from product enhancements to support-related information, known issues and useful tips. You can subscribe to this newsletter from the SYSPRO [InfoZone](#).

Forums

SYSPRO provides a number of active on-line [forums](#) for you to engage in various discussions about the product.

Contact us



The Technical Authoring team comprises: Freya Nell, Carol Hart, Monique MacNaught and Even Nasset. Send us your comments to help us improve the standard of our reference guides.



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